CHAPTER 7

LEARN ABOUT YOUR AUDIENCE AND USERS

A user-experience designer friend posted on Facebook as I was writing the intro to this chapter. She was elated because every single one of her current projects had budget for user research. I was so jealous.

In my experience, convincing businesses to spend money on audience and user research is really difficult. Sometimes, they have already made an investment in doing content strategy and just can't find additional budget. understatement.

More commonly, the budget holders just don't think it's necessary or valuable. They believe that the company or organization already knows everything it needs to know about its audience. Or they don't think knowing more than they already do is important.

So this chapter is all about how to get the user insights you need with the budget you have. It starts with documenting and communicating what you want to learn. Then, you develop your approach for getting the information.

WHAT YOU WANT TO KNOW AND UNDERSTAND

Documenting what you want to know and understand about the content users can help you identify the documentation and insight gaps the organization already believes it has. In addition, it gives you the foundation for developing a user research plan that satisfies you and your client or stakeholders.

MARKET RESEARCH VS. USER RESEARCH

Make sure everyone understands the difference between user research and market research. Most organizations have some amount of market research—which is super important—but it's not quite enough.

MARKET RESEARCH

Market research tells you whether people in the world or country or state or city or neighborhood want to buy your current (or planned) products. It answers the question, *"Is there a market for our product or service and how much would people pay for it?"*

It also gives you some demographic details—such as gender, income, family size, and ethnicity—that help companies segment their audience. For example, they may decide based on market data that single mothers making a certain income are most likely to buy what the company is selling.

All good stuff. But first a few caveats:

- Market research provides a very macro, quantitative view derived from a large survey sample representing the entire market. Not all those people who say they might buy what you're selling are or will be users of your content (or your offering, for that matter).
- Because market research tends to come from quantitative methods, it's more focused on what people say and less on what they actually do or believe.
- Market research doesn't usually give you insights about the content you have or might create in the future as a way to persuade, convince, or otherwise influence your audience.

All these considerations are where user research comes in.

USER RESEARCH

User research is the exploration of your users' (those who interact with your content or those who you would like to interact with your content) attitudes and beliefs, concerns, experiences, behaviors, and motivations. Let's dig into each of these in more detail by examining a real-life example: finding a new dentist.

So let's say you are doing content strategy for a recently board-certified dentist who has just opened a private practice and wants to launch a website to attract new customers (that's the business goal). The dentist is a pediatric and family dentist who picked her location after doing some market research to determine the number of families with children younger than 12 in a 10-mile radius and the number of pediatric and family dentists already practicing in the same area.

Great. A market exists for pediatric and family dentistry in her area. What about potential customers' attitudes and beliefs, concerns, experiences, behaviors, and motivations related to choosing a dentist?

ATTITUDES AND BELIEFS

Attitudes refer to what people think and feel about the offering and the people who provide it. Do parents of young and preteen children believe that their children should go to a pediatric dentist? Why or why not? Are potential customers afraid of going to the dentist? If so, why? Do the parents feel strongly about everyone in the household going to the same dentist? Why or why not?

CONCERNS

Concerns related to the provider, product, or service can cause a potential customer to worry or feel unsure. What concerns do potential customers have about dental care for themselves and their families? Do they have concerns about paying for dental care? Would they be concerned about going to a dentist with fewer than five years of experience? Why?

EXPERIENCES

Experiences are the interactions someone has had (or not had) with a similar provider, product, or service in the past. What positive or negative experiences have potential customers had with going to the dentist? How do those experiences influence what they are looking for in a new dentist? Have they taken their children to the dentist before? What were their experiences like?

BEHAVIORS

Behaviors are what people do related to the products and services an organization offers or plans to offer. How do potential customers typically do research when looking for a new dentist? Who do they talk with before choosing a new dentist for their children? Have they switched dentists in the past because of a bad experience or other factor?

MOTIVATIONS

Motivations refer to the internal or external factors that trigger someone to seek out a provider, product, or service. Are people likely to find a dentist for their family before they actually need one? Do they look for a dentist when something urgent happens, or do they already have a dentist they can call on? For what reasons do people switch dentists?

QUESTIONS AND GAPS

With the differences between market research and user research in mind, you should document what information you want to know about the audience and users. **Table 7.1** describes the components you might include in your documentation. And **Content Strategy Tool 7.1** is a version of the matrix you can download so you don't have to start from scratch.

In the **We wonder...** column, list the questions you'd like to answer through user research activities (which you'll propose later).

