ResearchOps Open-Source User Research Playbook

Overview

The goal of a Research Playbook is to increase consistency and quality of research results while decreasing startup costs for any individual research activity. By laying out the what, why, and how of a variety of research methods, you give your research team the opportunity to select from an existing list of collaboratively developed, approved methods. You also save the time of having to spin everything up from scratch every time.

You can read more about what Research Playbooks are and why you should have one via the accompanying blog post. This playbook is a work-in-progress.

Licensing

Current Issues (2019.09.23)

At this moment, the playbook is certainly not finished (as you can tell by the number of plays/guides/etc missing). There are certainly more methods than are even listed currently, but these are the ones I wanted to commit to up front.

There's also some formatting I'd like to change, but I wanted to err on the side of getting this out sooner rather than later.

Another massive hole is there's very little discussion around privacy, ethics, data stewardship, or really anything related to GDPR. A recent discussion around Consent, Release, and NDA forms in the Ethnography Hangout Slack community highlighted how different things may be based on regulations. The document is very USA-centric at the moment, and we should fix that.

Another thing is that this guide is written very platform-agnostic; there are a lot of efficiencies that could be gained if your team is using Confluence or other knowledge-management tools.

Contributing

This Google Document allows commenting by anyone, so as you read, feel free to make comments with discussion or suggestions. Once we have enough core caretakers, we'll begin accepting submissions from the community to allow anyone to submit a whole play, guide, or template (following the style guides, of course; consistency is key).

In case you were wondering what we'd like worked on, here's the current to-do list. Remember: the document is commentable, so you can add your own suggestions to the list as well.

Contributors

This playbook wouldn't exist without the considerable amount of effort from a number of individuals. Listed in chronological order or when contributors joined the project, you can dedicate your thanks to the following individuals:

Brad Orego

To-Do List

1. Some discussion about GDPR, whether that be guides or adding a section to each play/rewriting everything to be GDPR-compliant.
2. Fill out the existing list of plays.
3. Begin adding other guides, templates, and plays as we come across them.
4. Higher focus on user privacy/governance?
5. Maybe add a guide about IRB, if only to educate people as to what the ethical concerns are.

ResearchOps

The ResearchOps Community is a global group of people who've come together to discuss the operations and operationalization of user research and design research — also known as ResearchOps. ResearchOps includes the people, mechanisms, and strategies that set research in motion.

Visit our website to learn more and to get involved.

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Plays

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Plays

Plays are the bread and butter of the playbook: descriptions of different methods, how to do them, when to use them, and how to analyze/leverage the results. Plays make up the majority of this guide and can be divided a number of ways: quantitative vs. qualitative, evaluative vs. generative, and behavioral vs. attitudinal. Of course, not all plays fit cleanly into each category, but we'll do our best to tag methods to let you easily search and navigate to find what fits your needs.

Contents

- Diary Study
- Design Ethnography
- Contextual Inquiry
- Usability Study
- User Interview
- Card Sort
- Analytics
- Survey Design
- Journey Map Interview

User Interview Research Play

User Interviews are an efficient way to learn more about your users, including common workflows, goals/objectives, and pain points. User Interviews can occur in-person or remotely, though if you're going to their place of work in order to conduct the interview, you might want to consider using the Contextual Inquiry Play instead.

When to Use

User interviews are a useful tool when the problem space is loosely defined: whether you're at the beginning of a product discovery process or if you're investigating adjacencies, user interviews are a fairly low-overhead way to start gathering observations and generating insights about your problem space.

User Interviews will mostly provide **attitudinal** feedback, is a **qualitative** method, and is used for **generative** research.

Materials Needed

- Recording device (audio, video, screen capture, etc.)
- Interview script (printed in person, downloaded locally if remote)
- Scratch paper & pen to jot down thoughts/light notes
- Meeting space

How to Plan

1. Identify who your target user(s) are, including what some of their behavioral traits are, what their needs may be, and what their function is within their organization (to guide screening/recruitment; see the Recruiting Play [link] for more information).
2. Decide whether to focus on breadth or depth for the interview. Picking one topic to dig in on will provide richer insights, but may not paint a full picture of the participant and their use cases.
3. As you schedule participants, make sure you're tracking what state they're in on your project management tool (e.g. Jira, Trello) as well.
    a. You should create a tag (or Epic if in Jira) to encapsulate all items related to this study, including nuggets and participants.
4. Put together an interview script, using your Research Questions as a guide.

    a. Sanity check your script by making sure the answers to your script questions will provide answers to and insights about your Research Questions.
5. Circulate your interview script among teammates and stakeholders to get feedback and make any revisions needed.

