



CharityWise.
BY FRESH EGG


CharityWise

Getting user-centered insights: Free user research tools for charities

January 2024

Today we'll talk about how free tools can help you with:

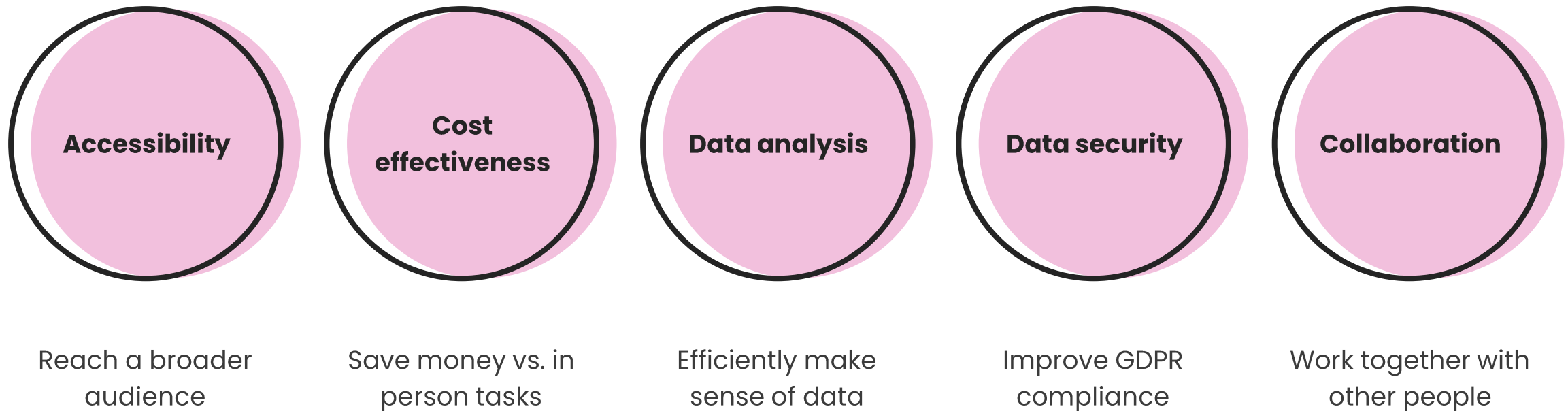
- How to make the most of an in-person opportunity
- Speaking to your users remotely
- Testing your website remotely without 'speaking' to users
- Making sense of your findings
- Tracking website usage data
- Making your website structure work for users



Some of these tools will be entirely free or have a free tier, others will have free trial periods.

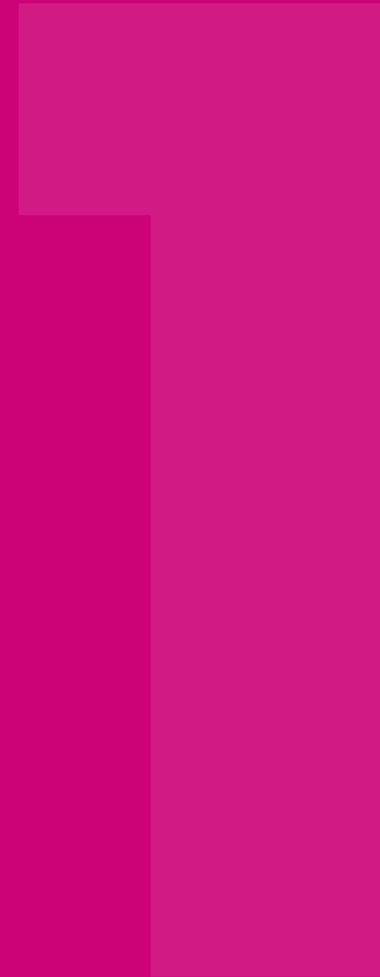
But first, why use digital tools at all?

