

Four Strategies for Engaging Medical Professionals as User Testers

Rather than theorizing about what works for users, you can verify it and uncover what doesn't work.

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Class II and Class III medical devices require user testing prior to market release, but recruiting medical professionals to participate in this essential practice can be a serious challenge. With demanding jobs that keep them overscheduled, doctors, nurses, and medical technicians are typically reluctant to make the time commitment necessary to be a user tester.

But you absolutely need their participation. Apart from ensuring device safety, user testing leads to an improved product that delivers a better experience for customers. In turn, that elevated user experience will likely result in greater product success. Rather than theorizing about what works for your users, you can verify it and uncover what doesn't work or needs improvement—and that yields better products.



The Practice of User Research and Testing

In case you're unfamiliar with the specifics of user testing, here's a bit of background. Since the late 1970s when the term "User Centered Design" was coined for software devices, usability designers have practiced an iterative design process that includes some form of user research and testing. That research and testing can take the form of observing users,

interviewing users, having users evaluate paper mockups, or conducting formal in-person testing, remote online testing, or at-home testing. While there are many different ways to conduct user research and testing, there are four key steps that are standard, including:

01

Plan the Task

It's best to create a written plan up front so all desired issues are covered and the task can run smoothly. Based on what task you're performing, identify the goals you want to achieve. In some cases, you may want answers to specific questions such as, "Do you know what to do when you enter this screen?" while in others, you're also looking for freeform feedback such as, "Do you believe this product will make your job easier or harder, and why?"

02

Recruit Participants

Ideally, you want to recruit user testers as close to your end-users as possible. For instance, a nurse who might administer fluids to a patient would be a good tester for an infusion pump. But it is often acceptable—even beneficial—to mix in other stakeholders or users who might not directly use the device but are closely aligned with your user group. Also, it's better to have a smaller group of users that you engage with repeatedly, rather than a larger group of users you only engage with once.

To identify potential testers, first investigate your company's internal network. Company founders and board members are often medical professionals themselves and have colleagues they can recruit, or they can tap their network of contacts. Second, consider searching discussion groups on LinkedIn, Facebook, and elsewhere organized around a shared topic of interest that relates to your device. You can join the groups yourself and post a notice letting everyone know about your product and that you're seeking paid participants.

By posting in discussion groups, you're able to reach many people at once. If you get a

response, send an email invitation describing the product in more detail—including its benefits—and explain how participating as a user tester can benefit testers themselves, as well as patients and medical professionals in general. Also, explain exactly what will be required of participants and inform them of any honorarium. Even though it's probably not much compensation, it indicates that you value their time.

A third source of potential testers is medical students, who might appreciate the learning experience as well as any compensation. You can approach the administration of a medical university and ask for permission to email students.

03

Conduct the Test

With testers eager to help, it's time to execute the plan. Follow your formal user-testing plan but diverge enough to take unanticipated opportunities that may arise during the research process to learn more detailed information or gather extra data. Be sure to record (audio and video are both effective) any interaction with users to consult at a later date. It's a good idea to have two researchers conducting any task—one speaking to the testers and the other managing the recording, taking notes, and keeping track of time.

04

Analyze and Document the Results

As with any research, the data collected can be large and diverse. To make the data comprehensible, you'll need to collate and analyze it, then present it in a way that's both easy to understand and clear enough to transform into actionable insights.



Convincing Medical Professionals to Serve as User Testers

Now that you understand the process of user testing and have identified the people you'd like to serve as testers, it's time to convince these busy professionals to say yes. This is where things get tricky: Typical recruiting techniques such as offering a modest monetary gift for participation are unlikely to sway busy medical professionals. The small monetary payoff isn't enough to offset the time demands they face.

So how do you convince them to sign up? With busy, often highly paid professionals, the key to recruiting them is to make it worth their time to take part. Following are some effective arguments to convince medical professionals to participate.

- Explain that your device will deliver better patient outcomes. Explain how being a user tester could help the product developer create a better device—one that, perhaps, delivers more accurate results than competing devices—and that, in turn, patients can benefit from this improved device.
- Spell out how your device can improve their medical practice. Perhaps your device delivers results more quickly than competing devices, allowing you to treat eight patients in the time it usually takes to treat five. More patients equals more revenue, an argument that might resonate with a medical practice owner.
- Appeal to their conscience. Medical professionals have taken an oath to help others. Leverage their empathy and desire to be of service by expressing how their insights and perspective will not only help shape this particular product, but improve medical care in general.
- Appeal to their ego. Who doesn't want to be considered an expert, a font of invaluable insight? To convince physicians in particular that their opinions are pivotal to the success of your product, lean heavily on language like "we can't improve this device without your unique perspective" or "your invaluable insight is essential to improving patient outcomes and care."
- Whatever approach you take, the key is to get medical professionals to empathize with the problem that your app or device addresses and convince them to feel they will benefit from the solution.

Don't Forget to Say Thank You

With a list of interviewees in hand, you now have a group of appropriate user testers excited to help you create the best possible product. Keep them in the loop by sending updates and gratitude. (“Our product is coming together. We’d love for you to come in and try it!”) And, be sure to nurture these relationships. You may need to call on these people in the future—even if you don’t end up working with them on this particular project—and maintaining existing relationships is much easier than forging new ones.

The key to recruiting medical professionals is to appeal to their commitment to their professional mission and empathy. A little bit of “we need your experience, expertise, and perspective to improve medical care for your patients and patients everywhere” goes a long way.

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