



**CharityWise.**  
BY FRESH EGG

CharityWise

# Free user research tools for charities

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August 2024


# What these free tools can help with...

## Human insights

- In-person ("guerilla") research
- Remote interviews
- Unmoderated research

## Data and analytics


- Tracking website behaviour
- Making your website structure work for users



Every tool featured in this talk is FREE – or – has a free tier/trial

# Why do user research online?

Digital research tools can give you deeper insights, broader reach, and knowledge you can use.



**Accessibility  
& inclusion**

Reach a broader  
audience




**Cost &  
scalability**

Gather insights at  
scale



**Managing  
data**

Analyse data easily  
and securely



**Share, save &  
collaborate**

Build knowledge  
as a team

Human insights

# Making the most of an in-person event



# Grab the chance to research when you can

Face-to-face with your website's audience? Turn your phone into a testing device...



# Grab the chance to research when you can

Face-to-face with your website's audience? Turn your phone into a testing device...

## How to record your iPhone screen

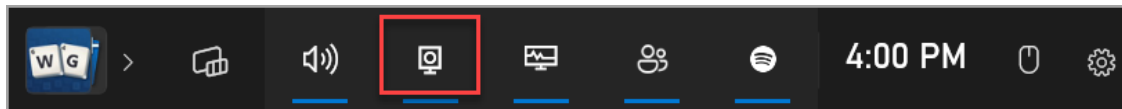
- Go to Settings > Control Center, then tap the "Add" button next to Screen Recording.
- Open Control Center on your iPhone, or on your iPad.
- Tap the grey Record button, then wait for the three-second countdown.
- Exit Control Center to record your screen.
- To stop recording, tap the Screen Recording button at the top of your screen, then tap the Stop button. Or open Control Center and tap the red Record button.
- Go to the Photos app and select your screen recording.

<https://support.apple.com/en-lamr/102653>

# Grab the chance to research when you can

Face-to-face with your website's audience? Turn your phone into a testing device...

## Game Bar (Windows)



<https://support.microsoft.com/en-gb/windows/record-a-game-clip-on-your-pc-with-game-bar-2f477001-54d4-1276-9144-b0416a307f3c>

## Quicktime (Mac)



<https://support.apple.com/en-gb/guide/quicktime-player/qtp97b08e666/10.5/mac/14.0>