Using digital tools can enhance the quality and efficiency of your research efforts



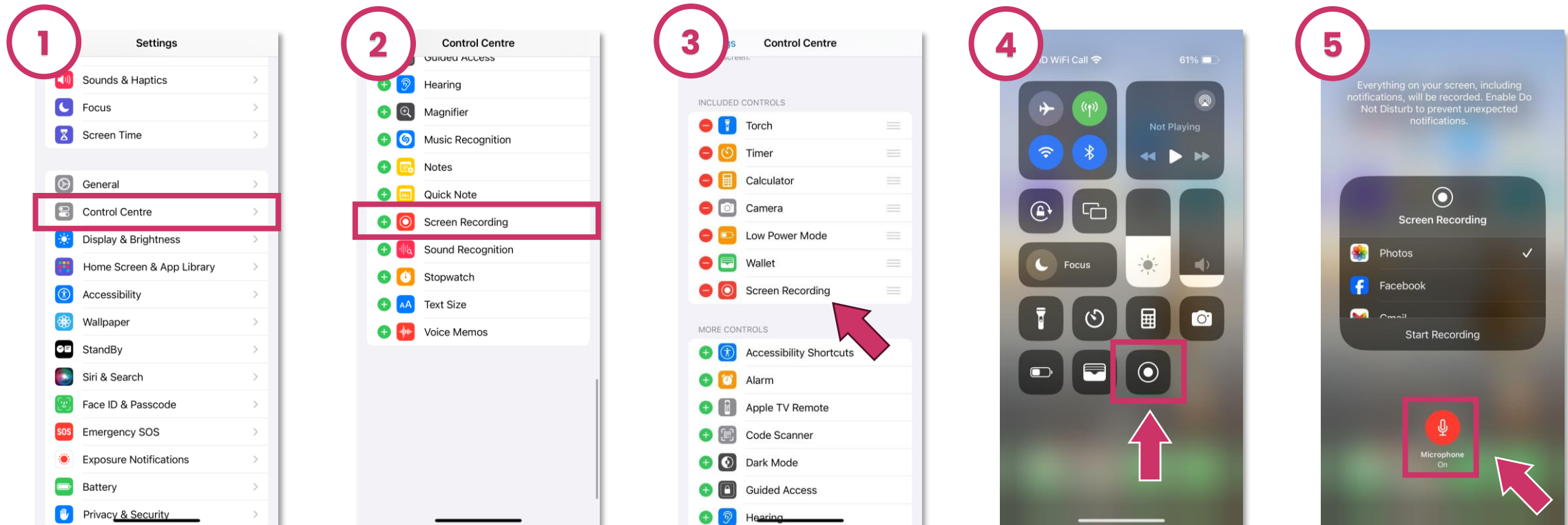
Guerilla research

Making the most of an in-person event



Grab the chance to research when you can

If you're going to be face-to-face with your supporters or beneficiaries, there are ways to capture insights that are non-invasive or time consuming, like this mobile screen and voice record feature.



Things to remember when doing impromptu research

Your dynamic with the people you speak to is often a little different in an informal environment, so it's worth keeping in mind some key behaviours:



