CONTENTS

Acknowledgments xiii Survival Stories xv List of Videos xvii List of Situations xix Author Bios xxiii

Introduction

Why we wrote this book 1 Who this book is for 1 What you'll learn 2 One-on-one user research methods 3 Language used in this book 3 How this book is organized 4 Sidebars and survival stories 6 Companion website and videos 7

Part 1 Your Moderation Toolkit 8

Chapter 1	Moderation Matters: Power, Responsibility, and Style 1 "Are they laughing at me?" 11	0
1.2	Power and responsibility 11	
1.3	The session ringmaster 13	
Sidebar	"Yes, and " 15	
1.4	The science and art spectrum 15	
1.5	Your moderating style 17	
1.6	Effective adaptation 17	
Sidebar	Tips for new moderators 21	
Survival Story	"The chair's arms were too fixed and narrow" 22	

Chapter 2 In the Trenches: Six Steps for Handling Situations 24

2.1	Take a moment to evaluate the situation before jumping to action 25
Sidebar	Using a pretext 27
2.2	Resolve any threats to physical safety 28
2.3	Verify that you're not causing or magnifying the situation 28
Sidebar	Learning to enjoy the silence 30
2.4	Check the participant's comfort level 32
Sidebar	Protecting participant rights 32
Sidebar	Setting context for your behavior 35

CONTENTS

2.5	Use careful language and tone to probe on the situation and begin to resolve it 36
Sidebar	What not to say 37
2.6	Regain control to bring the session back on track 38
Survival Story	"I know what she needs" 40
Chapter 3	Mix and Match: Your Moderation Patterns Toolbox 42
3.1	Take responsibility 43
3.2	Clarify the task/question 44
3.3	Redirect the participant 45
Sidebar	The diversionary assist 47
3.4	Reassure the participant 47
Sidebar	Should you tell a participant that her feedback is helpful? 48
3.5	Build engagement 49
3.6	Disengage from the participant 51
3.7	Take a break 52
3.8	Shift the focus 53
3.9	End the session early 54
3.10	Choosing the best pattern for your situation 55
Survival Story	"The ground started to move" 58
Survival Story	"His frustration was clearly growing" 59

Part 2 Your Survival Guide 60

Chapter 4	Recruiting Mishaps: Participants You Weren't Expecting 62
4.1	Participant does not seem to meet a key recruit criteria 63
4.2	Participant either refuses to or can't do a key task 66
4.3	Participant has an unexpected physical feature 68
4.4	Participant is unfamiliar with the equipment 70
4.5	Participant has difficulty reading 72
4.6	Participant or others ask you to help 74
Survival Story	"An unexpected picture started to emerge" 76
Chapter 5	Participant Misconceptions: Not What the Participant was Expecting 78
5.1	Participant thinks that she is participating in a focus group 79
5.2	Participant doesn't want to be recorded or has other concerns 81
5.3	Participant has different expectations for the compensation 84
5.4	Participant brings you to a conference room or other space 86
5.5	Participant treats a contextual inquiry like an interview 88
5.6	Participant brings someone else to participate with her 90
5.7	Participant thinks the session is a job interview 93

5.7Participant thinks the session is a job interview9.5.8Participant brings a child or pet to the session96

Survival Story	"She was desperate for work" 98
Survival Story	"He refuses to leave" 100
Chapter 6	Some Guidance Required: Participants in Need of Shepherding 102
6.1	Participant is reluctant to say anything that negative 103
6.2	Participant does something you don't understand 105
6.3	Participant is not thinking aloud 107
6.4	Participant is not able to complete a necessary task 109
6.5	Participant ignores or pretends to understand your question 112
6.6	Participant not approaching workflow naturally 114
6.7	Participant does not have any negative feedback 116
6.8	Participant believes he has successfully completed a task 118
6.9	Observers are not engaged in the session 120
Survival Story	"She was so appreciative" 122
Chapter 7	Make it Work: Handling Technical Obstacles 124
7.1	Technical issues arise with your setup and/or equipment 125
7.2	Remote participant experiences difficulty joining 127
7.3	Facility loses its internet connection 129
7.4	Remote participant drops off the call 131
7.5	Prototype or product changes unexpectedly 133
Survival Story	"The lights seemed dimmer than normal" 135
Chapter 8	Is This Right? Responding to Uncertain Participants 136
8.1	Participant looks for affirmation 137
8.2	Participant asks for your opinion 139
8.3	Participant looks or sounds uncomfortable and/or nervous 141
8.4	Participant is self-blaming 144
8.5	Participant asks, "Did other people have trouble with this?" 146
8.6	Participant is unwilling or unsure 148
Survival Story	"She looked agitated" 150
Chapter 9	What's Going On? Recovering from External Interruptions 152
9.1	Participant is running late 153
9.2	Observers are loud and distracting 156
9.3	Participant receives a call during the session 159
9.4	Participant cancels or is a no-show 161
9.5	Observer unexpectedly interacts with the participant 163
9.6	Session interrupted accidentally by an observer or someone else 167
9.7	Session interrupted by someone the participant knows 170
Survival Story	"Too dumb' to yield meaningful results" 172

