

User Testing

# Scaling research for better CX

How to guide





# The Age of the Customer has arrived

Analysts and pundits have proclaimed this the Age of the Customer, a nod to the shift in power from corporations to the customers that they serve. This shift has been fueled by a number of factors, with massive technological advancements underlying this change.

Forrester summarizes the potential wins and losses in this new Age of the Customer by stating, "In this era, digitally-savvy customers... change the rules of business, creating extraordinary opportunity for companies that [can] adapt, and creating existential threat to those that [can] not."

As it stands today, 86 percent of customers are willing to pay more for a better customer experience, and they are seeking highly responsive, customized, and delightful experiences that seamlessly match their lifestyles.<sup>1</sup>



## Providing great CX is a critical business initiative

**75%**

Forrester reported that nearly 3/4 of businesses say improving customer experience is their top priority.<sup>2</sup>

**81%**

Gartner found that 81 percent of customer experience (CX) leaders report they will compete mostly or entirely on CX.<sup>3</sup>

## However, saying is easier than doing

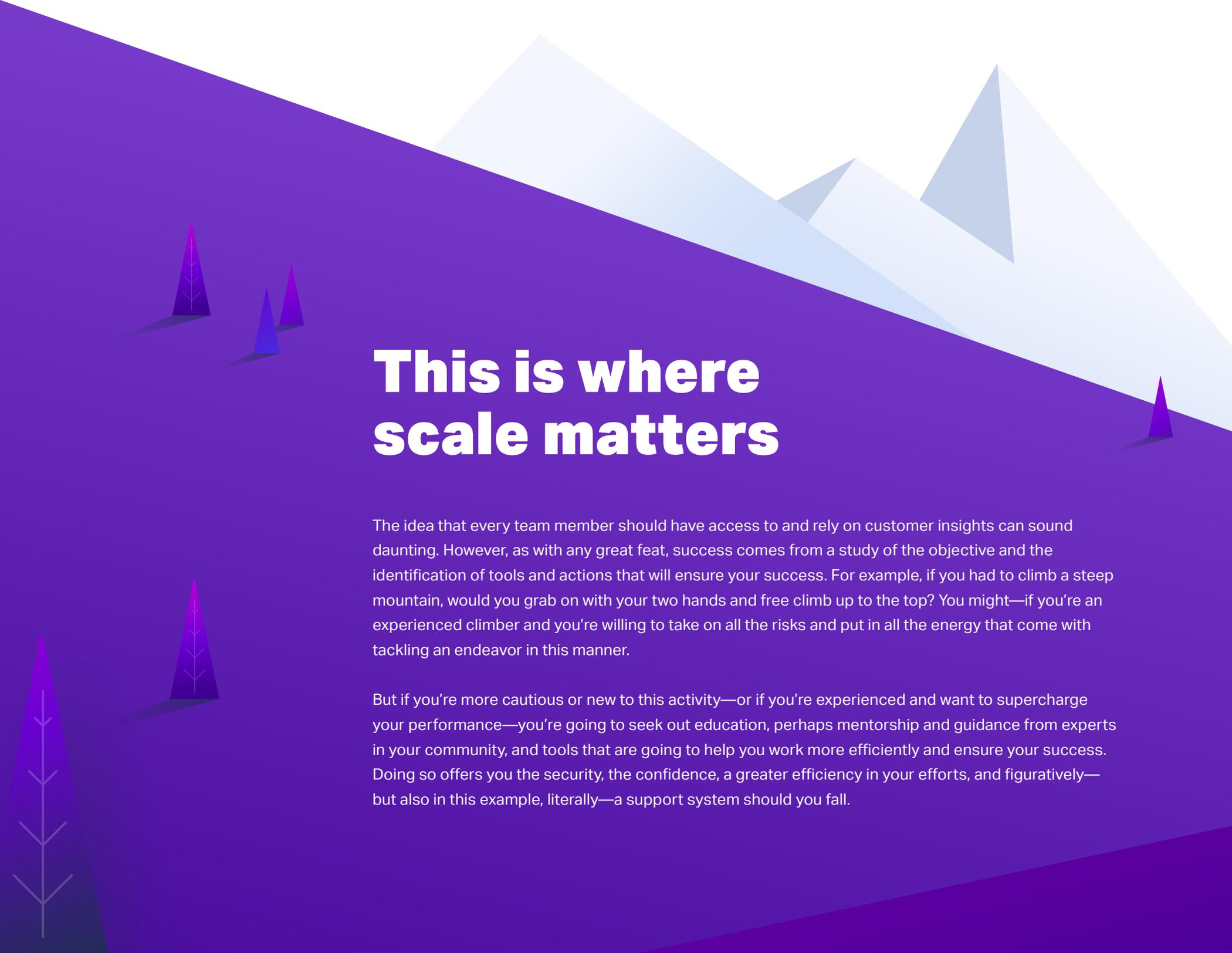
**1/5**

Forrester showed that only 1 in 5 companies delivers good or great CX.

**22%**

Gartner reported that less than half have established the rationale for why CX drives business outcomes. Worse, just 22 percent of CX leaders report that their CX efforts have exceeded customers' expectations.<sup>4</sup>

For companies who are ready, willing and excited to take their brands' CX to the next level, but also struggle identifying how to accomplish this, we have an idea: to provide what your customers want and expect, start by encouraging every team involved in the creation or presentation of your brand's experiences to deeply and thoroughly understand the customers themselves.