**Always get
consent**

**Stick to your
objectives**

**Follow best
practises for
asking good
questions**

User testing / audience interviews

Speaking to people remotely

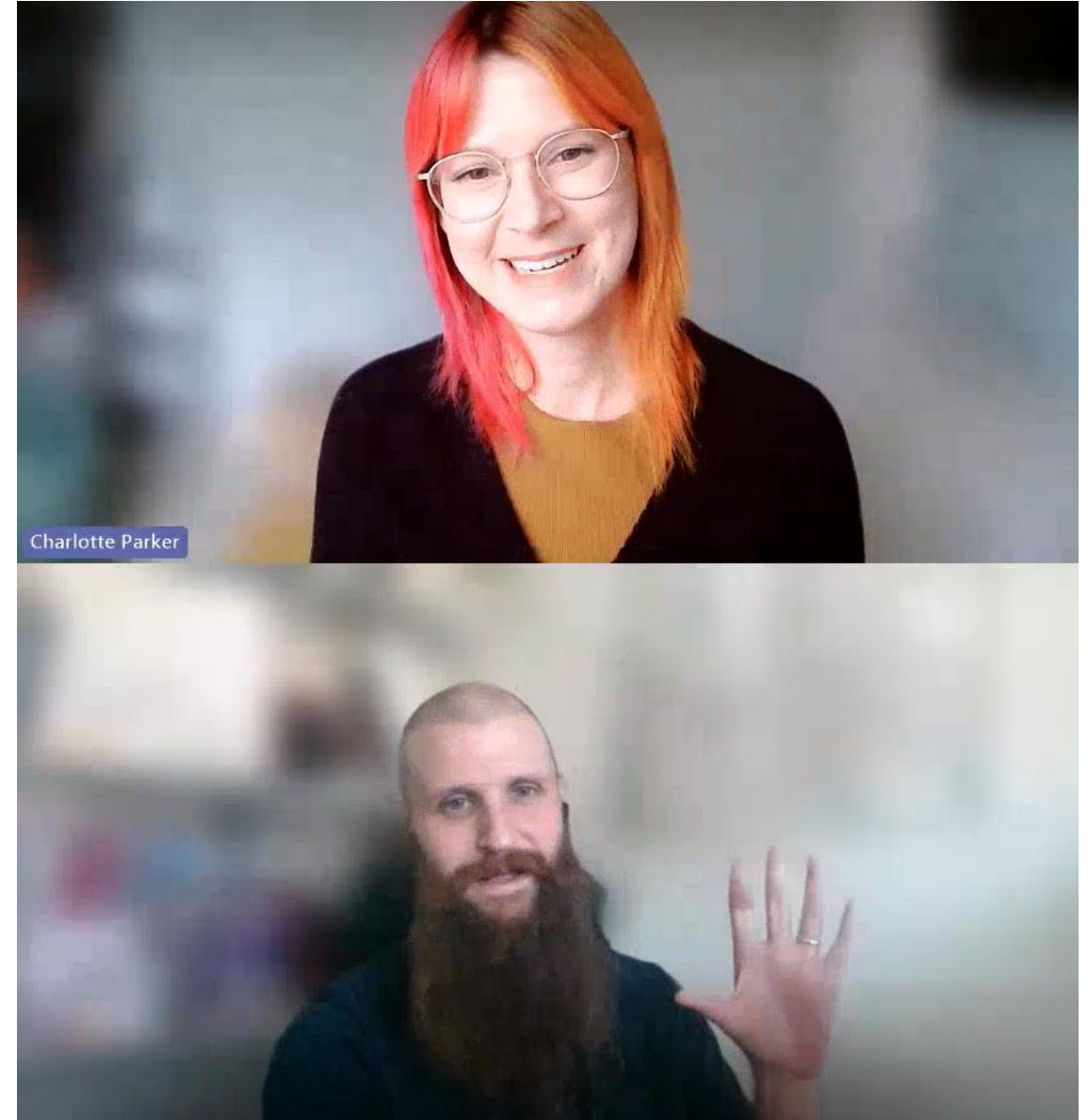


Video conference tools are vital for remote research

Being able to easily reach your donors, partners and beneficiaries wherever they are only requires a conferencing tool, for example:

- Zoom
- Skype
- Google Meet
- Microsoft Teams

Just send your participant a link to your meeting, then ask them to share their screen as they move through your website.



Choose the best option to suit your needs

	Zoom*	Skype*	Google Meet*	MS Teams*
Download required?	Yes	No	No	Yes
Session limit	40 min	4 hours	1 hour	1 hour
Max. participants	100	100	100	100
Call recording	✓	✓	✗	✗
Screen sharing	✓	✓	✓	✓
Transcription	✗	✓	✗	✗
Screen control	✓	✓	✗	✗
Live closed captions	✓	✓	✓	✓
Chat	✓	✓	✓	✓

*All comparisons made between free tiers.

Unmoderated user testing

**Testing your website
remotely without
'speaking' to people**




You don't *have* to speak directly with users

Unmoderated testing involves people providing feedback and completing tasks *without* you guiding them.

You'll need a testing platform, for example:

- Lookback
- Maze
- Lyssna (*formerly UsabilityHub*)

Many platforms do free tiers or trials, so plan your testing well to benefit from this.


[Open page](#) 

Task 3

You need to find information about the impact poverty can have on people's health outcomes. Please describe what information you might expect to find on this website.

Now use this website to find relevant information - please avoid using the links at the very top of the page.

Please remember to think out loud while you are looking at the website.

 Remember to return to this tab when you finish the task.

Next

User testing and audience interviews

Making sense of your findings



You don't need complex digital tools to take notes

If you're on a tight budget, a common approach for note-taking is to use a spreadsheet.