Under **We care because...**, describe why this information is important to learn or how you'll use it.

In the **We assume...** column, you and your stakeholders can list their assumptions (which haven't been validated) that answer the related research question.

In the **We know...** column, you and your stakeholders should list anything that has been proven about your research question.

To use the matrix, begin by filling out the first two columns. Then, call a meeting of the key stakeholders you think would have the most interest in understanding the users and knowledge about the users. Work together to fill out the final two columns. At this point, you want to do this quickly using a first-thoughts-that-come-to-mind approach.

TABLE 7.1 **USER UNDERSTANDING MATRIX**

WE WONDER...	WE CARE BECAUSE...	WE ASSUME...	WE KNOW...
What concerns do potential customers have about dental care for themselves and their families?	We want to address these concerns effectively on the website.	Parents want to get everyone in at the same time and are worried we can't accommodate their schedules.	
Are people likely to find a dentist for their family before they actually need one?	It affects whether we prioritize positioning about our philosophy and credentials versus information about getting an appointment in an emergency or on short notice.	A lot of people aren't proactive about finding a dentist.	Ten people have called for emergency appointments in the first month we were open after finding us in their insurance providers' online directory.

CONTENT STRATEGY TOOL 7.1

USER UNDERSTANDING MATRIX

Download the matrix and use it to record your user research questions and rationale for answering them so you can start a conversation with your stakeholders.

TIPS

- Approach this exercise like a brainstorm. The questions don't have to be perfectly articulated or structured.
- In accordance with the rules of brainstorms, avoid questioning what stakeholders assume or know.
- Continue to add information to this document as you come up with additional questions, assumptions, and knowledge.

WHERE TO GET IT

Download the plan at www.peachpit.com/register.

WHERE IT CAME FROM

Brain Traffic (www.braintraffic.com)

As the matrix takes shape, gaps in user understanding will become apparent, which is important because you involved stakeholders in identifying the gaps instead of just telling them what is lacking. It's also your starting point for planning how you'll approach learning about the audience and users on this project. We'll get into that next.

YOUR APPROACH TO USER RESEARCH

Tough love time. Lets face it: Most of us who do content strategy or user experience work aren't satisfied unless we get to do user research with actual users. At least, that's how I feel.

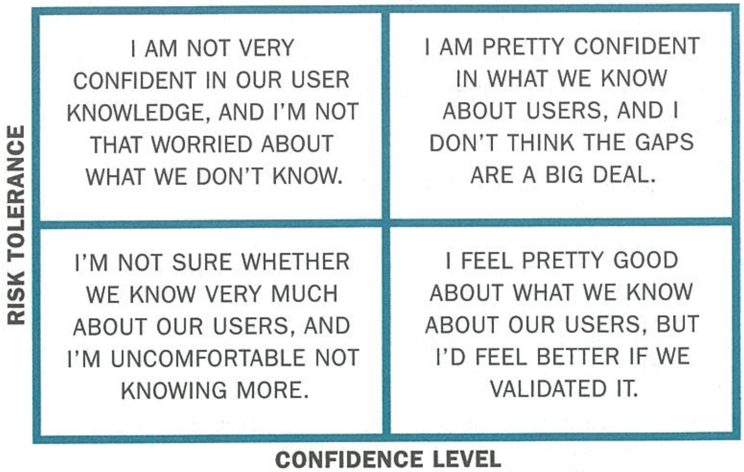
That is the best-case scenario, of course. But right now is when you need to get yourself mentally prepared to do the best you can with the budget and appetite afforded on your project.

ASSESSING APPETITE

Your client's or stakeholders' appetite for user research comes down to an assessment of their level of confidence in what they assume or know and their tolerance for risk. So go back to your User Understanding Matrix, and facilitate a discussion based on the gaps you've identified together.

Ask them how confident they are in what they assume or think they know. Then, ask them how comfortable they are with the consequences of those assumptions being wrong. Give them time to discuss and process on their own without interjecting. There will be some silence. And there may be some heated discussions. That's good.

When the discussion has died down, ask them to identify where they best fit in the risk tolerance/confidence level matrix. From there, you can put together a user understanding approach that meets their needs. The options or combinations of options in that approach include reviewing what they already have (for example, market research and site analytics), pulling opinions and insights out of the stakeholders' brains, and talking with or observing actual users "in the wild."



PROPOSING AN APPROACH

Start to build your recommended approach based on their assessment of confidence and risk, the gaps in knowledge you've identified as a group, and your perception of how much time and money they are willing to spend.