# This is where scale matters

The idea that every team member should have access to and rely on customer insights can sound daunting. However, as with any great feat, success comes from a study of the objective and the identification of tools and actions that will ensure your success. For example, if you had to climb a steep mountain, would you grab on with your two hands and free climb up to the top? You might—if you're an experienced climber and you're willing to take on all the risks and put in all the energy that come with tackling an endeavor in this manner.

But if you're more cautious or new to this activity—or if you're experienced and want to supercharge your performance—you're going to seek out education, perhaps mentorship and guidance from experts in your community, and tools that are going to help you work more efficiently and ensure your success. Doing so offers you the security, the confidence, a greater efficiency in your efforts, and figuratively—but also in this example, literally—a support system should you fall.

# Researcher-only research creates bottlenecks

Some organizations have centralized customer research teams where only experienced researchers conduct all research to provide insights and learnings across the entire organization. Other organizations are structured in a similar manner, but instead embed a researcher within each segment or department.

The benefit is maintaining a high quality of research that is conducted and insights collected and shared. However, these structures also come with a number of challenges. One problem is overloading researchers with the needs of the entire team—with valuable insights potentially going uncollected or overlooked.

A UX researcher at a tech company told us, “We feel like we’re being stretched... [With] all of the requests that they have, we’re having a hard time filling that need.”

