

UZ Qualitative Data Analysis - Optimizing Efforts Through A Codebook, v1.0

Created @January 26, 2022

There are two portions of qualitative analysis that we will go through following a UZ study: 1) video data analysis, and 2) open-ended text-response data analysis. Please note that this is only the first draft of this revision to how we approach UZ Qualitative Data Analysis, and items here are subject to change based on implementation with team.

Video Data Analysis

? The following is done in this way to condense robust and rich qualitative data from videos on UserZoom. For any given task, the amount of video data = number of tasks * number of participants, i.e. (5 tasks * 15 participants = 75 total pieces to evaluate and reference). In an effort to make effective and efficient analysis, this process has the researcher code the data and create analysis based on trends that overlap within the video data.

1. Prepwork

- Create a data table to store all video data tasks, participants, and codes.

2. Code Through Data

- Go through all video data. Assign parts of all videos that you think are important with a code. Keep track of codes that you use by adding new codes to your codebook.
- You may see a pattern of similar codes. It may be beneficial to to organize them as these patterns become apparent.

- Some codes can be used on any study (Navigation → toc, or Study Errors → user does not follow scenario) while other codes may be unique to some studies.

3. Put Key Codes Into The Table

- Go through each video (the “notes” tab will have your codes saved at the timestamp you put them in) and log the **most important*** codes that relate to each task in the table that you created during the prepwork step.
- ***most important** = During the coding process, you may have identified some codes that are helpful but not critical to the task (i.e Site UX → bug). We want the most important and relevant codes for each task to help us identify trends during our analysis, and codes that are not critical to the task may add unnecessary data.

4. Identify Trends Based on Codes

- Look through each task in the table, and identify any potential trends. Take note of these observations. This may be a good opportunity to bring in other team members to help identify these trends; Be sure to 1) help them understand your codes and 2) make clear the tasks that they are looking at.
- A data table is helpful here because it can help sort by most common codes in the column.

5. Review Trends, Analyze

- Review the trends that you have observed. consider these questions from NNG on thematic analysis:
 - Are the trends well supported by the data?
 - Are the trends saturated with lots of instances?
 - Do others agree with the trends you have found in the data after analyzing the data separately?
 - **If the answer is no to any of these, consider going back and reviewing the coding and trends again.*

6. Create Takeaways and Next Steps

- What did you learn from this data? What do you plan on doing next with it? Create takeaways and next steps based on these trends. Reviewing the trends should create a discussion around potential pain points, areas of opportunity, and things that worked well. Make sure that you stay aligned with your study overview and goals.
- **Sample idea of takeaways:** In this task, you and the team have identified that users naturally gravitate towards the insurance CTAs when considering how to afford treatment.
- **Sample idea of next steps:** As a follow-up to the previous takeaway, you and the team couple that analysis with data (i.e low percentage of insurance providers accepted on site), and decide to put more emphasis on pushing higher quality leads down the funnel before pushing them to the vob page.

6b. RICE analysis

This will be used for any next steps generated as a team, separate from the researcher's recommendations of next steps.

- Applying the RICE scoring model, evaluate the next steps generated to see which would be the most effective ideas in terms of execution and effort.
- RICE stands for
 - Reach - How many users it will affect through our portfolio
 - Impact - Think how it affects calls, Aktify, SSVOB, etc. Does it improve funneling and usability?
 - High, medium, low
 - Confidence - How much data supports this idea? Codes will be a good measure of this
 - High, medium, low
 - Effort - People involved, story points, etc
 - Amount of teams needed ≠ Level of effort

Open-Ended Text-Responses Data Analysis

? These can take a similar form to the video data because this is also qualitative data. However, as they do not utilize the notes-feature that the UserZoom UI has (take codes based on the timestamp), they need to be manually created.

1. Prepwork

- Create a data table to store all qualitative data tasks, participants, and codes.
- Export the UZ study data to an excel sheet for easy reference.

2. Code Through Data

- Go through each qualitative data response per task, assigning codes to each response.
 - You can reuse any of the codes that you created during the video data portion of the analysis. This may help identify consistencies and inconsistencies that the user does.

3. Put Key Codes Into The Table

- Log the **most important*** codes that relate to each task in the table that you created during prepwork.
 - ***most important** = During the coding process, you may have identified some codes that are helpful but not critical to the task (i.e Site UX → bug). We want the most important and relevant codes for each task to help us identify trends during our analysis, and codes that are not critical to the task may add unnecessary data.

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6. Create Takeaways and Next Steps*

*see note at the bottom of this section

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**Note that you can combine the different qualitative analyses at step 5 (video data + open-ended data), and perform step 6 and 6b using the data from both to avoid potential duplicate work. However, each case may be different, and the open-ended responses may have different actionable steps than the video data. Your mileage may vary.*

Literature used as a reference/inspiration:

<https://joegraysux.com/qualitative-coding-case-study/>

<https://www.nngroup.com/articles/thematic-analysis/>

<https://www.userzoom.com/ux-library/what-is-data-cleaning-and-why-is-it-important-in-user-research/>