Generally, I propose at least a documentation review of current market or user research and a stakeholder workshop targeted toward understanding the users' context and content needs. In cases where risk tolerance and level of confidence are low, I always recommend research with actual users.

If risk tolerance is low and confidence is high, or risk tolerance is high and confidence is low, I go with my instincts about budget, gaps, and my confidence in making good recommendations with or without research with actual users. There's no one right answer except that you should answer as many of your outlined questions as completely as you can.

Have a conversation about your approach before putting anything in writing (if something in writing is necessary). Start with the best-case scenario, but have a scaled version in mind. Avoid the temptation to offer the scaled version at the first sign of resistance. Because you've worked with them to figure out how they feel about their assumptions and risk-aversion level, your approach should be pretty spot-on.

TIP

Gauging what you'll really need for user research is difficult until you dig into the discovery phase. I always include a bucket of time/money in my original proposal. And then I revisit it at this phase so that I can have a conversation about how I'll use the hours/funds and whether I want to ask for more.

Once you've agreed on the approach—whether it was your original proposal or a negotiated scaled version—you can document it formally if you need to. Usually, I've been able to use an outline similar to the one in **Table 7.2** via email or in a proposal or change order.

TABLE 7.2 **SAMPLE USER RESEARCH PROPOSAL**

ACTIVITY	EFFORT/COST
Market Research Review: We will review existing market research to pull out data and document user assumptions. Documents to review include *<document name 1>* and *<document name 2>*.	$### (# hours × $rate)
Stakeholder Workshop: We will facilitate a half-day user-focused workshop session to document current knowledge and assumptions about users and map content to the customer lifecycle.	$flat_fee
User Interviews: We will conduct user interviews with up to six users to validate assumptions documented through the market research review and stakeholder workshop.	$### (# hours × $rate)

DOING THE RESEARCH

The methods you're able to use for your project depend on your client's or stakeholders' appetite for user research activities and user research costs (in hours and budget). You can learn valuable information and get some useful insights without talking to real users.

Just make sure your client or stakeholders know that your informed assumptions will have to do. Don't forget to explain that making assumptions also poses a risk that your content won't meet users' needs. And content that doesn't meet users' needs is less likely to positively affect the bottom line.

For example, you might assume that the most important issue a potential customer considers is your product's price. So, you'd likely prioritize messaging about price in your content. If, in fact, convenience is more important to your audience, you might miss an opportunity to provide content focused on what your user cares about most.

DOCUMENTATION AND ANALYTICS REVIEW

Get out your Discover Insights Workbook (Content Strategy Tool 6.3) for this task. The tool contains columns for insights, topics, sources, and source categories. I've applied those more specifically to users here:

- **Insight**—What important item about users did I learn?
- **Topic**—What topic is the insight about? I use the categories discussed earlier in this chapter (attitudes and beliefs, concerns, experiences, behaviors, and motivations). You'll probably want a general one for demographic information as well.
- **Source**—What document or other source did I get this insight from in the inventory? Examples here might include market research report, audience segmentation strategy, user research summary (if they've done some before), personas, user scenarios, or site analytics.
- **Source category**—What category (strategy, user information, analytics, people, and process) is the source document from?

I usually create a separate sheet for reviewing user research-related documentation and include a few more items. First, I add a column for research question (for example, which of my questions about users does this insight answer or inform?).

Then, I add two columns I can mark with an X for whether I feel my insight is an assumption or knowledge. For example, I might learn from site analytics that most people who visit a dentist's website click the About Us tab within a few seconds. I might assume from that bit of data that people are very interested in information about the dentist. (We'll come back to that.)

Once you've gone through the documentation, you have a great starting point for setting up your research with real users—if your budget allows it. And your list of assumptions and actual knowledge might just be what you need to convince your client or stakeholders that more user research is needed.

STAKEHOLDER WORKSHOP

You can use some fun activities to understand what your stakeholders know and assume about their audience and users. When you hold one of these sessions, get your participants warmed up and ready to participate.

One of the ways I like to do that is to ask everyone to share a recent experience using a website and talk about ways they were frustrated, just satisfied, or delighted. Then, you can jump in to some other activities that require that they put themselves in their users' shoes... or minds.

I plan these activities to build upon each other, which creates some continuity in the session so participants don't feel they are doing a series of random things. A pretty typical set of activities includes the following:

Trigger brainstorm—Ask stakeholders to spend a couple minutes brainstorming by themselves all the reasons a user might visit their website, use their app, or interact with their content in some other way. Each of their ideas is written on a note. Then, one at a time, they read their notes and put them on the wall. As each person takes a turn, I ask them to start grouping the triggers into categories.