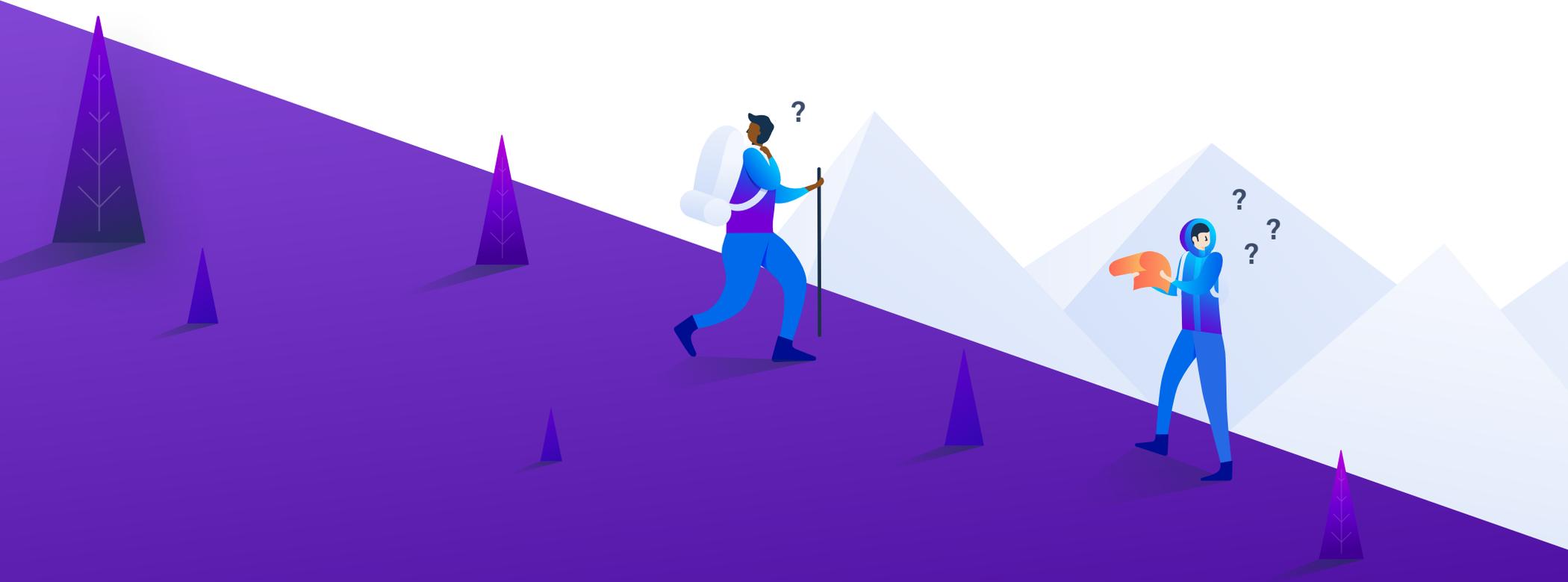
If we think about the metaphor of scaling a mountain—the Peak of CX, if you will—this setup is like having one expert climber trying to reach the summit with a bunch of non-climbers holding onto their back. In this effort to let only the expert do what they are good at, the progress is slow, grueling and you risk everyone failing from such a concentrated effort.

And if a researcher in this scenario is facing a tight timeline, they might be desperate to get everyone off their proverbial back—finding a solution to ensure teammates get responses to one-off requests — if they stand any chance of focusing on strategic CX initiatives to drive large, innovative changes for the company.



## Walmart

A “lean mean team” of two, the Site Optimization team at Walmart Canada was tasked with supporting 16 departments. Challenged with keeping up with the high demand, they turned to UserTesting in order to scale team access to valuable customer insights. [Read their story.](#)



## A research free-for-all results in chaos

The alternative setup, however, holds its own challenges. Other organizations have adopted a more open structure where everyone does their own research, collecting the necessary customer feedback to meet their project needs. While this matches organizational imperatives to be customer-centric, non-researchers may not understand the optimal ways to go about collecting answers to support their objectives. Researchers are stretched thin trying to cram what often amounts to decades of education and professional experience into short training sessions. Quality of insights may suffer, frustration and confusion rise, and

team members may not actually be generating the insights that will help them improve the experiences they are working on.

In our Peak of CX, this structure is like every inexperienced climber making a mad scramble to the top. The experienced climber (AKA our researcher) can only do so much to help hoist others upwards, but the effort is taxing and exhausting, and without a more organized effort, the reality is that few will succeed.

If we put these two ideas together, we start to realize that whether scaling a mountain or scaling customer research within your organization, a successful effort requires optimizing use of resources, collaboration and organization between team members, and the right tools to enable efficiencies for all.

# Scaling research lies somewhere in the middle

How an organization decides to structure research responsibilities and resources should align with its goals and objectives. However, here at UserTesting, we would advise that the ideal model lies somewhere in the middle of the two models described previously.

We think of this as an “empowered” model, wherein all parties are able to gather the insights they need to build customer-centric experiences. On the one hand, it entails loosening the reins on research so that customer data can be collected when, where and by whom they are needed. But on the other hand, and equally important, it also involves creating a system that ensures that internal expertise and best practices are effectively documented and disseminated to maintain a high quality in practices and outcomes.

Finally, we feel strongly that technology is a great enabler in this organizational transformation: that in order to scale—to do more with less, while maintaining a high bar of quality—technology is indisputably a key part of this change. It supports whole organizations getting the insights they need, while reserving research resources for higher impact, strategic projects.

# Who is involved and how each can help

It is widely believed that it is everyone's job to help improve customer experience. Here, we've identified three key stakeholders as well as their domains of influence in propelling and helping to scale CX best practices and research throughout an organization.





