The UX Research Process - For Uxers (Final Draft)

Author: Clare Krawitz and Heidi Roux
Last Updated: 5/28/25
Status: Draft

How to Use this document

This document has been developed to help support the product team when pursuing user research. Each initiative will follow a defined UX study life cycle. This resource offers considerations and best practices for UX-based research, as well as a step by step guide on how to set up, conduct, analyze and share results.

Some important things to remember:

Responsibilities/Roles

- The UX team generally serve as the main facilitators of a UX-based research study.
- Typically the UX team member will take on recruitment and sharing of insights to other stakeholders, although this can be shared if the team wants.
- Product Managers are typically supportive co-moderators and can help shape the design of the study if they are interested. Once the insights are collected and shared, they should take the research results to develop problem statements and prioritize the roadmap.

UX Research and The Center for Research - Key Research Differences

- The research that UX does is meant to be nimble - so err on the side of “how can we get this done as quickly as possible to ensure we get relevant insights to push things forward as quickly as possible”. This is a key differentiator between UX and The Center of Research - we aim for studies that are smaller and can be done in days or weeks instead of months if possible.
- UX research and The Center of Research differ in their goals, methods, audiences, and outputs.
- **The Center of Research** focuses on building theoretical industry-wide knowledge using rigorous, reproducible methods and aims its work at larger scale audiences through publications, point of view one pagers and hosting webinars.
- **UX research**, is practical and user-centered—its goal is to improve product usability through faster, iterative methods like interviews and usability testing, often shared as personas or design recommendations.
- Key differences include
    - Timeframe: Long-term (The Center of Research) vs. Rapid (UX Research)
    - Audience (industry level vs. product and internal teams), and scope (high level knowledge and data vs. contextual actionable insights).

How to Collaborate with UX

The Center provides theoretical frameworks, validated methods, and large-scale data and UX applies this knowledge in real-world contexts and supplements it with qualitative insights.

Collaborations can lead to deeper user understanding, stronger ethical practices, and more impactful solutions—such as jointly building personas by combining The Center’s analytics with UX’s interviews.

UX Research - Set Up

Set up your Goal

Use these general UX Research goals to help you think through what your specific research goal is right now.

- **Discovery** − Exploration methods are for understanding the problem space and design scope and addressing user needs appropriately.

- **Usability Test** – Usability testing and validation methods are for checking designs during development and beyond, to make sure systems work well for the people who use them.
- **Analyze** – (or post-analysis) - once designs are implemented, analyze gathered data and monitor incoming information for patterns and trends

Set up your Study – Step by Step

Step 1: Identify your research goal

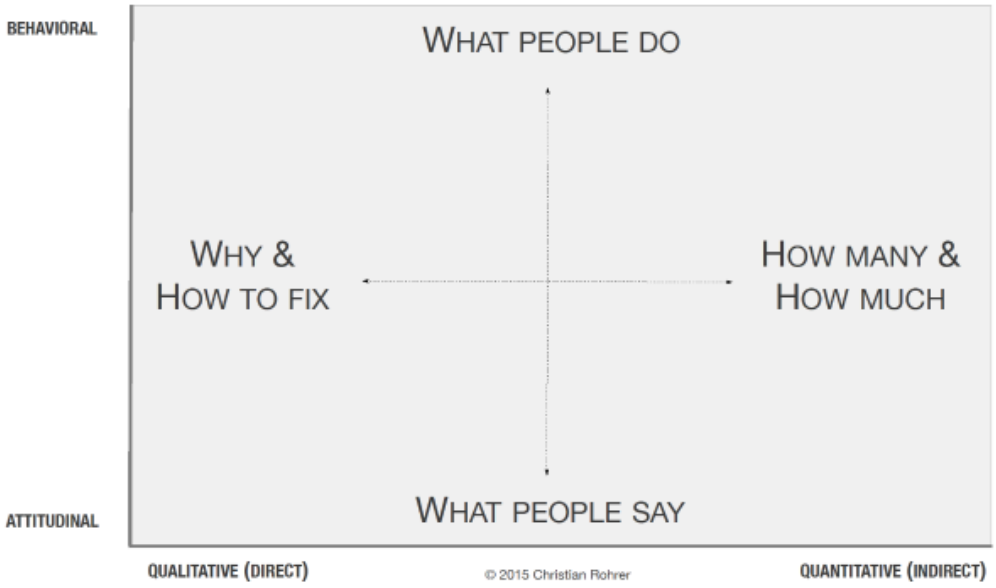
Check out this great article from LinkedIn on how to create a Research Goal
Example goal: Why do young people decide to do further study? **Step 2:** Get specific