# 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**



Human insights

# Speaking to people remotely

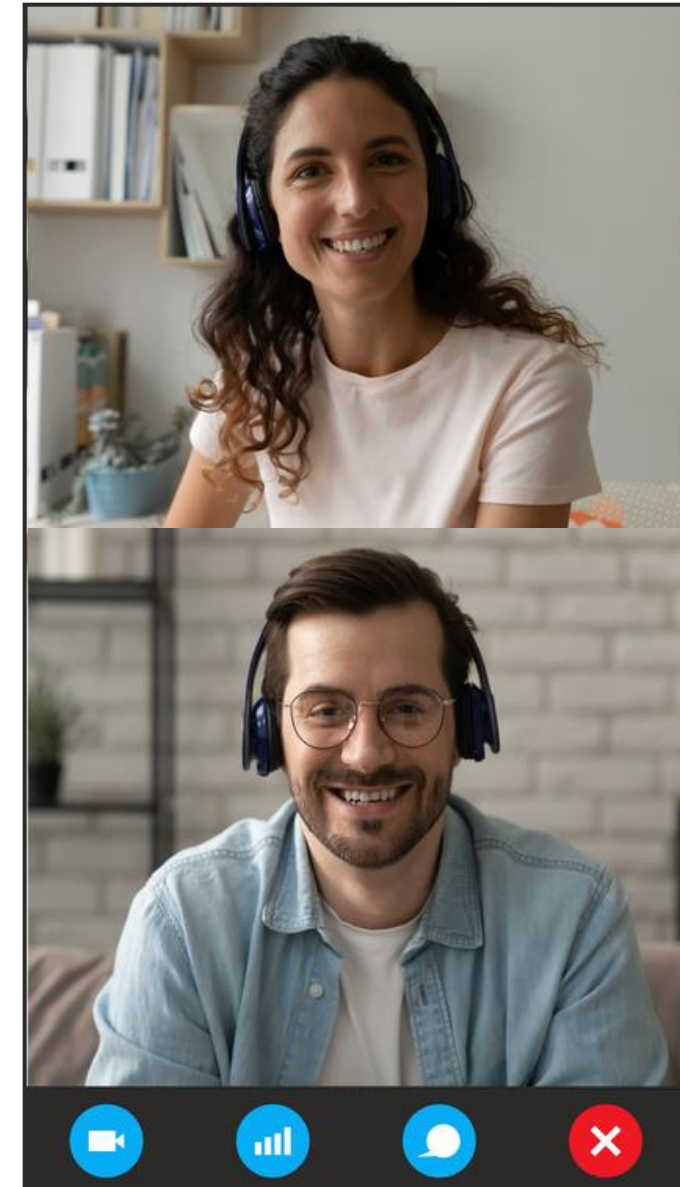


# Video conference tools are vital for remote research

Conferencing tools allow you to reach your donors, partners and beneficiaries wherever they are. Just send your participant a link to your meeting, then ask them to share their screen as they move through your website.

## Free conferencing tools:

- Zoom
- Skype
- Google Meet
- Microsoft Team



# Comparing conference tools

	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.

Human insights

# Unmoderated user testing




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

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

## Tools with free tiers/trials:

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


[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](#)

# What participants see

**Scenario:**  
You have searched for the best digital marketing and development agency and arrive at this website.

When you select "Open test page", the experience you are testing is in a new browser tab. Return to this current tab when you're ready for instruction. Keep both tabs open for the duration of your test.

**fresh egg**  
About us What we do Resources Work Blog Training Events Contact 01903 493 236

**Digital marketing driven by customer experience**  
LEARN MORE ABOUT WHAT WE DO

**Task 1**  
Explore the website in your own time, reading relevant content and visiting pages in the order you typically would.

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

Task 1 out of 2

# Comparing user testing tools

	Lookback	Lyssna	Maze	UserTesting
Trial length	60 days	Unlimited	Unlimited	On request
Sessions	5	15	1/month	On request
Transcription	✓	5 hours	✗	✓
Clips	✓	✗	✗	✓

Human insights

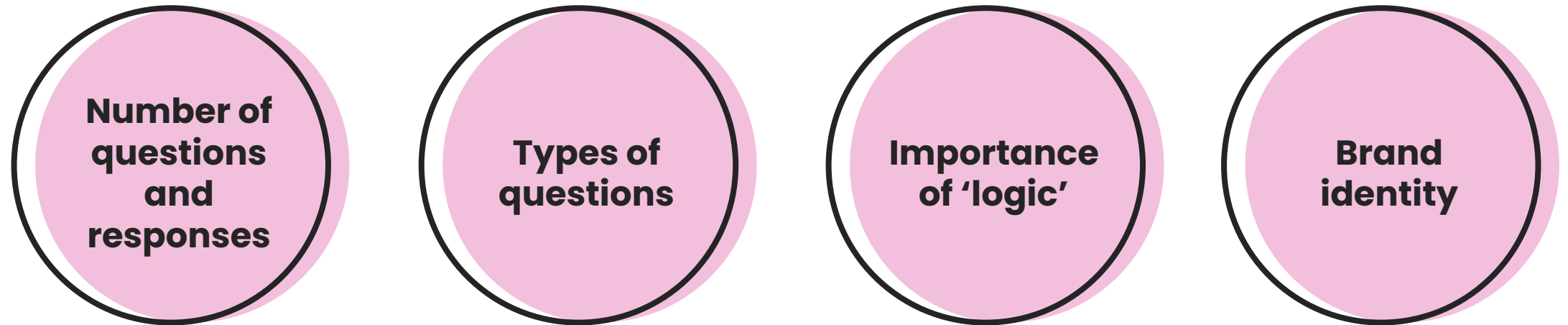
# Sending out questionnaires





# Obtain 'big data' by sending out surveys

Surveys are a practical and cost-effective way to gather a lot of data. When choosing a survey tool consider:



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

# Comparing survey tools

	Survey Monkey	Microsoft Forms	Google Forms	Typeform	Jotform
Free tier/trial	Tier	Trial	Trial	Tier	Tier
Unlimited surveys	×	✓	✓	✓	5 forms
Unlimited responses	×	✓	✓	×	100/month
Custom branding	✓	×	×	✓	×
Branching and logic	✓	×	×	✓	✓