# Executive

Individuals serving in an executive function are instrumental in communicating the vision for CX, serving as an advocate internally, and holding teams accountable.

## Select tools and solutions that enable teams

With buying and approval rights, executives must ensure that their teams are armed with the necessary tools, solutions and other resources in order to be successful. This means being crystal clear on solutions they are evaluating—that they are easy to use and yield the outputs promised.

## Tie team objectives in to higher-level CX goals

Serving as the connector or the conduit to higher-level initiatives, executives should ensure that teams do not become myopic and that all activities tie in to business objectives.

## Model customer-centric behavior

When sitting in on review sessions and presentations, executives should be kind but critical in asking, “Is this the right experience for our customers?” Ensure that teams are focused on customer needs when designing new products and solutions.

# UX Practitioner

As an expert in the field, the UX researcher serves a vital role as an evangelist, mentor and trainer.

## Tie research in to business objectives

Non-researchers often struggle with how to connect their business challenges with conducting effective customer tests. The result is the launching of tests that do not yield useful insights and likely the eventual abandonment of the effort entirely. UX researchers should help teammates start off on the right foot by identifying their challenges and offering suggestions on how to structure a test and the questions they should ask to gather the right feedback.

## Even better, offer "best-of" resources and examples

Sharing templates or otherwise providing tasks or questions that a non-researcher can copy and paste is a great way to scale expertise.

- Train teams on how to use in-product shortcuts, such as the pre-made [research templates](#) or [saved screeners](#).
- UX researchers can also create a library of templates that team members can easily use. Again, it's important that all resources are aligned with business objectives to ensure that non-researchers are making the connection.
- If there are best-in-breed tests available to study or copy in the UserTesting dashboard, let team members know, so that they can search and click "[Create similar test](#)" to make a copy to customize and launch.



## Stay organized with Workspaces

Organize your tests (according to projects, teams, or whatever works for you) and manage permission levels and access to different [workspaces](#). Open workspaces can facilitate knowledge sharing while private workspaces allow you control over top-secret or sensitive research projects.

## Follow the steps to become a true influencer or evangelist

Make the most of opportunities to share work and to be available to help others.

- Researchers should publish findings, along with the insights that helped them come to the conclusions, often and where others can access them. This can include sharing on a company wiki, a department website, or via 3rd-party tools like [Trello](#) or [Slack](#).
- Present at events (such as brown bag lunches and trainings) or hold office hours so that non-researchers can learn more about research and also know when and where to come for help and feedback.

## Establish a repeatable process

Let non-researchers know what part they are responsible for and where and when researchers can and want to be involved, so that processes are clear and to prevent one-off interruptions.

- If needed, communicate a review process and an [approvals workflow](#) to ensure that non-researchers are doing the bulk of the work upfront, and research experts can review before the tests are launched. This might be more important at the start of a non-researcher's ramp up period, so that they can get up-to-speed on what an effective plan or test looks like. Providing a template for teams at the onset can be very helpful in streamlining this process.
- Or, indicate that research teams should be involved upfront to provide consulting and to establish a general framework before teammates finalize and launch their tests.