Organise your testing questions or topics into a table and use the cells to record your notes.

Or you can take notes directly into the digital tool you do your analysis in later...

	A	B	C	D	E	
1			Question detail	Notes	Notes	Notes
2	2.2	Homepage	<ul style="list-style-type: none"> What are your first impressions of the homepage? What do you think this charity's main focus is? What do you think of the imagery used? How relevant is this charity to you, on first impressions? 	[10:10am] doesn't like how much orange is used, it's too much - it looks unprofessional	The charity focuses on homelessness and looks like it's based in a big city from the photos - this isn't relevant to me	
3	2.3	Finding information about research	<ul style="list-style-type: none"> What information might you need to help you trust this charity? What projects have they funded in the past? Can you get involved in future research? 	Need to know that they're aiming to do - it says it quite clearly here - they want to end homelessness across the UK Now it seems relevant than earlier	[10:22am] "it's good that they tell you 88p from every £1 goes to research. Sometimes you worry that the charity is wasting lots of money on expensive staff or adverts.	
4	2.4	Donate	<ul style="list-style-type: none"> Where would you go if you wanted to make a single donation of £20? How are you finding this form to fill out? What is your understanding of how your money might help this charity or the people it supports? 	[10:26] There's a donate button right at the top - it's really clear but without being too pushy	*hesitating* Not sure how to make a single donation, says it seems to want him to do a monthly donation but that's not what he wants	
	2.5	Find some information about how you can help	<ul style="list-style-type: none"> If you couldn't give any money this month but you wanted to help another way, where would you find more information? 	Tries "News and campaigns" - he expects campaign to mean an organised event that he could get involved in - he	Clicks a campaign blog about the Christmas appeal - visibly frustrated (big sighs) as this is asking him to donate money	

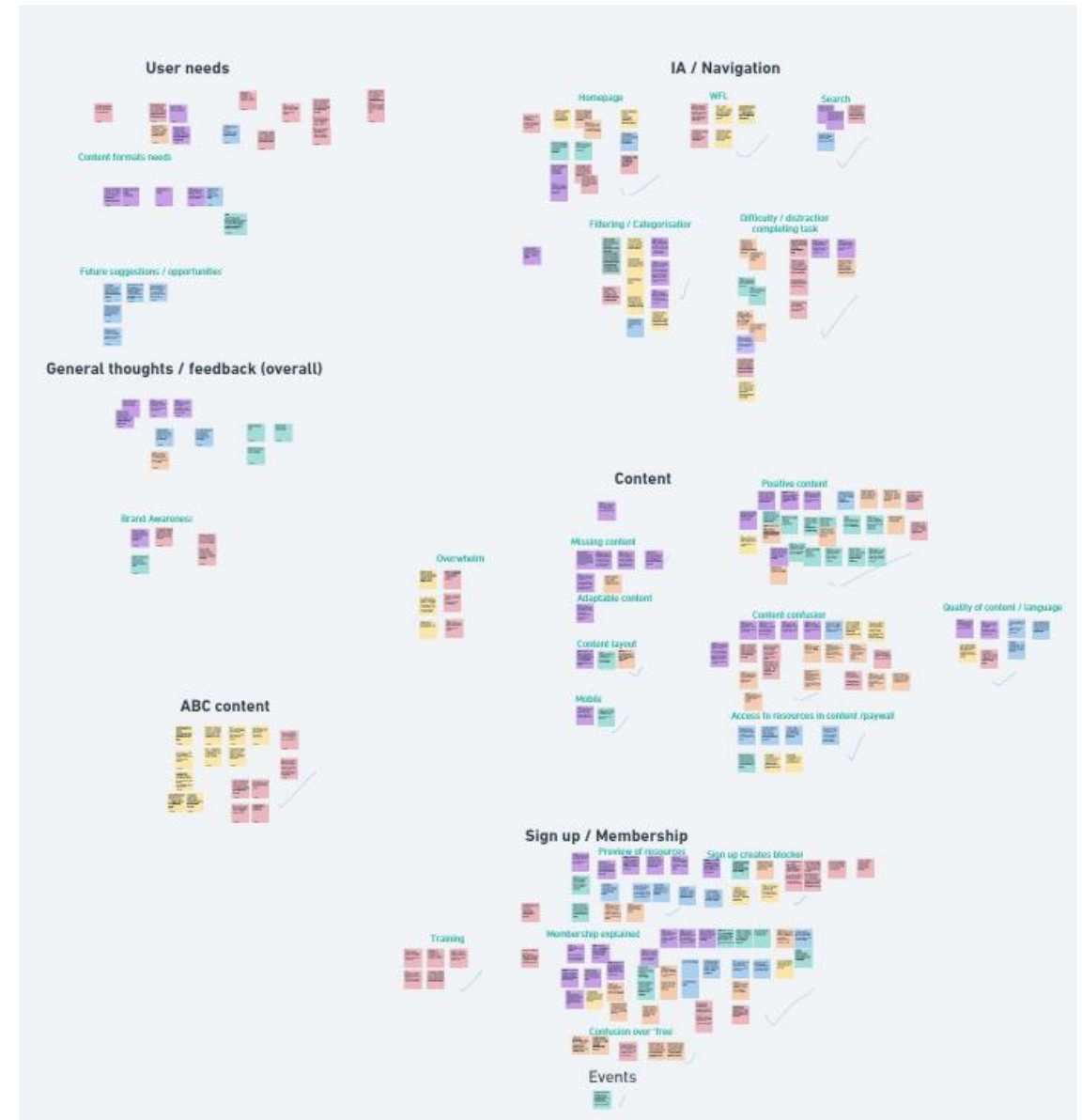
Whiteboard tools are also great for research analysis