\*All comparisons made between free tiers

Human insights

# Making sense of qualitative data



# 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.

	A	B	C	D	E	
1			<b>Question detail</b>	<b>Notes</b>	<b>Notes</b>	<b>Notes</b>
	2.2	Homepage	<ul style="list-style-type: none"> <li>• What are your first impressions of the homepage?</li> <li>• What do you think this charity's main focus is?</li> <li>• What do you think of the imagery used?</li> <li>• How relevant is this charity to you, on first impressions?</li> </ul>	[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	
2	2.3	Finding information about research	<ul style="list-style-type: none"> <li>• What information might you need to help you trust this charity?</li> <li>• What projects have they funded in the past?</li> <li>• Can you get involved in future research?</li> </ul>	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.	
3	2.4	Donate	<ul style="list-style-type: none"> <li>• Where would you go if you wanted to make a single donation of £20?</li> <li>• How are you finding this form to fill out?</li> <li>• What is your understanding of how your money might help this charity or the people it supports?</li> </ul>	[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	
4	2.5	Find some information about how you can help	<ul style="list-style-type: none"> <li>• If you couldn't give any money this month but you wanted to help another way, where would you find more information?</li> </ul>	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	

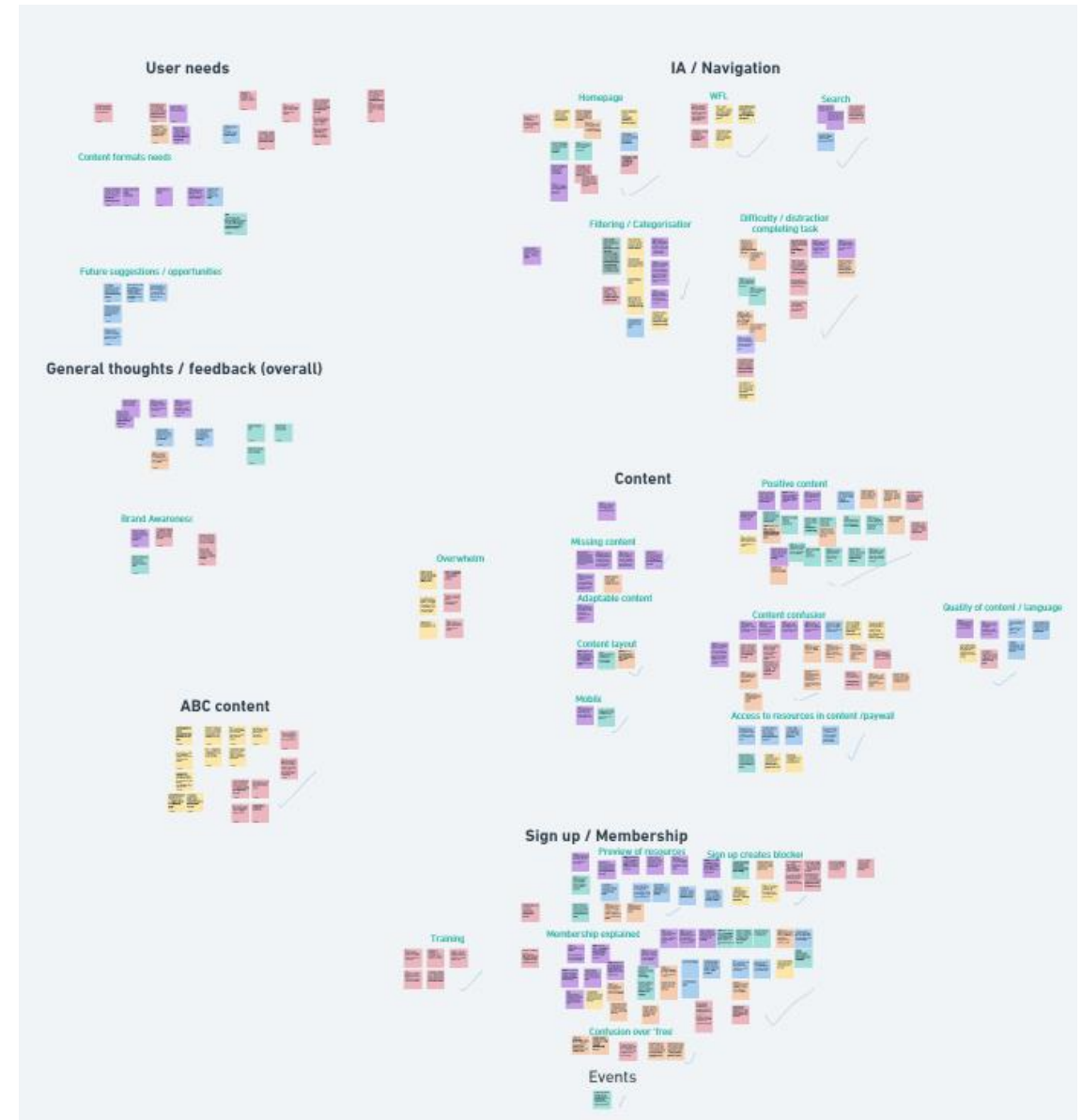
# Whiteboard tools are also great for research analysis

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

Use them to gather your notes, identifying patterns and themes.