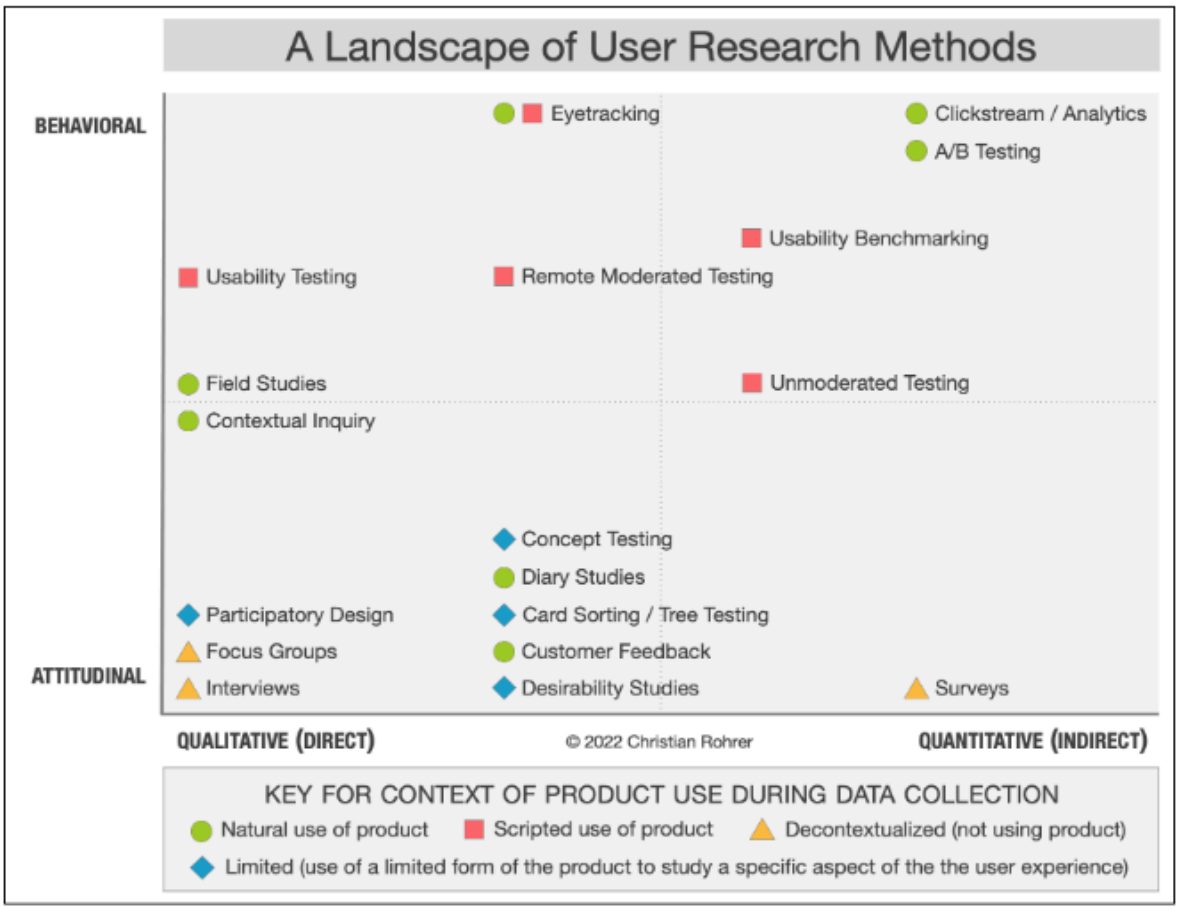
Operationalize your research goal so the study can be replicated.
Example: why do **young people** [*who to recruit:* people between ages of 16-18] decide to do **further study** [*what we study:* Enrolling to complete a degree or diploma]?