How to Execute

Beforehand

1. Based on who you're targeting, select users from 1010's Participant Pool or decide on another recruiting method (see the Recruiting Play [link] for more info).
2. Decide on an incentive for your participants. Generally speaking, compensating $1/minute is acceptable, with additional funds
3. based on remote vs. in-person and on the specificity of your participant needs (more specific === higher premium).
    a. See our Incentive Guide [link] for more information.
4. We recommend using Calendly to schedule interview times, as it provides an easy way for participants to select times that work best for them and integrates directly with Outlook to avoid conflicts.
5. Make sure participants have signed 1010's Participant Consent, Release, and NDA Form [link] and have returned that to you/that we have it on file.
6. If hosting at the office:
    a. Make sure you've provided ample instructions on how to reach our building, including nearby public transit options and parking options.
    b. We cannot compensate for parking or transit; that is part of their participation incentive.

Day Of

1. If you're travelling to meet the participant:
    a. make sure you give yourself more than enough time to get there. We recommend leaving an extra half an hour earlier than you think you need to.
2. If remote:

    a. make sure you have a room reserved and that there are no conflicts. Make sure your laptop is fully charged or that you have your charger with you.
3. If hosting at the office:
    a. make sure you've reserved one of the approved User Research Rooms [link]. You might want to reserve the 15-30 minutes
    b. ahead of your scheduled appointment as well; 1010data meetings tend to run over.
    c. Put a sign on the door with the schedule for the day so others are aware.
    d. Make sure there are some snacks and refreshments set aside if supplies are starting to look low.
    e. Print out a paper copy of the script. Print it in larger font than you think you need (14 or 16pt is best).
    f. Go down to the lobby to wait for participants at least 10 minutes before their scheduled start time.

During

1. If hosting at the office:
    a. Offer participants refreshments or use of the restroom before starting the session.
2. Make sure recording devices have been started (ideally, before the user enters the room).
3. Start with briefing, then work through the warm-up questions and into the main part of the interview.
4. As a facilitator, your sole focus should be on making the session run smoothly.
    a. The Talking to Users Cheatsheet [link] is a good primer on how to be a good facilitator.
    b. Do not attempt to take notes; the session will be recorded and you may be observers.
    c. Engage with the participants, but do not lead them. Remain neutral in your body language, tone, and responses.
5. During debrief, make sure users are aware of how and when they'll receive their compensation if they don't receive it
6. immediately in person.

After

1. Stop all recordings and ensure everything is properly transcribed/uploaded to the appropriate places.
2. If hosting at the office:
    a. Offer any refreshments and access to restrooms again before participants leave.
    b. Escort participants all the way out to the lobby and thank them again for coming in today.
3. If you have any observers, debrief with them immediately as to what they heard and learned.
4. After/during debriefing, reset the testing environment (room/etc) to its initial state and replenish anything as needed.

How to Analyze

1. Review the Research Repository Taxonomy [link] to remind yourself how to categorize feedback.
2. Watch/listen to the recording, going through with a fine-toothed comb, logging your observations as nuggets.
3. Once you've nuggetized all of the feedback you gathered, begin grouping them into larger themes which you can use to build your research summary.
4. Copy and paste the Research Summary Template [link] and begin to fill it out, using your Research Plan as a guide.

Further Reading

- https://www.atlassian.com/team-playbook/plays/customer-interview
- https://www.nngroup.com/articles/user-interviews/
- https://www.interaction-design.org/literature/topics/user-interviews
- https://uxdesign.cc/how-to-conduct-user-interviews-fe4b8c34b0b7

Usability Study Research Play

Usability Studies are one of the oldest and most widely used research methods in human-centered design. A usability study will not only help you understand how users think about the work they do and about your product, it will also help you understand their workflows and discover, at a high level of resolution, the pitfalls and friction points in your design. Usability Studies are often more high-touch than something more hands-off like user analytics, but you can leverage usability research to gather a lot of insight about your users.

