dscout

Concept Testing

The People Nerds Guide

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An intro to concept testing

By Nikki Anderson, Founder, User Research Academy

Sometimes you feel “between” discovery research and usability testing. Your team has a few concepts in mind, but they aren't fully formed ideas. They want to test to see if they are going in the right direction, but the concepts aren't usable.

I originally figured that usability testing would be a suitable approach to these problems. However, by the end of our tests we still lacked some necessary information. We had an idea of how users might (or not be able to) use a particular flow, but still not much knowledge of the concepts' validity. After some time, I learned about the nuances of concept testing.

What is concept testing?

Concept testing encourages you to put early-stage ideas in front of participants to determine which direction the team should go in or whether or not your team is going in the right direction. These tests will help you understand how people feel about your concepts/ideas.

The most common questions concept testing can help you answer are:

- What makes this concept appealing or unappealing?
- What, if any, problems does this concept solve for our users?
- What are the gaps in the concept/experience?
- Which concept should the team focus on?
- How does this concept compare to competitors?
- How well/unwell is the concept and value prop communicated to users?

Overall, there are two scenarios in which you can use concept testing:

Discovery phase

Concept testing is beneficial in the discovery phase because it helps teams narrow down the scope of their ideas. Let's say you're working at a company that provides retirement plans.

During generative research, you find that younger folks who should be thinking about a retirement plan don't understand the value or how it works.

Through an ideation session, your team comes up with several ideas to help communicate the value of retirement plans and how to get started with one right away. Your team has a total of three ideas and isn't sure which one is the right path. Concept testing is a fantastic way to figure out what direction the team should take.

Validation phase

After you and your team choose an initial direction (or two) and finish some low-fidelity prototypes, you can do more concept testing to continue to validate your design decisions. Concept testing can be a continuous process from low-fidelity to high-fidelity concepts. I always recommend starting with lower fidelity prototypes and working up to more polished versions.

Once you finish concept testing, you can try alpha and beta testing if you want to continue testing your product.

Remember, concept testing is not usability testing!

Please keep in mind that concept testing and usability testing are very different:

- You use concept testing to see participants' reactions to general ideas or concepts. You are getting an idea of what people think of concepts.
- Usability testing is to assess how effective, efficient, and satisfactory a prototype or product is. You can understand how participants use a given product or flow.

Always think of your goals before deciding on your methodology. If your team has a few different ideas they want feedback on, concept testing is a great choice!

How to run a concept test

By Nikki Anderson, Founder, User Research Academy

1. Set your objectives

Knowing what you want to learn not only ensures that you're choosing the correct method, but helps you outline the rest of your test. With clear goals, your tests will have focus and you'll get the information your team needs by the end of the concept test.

Some sample objectives for the retirement plan example might be:

- Compare the understandability of the three new retirement plans
- Examine how participants currently feel about signing up for retirement and how they respond to the new concepts
- Identify pain points and confusion with the three new retirement plans

2. Recruit participants

Once you've set your objectives, it's time to figure out who you want to recruit. Ideally, you're targeting people who would be using the product/feature in the future. I.e. users of your current product/service or a competitor's product with similar concepts to what you are testing. Creating a screener survey is the best way to ensure you get the right people. You'll ideally speak to about ten people per segment for concept tests to get the most robust results.

3. Review the concepts

I tend to ask for concepts to be completed 3-5 days before the first test. By having everything ready ahead of time, you'll have time to review the ideas that will be tested. Examining the concept with the designer gets you familiar with the flow and the information desired from the test.

4. Outline the flow of the test

Once I review the concepts with the team, I create a flow of the test. If you're testing more than one concept, make sure you vary the order. My concept tests follow similar structures and sections. See a full example for a 60-minute concept test below.

5. Create questions

Once you have an idea of the flow, it helps to create the questions for the general section and concepts A and B. Here are some common questions I ask during concept tests:

- Walk me through your overall impression.
- How would you describe this to a friend or family member?
- Have you seen something similar (ex: competitor)? What do you think of the competitor? What do you think of this?
- Have you used something similar to this in the past? Why or why not?
- Walk me through how you have used something similar to this in the past? What was great? What was terrible?
- What is confusing?
- What is missing?
- If you could change anything, what would you change?

