

Collaborative User Research Toolkit

Jami Peets, Senior UX Researcher
October 2021

Goal for today

**Learn new ways to do user
research collaboratively**

This is for...

UX researchers and
everyone else

Collaborative, cross-
functional teams

Those willing to take risks

This is not...

How to give others your job

Convincing stakeholders to do
user research

Every single method

Why make user research collaborative?

Align objectives
Learn together
Take action

FACTORS TO CONSIDER

Objectives

Constraints

Participants

WHEN TO COLLABORATE

Plan

Learn

Share & Apply Learnings

WHEN TO COLLABORATE

Plan

Set learning objectives and hypotheses

Establish methods and a research plan

Recruit participants

Prep team, stakeholders, and logistics

Learn

Conduct research

Analyze and summarize learnings

Synthesize learnings

Summarize insights

Share & Apply Learnings

Format learnings for your audience

Share learnings and stories

Gain consensus and answer questions

Take action on learnings

USER RESEARCH PROCESS

Plan

Set learning objectives and hypotheses

Establish methods and a research plan

Recruit participants

Prep team, stakeholders, and logistics

Learn

Conduct research

Analyze and summarize learnings

Synthesize learnings

Summarize insights

Share & Apply Learnings

Format learnings for your audience

Share learnings and stories

Gain consensus and answer questions

Take action on learnings

USER RESEARCH PROCESS

Plan

Set learning objectives and hypotheses

Establish methods and a research plan

Recruit participants

Prep team, stakeholders, and logistics

Learn

Conduct research

Analyze and summarize learnings

Synthesize learnings

Summarize insights

Share & Apply Learnings

Format learnings for your audience

Share learnings and stories

Gain consensus and answer questions

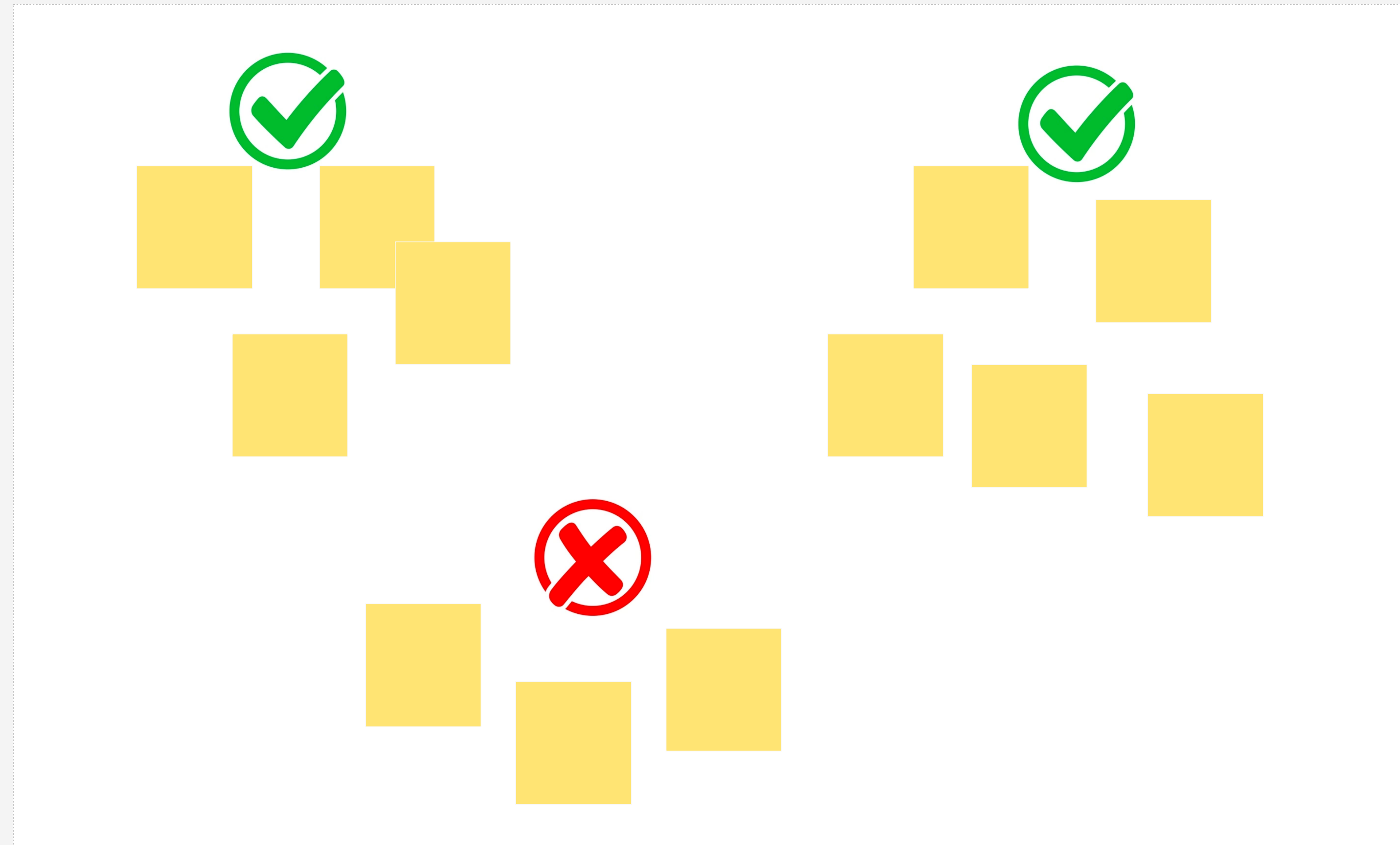
Take action on learnings

Plan Set learning objectives and hypotheses

ASSUMPTION GATHERING

Have everyone write out all assumptions and share back with each other.