When to Use

One of the essential elements of a usability study is having a stimulus for users to react to. That can be anything from paper prototypes to fully functioning applications to your competitors' products, however users need something to be interacting with and a set of tasks to achieve in order to run a proper usability study. Usability Studies are great for understanding users' mental models and workflows, but the primary goal is to uncover usability issues (confusion, friction, difficulty) in the stimulus presented.

Usability Studies primarily provides **behavioral** feedback, is a **qualitative** method, and is used for **evaluative** research. If you include an interview segment of the study, you can also get **attitudinal** feedback, and you can score certain elements of the test to generate **quantitative** feedback as well (e.g. success/error rate, task completion time).

Materials Needed

- Recording device (video, audio, screen capture, etc)
- Testing device
- Usability Test Tasks (printed, cut into individual strips/pieces if in person. In separate documents if digital)
- Scratch paper, pen to jot down thoughts
- Meeting space (see Approved Meeting Rooms [link] for User Research if hosting in the office)

How to Plan

- Identify who your **target user**(s) are, including what some of their behavioral traits are, what their needs may be, and what their function is within their organization (to guide screening/recruitment; see the Recruiting Play for more information).
- Decide whether to focus on **breadth or depth** for the usability test.
    - By structuring your tasks to be high-level, you can get feedback on overall workflow and find pain points, but you'll lose granularity as to what exactly is causing trouble.
    - Being more specific with your tasks will get you that granularity but may steer users too heavily.
- As you schedule participants, make sure you're **tracking what state** they're in on the Jira board [link] as well.
    - You should **create an Epic** to encapsulate all items related to this study, including nuggets and participants.
- Put together an **interview script**, using your Research Questions as a guide. This should include each task as well as questions related to that task.
    - Sanity check your script by making sure the answers to your script questions will provide answers to and insights about your Research Questions.
- Circulate your interview script among teammates and stakeholders to **get feedback and make any revisions** needed.
    - You should run **one teammate through the entire protocol** before bringing users in to make sure everything is ready.

How to Execute

Before

1. Based on who you're targeting, select users from 1010's Participant Pool or decide on another recruiting method (see the Recruiting Play [link] for more info).
2. Decide on an incentive for your participants. Generally speaking, **compensating $1/minute is acceptable**, with additional funds based on remote vs. in-person

and on the specificity of your participant needs (more specific === higher premium).
    a. See our Incentive Guide [link] for more information.
3. We recommend **using Calendly to schedule** interview times, as it provides an easy way for participants to select times that work best for them and integrates directly with Outlook to avoid conflicts.
4. **Confirm** participants have signed 1010's Participant Consent, Release, and NDA Form [link] and returned that to you/that we have it **on file**.
    a. Participants need to sign and return by **2 hours before remote sessions** or **12 hours before in-person sessions**, otherwise we consider it a no-show and they will need to try to reschedule.
5. If hosting at the office:
    a. Make sure participants have received the ample instructions on how to reach our building, including nearby public transit options and parking options.
    b. We **cannot** compensate for parking or transit; that is part of their participation incentive.
    c. See Participant Transportation Guide [link] for more information.
    d. Reserve one of the approved User Research Rooms [link]. You might want to **reserve the 15-30 minutes ahead of your scheduled appointment** as well; 1010data meetings tend to run over.

Day Of

1. If you're travelling to meet the participant:
    a. Make sure you give yourself more than enough time to get there. We recommend leaving an **extra half an hour earlier** than you think you need to.
    b. Pack all of the materials you need, including recording devices, testing devices, power supplies/chargers, and **multiple printed copies** of the tasks and the briefing/debriefing instructions.
2. If remote:
    a. Make sure you have a room reserved and that there are no conflicts.
    b. Make sure your laptop is **fully charged** and that you have your **charger with you**.

3. If hosting at the office:
    a. Reset the laptop, ensuring all **unnecessary programs are closed** on boot.
    b. **Print off** the new credentials, as well as any tasks slips that are missing as needed. Print it in larger font than you think you need (at least 16pt).
    c. Put a **sign on the door** with the schedule for the day so others are aware.
    d. Ensure the camera is **properly plugged into** the recording laptop and everything is set up there to record.
    e. Make sure there are some **snacks and refreshments set aside** if office supplies are starting to look low.
    f. Print out a **paper copy of the script**. Print it in larger font than you think you need (at least 16pt).
    g. Go down to the lobby to wait for participants **at least 10 minutes before** their scheduled start time.