## Free whiteboard tools:

- Whimsical
- Miro
- FigJam



Data and analytics

# Tracking website usage data

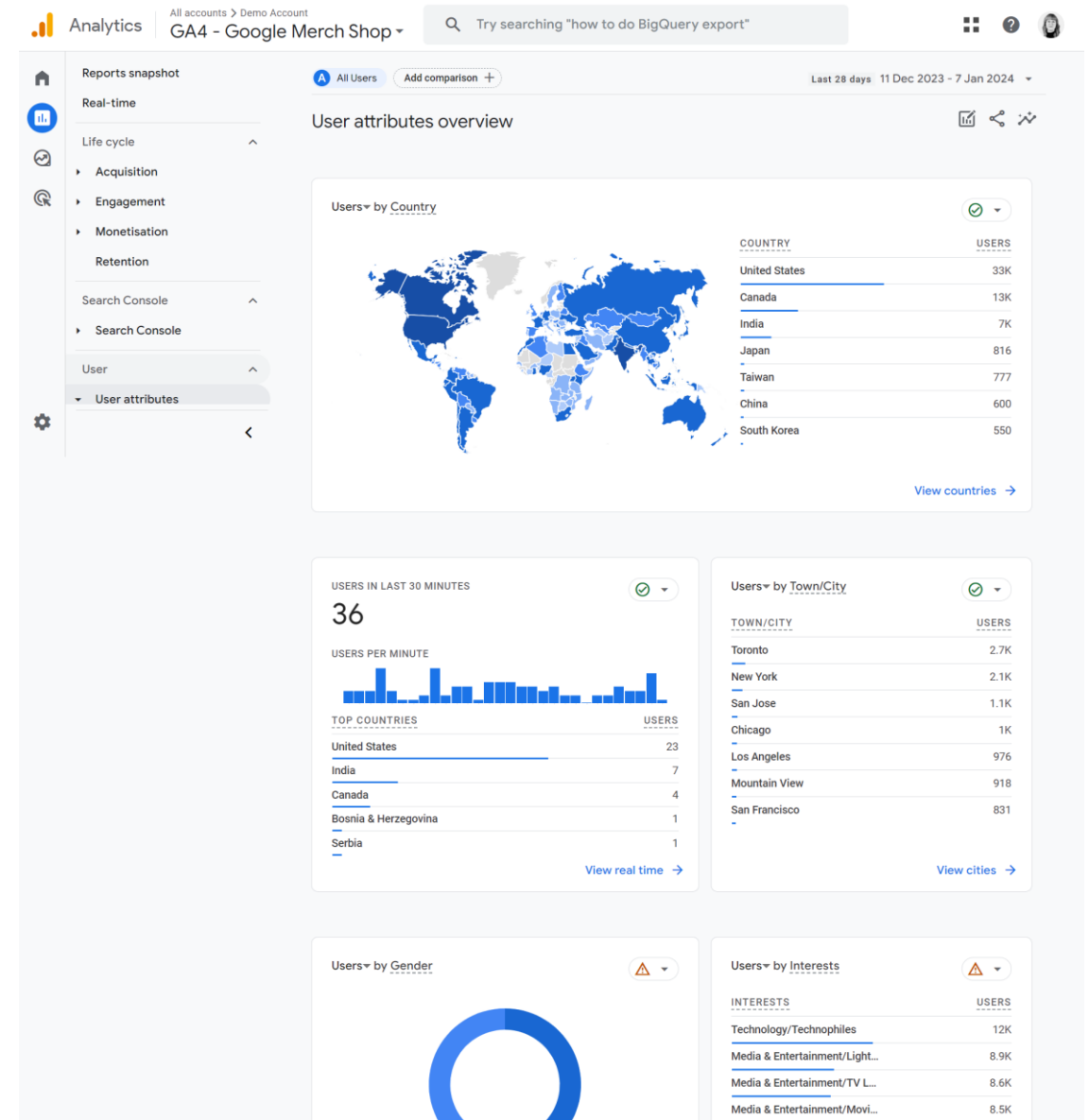


# Understand how people use your website

Web analytics allow you to collect, measure, and analyse user behaviour.