An online whiteboard is a remote, collaborative 'blank page' for visualising information.

Use them to gather your notes to identify patterns, themes or commonalities.

Examples of free tools:

- Whimsical
- Miro
- FigJam



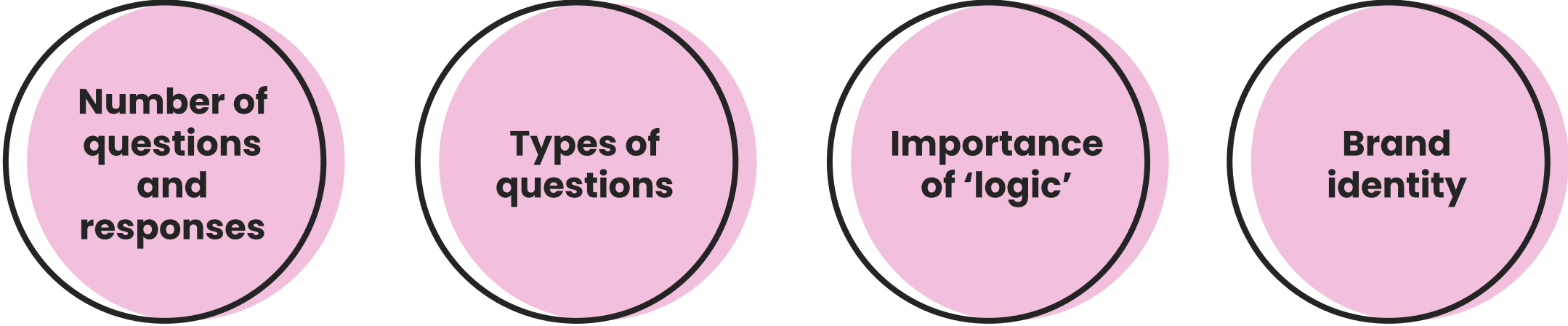
Surveys or screeners

Sending out questionnaires



Obtain 'big data' by sending out surveys

Surveys are a practical and cost-effective way to gather a lot of data, though they come with difficult-to-detect limitations. When choosing a survey tool consider:



**Number of
questions
and
responses**

**Types of
questions**

**Importance
of 'logic'**

**Brand
identity**

Popular freely tools include SurveyMonkey, Microsoft Forms, Google Forms and Typeform.