During

1. If hosting at the office:
    a. Offer participants refreshments or use of the restroom **before** starting the session.
2. **Double check** recording devices have been started (ideally, before the user enters the room).
3. Start with briefing, then work through the warm-up questions and into the main part of the interview.
    a. See Standard Briefing/Debriefing. [link]
4. As a facilitator, your sole focus should be on **making the session run smoothly**.
    a. The Talking to Users Cheatsheet [link] is a good primer on how to be a good facilitator.
    b. **Do not** attempt to take notes; the session will be recorded and you may be observers.
    c. Position yourself **slightly behind and to the side** of the participant: you want to be out of their line of sight and far enough away that you aren't hovering/crowding them. The stimulus should be their main focus.
    d. Engage with the participants, but do not lead them. Remain neutral in your body language, tone, and responses.

    e. **Let users struggle** longer than is comfortable. If they give up too easily, encourage them to keep trying and to pretend we aren't there to help. We want to see what their problem solving process is as well.
5. Debrief your participant at the end of the session.
    a. See Standard Briefing/Debriefing. [link]

After

1. Stop all recordings and ensure everything is properly transcribed/uploaded to the appropriate places.
2. If hosting at the office:
    a. Offer any refreshments and access to restrooms again before participants leave.
    b. Escort participants **all the way out to the lobby** and thank them again for coming in today.
3. If you have any observers, **debrief with them immediately** as to what they heard and learned.
4. In either case, you should jot down 3-5 initial observations/key takeaways from what you remember. The recording will provide details, but this can help you contextualize the session.
5. After/during debriefing, **reset the testing environment** (room, testing device, etc) to its initial state and replenish anything as needed.

How to Analyze

1. Review the Research Repository Taxonomy [link] to remind yourself how to categorize feedback.
2. Watch/listen to the recording, going through with a fine-toothed comb, logging your observations as nuggets.
3. Once you've nuggetized all of the feedback you gathered, begin grouping them into larger themes which you can use to build your research summary.
4. Copy and paste the Research Summary Template [link] and begin to fill it out, using your Research Plan as a guide.

Further Reading

- https://www.nngroup.com/articles/usability-101-introduction-to-usability/
- https://www.interaction-design.org/literature/topics/usability-testing
- https://www.usability.gov/how-to-and-tools/methods/usability-testing.html
- https://en.wikipedia.org/wiki/Usability_testing
- https://uxplanet.org/how-to-conduct-a-usability-test-in-six-steps-from-start-to-finish-4082e8d57858

Contextual Inquiry Research Play

When to Use

Contextual Inquiry can provide both **behavioral** (via observation) and **attitudinal** (via questioning) feedback, is a **qualitative** method, and is used for **generative** research.

Materials Needed

- *Recording device (video, audio, screen capture, etc) if permissible*
- *Interview script (printed if in person, digitally if remote)*
- *Observation/Coding guide*
- *Notebook & pen to jot down and observations*

How to Plan

How to Execute

Before

Day Of

During

After

How to Analyze

- Review the Research Repository Taxonomy [link] to remind yourself how to categorize feedback.
- Watch/listen to the recording (if they exist), going through with a fine-toothed comb, logging your observations as nuggets.
    - If no recording, make sure you've taken detailed notes, and use that to generate nuggets.
- Once you've nuggetized all of the feedback you gathered, begin grouping them into larger themes which you can use to build your research summary.
- Copy and paste the Research Summary Template [link] and begin to fill it out, using your Research Plan as a guide.

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Further Reading

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Guides

While plays are certainly at the core of a playbook (hence why it's called that and not a guidebook), there are a variety of accessory guides and templates to help support the plays themselves. You can certainly use the plays without the guides, but every play refers to at least one guide for accessory information. Guides were mostly developed in the interest of keeping the playbook DRY.

Contents

- Recruiting Guideline (Play?)
- Participant Incentive Guideline
- Observing Research Guide
- Talking to Users Cheatsheet
- Participant Transportation Guide
- Approved Meeting Rooms Guide

Observing Research Guide

Having stakeholders and product team members from all disciplines observe user research is a powerful way to glean additional insights, drive consistency and alignment, and build end-user empathy. In order to support observers partaking in research, this guide is designed to lay out some ground rules and answer questions for observers.

