# User Research Checklist

There's a lot to remember when conducting user research, I hope this checklist helps your own research to run smoothly.

It was designed with lab-based user research in mind but will also be useful for many different user research approaches.

In addition to the checklist I've added some sample agendas for kick off meetings and example templates to help you structure your discussion guides and reports.

I hope you find it useful! - @chudders

## Briefing / proposal stage

- [ ] Take brief from client & write it up
- [ ] Discuss potential approach/ methodology for research
- [ ] Write proposal
- [ ] Check proposal with colleagues (not necessarily with the same people that you created approach with)
- [ ] Collaborate on proposal with client / amend to suit
- [ ] Contact recruiter to discuss potential issues with recruitment & likely costs / issues
- [ ] Contact research facilities for quotes & availability
- [ ] Cost up work
- [ ] Check cost with colleagues and get them to sign off
- [ ] Share costs with client
- [ ] Discuss full proposal with client and negotiate to suit

## Project start!

- [ ] Book team to work on project
- [ ] Plan internal kick off, write agenda, invite team and book room (see appendix for a sample agenda)
- [ ] Conduct internal kick off
- [ ] Book lab facilities (if appropriate) & observation room
- [ ] Create project plan
- [ ] 

- [ ] Create/ share wider team kick off agenda (see appendix for a sample agenda)
- [ ] Book room for kick off
- [ ] Invite people for kick off (e.g. Project Manager, UX Researchers, client representatives)
- [ ] Conduct kick off
- [ ] Share actions following kick off
- [ ] Invite people to attend test sessions & debriefs etc (invite people like product managers, business stakeholders, product owners, designers, developers, influencers, people you want to influence, trouble makers!)

## Recruitment

- [ ] Write recruitment brief to define exactly who you want the recruiter to find for you (defining required segments, behaviours, attitudes, experience etc)
- [ ] Share recruitment brief with client and discuss/ amend to suit
- [ ] Send recruitment brief to recruiter and discuss
- [ ] Once it's available check and sign off screener & participant list from recruiter
- [ ] Support recruiter through recruitment process as required
- [ ] Share final list of recruited users with client

## Discussion guide / Test script

- [ ] Familiarise yourself with test candidate (prototype, app or website etc.)
- [ ] Do any suitable desk research you can to bring you up to date with the latest insights and to immerse yourself within the domain (e.g. look at analytics, previous research reports, your clients existing products and services, store visits etc)
- [ ] Review notes from kick off as a reminder of objectives of research to inform discussion guide
- [ ] Write discussion guide (see appendix for a some notes to help you write this)
- [ ] Share discussion guide with colleagues & amend to suit
- [ ] Share discussion guide with client and discuss/ amend to suit

## Test prep (ideally during week before the test sessions)

- [ ] Discuss structure of session with colleagues who will be helping you with the research, define roles & responsibilities for each other on the day

- [ ] Conduct test run of session well in advance of session with colleague who will help facilitate & take notes
- [ ] Check all rooms still booked
- [ ] Visit the research venue if you are unfamiliar with it. If you can't go in person visit their website to check out photos to get a feel for it.
- [ ] Amend discussion guide to fix any issues found in test session
- [ ] Order lunch and refreshments (we recommend getting loads of nice cakes in for observers to encourage them to attend)
- [ ] Book parking spaces
- [ ] Designate someone to greet users on the day, give them incentive and to ask users to sign consent forms
- [ ] Check that IT support staff will be available on the day
- [ ] Discuss with client what final deliverable needs to be so that you can plan to take notes in such a way as to facilitate analysis and reporting

## A few days before research

- [ ] Decide how notes will be taken i.e. individual insights to be put on separate post it notes and stuck on printed screen shots of relevant screens of prototype
- [ ] Print screens of relevant screens of prototype and stick on walls in observation room (if relevant)
- [ ] Check recording equipment works
- [ ] Organise incentives for participants
- [ ] Double check with recruits that they can still attend
- [ ] If providing remote viewing of research - set up and test that it works
- [ ] Add bookmarks to allow quick access to relevant parts of prototype (if required)

## Day/s of research

- [ ] Check & tidy test room and observation room
- [ ] Get in early to fix everything that will have stopped working for no reason!
- [ ] Check audio and video is being broadcast in observation room
- [ ] Check prototype is working / internet connection works

