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Exploratory Phase (Understanding Users & Context)

Goal: Understand users, their needs, pain points, and context.



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Diary Method

When should the dairy method be used?

Long-term behaviour tracking or understanding habitual usage.

Where should the dairy method be used?

It provides a direct measure of efficiency. Faster completion times (without errors) usually indicate better design and usability.

How should the dairy method be used?

Provide users with tools (apps, journals) to record their experiences daily over a set period.

Example:

A fitness app user logs their daily progress and challenges while using the app for a month.

Field Study

When should the field study method be used?

You need authentic, real-world user insights.

Where should the field study method be used?

In users’ natural environments (homes, workplaces).

How should the field study method be used?

Observe users silently or engage in light questioning as they interact with tools or processes.

Example:

Observing how a user organizes their home office setup to improve a task management app.

Interviews

When should the interview method be used?

Exploring user motivations, pain points, and feedback in depth.

Where should the interview method be used?

In-person, over video calls, or phone.

How should the interview method be used?

Prepare open-ended questions and follow up based on user responses for deeper insights.

Example:

Interviewing users to understand why they abandoned a cart in an e-commerce app.

Contextual Inquiry

When should the contextual inquiry method be used?

Combining observation with real-time feedback.

Where should the contextual inquiry method be used?

Users’ environments (workplace, home).

How should the contextual inquiry method be used?

Observe users performing tasks and ask questions while they work.

Example:

Observing a user using a software program and asking questions as they work through a task.

Competitive Analysis

When should the competitive analysis method be used?

Identifying opportunities and gaps compared to competitors.

Where should the competitive analysis method be used?

Online or with competitor products.

How should the competitive analysis method be used?

Evaluate competitors' interfaces, features, and user feedback.
Summarize insights in a report.

Example:

Analyzing competitor fitness apps to identify features that appeal to users and their pain points.

Literature Review

When should the literature review method be used?

Researching existing data to save time and effort.

Where should the literature review method be used?

Online databases, academic journals, UX reports.

How should the literature review method be used?

Search, analyze, and extract relevant information to inform your project.

Example:

Reviewing previous research on mobile app usability to guide your design decisions.

Customer Feedback

When should the customer feedback method be used?

Gauging user satisfaction and pinpointing specific issues.

Where should the customer feedback method be used?

Surveys, social media, customer support channels.

How should the customer feedback method be used?

Aggregate feedback, categorize issues, and analyze patterns for actionable insights.

Example:

Analyzing user feedback to identify complaints about a mobile app's slow loading time.