When to Use (for facilitators)

Ensure your observers have read this guide and asked any questions they may have before they're permitted to observe.

How to Plan (for facilitators)

1. Identify whether it's appropriate to have observers for this research activity.
    a. Certain factors such as **facilitator comfort, scientific rigor, and the study setup** make things more or less practical to have observers partake in a live session.
2. Identify who is appropriate to observe this particular research activity and coordinate scheduling with them.
    a. **Never cancel a session on behalf of an observer.** Participants and facilitators are much more important than observers. All sessions will be recorded.
3. Prepare note-taking materials for observers.
    a. This can be anything from a shared Google Document with a prescribed format, a print-out with different categories, or stack of post-it notes.
    b. If observers are taking notes by hand, provide writing utencils and surfaces.
4. Share this guide with each observer ahead of time, as well as the Research Plan (including the **interview script**).
5. Remind all parties that every session will be recorded.
    a. While it's exciting to observe sessions live, any inclusion of extra observers will **change the testing environment** and **may introduce bias**. Recorded sessions let you see users interact first-hand without introducing any additional complexity.

How to Execute (for observers)

Before

1. Prepare yourself mentally to observe user research.
    a. Observing users struggling with your product can be difficult. Remember that finding issues during a testing session is a **win, not a failure**. Better now than after launch.
    b. Practice **suspending your prior knowledge** about a topic in order to more closely align your mental state with the participant.
2. Understand more about what user research is.
    a. **Watch** a few previously recorded sessions to get a sense of the protocol and environment.
    b. **Ask your facilitator** any outstanding questions you may have about the setup, the goal, or the protocol.

During

1. **Silence (not even vibrate)** all devices (phones, watches, etc.), and computer notifications. There should be no interruptions. If you cannot commit to being unreachable for the entire test duration, **do not observe**.
    a. Even if you're remote: you want to minimize any chance of distraction for you or the participant.
2. The facilitator will introduce any observers to the participant so they're **aware who else may be in attendance and why**.
3. If remote, **turn off your camera** and **mute your microphone** in order to minimize distraction or background noise to the participant.
4. If in person, sit **out of the participant's line of sight** (to the side or behind) far enough way to not cause distress, **minimize shifting/fidgeting**, and attempt to be **completely silent**.
    a. Do not whisper to other observers or to the facilitator.
5. Do not engage with the participant in any way, **even casually/socially before the session**. Do not tell them what your **title/role** is at the organization. Do not **answer any questions** they may have.
    a. If they ask you a question, respond with "I'll be happy to chat with you later, but I must defer that to [our facilitator]".

    b. If they make a joke during the session, please try not to laugh. The facilitator will handle any interaction with the participant, including social reassurance.
    c. **Do not laugh** under any other circumstance, as this can be extremely embarrassing for the participant.
6. As an observer, you're a **fly on the wall**. You should have **no direct interaction** with the participant. **Do not interrupt** the session in any way.
    a. Please **take notes** on what you see, especially if you have additional follow-up questions for the participant.
    b. Pay attention to what users **do** more than what they say, especially if it's a **hypothetical statement** (e.g. "My boss would not like this"). Behavior is more important and more telling, and sometimes what users **say** does not match what they **do**.
    c. **Paper and pen** is best for taking notes (as it makes the least noise), but if you're going to use pencil and/or type, please try to **type fairly consistently/constantly**. Participants will notice if you only type after certain actions, and it will distract them.
7. The facilitator should reserve some time at the end to ask any additional questions that may've come up during the session.
    a. If this is remote, **use Slack to send questions** to the facilitator. Keep communication to only what's essential and don't assume the facilitator will see it or be able to work it into the session.

After

1. Debrief with your facilitator immediately after the session ends.
    a. Share your **immediate thoughts** on what you observed as well as your **experience of being an observer**.
2. Share your notes with the facilitator and the rest of the stakeholders/research team.
    a. Participants are not designers. If they gave specific suggestions, it's to **illuminate a problem** they're having, not what the solution should be.
    b. Be careful to share only **observations**, and not **explanations or rationales**. It's dangerous to jump to conclusions too quickly/without observing multiple sessions.

