DESIGN BETTER BY
LISTENING FIRST

RESEARCH THAT PUTS USERS AT THE HEART OF DESIGN

UX Research

The Fundamentals to conducting UX Research

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DOCUMENT
01

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What is User Research?

User research is the systematic process of studying and understanding your target users and their needs, behaviors, motivations, and contexts. The ultimate goal is to generate actionable insights that inform product decisions and improve the user experience.

> User research is not optional—it is integral to designing products and services that meet real user needs.

Why User Research Matters

1. **Empathy & Insight:** Reveals the real user perspective, challenging assumptions and avoiding internal bias.
2. **Improved Experiences:** Informs design decisions, leading to better products and services.
3. **Business Impact:** Mitigates risk by validating ideas early and reducing costly rework.

> "User research helps teams avoid designing for themselves and instead build for the real people they're trying to reach."

Choose the Right Research Method

User research encompasses a wide range of approaches and methods, each suited to answering different questions at various stages of the product lifecycle.

1. **Data Type:**
   - **Qualitative:** In-depth exploration of behaviors, motivations, and pain points (e.g., interviews, field studies).
   - **Quantitative:** Numerical data measuring frequency, volume, and patterns (e.g., surveys, analytics).
   - **Mixed Methods:** Combines both for comprehensive insights.
2. **Research Purpose:**
   - **Generative (Exploratory):** Uncover unmet needs and opportunities (e.g., ethnography, diary studies).
   - **Evaluative:** Test and refine existing solutions (e.g., usability testing, A/B testing).
3. **Attitude vs. Behavior:**
   - **Attitudinal:** What people say and feel (e.g., surveys, interviews).
   - **Behavioral:** What people actually do (e.g., analytics, observational studies).
4. **Level of Moderation:**
   - **Moderated:** Researcher actively guides sessions (e.g., interviews, focus groups).
   - **Unmoderated:** Participants complete tasks independently (e.g., online surveys, A/B tests).

Tip: Many methods can straddle categories—choose based on your research questions and goals.

Timing and Role of Research in the Product Lifecycle

Research supports different phases of the product lifecycle:

PHASE	GOALS	METHODS
Discovery (Pre-prototype)	Understand user needs & context	Ethnography, generative interviews, diary studies
Validation & Testing	Evaluate design concepts	Usability testing, A/B tests, preference tests
Launch	Monitor early use and feedback	Surveys, bug tracking, early adopter feedback
Post-Launch	Ongoing optimization	Analytics, NPS surveys, support data

Key Reminders:

- Don't treat research as a separate "box" in your roadmap—it should flow throughout the entire product development cycle.
- Align the scope of your research with the decisions at hand.
- Combine qualitative and quantitative methods at multiple stages to ensure a well-rounded view.
- Involve stakeholders throughout to maintain buy-in and relevance.

Step 1: Define Research Goals

Purpose: Clarify what you want to learn and why.

Conduct a brainstorming session with stakeholders to separate facts, assumptions, and opinions. This ensures that research questions are relevant and actionable.

Key Questions:

- What do I want to know?
- What do I not know yet?
- What decisions will this research inform?
- How will this research support business goals?
- Where are we in the product development cycle?

Tips:

- Involve stakeholders early—this sets expectations and prevents misalignment later.
- Consider the broader context: how will the insights be used, and by whom?
- Document everything—having clear goals makes it easier to evaluate whether research has met its purpose.

Step 2: Stakeholder Alignment

Purpose: Gather internal perspectives, align on priorities, and surface potential constraints or opportunities.

What to Cover:

1. Why is this project important?
2. What does success look like?
3. What role does each stakeholder play in the project?
4. What challenges or concerns do they foresee?

Step 3: Develop Effective Research Questions

Purpose: Create specific, actionable questions that guide your research and ensure useful insights.

Characteristics of Good Research Questions:
Specific: Clear enough to know when it's been answered.
Practical: Feasible to answer within the constraints of time and budget.
Actionable: Directly tied to decisions or product improvements.

Examples of Good Questions:

- How do users currently create and manage email campaigns within our tool?
- What challenges do marketers face when segmenting their audience lists?
- Which templates or content blocks do users rely on most when designing campaigns?