6. Think about quantitative data

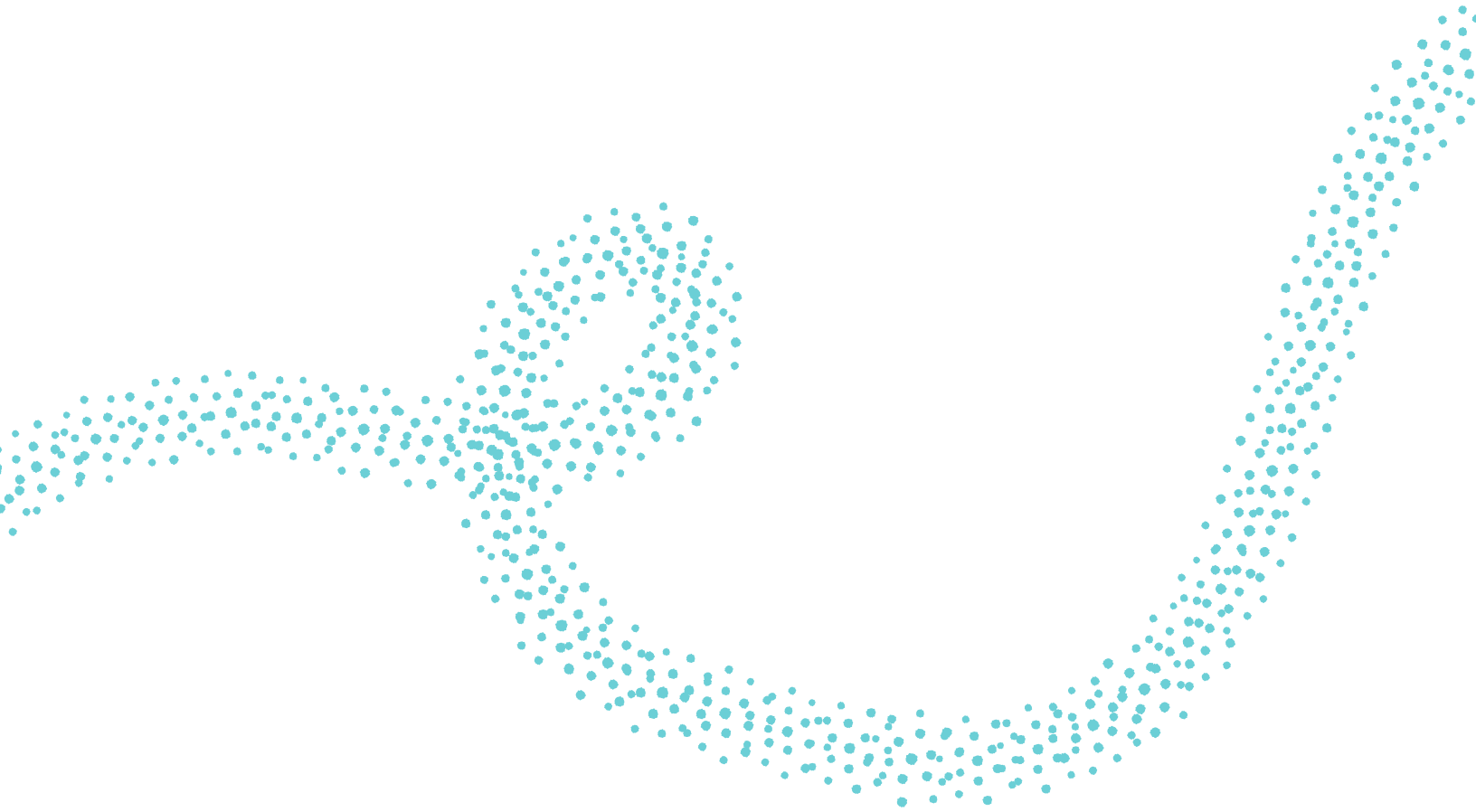
Because we are talking about qualitative concept testing, it's essential to consider adding quantitative data into the mix. For example, you can ask participants a satisfaction score at the end of each concept ("On a scale of 1-7, how satisfied/dissatisfied are you with this concept?"). Additionally, you can follow up moderated testing with unmoderated testing to bolster your numbers.

