Here's an overview of different meetings, tasks and templates to fill out as you make your way through a user research project.

Where should I store my retro notes, sensemaking notes, audio files and transcriptions?

- In our “User Research” folder, there's a subfolder called “Project Folders”
- In “Project Folders” you should create a new folder for each project.
- In your project folder, you should paste in copies of documents in “Project Folders” which include a retro document, a sensemaking document and a research plan document. You should also store your recordings and transcriptions here. You probably want a separate subfolder for each interview, but it's up to you.

Part one: Initial research planning (Sprint 1)

Helpful documents: Survey logistics & basic principles, Interview logistics & basic principles, Should I use a survey or interviews?, Research plan document to make a copy of and fill out for each project

1. Make a new folder in “Project folders” for your project, and copy in copies of the retro, sensemaking and research plan documents that live in the sample folder
2. You should start by spending a few minutes jotting down some thoughts about your research questions on the research plan document.
    a. Here are some questions to consider:
        i. On a broad level, what are you trying to accomplish? *Some examples might be: informing how to approach a reporting project, informing a design decision such as a tweak to the newsletter layout, learning something broad about a product like motivations for membership, getting data for a specific product decision*
        ii. Are you looking to get information on an ongoing question, like motivations for subscribing to a newsletter, or is this more of a one-off user research project for something more specific?
        iii. Would your questions be better answered with data, or with qualitative information you glean from a conversation? Would it be helpful to have a mix of both?
3. Optionally, grab 20 minutes on (product team member's) calendar to hash out any questions you have about this initial planning
4. Next, have a 30 minute scoping meeting, where you'll solidify your **research questions**
    a. This is a meeting with relevant team members, product manager and other product team members as optional
    b. The goals of this meeting are to determine **what** you want to research and the **correct method** for this research
    c. We'll fill out the second part of the research plan document and address any issues or questions
5. Next, have another 30 minute scoping meeting, where you'll solidify some of the logistical questions around your research, and tie up any loose ends
    a. This is a 1 hour meeting with one point person from your team, (product manager) and other product team members as optional.
    b. The goals of this meeting are to determine **who you should reach** for your research, a rough **timeline** for research and what your **next steps** are for your research plan

    c. We'll fill out the third part of the research plan document, review the research plan together, address any issues or questions, and make sure you're ready to move onto the next steps
    d. During this meeting, we should also scope out a basic timeline of work and put stories into airtable for upcoming sprints

Part two: Scheduling and conducting your research (Sprints 2, 3, 4)

Helpful documents: Interview logistics & basic principles, Interview notes template (for taking notes as you interview someone), Survey logistics & basic principles, interview checklist

6. Write your survey or interview questions (Sprint 1)
    a. For guidelines around good interview questions, see Interview logistics & basic principles
    b. For guidelines around creating a survey, see Survey logistics & basic principles
7. Schedule research (sprint 1)
    a. Interviews should be scheduled two weeks in advance. Some notes on scheduling can be reviewed here
    b. Survey planning is much more flexible. The important thing is to plan how you will contact potential respondents. If you are doing this through our newsletters, you should coordinate with Local Directors at least one week in advance.
8. Conduct research (sprint 2-3)
    a. The Interview logistics & basic principles & Survey logistics & basic principles documents have some helpful notes to help you with the logistics around conducting research.
    b. For interviews, here's a template you can use to take notes during the interview

Part three: Compiling your results (Sprint 4)

Helpful documents: Interview notes template, sensemaking template, Interview logistics & basic principles, Survey logistics & basic principles

9. Initial takeaways
    a. Survey
        i. For survey results, someone should take up to ~1 hour to review the data and articulating core results
        ii. There is helpful info on how to get good survey results in the Survey logistics & basic principles document
    b. Interviews
        i. The interviewer should take ~15 minutes after the interview to write down big takeaways/insights that come to mind
        ii. You can continue filling out this template
10. Catalog recordings and transcriptions/survey results/initial takeaways
    a. Notes on recording and transcribing here
    b. Download a copy of survey results and drop it in your project folder

Part four: Sensemaking (Sprint 5)

Helpful documents: Sensemaking template

11. Sensemaking with product

a. 1 hour meeting with members of the team that conducted user research and the product manager, with other product team members as optional attendees. Other employees are welcome, too.
b. At this meeting, we'll review big takeaways from the interview and try to come to some conclusions/insights
c. Here's a sensemaking template to copy and use

Part five: Cataloging and retro (Sprint 5)

Helpful documents: Retro template

12. Retro + cataloguing meeting
    a. 1 hour meeting with team members who participated in user research, with product manager + product members as optional
    b. First, spend up to 30 minutes cataloging in your user research database
    c. Here's a retro template to copy and use. Retros should be stored in the retro folder in the user research folder, and labeled as projectname_retro_date i.e. issuesseries_retro_1129
    d. Write down retro notes for 5 minutes, discuss for 15-25 minutes
    e. Designated note-taker takes notes