Important Distinction:

- **Research Questions:** What you want to learn (ex. How do marketers evaluate the performance of their email campaigns in our tool?").
- **Interview Questions:** The prompts you ask to uncover that info (ex. "Tell me about a recent email campaign you ran. How did you determine whether it was successful?").

Tip: Avoid "yes/no" or leading questions—focus on open-ended exploration.

Step 4: Choose Appropriate Research Methods

Purpose: Select the best-fit methods to answer your research questions, based on data type, context, and resource constraints.

Factors to Consider:

- **Stage of development:** Discovery, validation, post-launch, etc.
- **Type of data needed:** Qualitative vs. quantitative, attitudinal vs. behavioral.
- **Decisions to be informed:** Align methods with how findings will be used.

Best Practice:
Familiarize yourself with the landscape of research methods.
For example:

- Discovery: Interviews, field studies, card sorting.
- Validation: Usability tests, A/B testing, task analysis.
- Post-launch: Surveys, analytics, support ticket analysis.

Tip: Use mixed methods (qual + quant) where possible—this strengthens findings and ensures a comprehensive view.

Step 5: Assemble Your Toolkit

Purpose: Gather the tools and logistics needed to execute your study efficiently and ethically.

Core Tools:

- Recruitment (e.g., Surveys, CSM, and PM/PO)
- Communication (e.g., Zoom, Google Meet)
- Note-taking (e.g., Figjam)
- Storage & sharing (e.g., Google Drive, Figjam, Glean.ly)
- Specialized tools as needed (e.g., Workshop, Maze for unmoderated usability testing, Datadog to create flows)

Tip: Ensure data privacy and participant confidentiality

Step 6: Create a Research Plan

Purpose: Document the “who, what, when, why, and how” of your research project to keep everyone aligned.

Elements of a Good Research Plan:

- Title & context
- Team members & roles
- Research goals and questions
- Methodology and evaluation criteria
- Participants: who they are and how you’ll recruit them
- Schedule and milestones
- Budget considerations
- Analysis plan and next steps

Tip: A research plan is not static—update it as you learn and iterate.

Step 7: Conduct the Research

Purpose: Gather data systematically and ethically, while being flexible enough to adapt if needed.

Tips for Execution:

- Prepare detailed scripts or guides (for interviews, usability tests, etc.).
- Conduct pilot sessions to refine your approach.
- During sessions, be an active listener—stay open to unexpected findings.
- Document everything—verbatim notes, screenshots, recordings (with consent).

Ethical Considerations:

- Obtain informed consent from all participants.
- Protect participant data and respect privacy.

Step 8: Analyze & Synthesize Findings

Purpose: Turn raw data into clear, actionable insights.

Key Practices:

- Organize data (e.g., affinity mapping, thematic analysis).
- Identify patterns, outliers, and contradictions.
- Connect insights back to your original research questions and goals.

Tip: Avoid data dumping. Synthesize findings to highlight what matters most and why.

Step 9: Share & Act on Insights

Purpose: Communicate findings effectively to drive action and improvement.

Tips for Delivering Insights:

- Tailor insights to your audience—what do stakeholders care most about?
- Use engaging formats: concise reports, visual summaries, video highlights.
- Tie insights to real-world decisions (e.g., prioritizing design changes).

Example Deliverables:

- Insight summary deck (with key takeaways and next steps)
- Persona updates or journey maps
- Video highlight reels of usability pain points
- Recommendations linked to business goals

Tip: Storytelling makes insights stick—use real quotes, video clips, and examples to bring data to life.

Key Reminders for the Process

- Involve stakeholders throughout—research is more impactful when it's co-created.
- Be flexible—iterate as you learn.
- Keep documentation organized—add it to the research repository for long-term impact.