7. Do a dry run

Once everything is together, conduct a dry run to ensure the flow makes sense for the team and participant. Sometimes dry runs can uncover gaps or questions that we didn't think to ask. No matter what test I am conducting, I always do a dry run before the first participant!

8. Synthesize the data

Once the concept tests are over, I go back to each question I asked and write each participant's responses. For example, if I asked the question, "Have you used something similar in the past?" I will tally up how many people did or did not. Then, for the "Why or why not?" follow-up question, I would write down the answers and cluster anything similar between participants. This method gives me an idea of the overall responses and feelings toward each concept and which one resonates better with participants.



Case study: Compass Digital Labs

Compass Digital Labs (CDL) works at the intersection of hospitality and technology.

Their suite of apps are offered to three core sectors: healthcare, higher education, and business and industry. Each app is focused on getting customized, healthy meals for users in those sectors—be they college students, hospital staff, other working professionals.

"There was a need to redesign the core app." User Research Lead William Georg explains. "So, the designers created three alternative versions of the product, which we needed to test."

Product Design created the unique concepts and presented them to William and his team member, Sanaz Hafezi. He proposed two weeks of testing; however he learned that they would have far less time to explore the different design concepts.

In the spirit of cross-functional collaboration, all teams involved doubled down on their efforts and made a plan that would work with the time they had allotted; dscout was a huge enabler in allowing them to adhere to the tight timelines.

How they did it

While the prototypes were being developed, William and his team set to work recruiting.

"I started recruiting partially with dscout," he explains. "We wanted to test with 12 users. Six non-users of our products and six current users—who we'd already had recruited. We put them in separately and onboarded them with dscout."

To conduct and record all of these research sessions in time, the team turned to dscout Live for remote interviewing. They also found creative ways to stack tasks.

"As we were recruiting and going through screeners, our researcher was already preparing her analysis templates," William says. "Eventually, she built an hour in between sessions to input the data from the previous session into the analysis sheet."

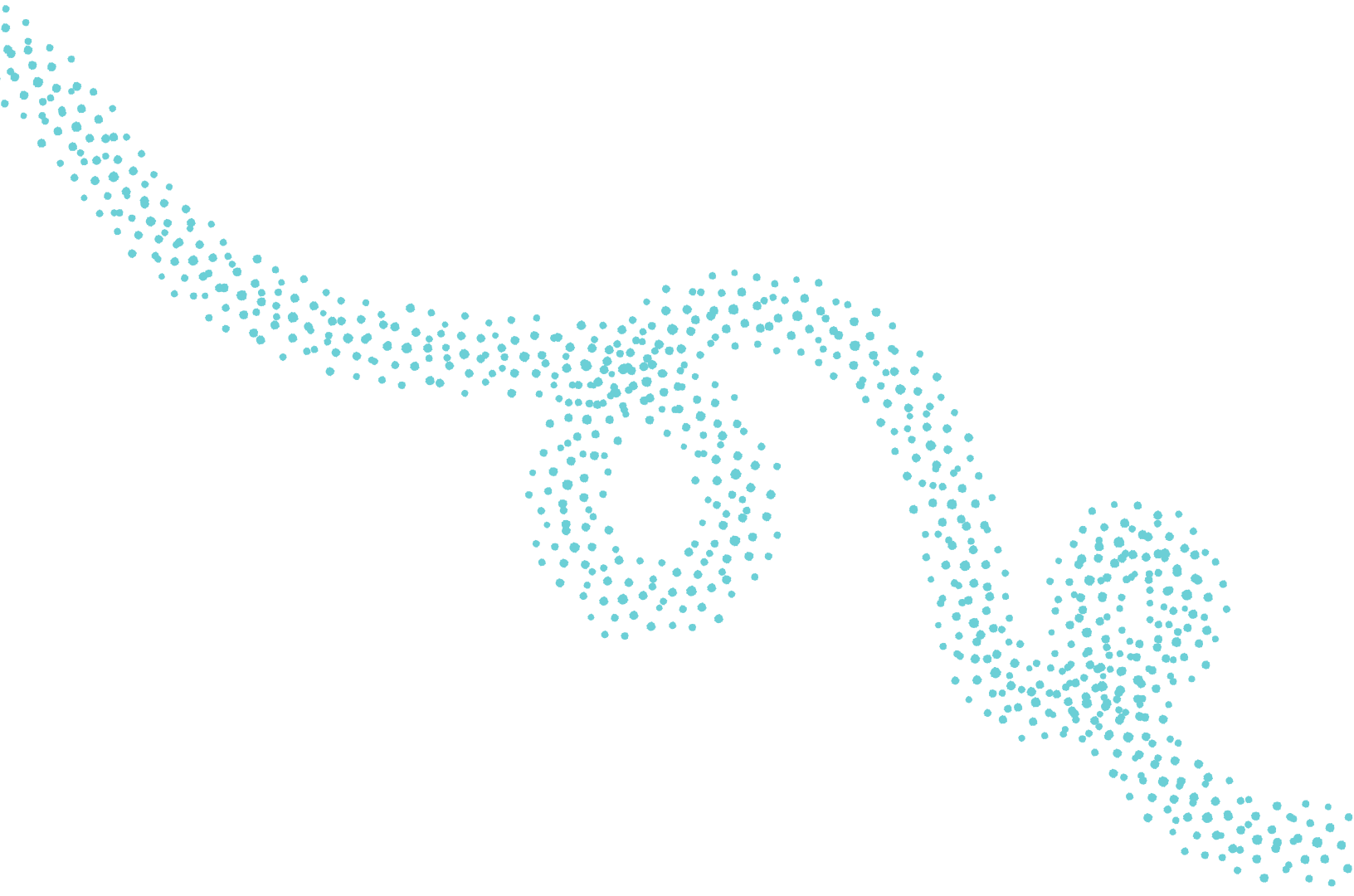
Assisted by the herculean effort of the researcher, the team was able to test and analyze their results with days to spare.