# Doer

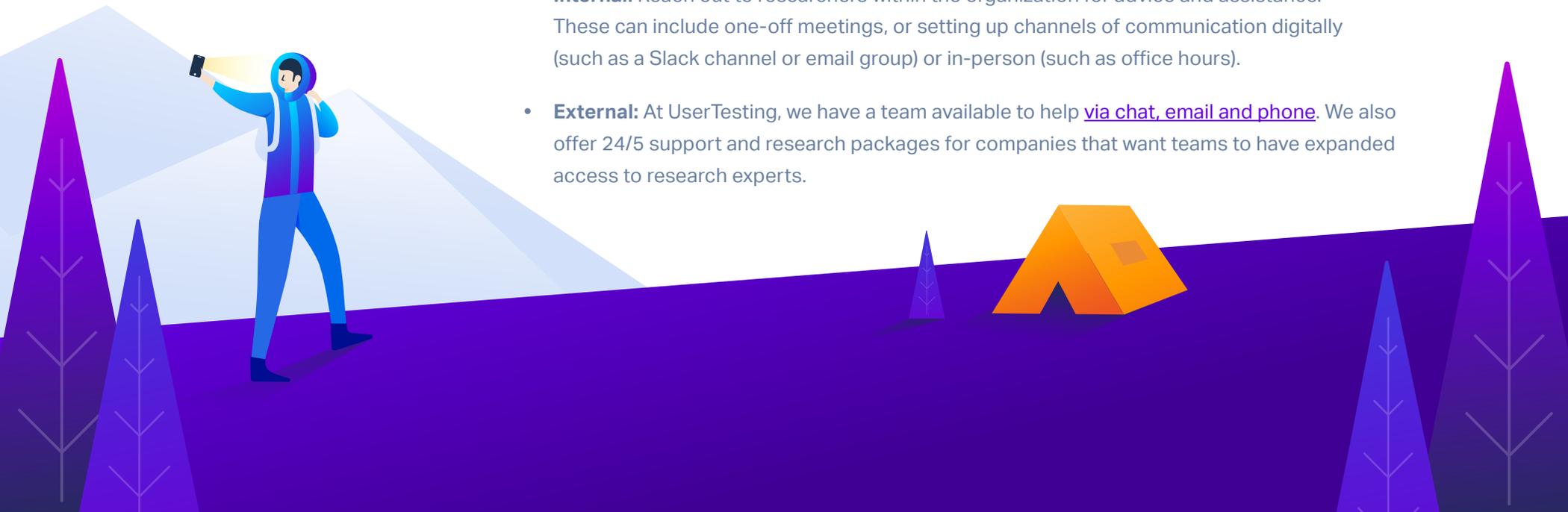
As non-researchers, “doers” (including product managers or members of a marketing team) should work with research teams to gain foundational knowledge, and also lean on resources to continue building upon their skills.

## Identify business objectives and related questions

Research is a means towards an end—meaning, it’s a way to get answers to your questions. So doers should start by listing out objectives or challenges, like, “Why are customers dropping off at this point in the workflow?” or “Why is adoption of this feature so low?” or “How would this audience segment interpret this media asset?” Then [start mapping out the task and questions](#) that help secure answers to these questions.

