

User Research Method

House Cleaning Information

- Who on the team is helping with/ conducting the research?
- Date when this research was worked on, conducted, synthesized, and finished.
- How will you display the results of your research? (i.e., presentation, changes to a prototype, list of users' stories, etc.)

Background

- Why are we doing this, and what needs to be validated or explored?
- Who is identifying that research needs to be done and what is their rationale for it?
- How important or critical is this research?
- Has there been any prior research or insights that we can leverage or utilize before conducting our own?
- How will our research help produce insights/evidence to help make decisions?

Objective(s)

- State the overall objectives for why this research will be helpful.
- List action items or checkpoints to get a sense of what has to be done in order to achieve the objective(s).

Method(s)

- Describe the research method you are using (let others know how you are conducting your research and/or to inform stakeholders if they are unfamiliar with the method and how it might differ from a more traditional method).
- Who will be at each research session? List out each type of person and how many of those people there will be (pro tip: always try to bring only necessary people to the research session, as too many voices/people at one time can skew the research and takeaways).
- Will this method collect quantitative data, qualitative data, or both? Why?
- Is the research primary or secondary?

Timeline and Estimates

- How long will it take you to complete this research? Make sure to include:
 - Time it will take for each session
 - The time it will take to schedule and plan for the research
 - The time it will take to synthesize research after the research sessions have been completed

Research Questions / Specs

- Write down a list of overarching questions that will help to achieve your objective(s). What kinds of questions do you want to ask? If it's qualitative, how do you get users to tell stories about their experience?
- Choose your main focus areas from the list below and explain how it helps to achieve your objectives:
 - **Utility:** Is the content or functionality useful to intended users?
 - **Learnability:** How easy is it for users to accomplish basic tasks the first time they encounter the design?
 - **Efficiency:** Once users have learned the design, how quickly can they perform tasks?
 - **Memorability:** When users return to the design after a period of not using it, how easily can they reestablish proficiency?
 - **Errors:** How many errors do users make, how severe are these errors, and how easily can they recover from the errors?
 - **Satisfaction:** How pleasant is it to use the design?
 - **Persuasiveness:** Are desired actions supported and motivated?
- Add any specific case scenarios or edge cases that might be considered in this research.

Participant Profile

- Describe any criteria users need to meet to be selected for this research. Do they need to be experienced or new? Is there a job title they should have or a certain clearance level?

Tools / Equipment Needed

- Any materials or software that is needed to conduct the research – everything from pens and paper to video conferencing accounts for both/all parties.

Potential Blockers

- Is there anything you can foresee blocking or holding this research back?

Assumptions

- Everyone usually has a few assumptions going into a research session whether it is intended or not. Is there anything we are assuming going into the research sessions?

Appendix / Notes

- Is there any additional information that can be provided or updates about the situation?
- Are there any initial hypotheses going into the research that we might have?

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