Data and analytics

Tracking website usage data

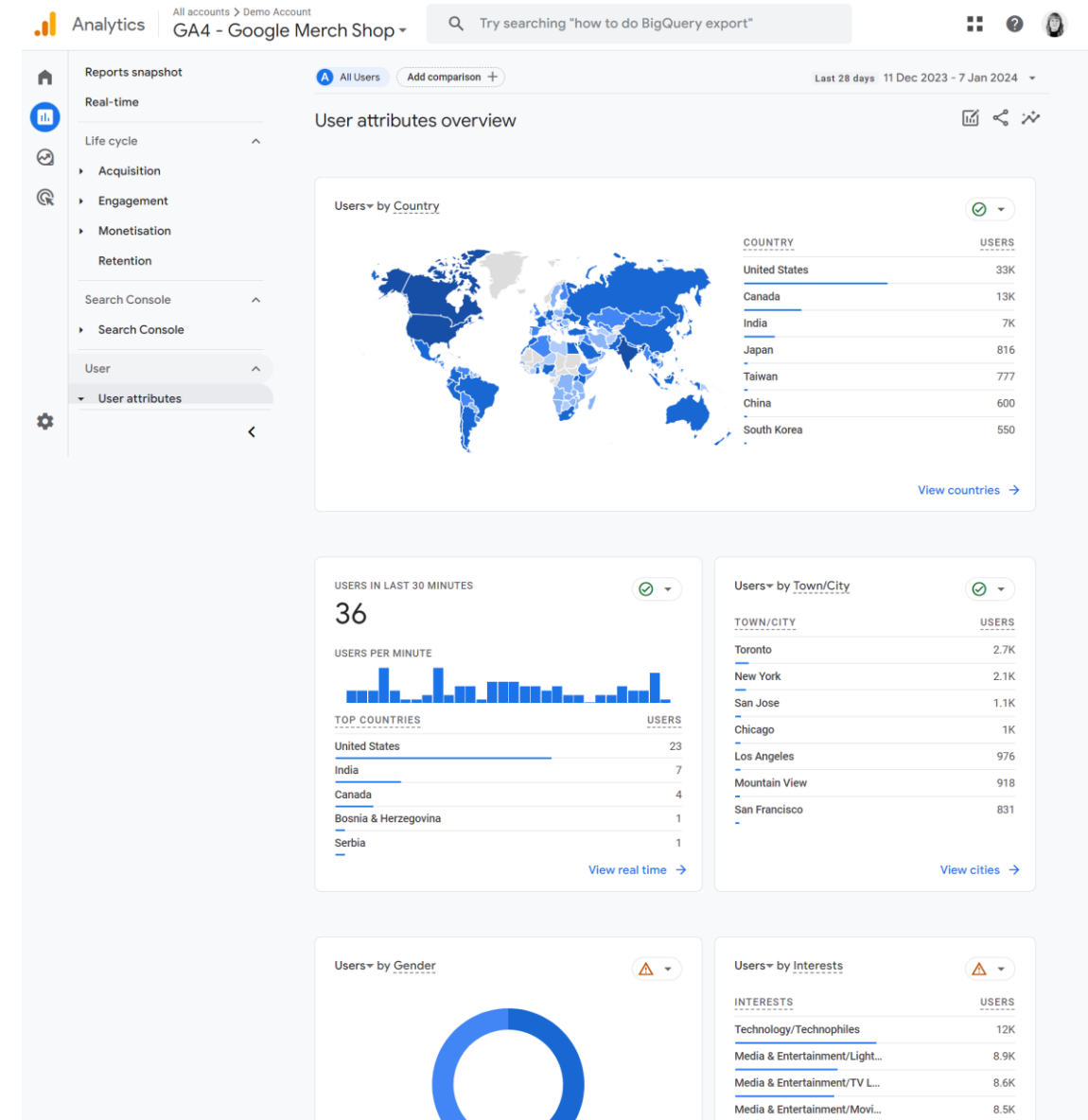


Understand how people use your website

Web analytics is the collection, reporting, and analysis of data generated by users' visiting and interacting with a website.

- Gain an idea of your user types
- Analyse what they are doing on your website
- Feed data into personas
- Obtain data to convince stakeholders

Google Analytics is the main free tool, but there are other options like Mixpanel.



Analytics pitfalls to avoid being misled by data

Analysing your data in the wrong way can be worse than not considering it at all.
Some of the issues below may lead you to make the wrong design decisions.



**Irrelevant
metrics**

**Getting
drawn
into the
numbers**

**Misinterpreting
numbers**

**Mistaking
correlation /
causation**

Remember that analytics data is a partner for other forms of user research, not a **substitute**.