Step 2: Identify which quadrant your goal falls into

Example goal: WHY (qualitative) do young people decide (decision to look at what people SAY) to do further study? = Qualitative + Attitudinal

- Qualitative + Attitudinal = problem to solve is WHY & HOW to fix;
    - Data type is what people SAY
- Qualitative + Behavioral = problem to solve is WHY & HOW to fix;
    - Data type is what people DO
- Quantitative + Attitudinal = problem to solve is HOW MANY & HOW MUCH;
    - Data type is what people SAY
- Quantitative + Behavioral = problem to solve is HOW MANY & HOW MUCH;
    - Data type is what people DO


BEHAVIORAL
WHAT PEOPLE DO
WHY &
HOW TO FIX
HOW MANY &
HOW MUCH
ATTITUDINAL
WHAT PEOPLE SAY
QUALITATIVE (DIRECT)
© 2015 Christian Rohrer
QUANTITATIVE (INDIRECT)


A Landscape of User Research Methods
BEHAVIORAL
Eyetracking
Clickstream / Analytics
A/B Testing
Usability Benchmarking
Usability Testing
Remote Moderated Testing
Field Studies
Unmoderated Testing
Contextual Inquiry
Concept Testing
Diary Studies
Participatory Design
Card Sorting / Tree Testing
Focus Groups
Customer Feedback
ATTITUDINAL
Interviews
Desirability Studies
Surveys
QUALITATIVE (DIRECT)
© 2022 Christian Rohrer
QUANTITATIVE (INDIRECT)
KEY FOR CONTEXT OF PRODUCT USE DURING DATA COLLECTION
Natural use of product
Scripted use of product
Decontextualized (not using product)
Limited (use of a limited form of the product to study a specific aspect of the the user experience)

Step : Select a research type based on your quadrant

Note: If you aren't familiar with the research types, consult UX.

Qualitative + Attitudinal	Qualitative + Behavioral	Quantitative + Attitudinal	Quantitative + Behavioral
Card Sorting Great for navigation studies	**Ethnographic Field Study** Studies the end user's actions in person	**Email Survey**	**A/B Testing**
Desirability Study Great to test UI	**Moderated Remote UX study**	**Exit Survey** Execute as user exits experience	**Clickstream analysis** Amplitude
Diary Study A long term study great to discover use over time	**Unmoderated Remote UX study**	**Intercept Survey** (Pulse, pop-ups,. slide-ins) these appear to collect immediate reactions or in the moment behaviors.	
Feedback Great for finding bugs. Use this method with caution. Often needs validation from other testing methods due to inherent bias.	**Usability benchmarking study** PURE - fast and easy usability study. Focus is finding bugs/blockers only.	**Net Promoter Score–NPS** Measures user loyalty and satisfaction over time. Identifies pain points. Benchmarks against industry competitors.	
Interview - Structured Great for learning 'why' and digging into details.Use when you need consistent data or are short on time.		**Remote Survey**	
Interview - Semi-structured Great for learning 'why' and digging into details. This method is more flexible and allows a greater range of discovery than			

structured.			

Step 5: Identify Key Stakeholders

Identify and involve key stakeholders early in the process. Gather their input on research goals, questions, and priorities.

Step 6: Timeline and Recruitment

Identify your timeline for this research and account for time to set up and conduct the interviews.

Step 7: Define Participant Criteria

Define the target user profile. Specify criteria such as demographics, behaviors, and other relevant characteristics. How many users do you need to interview for you to gather all the information you need? How long will the interviews take?

Step 8: Create a Plan and have it reviewed

The following link has a template with useful examples included to help guide you to build a research plan: [Link]

Formulate clear, focused research questions that align with the objectives. These questions will guide the entire research process.

See resource for examples of questions:
https://docs.google.com/document/d/1IRhIU4JcIQYss35U6-UGo3bRzOXnAIbNeFu45ePgh94/edit?usp=sharing

Once you have created a plan, review this with at least 2 other relevant stakeholders than can give you constructive actionable feedback (Product Manager, UX, the Center of Research)

Step 9: Create YouTrack Tickets

Create a YouTrack parent ticket. Ensure you add any relevant documentation. Add timelines and priorities to your ticket. Add any sub tasks to your ticket.

Step 10: Recruitment

Determine the best channels for recruiting participants, such as using Dscout to help recruit, reaching out to internal teams or utilizing our list of approved contacts here [link]

When reaching out to a client for the first time, please always notify the SAE for the account and their manager to ensure that we can contact them. They may be having contract discussions and we want to ensure that the relationship is managed. Also it can be really helpful to speak with the SAE first to get some rich contextual information going into the interview.

For participants (as it stands today) - we also want to have some level of approval through a client to speak to their populations. The UX team is actively working on a means to speak to populations without permission but this is currently under discussion.