How to Analyze (for all)

While this guide is meant to create the best possible experience for observers and facilitators, it's by no means set in stone. After the conclusion of every set of research sessions, meet with the Research team and with stakeholders in order to assess the guide and the protocol and to suggest any changes or modifications.

Further Reading

- https://www.nngroup.com/articles/observer-guidelines/
- https://medium.com/@ryaninteractive/a-guide-for-user-research-observers-2df4e0b50423
- https://uxpamagazine.org/engaging-study-observers/
- https://lebsontech.com/observing-usability-studies-a-guide-for-stakeholders/
- https://www.uxmatters.com/mt/archives/2012/08/observing-user-research.php
- https://docs.google.com/document/u/2/d/e/2PACX-1vTeAacHcnmsP2dGSR_9tH-4Y41XVwpwSoZtADHauDobXt2E_hKe47mVW4OsOt1X6sibaAYSE_g1ED0h/pub

Participant Transportation Guide

People need to know how to get to your office/testing location

When to Use

Whenever you have participants coming to a specific location (e.g. your office).

How to Plan

Write it, make sure everyone agrees/is aware of it. Double check with legal, HR, etc

How to Execute

Make sure users receive it, acknowledge reading it, and ask any questions they may have.

You'll want to include every possible transit option: what the parking situation is, if there's any public transit or regional transit options, what it might be like to bike there, etc.

How to Analyze

Gather feedback as needed

Further Reading

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Talking to Users Cheatsheet

If you don’t have time to read anything else or if this is your first time conducting research with live participants, read this first.

When to Use

How to Plan

How to Execute

How to Analyze

Further Reading

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Templates

Templates are mostly here to hold things you'll likely be copy/pasting. They should live as an actual template in whatever software tool you're using for knowledge management (Google Drive, Confluence, etc). Like most things in this playbook, they reduce the amount of re-work and minimize drift.

Contents

- Standard Briefing & Debriefing
- User Research Plan Template
- User Research Summary Template
- Participant Consent, Release, and NDA Form

Standard Briefing and Debriefing

Almost all interactions you have with end users should have some sort of briefing and debriefing. While this may not be practical when doing more informal/guerrilla research activities, if there's a scheduled session, you should brief and debrief your participants. This template is designed to create consistency in how we start and end research sessions. Feel free to customize as needed, but be cautious and deliberate when doing so.

Standard Briefing

1. Thank the participant for taking the time today to help us out.
2. Remind them the session is being recorded and that it's only for our own internal use and to improve the experience of the session itself.
    a. Without a recording, we would need observers, or the facilitator would have to take notes, which is bad.
3. Give them an outline of the events to come.
    a. Specify that we will reserve time at the end of the session to answer any questions they may have, and that you may have to defer questions asked during the session until this time in order to minimize bias.
4. Give a demonstration of the Think Aloud methodology.
    a. Use a common task all users should be familiar with, such as doing laundry or baking a cake.
5. Emphasize that nothing they do or say is wrong, and that the system may be a little buggy, so if they encounter errors, it's completely our fault.
    a. Remind them that while we encourage them to try to complete the tasks on their own, we can step in to help or they can skip tasks as needed.
6. Ask if they have any questions before getting started.

Standard Debriefing

1. Thank the participants once more for their time, focus, and energy today.
2. Answer any questions they may have, especially any questions you had to defer during the session.
3. Clarify what compensation is and how it will be delivered.

4. Ask users if they'd be interested in participating in future research activities, noting that you'll hold onto their contact info if so.

User Research Plan Template

How to Use

Copy everything in this template below this section, replacing everything in italics with the actual details of your particular research study. Feel free to delete sections you don't need (e.g. if you're not running a survey, you obviously don't need survey questions).

Why are we doing this? (Motivation)

A high-level overview to provide context for this research and what's driving the request for research on the topic. Identifying product/business questions and goals here is a good start.

What are we looking to learn? (Objective)

- *Bulleted list of specific Research Questions you intend to answer based on the above prompt.*
- *You should use this to guide the script/survey questions you include below, as well as the selection of research method and audience.*
- *This is more or less how to measure success: if you cannot answer these questions by the end of your study, you haven't picked the right method, the right audience, or the right questions.*
- *Try to keep this to 5-7; anything more should be split into separate studies, anything less is likely a waste of resources.*

How will this impact our work? (Outcomes)

Using the above questions, write specific changes that will be made based on the results of your research (e.g. if you validate an assumption or answer a question, what will the team do? If you fail to do so, what happens?)

