dscout

Digital Product Testing
The People Nerds Guide

Jump to

An intro to digital product testing

The internet, the mobile revolution, wearables, and a "smart" version of just about everything. Digital technology's ubiquity is only outdone by its diversity. All of that means your experience—regardless of channel or modality—needs to deliver.

What a human factors engineer is to physical products, the user experience researcher is to digital ones. Mobile apps need optimization, features need use cases, and users want delight. All of this (and much more) is subsumed under the umbrella "digital product testing." The personal, private, and mobile nature of digital technology can mean that user experiences—and outcomes—are diverse, creating what feels like an endless source of questions and opportunity.

Growing the habit of iterative, human-centered, mixed methodological product testing keeps design teams creating, eng teams sharp, and product managers thinking two steps ahead. It also means your product roadmap, strategic initiatives, and growth models accurately reflect both your current customers and tomorrow's evangelists.

What is digital product testing, and how does it differ from "usability" testing?

For user experience researchers, product testing may have any number of goals: benchmarking a current experience, exploring how a competitor compares, honing in on a single source of customer friction, or unpacking use cases unknown by the design team. A unifying characteristic is that some digital product—an app, website, or aspect of either—is the focus.

Usability has historically focused on a users' interactions with a screen to track specific metrics like time-on-task, and overall getting a picture of how a screen, UI, or experience flow is interpreted—or not—by a user. Sometimes, pulling insights from click trails or heat maps may be considered usability data.

Although a usability element may be part of a digital product design, this guide focuses on a higher-level conceptualization of "product testing," to include moments away from the screen that might be as, if not more, important to what a user does when they finally arrive on that screen.

Additionally, digital product testing might collect different kinds of variables and metrics: user stories, screenshots/recordings of pain points, photo collages, and the classic scale/open-ends. In short, digital product testing—as defined here—refers to a constellation of questions (evaluative, generative, and discovery) related to a digital experience, not just the clicks, paths, and preferences of a user as they interact with a screen or set of screens. It's more contextual, can be holistic, and might involve a screen, but doesn't necessarily need one.

Product testing best practices + common mistakes

When recruiting for digital product testing studies….

1. **Mind your sample size.**
   If you're doing an in-depth usage analysis, know that this data can be a HEAVY lift to field and analyze. We'd suggest picking fewer people (n=15-30) and relying on triangulating methods if you need numbers (i.e. your own usage data, or a separate, larger study that's more streamlined).

2. **Know what kind of feedback you want, and recruit accordingly.**
   Are you interested in natural usage patterns? Detailed, tactical feedback? General impressions? Feedback from power users, or casual users? Make sure you have a target in mind before you begin.

   a. If you want detailed feedback, get people who can give it. dscout has a ton of people who identify as "early tech adopters" or "tech savvy"—leverage that by screening for it. They tend to speak better on the details of the new feature or product you might already be working on, and it will also save you a lot of headaches re: troubleshooting.

   b. Alternatively, if you're interested in people who AREN'T tech-forward, be prepared for a little extra hand-holding in the process, and for less technical feedback.

   c. If you want power users of an existing product of yours, it's a viable option to recruit directly from your users, rather than sourcing from your tool or recruiting partner. If you've oversaturated your own panel, however, recruiting elsewhere and including targeted, usage-based questions in your screener survey is a good bet.

3. **Over-recruit a little more than normal.**
   Getting a digital product to someone's phone or computer can be a time-consuming process, and some people get burnt out during troubleshooting. There might also be unforeseen technical issues that knock people out of your project that you didn't account for during screening.

When fielding product testing studies....

1. **Leave yourself time for getting the product into people's hands.**
   You might not be sending products out to people's doors, but don't get fooled into thinking that a product or feature toggle is going to be a hassle-free, immediate experience. Build time into your project to get the new product in people's "hands," and have someone on hand to troubleshoot the project.