"[Our UXR] completed everything, and she told a good story about what needed to be done for each part of the product and what components to consider," William recalls. "She delivered her report within four days after she finished the last session. She created this insane workflow that enabled her to work super-fast. And a lot of it was basically enabled and powered by dscout."

In the end, testing with dscout empowered them to create a hybrid design that compiled the best aspects of the three initial concepts.

"dscout has been really great at helping us recruit and collect data," William says. "Some of the reasons why it's been so helpful is because we are given a certain amount of time to do everything and we need to come up with insights."

"The more I can shorten the time it takes me to recruit people and plan the research, the more time I have to do the rest—analysis, synthesis, good storytelling, and good design."



Sample study designs: Concept testing 3 ways

By Karen Eisenhauer, Marketing Research Lead at dscout
and Nikki Anderson, Founder at User Research Academy

Here are three sample dscout mission designs for concept testing in dscout—plus some upfront advice on when to use each one.

1. Decide on a method

Concept testing can work in a variety of ways. Choose the one that's best for your bandwidth and your team's needs.

Moderated concept testing using Live

Moderated concept testing lets you get in-depth feedback and insights about 1-2 concepts. You're able to understand how people are interpreting and interacting with the concept, get detailed design feedback, and dig deep into emerging areas of interest. Running Live interviews are rewarding, but time and resource-intensive.

Unmoderated testing using Diary

Diary gives you a larger sample size than Live and requires less resources. It also allows you to test a wider range of concepts without eating up too much of your or the scout's time. Diary is also a great tool for comparing multiple concepts against one another with both qualitative and quantitative metrics.

Unmoderated testing using Express

If you are looking for quick, broad directional insights, Express will allow you to ask a brief series of questions about your concept(s) and get feedback in record time, all with minimal effort on your part.

Mixed methods

You can also use an Express mission as a first step to a larger study. Putting together a quick-hit survey can help crystallize which concepts warrant further examination and then diving deeper with either a Diary or a Live mission.

2. Decide how you're going to present your concepts

Another big decision worth making before you design your study: How will you communicate your concept(s) to the users? Our teams at dscout have done this in a variety of ways:

Moderated: share your screen

Moderated interviews are perhaps the most straightforward way to share concepts. dscout Live is the tool we internally use to interview scouts. When it comes time to review concepts, share your own screen in the Live call and display your concepts or prototypes from your computer. Collect their verbal feedback, or ask them to guide your mouse around the screen to explore.