Chapter 10	Get on Track: Overcoming Momentum Blockers 174
10.1	Participant starts going on a tangent 175
10.2	Participant consistently focuses on irrelevant details 178
10.3	Participant does something very unexpected 180
10.4	Participant is slow or thorough 182
10.5	Participant gives vague responses to questions 184
10.6	Participant is difficult to hear or understand 186
10.7	You don't have time to complete everything 188
10.8	Participant struggles excessively with a task 190
Survival Story	"The request caught me off-guard" 192
Chapter 11 11.1 11.2 11.3 11.4 11.5 11.6 11.7 11.8 Survival Story	Take the Wheel: Guiding Wayward Participants194Remote participant is obviously distracted195Participant is distressed by a personal line of questioning197Participant insists that she would never do something199Participant is frustrated by the prototype's limited functionality201Participant seems annoyed at your neutrality203Participant does not seem to respect you or take you seriously205Participant becomes insulting or has an agenda207Participant becomes agitated by a product's usability issues210"I would have trusted my gut"212
Chapter 12	A Delicate Touch: Addressing Sensitive Situations 214
12.1	Participant is extremely entertaining and friendly 215
12.2	Something personal, inappropriate, or confidential is visible 217
12.3	Participant is obviously distracted by external circumstances 220
12.4	Participant tells you something personal 222
12.5	Participant has a disconcerting or distracting physical attribute 225
12.6	You have to point out something potentially embarrassing 227
12.7	Participant seems upset 228
12.8	Participant has an unexpected disability or service animal 231
Survival Story	"My best option was to smile" 233
Survival Story	"You sure are pretty" 234
Chapter 13 13.1 13.2 13.3 13.4 13.5 13.6	Uncomfortable Interactions: Responding to Awkward Situations 236 Participant curses or makes inappropriate comments 237 You know the participant, or the participant knows you 240 Participant knows an unexpected amount about you 242 Participant flirts with you 244 Participant does something awkward or uncomfortable 247 Participant makes a strangely specific request 249

- 13.6Participant makes a strangely specific request2413.7Participant makes request during a site visit251
- Survival Story "She tipped me ... big!" 253

Chapter 14	Safety First: Minimizing Emotional and Physical		
	Distress 256		
14.1	Fire alarm goes off or the facility needs to be evacuated 257		
14.2	A natural disaster (e.g., earthquake, tornado) occurs 259		
14.3	Participant starts to look ill or otherwise unwell 261		
14.4	You begin to feel unwell while moderating a session 263		
14.5	You notice a bad smell or have an allergic reaction 265		
14.6	Participant seems to be drunk or stoned 267		
14.7	Participant touches you 269		
14.8	Participant's environment contains dangerous items 271		
14.9	Participant is doing something illegal or threatening 273		
Survival Story	"We didn't know much about them" 275		
Survival Story	"I knew what it was like" 276		

Part 3 Improving Your Skills 278

Chapter 15	An Ounce of	f Prevention:	Avoiding	and Mitigatin	g
	Situations				

15.1	Recruiting process 281
15.2	Your study plan 284
15.3	The product, space, and technology 287
Sidebar	Troubleshooting skills are a lifesaver 289
15.4	Your observers 291
15.5	Your technique 293
Sidebar	Your moderating "instincts" 294

Chapter 16 Sharpening Steel: How to Improve Your Skills and Help Others Improve Theirs 296

16.1	Working on your own moderating skills 297
16.2	Integrating tips and feedback 301
16.3	Giving feedback to other moderators 302
Sidebar	What to look for in a moderating critique 302
16.4	Spread your wings 304

APPENDICES 307

Appendix A	What to Say 308	
Appendix B	Preparing for a Successful Session	312
Appendix C	Resources 318	

References 320 Index 321