Step 11: Check Security Best Practices: How to research using PII/PHI

Always set up your test so that no real PII/PHI is used. Here is the definition of PII/PHI:

> *HIPAA uses the term **Protected Health Information (PHI)** to refer to protected data, but the concept is very similar to the term **Personally Identifiable Information (PII)**, which is used in other compliance regimes. Understanding how PII and PHI overlap can help organizations unify compliance efforts across regimes, reducing the risk, cost and complexity of keeping data safe. PHI vs. PII: As the name implies, personally identifiable information is any data that can identify a person. Certain information like full name, date of birth, address and biometric data are always considered PII. Other data, like first name, first initial and last name or even height or weight may only count as PII in certain circumstances, or when combined with other information.For example, a record that referred to "Mr. Smith in New York" would be unlikely to contain enough information to give away the subject's identity. If the patient had a less common name and lived in a small city, however, it would probably count as PII, since it would be easy to deduce who the subject was.Although it doesn't explicitly address personally identifiable information, HIPAA regulates situations like this under the term Protected Health Information. PHI includes anything used in a medical context that can identify patients, such as:*

- Name
- Address
- Birthday

- Credit card number
- Driver's license
- Medical records

Follow these best practices when you run a test that may prompt test participants to provide their PII:

- When requiring a test participant to complete a form requesting PII, instruct them to enter false or "dummy" information that will not identify a specific individual.
  For example: "Enter the email address = fake@google.com and password = fake."

- Never ask for social security numbers, medical records, or bank and credit card information.
  For example: "Please use fake information like 5555-5555-5555-5555 Exp: 12/20"

- If your test requires test participants to go through a complete checkout process, provide participants with gift cards or gift codes in order to complete the checkout process without entering their own credit card information.

- If it's necessary for a test participant's PII to be visible on the screen during a certain task, enable the "blur tool" (if available with your account) to make the screen unreadable during that specific task. Contact UserTesting Support for assistance using the blur tool. You can also visit this link for more on the blur tool.

- If these best practices will not be sufficient for your research needs, please contact the Dscout Support team to discuss alternatives. If it is determined that it is acceptable to record PII during your test, you will need to provide test participants with a detailed explanation of what PII will be recorded, what it will be used for, and get their written consent before the start of the test.

- If you expect test participants' PII to pop up during the recording (such as notifications), please create screener questions to set expectations before the test starts.
  For example: Create a screener saying, "This test requires you to disable notifications. Have you disabled all notifications on your smart device?"
  1. Yes, I have disabled notifications. [Accept]
  2. No, I do not wish to disable notifications. [Reject]

Step 12: Incentives

Decide on appropriate incentives for participation, which could be monetary compensation, gift cards, or other rewards. We have a specific amount allotted for Dscout and this should be discussed before the study as it can be dependant on **who** you are trying to recruit e.g. a doctor may expect more compensation.

Step 12: Scheduling and setup

Coordinate with participants to schedule sessions at convenient times. Ensure that logistics such as location, equipment, and materials are prepared. Setting up a spreadsheet to note when the interviews are set and tracking when they have been completed is helpful. You can also invite stakeholders to sign up to be a part of specific interviews that they might be more interested in than others ahead of time.

In Dscout, if you are using the screener functionality, you will need to go through the screener process. Selecting “best fit” candidates for your study.

Here is a best practices document for setting up a new dscout test for UXers

Step 13: Test Run / Dress Rehearsal

Best practice is to test the interview with someone internally to better understand if there are any changes you want to make before the actual interviews. This is an optional step but often can be so helpful when preparing for the interviews themselves.

Conducting Interviews: Best Practices

When conducting interviews here are some tips and best practices…

Check your attitude

- Be humble
- Make sure your test results are usable for others that might need them.
- Researchers should check the quality of their work processes regularly. Suggestions: listen to feedback, hire an independent coach, or watch a video of themselves conducting an interview with a colleague.
- Avoid personal opinion. Base opinions on data only.
- Avoid making design decisions based on user opinions. Think “Don’t tell me, show me!”
- Do not test your own baby. You are not sufficiently unbiased to evaluate criticism of key design decisions.
- Beware of bias! We all have biases, recognizing bias is the first step to eliminating them.
    - Confirmation bias: The tendency to look for, interpret, choose or recall information in a way that confirms your own pre-existing beliefs or hypotheses.

    - False Consensus Effect: A tendency to assume that others think or will behave the same way as yourself.
    - Implicit Bias: When we have unconscious preferences for certain groups of people, or associate stereotypes with certain groups.
    - Try taking the Implicit Bias Test and note down your biases.