## Lean on resources

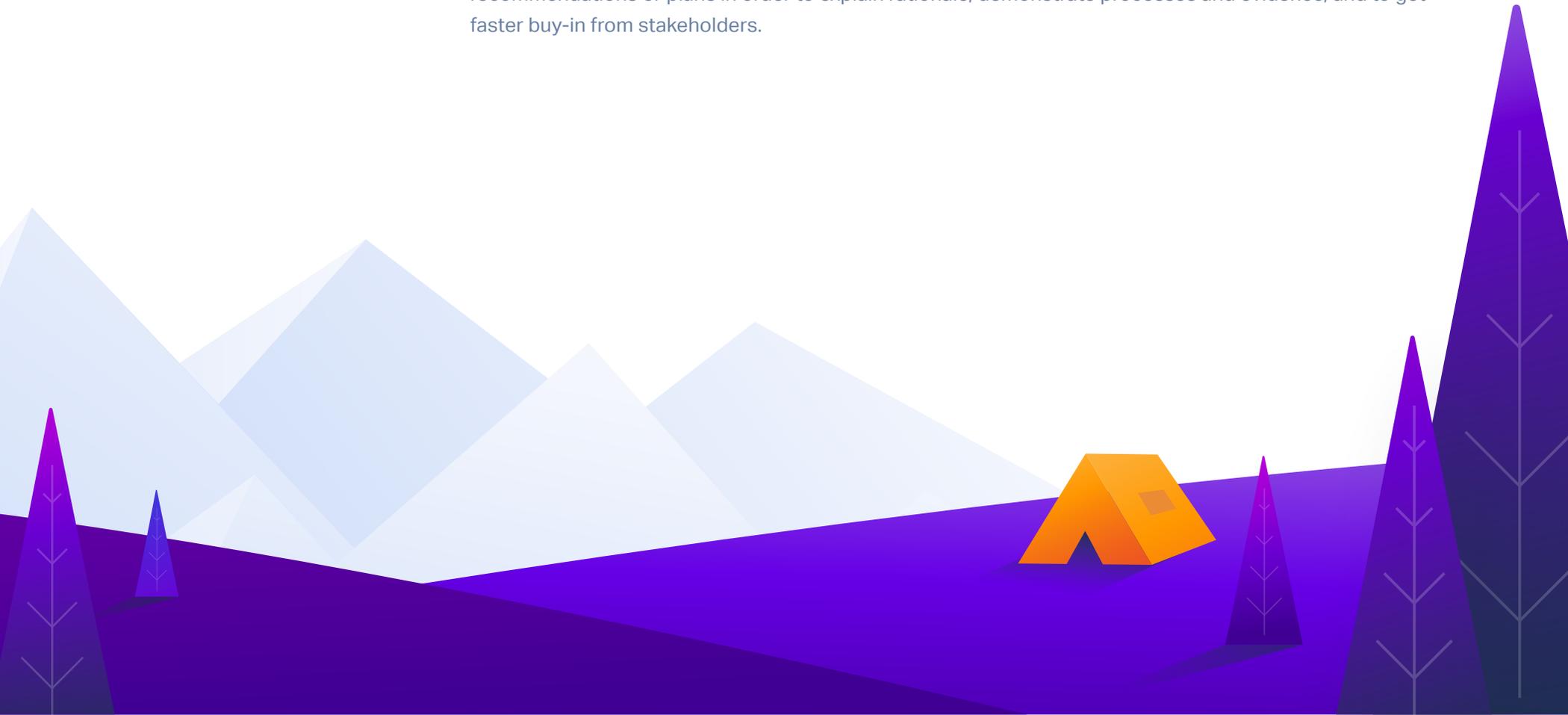
- **Internal:** Reach out to researchers within the organization for advice and assistance. These can include one-off meetings, or setting up channels of communication digitally (such as a Slack channel or email group) or in-person (such as office hours).
- **External:** At UserTesting, we have a team available to help [via chat, email and phone](#). We also offer 24/5 support and research packages for companies that want teams to have expanded access to research experts.



- Users can access the [pre-made templates](#), based on common objectives, available in the UserTesting platform. They can also access saved screeners, to more quickly create audience targets without needing to start from scratch.
- Turn to the [UserTesting Complete Guide](#) as a starting point on research best practices. Additionally, there is a [Help Center](#) with articles on how to use the UserTesting platform.

### **Package and present**

Gathering customer insights is part of a process that starts with identifying a problem and possibly some hypotheses, gathering insights from customers, and then ends with a conclusion or the detailing of next steps. Doers should document this, including [clips of customer insights](#), when presenting their recommendations or plans in order to explain rationale, demonstrate processes and evidence, and to get faster buy-in from stakeholders.



# A final note

As much as this paper has been about the respective roles and responsibilities related to scaling research, it's important to note that equally important is the teamwork required to pull it all together. If providing amazing customer experiences is divided amongst multiple divisions, touchpoints, and individuals throughout an organization, everyone must do their part in being patient and generous, brave and proactive, and willing to step in when the help is needed.



<sup>1</sup> **Temkin Group**, "ROI of Customer Experience, 2018."

<sup>2</sup> **Forrester**, "72% of Businesses Name Improving Customer Experience Their Top Priority," 2016.

<sup>3</sup> **CMO.com**, "CX Is The New Battleground For Financial Institutions," 2018.

<sup>4</sup> **Gartner**, "Gartner Says Customer Experience Pyramid Drives Loyalty, Satisfaction and Advocacy," 2018.

## About UserTesting

UserTesting enables every organization to deliver the best customer experience powered by human insight. With UserTesting's on-demand Human Insight Platform, companies across industries make accurate customer-first decisions at every level, at the speed business demands. With UserTesting, product teams, marketers, digital and customer experience executives confidently and quickly create the right experiences for all target audiences, increasing brand loyalty and revenue. UserTesting has over 1,200 subscription customers including half of the world's top 100 brands, and has delivered human insights to over 35,000 companies to-date. Backed by Accel and OpenView, UserTesting is headquartered in San Francisco, CA. To learn more, visit [www.usertesting.com](http://www.usertesting.com).



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