Information architecture

Making your website structure work for users



Free tools can be used to do a card sorting exercise

Card sort using 3 different platform options:

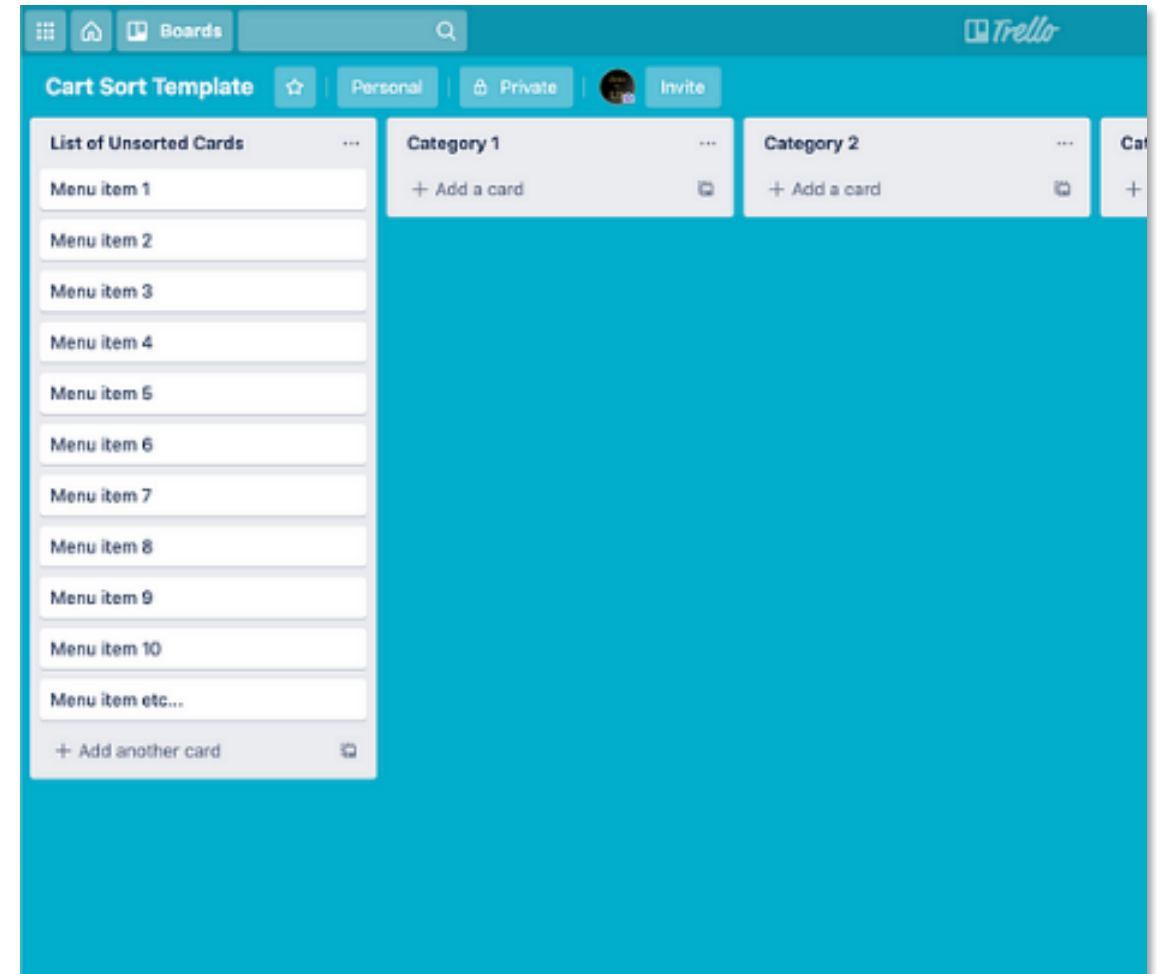
- Set it up yourself using Post-its on any of the Whiteboard tools we've mentioned
- Use a list-making “Kanban” tool like Trello
- Use a dedicated research tool like OptimalSort