2. **In-the-moment data is so valuable for these studies.**
   Asking users about pain points or benefits is one thing, but users are generally very accommodating—so things that we might think of as 'pain points' or improvements to be made might gloss under their radar. If you run an unmoderated study, and have them log responses or share a screen recording in a regular moment of use, you might see them searching for a button you meant to make obvious. Or backtracking in one place particularly. Or getting mildly frustrated. These are things they wouldn't report, but that you care about. This could also be done in a moderated environment where screensharing is possible (ie. dscout Live on desktop or mobile).
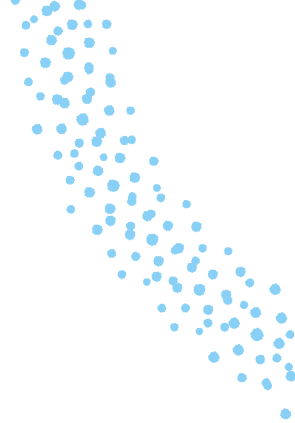
3. **Screenshots are your friends.**
   Participants will almost certainly lack a common language to talk about their exact feedback in terms that make sense to you. On top of that, sometimes they think they have the language, leading to some very confusing miscommunications. To avoid this, try to capture screenshots or screen recordings of their actions, so you can look straight at the behavior instead of taking their (potentially vague) word for it.

4. **Get specific with your questions.**
   Don't be afraid to go pretty abstract with journeys. You're never going to capture a journey that's aligned to every user's experience. Everyone's a little bit idiosyncratic, so trying to make sure every step in every recorded journey is the way of madness.

5. **Give your participants more context.**
   One tactic to help alleviate potential participant burnout is to provide a little more transparency than you might in other projects. Be clear with participants that you're figuring things out together and build a sense of partnership in improving the product. Let people know this is not a final product and there may be some maneuvering to make things work. You can also be very clear with the type of feedback you're looking for by acknowledging that there may be additional issues with flow or visuals, but you want them to spend most of their time and energy on a specific aspect of the experience.

Case Study: T-Mobile's scrappy, iterative approach to mobile research

At a company like T-Mobile, mobile app research is a necessity, and longitudinal, contextual research is often needed.

"Oftentimes, we're interested in very concrete moments that happen intermittently," says Principal User Experience Researcher Andrea Lindeman. "For example, understanding the context and experience of someone paying their bill."

"Shadowing someone in real life until the moment they decide to pay isn't an effective use of our time. And it's way more useful to see the actual moment than to tell users in a lab 'Let's assume you just got your bill...'"

Time and resource constraints can be more of a roadblock when your company moves fast and is hungry for insights.

"Since we've discovered dscout, we've been able to reach a larger number of participants and get more in-context mobile data—and we still get that data super quick," Andrea says, "We can also reach out to the same participants over time and follow up post-study as needed. That's been really valuable for us; 'how much data can we get before a design comes out' is a measure of success."

Case 1: Out of the app and in context

When the team launched T-Mobile Tuesdays (their rewards program) they had a lot of behavioral analytics data within the associated app. But once people save offers and go to redeem them—they're out of the application. The researchers lose track of what they're doing, what happens to them, and what their experience is.

"dscout allowed us to really effectively track where our users go and helped us to better understand their experience outside the app. They're able to record their screen and upload what they do—versus being constrained to a specific prototype or application— which was so powerful for us. We could also capture users when redeeming offers in a physical retail store to understand the in-store experience as well."

"It was the first full picture that we had of customers redeeming various offers. And naturally, we found the experience wasn't always delightful. So we were able to then go back to our partners and make some changes on our end as well."

Case 2: More effective beta bug zapping

While the T-Mobile app was in its beta period—before a major redesign— the team did a dscout study to test it. Participants signed up to interact in the beta over the course of four weeks. They asked them to do some specific tasks, but also asked them to, whenever they went into the app, record their natural usage.

"If they were going in to check their data allowance, or pay their bill or what not, we asked them to upload those moments. In this way, we could capture key interactions with the app in users' own contexts and timing, resulting in much richer and true-to-life insights than we get in the lab."

"Anytime a user submitted a video with a serious issue, our product team could watch the videos back and replicate how the user encountered the problem. We resolved countless issues that way, in real time, before the new app was launched."

How to design a study that generates needle-moving product feedback

Getting on-the-ground and closer to your customers as they interact with your digital experience or product is the goal of this approach. The context around a decision or action—the why—can lead to more impactful, longer-lasting improvements—be they to the UI or broader offering. The applications and use cases of digital product testing are varied, so starting with an outcome or problem statement will go a long way toward illuminating how to construct your design.

Questions like:

1. Will they like—or even use—this new feature?

2. If we want users to start [action], what should the product coach?

3. What is missing from our experience?

All might require a slightly different set of questions, methods, and approach. Considerations include:

- **Modality:** Is this a mobile, desktop, or multimodal experience?