Foster research at work

- Make the consequence of ignoring usability obvious
- Avoid opinion wars. Communicate your ignorance of user opinion and test instead.
- Be an ally
- Document & sell successes

Flexibility

For User interviews: Some users may not show up or need to reschedule. Wait 5 mins before you attempt to contact them to ask if they are still able to make it. After 15 mins, you can drop from the interview and send them a message to reschedule.

Data Analysis

Qualitative Data Collection

Tools and Software

Prepare the necessary tools and software for data collection.

Conducting Sessions

Follow best practices for conducting research sessions:

- Obtain informed consent from participants (not needed if they are coming through a usertesting platform as this is prebuilt into their contract with the platform)
- Create a comfortable environment: start off with questions that put the participants at ease e.g. "*What is the weather like where you are?"* Or *"I know this is called an interview but there are no wrong answers, your comments will not hurt my feelings"*
- Follow your outlined and prepared script or guide.

- Be neutral and avoid leading questions (this is especially true for usability testing e.g. don't tell them what to click!)

Documentation

Thoroughly document all sessions. This includes transcripts, audio/video recordings, notes, and any other relevant materials.

Qualitative Data Analysis

Methods

Select appropriate analysis methods based on the type of data collected. Common methods include inter-rater analysis or thematic analysis, statistical analysis, and affinity diagramming.

A good rule of thumb is to aim for the fastest path to insights while preserving important context and avoiding overgeneralization. Affinity mapping—preferably done in FigJam—is the go-to method for this. Inter-rater analysis, while valuable for large, multi-year studies, is generally avoided in most cases due to the time it takes to yield actionable insights.

Synthesis

Synthesize findings to identify patterns, themes, and insights. Ensure that the analysis addresses the original research questions. It is highly recommended to team up with another researcher or stakeholder to work on this together as this process can be highly subjective and it's helpful to check if the understanding gathered matches with another more objective person.

If you would like to utilize AI to speed up your analysis, please following the guidelines to ensure security / confidentiality is maintained: [Link]

Smaller Study (Weeks): Affinity Diagramming (Preferred Method)

When presented with a more focused study or one where you may need insights faster (for example: understand how a client admin uses the reporting features today) you may need to be more nimble so you can start designing and passing on pain points to the product team. It is best to use affinity diagramming to sort and categorize.

Larger Study (Months/Years): Thematic Analysis / Inter Rater Reliability

When presented with a larger study with lots of data to parse and you have resources available to help with the analysis, it is best to use the inter rater method to theme and code. The benefits of this method are that you work with another person to really validate the findings. For further detail on how this works, you can follow this guide: [Link]

Reporting

Create a comprehensive report detailing the research process, findings, and recommendations. Use clear visuals and direct quotes from participants to support the findings.

A guide/template to be able to present this information can be found here: [Link]

Output Assets: Presentation of Findings

Deliverables

Prepare deliverables such as reports, presentations, and executive summaries. Tailor these to the needs of different stakeholders.

As standard we expect the following:

- A key findings report going through the results for each to be given to researchers and core stakeholders that want to dig in even further to the details.
    - Link to template: Key Findings Share Out Template
- A presentation deck that can be utilized along with the videos to be able to better communicate findings via meetings and to facilitate Q&A sessions
    - Template coming soon

Supplemental share out assets can be the following:

- A short video summary for more high level findings to present to leadership/across the organization
- A longer, more contextually rich video for product managers and researchers who need more insight into the “why?” and the “what?” and to encourage questions and further exploration.
- External presentations to clients
    - Please ensure that if this is requested that a review is done by management to ensure that this is ok to share
- A figma slide presentation with embedded prototype
- Personas built using the insights

Stakeholder Meetings

Present findings to stakeholders in a clear, concise manner. Highlight key insights and actionable recommendations.

Follow-Up Actions

Collaborate with stakeholders to define next steps based on research findings. Ensure that insights are translated into design or business actions.

Complete the following to finalize the study

- An email sent to the product team with the findings
- A google chat message sent to the broader UX team

Store all insights in the shared drive in google for the relevant year

---

Appendices

Appendix A: Templates and Examples

- Consent Form Template
- User Interview Plan Template
- Key Findings Share Out Template
- Analyzing with AI Best practices
- Dscout Best practices for UXers

Appendix B: Tools and Resources

- Recommended Software and Tools
    - Conducting the study
        - Dscout
        - Google
        - TBD
    - Synthesizing findings
        - ChatGPT
        - Figma (Figjam)
        - TBD
- Useful Articles and Books
    - When to Use Which User-Experience Research Methods
    - How to write effective research reports and presentations
    - Perfecting the art of UX research reports