1.

Who will we talk to? (Audience & Resources)

A general description of who you're targeting, why you've selected to target these individuals, how you intend to source them, etc.

Target Sample Size

How many participants do you plan to talk to

Compensation

How participants will be compensated for their time, if at all

Target Completion Date

When do you expect to be done with the research and have results

How will we do it? (Methodology)

A brief description of what method you've selected, why you selected that, and how it will answer the above Research Questions.

Survey Questions

- ***Question 1:*** *Text of the question (e.g. "I feel the system was easy to use")*
    - *Likert-5 Scale*
    - *1: Strongly Disagree*
    - *5: Strongly Agree*
- ***Question 2:*** *Another question, this time a multi-select (checkbox)*
    - *Multi-select*
        - *Option A*
        - *Option B*
        - *Option C*
- ***Question 3:*** *Maybe this one is free response*
    - *Free response*
    - *Optional*
- ***Question 4:*** *You can get really inventive/creative with the questions, such as including a matrix.*
    - *Matrix: one [adjective] per row, [adjective] for columns*
    - *Columns:*
        - *Daily*
        - *Weekly*
        - *Monthly*

        - *Quarterly*
    - *Rows:*
        - *I brush my teeth…*
        - *I call my parents…*
        - *I wash the dishes…*

Interview Script

- *[Instructions to the facilitator, such as what stimuli to present to the participant and when]*
- ***Task 1:*** *Text the user will see when they are given this task (e.g. "Log into the system with the following credentials: Email: test@examples.com, Password: password)*
    - ***Question 1.1:*** *Asking a (qualitative!) question about the task they just completed, e.g. How do you feel about the placement of the log in button on the homepage?*
    - ***Question 1.2:*** *Another question pertaining to this particular task.*
    - ***Question 1.3:***
- ***Task 2:*** *Navigate to the storefront for Brad's Brads & Other Nails and add an item to your shopping cart.*
    - ***Question 2.1:*** *Bad example: How much did you like the name "Brad's Brads & Other Nails"?*
    - ***Question 2.2:*** *Good example: Was there anything about this experience that tripped you up or was otherwise jarring?*

Assets

Use this section to include links directly to the prototypes, mockups, surveys, emails, etc. you will be using in the study.

If this individual study is part of a larger research initiative/plan, feel free to link back up to that parent document as well.

User Research Summary Template

How to Use

Copy everything in this template below this section, replacing everything in italics with the actual details of your particular research study and your findings. You should lean heavily on your Research Plan for the first few sections. Feel free to delete sections you don't need (e.g. if you're not running a survey, you obviously don't need survey questions).

Why did we do this?

A restatement of this section from your research plan, with a mention of who you talked to and why you picked this research method.

What were we looking to learn?

- *Literally copy and paste this section from your Research Plan.*
- *Do not change your goals as a result of your research. If you didn't accomplish your goals or answer your questions, that's worth knowing so you can iterate in the future.*
- *Changing your goals/hypotheses/etc after getting your results is unethical and leads to bad research outcomes.*

Who did we talk to?

Any updates/modifications to who you intended to talk to based on who you were able to recruit. Specify how many participants completed sessions, how they were sourced, and how you talked to them (e.g. remote vs in person, location, etc).

Key Takeaways

- *A bulleted list of the insights you gathered that pertain directly to the Research Questions and goals identified above.*
- *There's no rule as to how many bullet points you need here, but it should roughly mirror how many you had in the goals.*

Other Insights

- *You will invariably gather other insights as a result of your research activities that don't directly pertain to the goal of the study.*
- *Instead of losing those insights, put them here in case someone is reading this and it's interesting to them.*
- *You'll also want to capture all of this in your Research Repository [link], but it's worth mentioning here versus burying there.*

Next Steps

- *While I don't really think Research, in its purest form, should make recommendations as to what the product/team should do, it's good to include a section as to what you think should happen next.*
- *There are basically 3 outcomes to any research activity: 1) keep doing what you're doing, 2) do something different, or 3) do more research. 3 is always an option, but whether or not it's the most appropriate action depends on the situation and your confidence level.*

Resources

A list of links to the recruiting plan, to the research plan, to the raw recordings/notes, and to the research repository where insights are stored.