- **User base:** Does your question implicate current, new, or both users?

- **Temporality:** Can we "see" the moments of interest in one sitting or do they unfold over time?

- **Product proximity:** Are we curious about something that happens inside the digital experience or something that might happen before or after someone "lands" there?

Again, before a question is even programmed, ruthlessly prioritize what you need and want to learn from users, why that data is important, and how it helps answer the question. Scope creep is ever-present, and especially so when digital products (and their limitless potentialities) are involved.

Sample study design: Understanding new features in context

Testing a new feature allows you to see how project in beta is will actually be received before it's out in the wild.

Traditionally, research on new features would involve sitting in a room with someone while they get a sense of the product. But that will only get you first impressions, which is really the start of a user story with a new feature or product.

Using a longitudinal methodology, or a tool like dscout, you can get a variety of insights into a new features' reception that more traditional methods won't. You can get a sense not only of what people think of right off the bat, but also a sense of natural usage. When are people turning to your new feature? Does it naturally fill a need? How does their usage style change as the new feature or product is introduced?

In-the-moment data can also give you insight into use cases you hadn't considered before, and how a new feature slots into someone's actual, concrete life.

Also, you can get feedback from them after a period of acclimation, rather than right off the bat, so you can see in real-time how their opinion has changed once they've gotten used to the product.

Below is a one-size-fits-most, longitudinal, unmoderated, design. As mentioned previously, product testing encapsulates a host of use cases. Modify the parts of this design to fit your specific need, your toolkit, or to your most accessible methodologies.

Part 1: Getting to know you

It's always nice to start with a baseline! This gets you more familiar with what users think of your brand or company before a new product gets thrown their way. Ask them how they use the product, what it means to them, and what other products they use in conjunction. This also acclimates new participants to the study, before doing more in-depth activities.

Example questions:

1. How often do you use this product?

2. How long have you been using this product?

3. What role does this product play in your life?

4. What is this product best for, in your opinion? What makes it great?

5. What would you change about it?

6. What other products do you use to accomplish similar tasks?

Part 2: Meet your new product

This is a technical stop-gap measure to make sure that your product is getting rolled out the way you intend it to. In dscout, design this as a single entry part. Here, you want to require participants to complete any technical requirements they need to complete (e.g. restarting their computer, updating their app, etc.) and show a picture or screenshot of your new feature. This lets you make sure everyone's on the same page before collecting feedback.

Example questions:

1. Show us a screenshot of your updated app/new product/new feature.

2. Do you have any questions before we proceed?

Part 3: Highlights and lowlights

This is a fun inventory-style activity that lets users highlight the best and worst of your new feature or product. This is better for a big change, like a UI overhaul or a new product, and less good for a small change like a button moving locations. Ask users to submit entries for "highlights" (what stands out as great) and entries for "lowlights" (what stands out immediately as a concern).

If you'd prefer to get this feedback after scouts have had a chance to acclimate to the product and have a better sense of what it can do, feel free to switch this part with part four.

Example questions:

1. What feature or element of this new product are you showcasing?

2. Is it a highlight or a lowlight?

3. Take a screenshot of what you're showcasing.

4. In a 60-second video, explain to us what makes this stand out (either as a victory or a concern).

5. If it's a lowlight, what would you change to fix it?

6. If it's a highlight, what about your experience would it improve?

7. Rate the impact on a scale of 1-10.

Part 4: In-context use

Ask users to capture moments where they use this new feature or product throughout their days. Users describe what they're trying to do and how the product is helping or hurting their attempts to accomplish their goals.

If you're interested in broad usage information, you can just have participants report that via open-ends. For more tactical information about how they're navigating your product, ask for screen recordings and videos of them accomplishing the task in real-time.
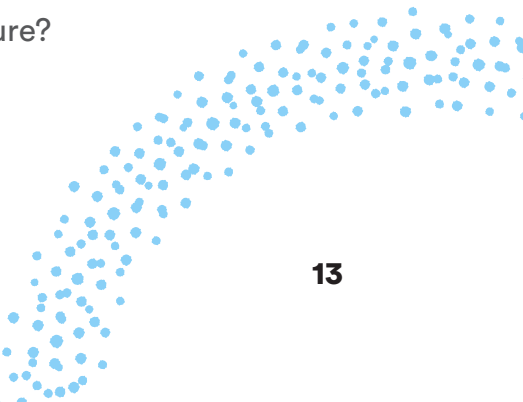
Example questions:

1. What are you trying to accomplish right now?

2. Where are you / who are you with / etc.

3. How did you make use of the new feature / product in trying to accomplish this goal?

4. Take a screenshot / screen recording / video of you accomplishing this goal using the product, narrating what you do as you go along.