Moderated + stim

You also have the option to add stim to your Live missions, which will give the scout some control. This can be useful if there's a lot for them to explore, or if it's an interactive wireframe or prototype that you want them to look through.

Unmoderated + stim

Stim in unmoderated research/dscout Diary allows you to upload still images to survey questions. This is a good option if your concept is relatively simple to get across, or if it can mostly be described in text with some visual aid. Program in a question with a text description of your concept and use stim to illustrate your idea.

An external website

Create a private micro-site with separate pages for each concept including images, descriptions, use cases, or anything else you want scouts to respond to. You can include relevant links in your dscout study, or you can send Live participants a link ahead of time if you prefer for them to spend time reviewing the concept before your call.

Method 1: Moderated concept testing

Moderated concept testing is a great way to get detailed, in-depth feedback on your concepts. It can be time and work-intensive, but will be worth it for the level of fidelity you will get on your samples.

Recruit and sample size

For in-depth concept feedback, you will likely want people who are already knowledgeable about your product (or about similar products) and who are going to be articulate.

Your sample size doesn't need to be large for this study, and will be in part determined by how much bandwidth you have for interviewing. We suggest 5-10 people per key segment you want to look at.

Guide design

- **Introduction (3 minutes):** This includes an overview of the test, who you are, signing an NDA/consent form, and additional instructions.
- **Warm-up (5 minutes):** Time to ask the participant general questions to get them ready for conversation. My favorite warm-up questions are, "What hobbies do you love?" "What do you do in your free time?" and, "What have you watched recently that you loved?"
- **General questions (10 minutes):** Aimed to focus on the problem-space of the concepts. For example, if we were testing different meal kit plans, we would use this section to ask about meal kits or cooking habits, in general.
- **Concept A (20 minutes):** Focus conversation on the first concept. I start with general impressions and have participants explain the concept to me, as they would friends or family members. Then, I dive deeper into the different details of the concept.
- **Concept B (20 minutes):** Focus conversation on the second concept in the same way as above.
- **Follow-up (5 minutes, optional):** A buffer to follow up on the concepts and check if the participant has anything else to talk about or add.
- **Outro (2 minutes):** Thank the participant, answer any of their questions, and explain any next steps, such as when they can expect the incentive.

Method 2: Unmoderated concept comparison

Unmoderated concept testing has the advantage of reaching a lot of scouts with less time and effort. Your feedback won't be quite as detailed as it is in moderated testing, but will still give you a broad sense of what people are responding to in concepts.

Designing an unmoderated concept study also allows you more space to ask foundational questions relating to your concepts. This is optional, and your team may have already done this work. But survey-style testing will allow you to kill two birds with one stone.

Recruit and sample size

Who you recruit will depend on the segments you are trying to reach with your new concepts. It helps to consider:

- Power customers: people who know a lot about your product.
- Light customers: people who infrequently use your product. The concepts might get them to increase their usage.
- Prospective customers: potential customers. The concepts might get them to switch to your product.

A mix may also be beneficial, consider any key segments your company wants to examine.

Sample size can vary depending on your bandwidth. The sample can be as small as a moderated study (~5-10 scouts per segment), but can also be larger without a lot of additional effort on your part. Making your study automatic will decrease on scout management needs, making this an even lighter lift.

A larger study (25+ scouts per segment) can have the added benefit of allowing some quantitative reporting (though these numbers will still be representative or definitive).

Part 1: Understand the current situation

This first part serves multiple purposes. First, it lets you get to know your scouts and gives important context to later answers. It also warms them up to the space you will be asking about, which is critical because concept testing is oftentimes a new cognitive space for people.

Most importantly, it gives you a baseline of how users are thinking about your product or product space, and what issues exist around it.

Example:

1. How often do you do [activity related to concept]?
2. What are the biggest challenges in [activity related to concept]?
3. How do you currently get around those challenges?
4. If you could wish for a new solution to those challenges, what would it be?

The first part is typically a quick introduction, so if you desire more information, additional questions or even additional parts can be added to increase the detail you get at this foundational stage.