Resources

Recommended Additional Reading & Frameworks

- Nielsen Norman Group's UX Research Cheat Sheet
- NNG's Psychology and UX Topic
- Growth.Design Case Studies
- Just enough research by Erika Hall
- UX Methods: A Quick Guide to User Experience Research Methods by James Pannafino

INTERNAL RESOURCES

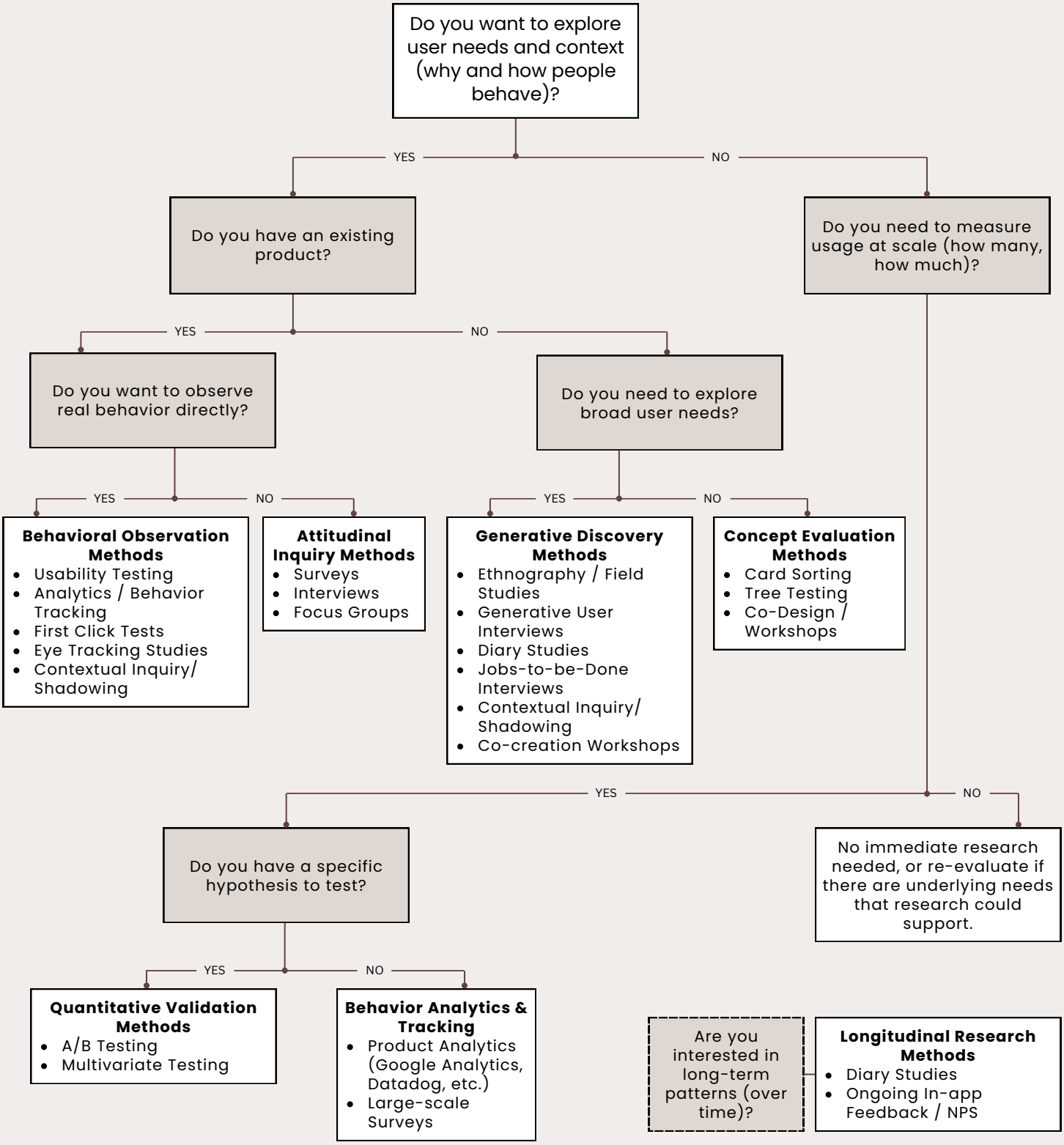
Research repository	Glean.ly
Figjam Templates	Figjam
UX research page	Google sites

Choosing a Research Method

This flow diagram guides you through key questions to help select the right research method, from understanding user needs to measuring usage and validating ideas. It also prompts you to consider whether you need long-term data, helping you choose the most effective method for your specific goals.

What do you need to understand right now?

- Who our users are and what they need? (Generative/Discovery)
- How well our product /feature is working? (Evaluative/Usability)
- How much or how often people do something(Quantitative/Analytics)



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