- Analyse your users
- See what they do on your website
- Find problems
- Identify key content

Google Analytics is the most popular free tool, but there are other options like Mixpanel, Piwik

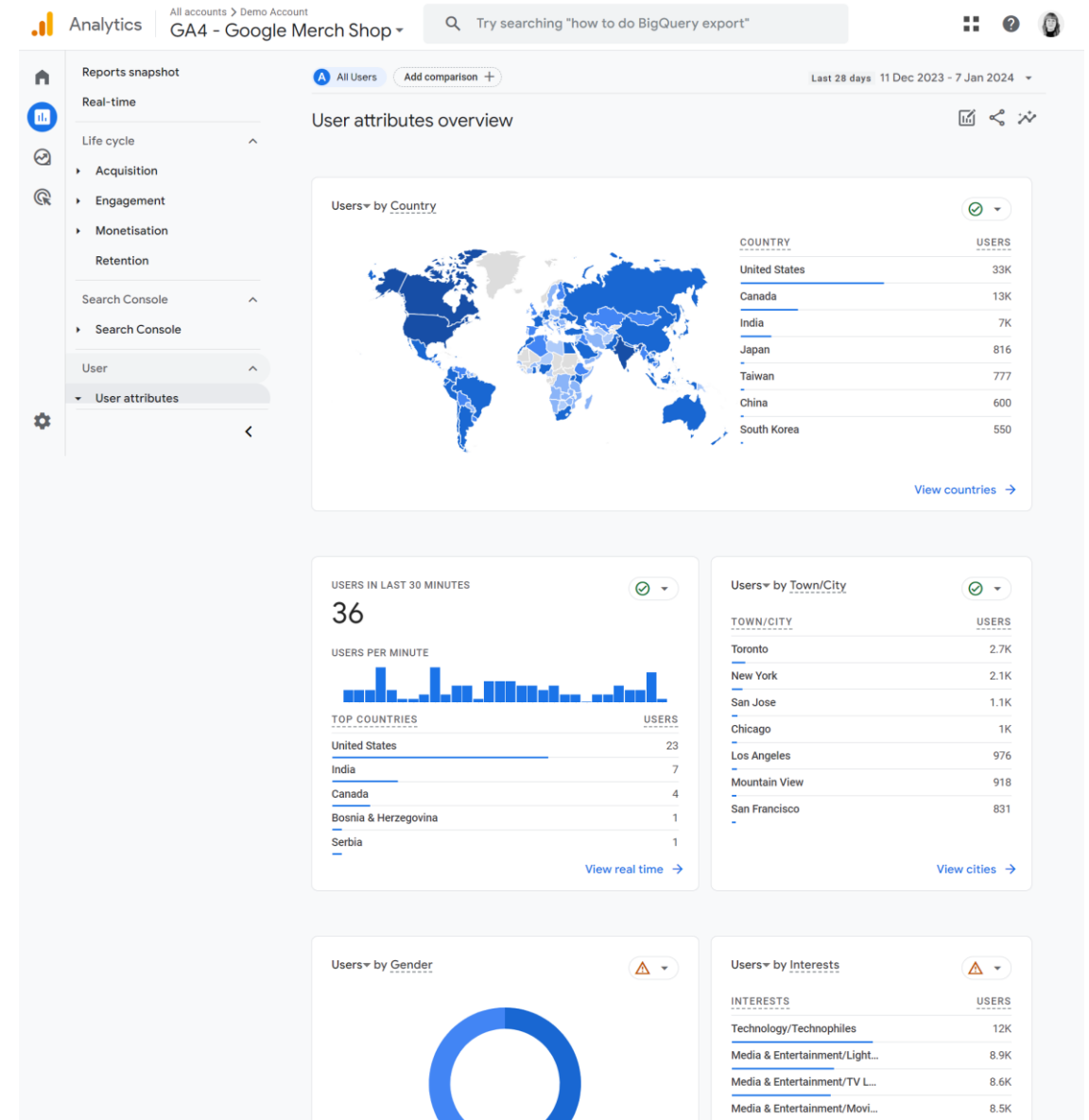


# Understand how people use your website

Web analytics allow you to collect, measure, and analyse user behaviour.

## Reports to explore

- Donation funnel
- Acquisition channel
- Landing page report
- Sign-ups by page
- Audience overview





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)

**Any Questions**

# Thank you.

If you have any questions, please contact Fran Hall.

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**CharityWise.**