For example, consider asking scouts to:

- Record a video telling you about their biggest barriers to success are in your problem space
- Inventory all the current tools and solutions they have to whatever problem you're trying to solve for
- Sketch out their own concepts for solutions to their problems
- Compare your product with competitors on how well it currently solves their problems
- Capture in-the-moment activities related to your concept

Part 2+: Testing concepts

This is the real meat of the design. Dedicate one part to each individual concept you would like to test. Each part should be identical to one another for comparative purposes.

In these parts, close-ended questions will be extremely useful. They will let you quickly compare impressions of your various concepts on the close-ended response analysis page and will also let you filter to subsets of opinions that you want to read more about.

In the introduction and/or first question of each part, include the concept that you wish to get feedback on. This can be a checkpoint with a description, added stimulus for a visual concept, or a link to a private website for a more in-depth concept description.

Example questions:

- How intrigued/compelled are you by this concept? Why?
- How applicable do you think this concept is in your life? Why?
- How would this concept improve (and/or not improve) the experience of [activity related to concept]?
- How would you use this concept in your daily life?
- If this concept were a reality, do you think you would engage in [activity related to concept] more or less than you usually do? Why?
- Do you think this concept is unique? If not, what does it remind you of?
- What stands out to you as great about this concept?
- What stands out to you as concerning about this concept?

Final part: Reflect and compare

After you've finished running through your concepts, give users a moment to reflect and review everything as a whole. Find out which one was most appealing to each scout, and take the opportunity to collect some verbatim quotes that will speak directly to each in comparison.

An example to guide them through it:

- Review all the concepts we've presented to you and rank them in order of most interesting to least interesting.
- Review all the concepts we've presented to you and rank them in order of how often you would use them.
- What about the top ranked concept do you like the most? What makes it better than the others?
- What could change about it to make it even better?
- What about the bottom ranked concept do you like the least? What makes it worse than the others?
- What would need to change about the bottom ranked concept to make it more appealing?
- What activity/use case do you think would benefit MOST from one of these concepts? Why?
- Any last thoughts about any of these concepts?

Method 3: Quick-hit concept impressions

If you're looking for quick and dirty feedback on a couple of concepts to see if you're on the right track, then an **Express mission** may be all you need. To do this, condense each part in the suggested Diary design to 1-3 questions and launch a single survey that captures feedback for all your concepts on a high-level

Example design:

- How often do you currently do [activity related to X]?
- How enjoyable is this activity currently?
- What could change to make this activity better?
- Please look at CONCEPT 1. Overall, how compelling is this concept? (scale question)
- Explain why it is compelling or not compelling.
- How applicable is this concept? (scale question)
- What use do you think this concept would have in your life?
- What are 3 words you would use to describe this concept?
- [repeat Q4-Q8 for subsequent concepts]
- Rank all the concepts you've seen.
- Which did you rank #1 and why? What makes it better than the rest?
- Which did you rank last and why? What makes it worse than the rest?

6 Reasons to use dscout for concept testing

By Ben Wiedmaier, Content Producer at dscout

Our versatile suite of tools is an excellent resource whether you're a beginner or a concept testing pro. I've narrowed down my top six arguments as to why dscout can take concept testing from walking to running, but you can find more details on each of our tools here.

1. Organic insights when you need it

As a designer, you want your work to fit into folks' actual contexts and lives. To do that, you need real-world situations for concept evaluation. Our mobile approach offers a chance to ask participants for feedback in the places, spaces, and use cases in which they actually inhabit. Helping you go from the clinical (and sterile) lab to the complex (and nuanced) real-world.

2. Scalable and scrappy

Sometimes, all you have are the folks around you for testing. While any feedback—even from friends and family—is useful, getting design concepts in front of users and would-be users is gold. With Express, concept testing is not only faster, but scaled-up. You can work with a large group of participants (i.e. 100 people) and gather feedback on a design, or drill in with a smaller group using Recruit and Diary and capture multiple moments to check reliability.

3. Modality mixes

The average consumer encounters a design across a multitude of channels: mobile, desktop, in-store, on-the-go, etc. Our suite of tools offers a way to capture all of these impressions, in both mediated (walking a user through a concept) and unmediated (asking a group to view and then review a design) formats. A design experience should delight wherever it is found, so pressure test it accordingly.