- [ ] Turn off any notifications that could distract the user during the sessions
- [ ] Give list of participants to reception/ greeter
- [ ] Print off consent forms for participants to sign before research
- [ ] Leave piles of sharpies and post its in observation room
- [ ] Leave copies of materials for testing in observation room e.g. participant lists, screenshots of test material & discussion guide etc
- [ ] Brief observers on what will happen during the day and how you'd like them to participate, remind them of what you are testing and why etc
- [ ] Leave time to re-read discussion guide and prepare for conducting the sessions
- [ ] Facilitate session/s, recording each one if required
- [ ] Take notes on every session
- [ ] After each session return prototype to start point, deleting cookies / sample data etc
- [ ] Check with observers after each session whether discussion needs to be refined/ refocused

## Analysis & reporting

- [ ] Recap requirements for the report e.g. format, depth & structure (you may just need to summarise findings in an email or spreadsheet or spin them up into user stories or similar if planning to resolve them within sprints)
- [ ] Absorb the data individually then look for patterns, insights, evidence and ideas with your colleague
- [ ] Create 'report' (this can also just be a list of findings for more agile projects of course - see appendix for a sample report structure
- [ ] Share report for feedback and amend it to suit
- [ ] Extract recordings if required and supply to client
- [ ] Present report
- [ ] Share report with all parties

# Appendix

Many of the activities listed above follow a tried and tested formula.

Here are some example templates that you can use on your own user research projects:

**Sample internal kick off agenda**

- Aims and objectives
- Project background & wider business context
- Discuss brief
- Team roles & responsibilities
- Pre mortem
- cxpartners objectives for the project
- Budget & timeline

**Sample project kick off agenda / questions to cover**

(What / When / How / Who / Why / Where framework is useful here)

- Intros covering roles & responsibilities
- Project background & wider business context
- Aims & objectives of research - Why doing it? What do we want to learn? (informs discussion guide)
- What are we testing?
- What testing methods are we using?
- Who / how many users do we want to test with? (informs recruitment brief)
- Where are we testing?
- When are we testing?
- Agree the research questions / objectives and what will be tested
- When do we need to deliver results by?
- Do we have any customer lists we can recruit from?
- What data protection issues should we be aware of with customer data?
- What devices are we going to test with? Desktop / tablet / mobile etc.
- Are we going to try and measure anything like satisfaction / time on task?
- Are we going to ask users to use anything else in test such as competitor sites?
- What do we not want user feedback on?
- What hypotheses are we looking to learn more about in the research?
- What format of report will be most appropriate?
- Are there any 3rd parties we need to involve?
- Known areas to focus attention on during testing?
- What are the risks?
- Success criteria?
- Walk through project plan / holidays / project comms / availability of key people

**Notes to help with writing discussion guides**

The discussion guide lists all questions the facilitator should cover in order to investigate the specific areas of interest within the prototype.

They generally aren't followed verbatim, the challenge for the facilitator is to get the answers they need while making the session feel as natural as possible.

It differs from a script in that you don't need to get through all of the questions with all of the users, but by the end of the sessions you're aiming for insights from them all.

Typically a discussion guide will include:

- Title / author / version / date
- Objectives of session/ research & any hypotheses people have that are to be investigated

- Things to cover when first meeting participant: (these are best covered off in reception before participant gets to test room as they put them at ease)

    - Thanks for getting here on time and for participating
    - Get them a drink & make sure they have signed the consent form
    - Reminder that the session will be recorded and observed
    - They can stop at any point if they don't want to continue
    - The session will last x minutes and will involve you doing y
    - Remind them to tell us what they are thinking as well as what they are doing during the session
    - Remind them that they won't offend you by criticising the prototype, you are just the researcher
    - Everything discussed will remain confidential and will only be shared with the project team
    - Reminder that they are not being tested, you are interested in their thoughts and opinions and how you find using the prototype
    - Make sure they are comfortable, move chair, swap mouse to correct size etc
    - Do you have any questions before we start?

- Participant background questions / scene setters to get them comfortable talking

- Multiple sections with questions/ activities to suit relating to the areas with reminders of how much time to spend on each part (with reminders of the objective of each set of questions). Typically notes and prompts/ reminders for the facilitator will also be included within this section.

- Wrap up questions

So in summary the general structure we would recommend is intro > warm up > participant background > main activity or topic > follow up tasks > comparisons with competitors (if relevant) > wrap up

**Sample report structure**

- Aims & objectives of research
- Exec summary
- Method used
- User profiles involved
- Key findings - We generally explain some or all of the following - what we saw/ heard, what we think you should do about it, how big an issue we think it is, screenshots to illustrate the issue, user quotes to reinforce issue.