Free tools can be used to do a card sorting exercise

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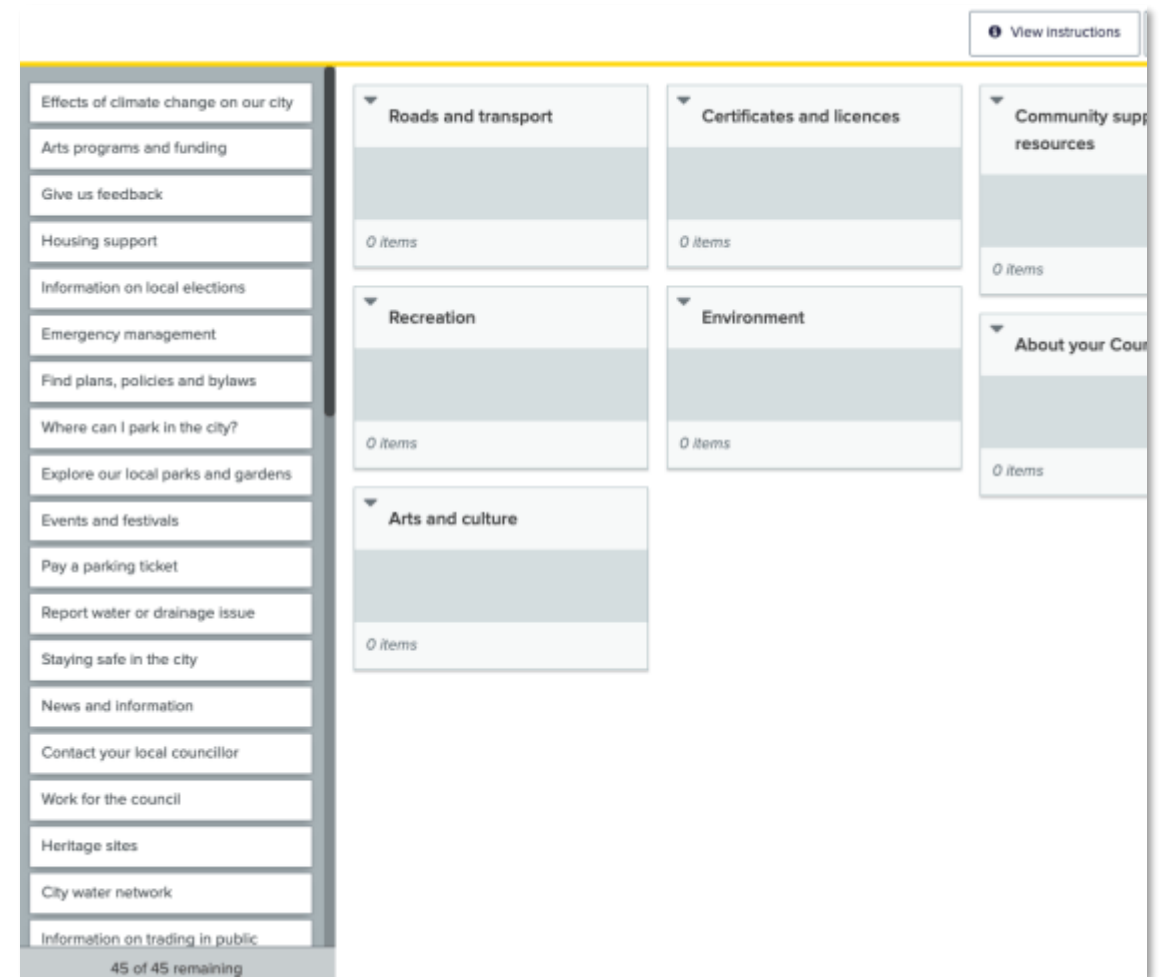
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Wrapping up

**There are many
options for free
digital tools...**



What we've covered in today's webinar

- ✓ Making the most of an in-person opportunity (screen recording functionality)
- ✓ How to speak to users remotely (e.g. Zoom, Skype, Google Meet)
- ✓ How to get website feedback remotely without speaking directly to your users (e.g. Lookback, Maze, Lyssna)
- ✓ Making sense of your findings to identify themes and actions (e.g. Excel, Whimsical, Miro)
- ✓ Tracking exactly how users are using your website (e.g. Google Analytics)
- ✓ Understanding how users categorise your topics to create the best information structure (e.g. OptimalSort, Trello)

Thank you.

If you have any questions, please contact David Somerville.

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CharityWise.

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egg**