4. Layered inputs = more confidence

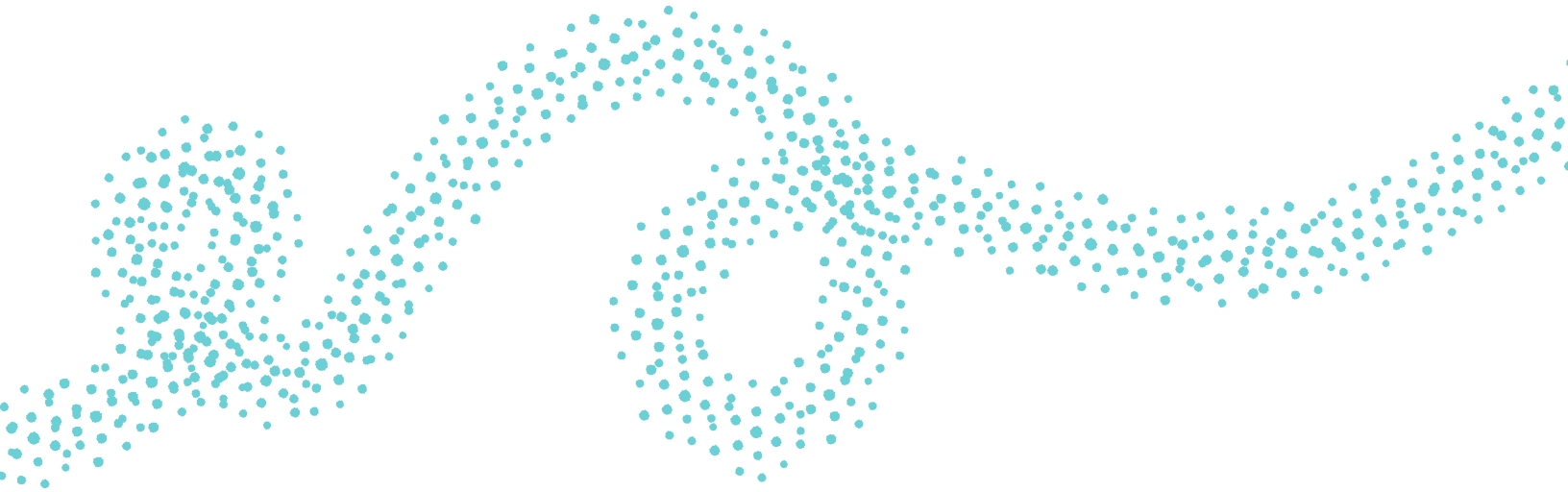
With dscout, concept testing goes beyond just the design offered. You can program a few scale questions to gauge impact metrics like ease of use or degree of findability. Using these to create an open-end to capture adjectives users label the design with or, ask for a selfie video to contextualize the feedback. You have more data streams at your disposal, which means not only design feedback, but qual and quant metrics to boost rigor and create more confident decisions.

5. Boost stakeholder visibility

Design research shouldn't be a black box. dscout offers a number of ways to socialize, share, and add visibility to your work, whether its invisible observer roles, Slack integration, or private share links, there's a bevy of ways to get your ongoing insights in front of your decision-making partners.

6. Flexes to your use case

Week-long app trial? Check. 24-hour button impression test? Check. Small-sample IDI walkthrough? Check and check. Whatever your concept or prototyping needs, we have a tool to support it. "Doing" concept testing can be as simple as programming a few questions or as robust as launching a prototyping and card sort activity over an interview. Each tool is straightforward to use, and with dscout's built-in scout pool, you'll never be wanting for ideas.



Recommended Resources

1. What is Prototyping?

2. Get Early, Critical Feedback Before You Launch: Try Alpha and Beta Testing

3. A/B Testing for User Researchers: A Low-Lift Way to Answer Quick Product Questions

4. Concept Validation: The Perfect UX Research Midway Method

5. How to Test a Design Concept for Effectiveness

Elevate your concept testing.

Use our suite of tools 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 your actual users.

Learn more about starting a project

You're fascinated by the why. We break down the hows.

Follow the People Nerds blog to hear from top UXR practitioners and pick up a few pieces of novel advice for every stage of your research project cycle.

Check out the blog