Name the user—Here, we're trying to put a human face on the categories of triggers. First, I ask them to stand up and make sure they feel comfortable with the categories they've formed. Next, I ask them to come up with a label for the category, like loyal customer or casual visitor, and give that person a name. So, they end up with something like Casual Visitor Veronica. Finally, I ask them to collectively put the labeled and named users in order by priority to the business.

HINT
The stakeholder workshop serves a dual purpose. Once you've created the user stories, you'll start to map what content users need during their journey. More on those activities in Chapter 8.

User stories—With this activity, your participants will create reality-based scenarios their users might actually experience. I have people work in pairs or threes, each group taking one of the users identified in the previous exercise. Using a worksheet I provide (included in **Content Strategy Tool 7.2**), they write a story or scenario based on a literary pattern called A Hero's Journey, described by Joseph Campbell in his book *The Hero with a Thousand Faces*. I got this idea from a former colleague and friend, Matt Edwards. As they write their scenario, they also record thoughts on what the user is thinking, feeling, seeing, and doing along the way. Then, they share their stories, and it's usually pretty funny and extremely informative because it sheds light on your stakeholders' assumptions about users' attitudes, behaviors, and experiences.

The resulting user stories, combined with what I learned from existing documentation and analytics, give me a lot to go on. It's not foolproof, because I haven't validated it with real users. But I can work with it.

RESEARCH WITH ACTUAL USERS

I really hope you get to do some real user research to validate and expand upon the insights you've already gathered. Some great user research resources go into much more detail than I'm going to here. One is *Observing User Experience (second edition)*, by Elizabeth Goodman, Mike Kuniavsky, and Andrea Moed. Another is the User Research Basics section at www.usability.gov.

Before you jump in headfirst, spend some time thinking about the kind of people you want to talk with. For example, for our dentist client, you might want to recruit parents who have looked for and chosen a new pediatric and family dentist in the past six months so that the experience is fresh in their minds.

CONTENT STRATEGY TOOL 7.2

USER RESEARCH WORKSHOP ACTIVITIES

Download the sample workshop plan to get more-specific instructions and templates for conducting the workshop described in this chapter.

TIPS

- Adapt the exercises to your situation. For example, if you're not all in the same room, you might brainstorm in a Google doc that everyone can see or use an online brainstorming tool.
- During the user story exercise, listen in on participants' conversations to get even more insights that might not make it into their worksheet.

WHERE TO GET IT

Download the workshop plan at www.peachpit.com/register.

WHERE IT CAME FROM

Brain Traffic (www.braintraffic.com)

Now you can choose your research methods. I find two methods particularly helpful at this point in the project:

Interviews—User interviews are similar to stakeholder interviews, and you can use much of the information about structuring and conducting the interviews from Chapter 6 to get ready. Ask questions that address attitudes and beliefs, concerns, experiences, behaviors, and motivations, as discussed earlier in this chapter. Whenever possible, do the interviews in person so you can observe facial expressions and body language for added context.

TIP
Demonstrate that you respect your user research participants' time. Keep interviews and observation sessions short, and provide an incentive for participating.

Observation—Observation involves asking participants to visit a website or use an application while you watch. Ask them to talk you through what they're thinking and doing. Using the dentist example, you might visit another dentist's website and ask the user to walk you through what they would do on the site if they were researching dentists for their family or looking for a dentist in an emergency. Remember a little earlier when we discussed assumptions based on site analytics? Here's where you can validate them. In the previous example, you assumed that users clicked About Us because they wanted to learn more about the dentist. But maybe, instead, participants might say they clicked there because they assumed that's where the contact information would be and they needed to find it fast.

TIP

Remember that you don't need to talk with many people to get valuable insights. Five is all you really need. If you're using both methods described here, you could recruit five for each or do interviews and observation with the same five people.

After you've completed your user research, go back to your User Understanding Matrix and fill in what you learned. Be sure to include any new assumptions that arose from the research, too.

NICE TO KNOW YOU, USERS

Do you realize how set up you are for making smart content strategy recommendations after all this user research work? I'm excited for you. Really, I am. I hope you are, too.

The next chapter talks about how you take your business and user insights into evaluating the current state of your content. The kind of assessment you can do now goes far beyond counting how many pages you have to knowing how well your content supports your business goals and satisfies users' needs.