5. On a scale of 1-10, how do you feel about this product in this moment?

6. What would improve your experience?

Part 5: Reflection

In the final part, ask participants to reflect on their period of using this new product.

Example questions:

1. In hindsight, what stands out to you about this new product/feature?

2. What works particularly well?

3. What would you change?

4. If given a chance, would you keep using this product/feature?

5. How would you rate this product/feature?

Alternate design: Naturalistic data (the "surprise feature" method)

This is a slightly different version of a similar flow. Instead of TELLING users they are getting a new update, you simply update their product mid-field and see what happens. You can use this if you're interested in non-primed, naturalistic data from your participants, and if you're interested to see how intuitively your update will integrate with existing usage patterns.

Note that you do run the risk of getting little to no data on your new feature, if for some reason it doesn't stand out to users in the short period of time it's available to them. You may need to pivot and direct users to your update if that's the case.

Note that troubleshooting will also be trickier in this version. You'll have to monitor screenshots extra closely to make sure the update made it to the participant, without actually asking them about it.

To do this style, remove part 2 from the above flow, and make the moments part a little longer. Collect baseline moments for a few days to get a sense of normal use, then introduce your new update. Use tags to delineate pre-update entries, post-update entries that use the update, and post-update entries that don't include the update.

You can still use reflection parts at the end of your study.

Additional methods:

Use dscout Live (or another research tool that allows for desktop and mobile screen-sharing) to do a more traditional user feedback session. If you want super tactical feedback on specific actions, invite a few participants to sessions and have them share their screen and walk through the tasks you have in mind and narrate their processes. This will give you a high level of detail on some specifics, which is nice to triangulate with more natural data that you'd get in an unmoderated study.

6 reasons to use dscout for digital product testing

1. **Organic, in-the-wild, as-they-use it moments.**
   Lab settings and even in-homes can feel stale and produce inaccurate data. dscout offers you proximity to the digital moments you need. Create a compelling prime or trigger and let the user submit what matters to them.

2. **Photo and video data that brings stakeholder-shaking data.**
   What better data stream than screenshots, screen recordings, and even selfie-video to pair with your open-ends and quant? With dscout, mix your questions to triangulate and create a fuller picture of your product's experience. Together, this creates unignorable, eye-opening data to support your recommendations and insights.

3. **Rapid, iterative, and less precious.**
   Never be accused of "Launch blocking" again. Recruit in as little as 48 hours or go with a qual survey and capture feedback right away. Lightweight tools offer iterative, rolling research opportunities, letting you match your practice to whatever timeline your product, eng, or design team might be on.

4. **Create a team sport of your product testing.**
   Add collaborators and stakeholders to see the data themselves. Note taking, @-mentions, and share links keep teams in-the-know and socialize the power of contextual experience research for innovative product testing.

5. **Diversify your recruitment.**
   Reach beyond your backyard with participant recruitment that matches your broader user (and even prospect) base. Create customized screeners, segment by user type, and even glean top-line insights before your study even launches.

6. **Omnichannel-ready.**
   Whether it's moderated or unmoderated, dscout offers mobile and desktop tools to match your digital product format. Whether you're sharpening an existing offering or exploring an expansion, we have you covered.

Recommended Resources

1. **Dropbox's "Product-Shaping Usability" Approach to Testing**

   By Tony Ho Tran, published on People Nerds

2. **Building a Digital Product Testing Team From Scratch**

   By truematter

3. **Capturing the Full Omnichannel Digital Experience**

   By Katie Masciopinto, published on People Nerds

4. **Beta Testing as a Mixed Methods Playground**

   By Tony Ho Tran, published on People Nerds

5. **A/B Testing for Product Researchers' Quick Questions**

   By Nikki Anderson, published on People Nerds

6. **The Keys to Successful Usability Testing: Observe, Don't Just Listen**

   By Nikki Anderson, published on People Nerds

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Use the dscout platform to recruit smarter, field faster, and up your org's research capacity. Our tools for remote research champion user voice by letting you see, hear, and engage with your actual users.

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