As you learn more as a team, identify which assumptions were right, wrong, or need more research.



Vijay Kumar, 101 Design Methods

Plan

Set learning objectives and hypotheses

LEARNING PLAN

After talking through assumptions, prioritize which questions you want answered.

Divide up how team members will answer each question.

Report back learnings.

Question	Priority	How to Answer it	Learnings	Action items

Leah Buley

Activity (5 minutes)

MORE IDEAS

What are other activities you do that meet the same goal as this activity?

Has this sparked any new ideas?

TIPS & TRICKS

Advice for someone trying to facilitate this activity.

Hacks, shortcuts, and pro tips

Pitfalls to avoid

QUESTIONS

Do you have any questions about this activity?

USER RESEARCH PROCESS

Plan

Set learning objectives and hypotheses

Establish methods and a research plan

Recruit participants

Prep team, stakeholders, and logistics

Learn

Conduct research

Analyze and summarize learnings

Synthesize learnings

Summarize insights

Share & Apply Learnings

Format learnings for your audience

Share learnings and stories

Gain consensus and answer questions

Take action on learnings

MODERATED INTERVIEWS

Plan ahead and invite team members and stakeholders to participate in user interviews.

Brief newcomers, set expectations, and assign different roles to keep engagement high.

Remind everyone what you're trying to learn.



Roles:

- Greeter, escort
- Head note taker
- Support note taker
- Photographer
- Time keeper
- Stakeholder question consolidator

Learn

Analyze and summarize learnings

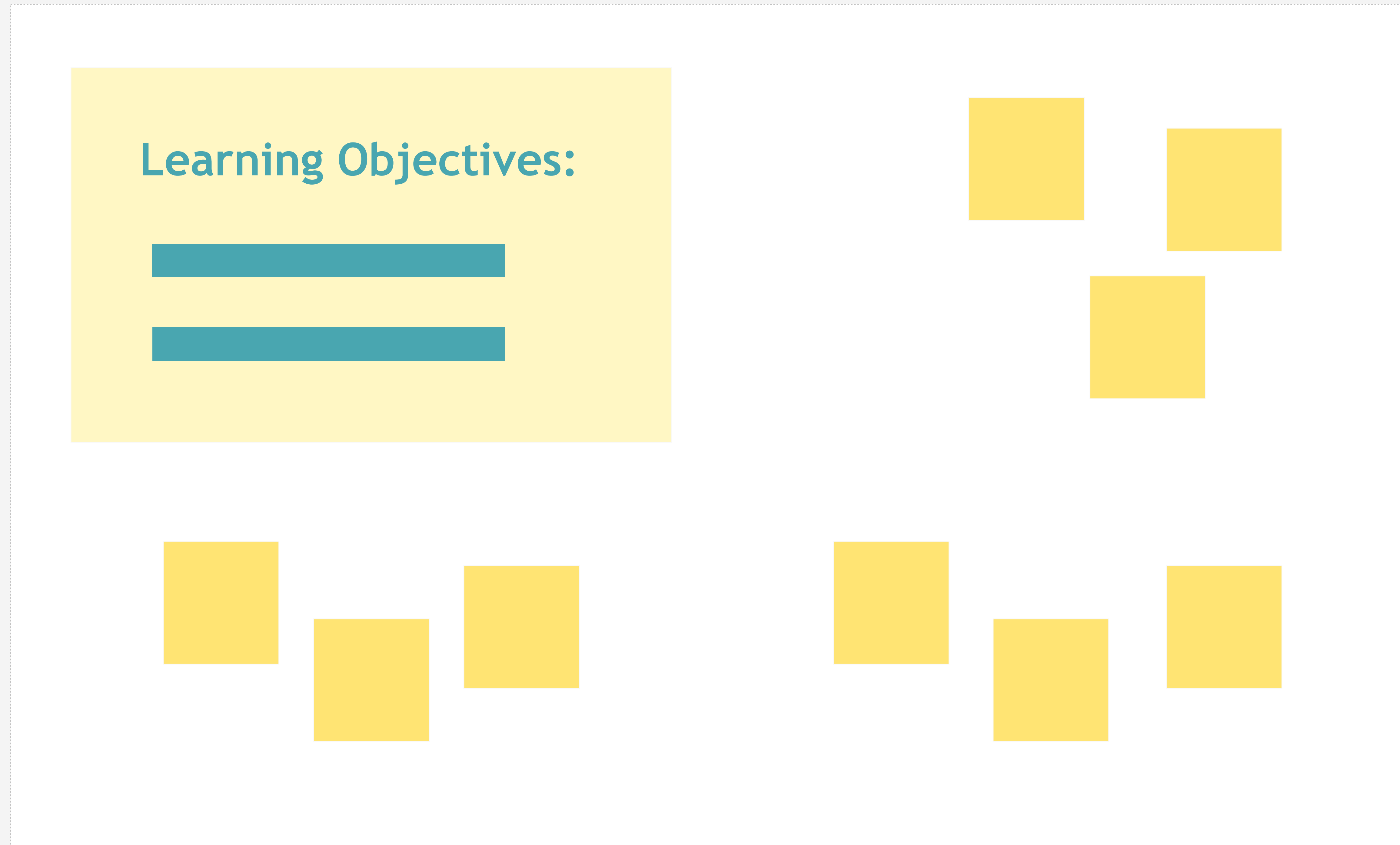
DEBRIEF

Remind everyone again what you're trying to learn.

After each session, take some time to review notes.

Each person shares the top 3 things they learned (new, surprising, interesting).

Group findings based on themes.

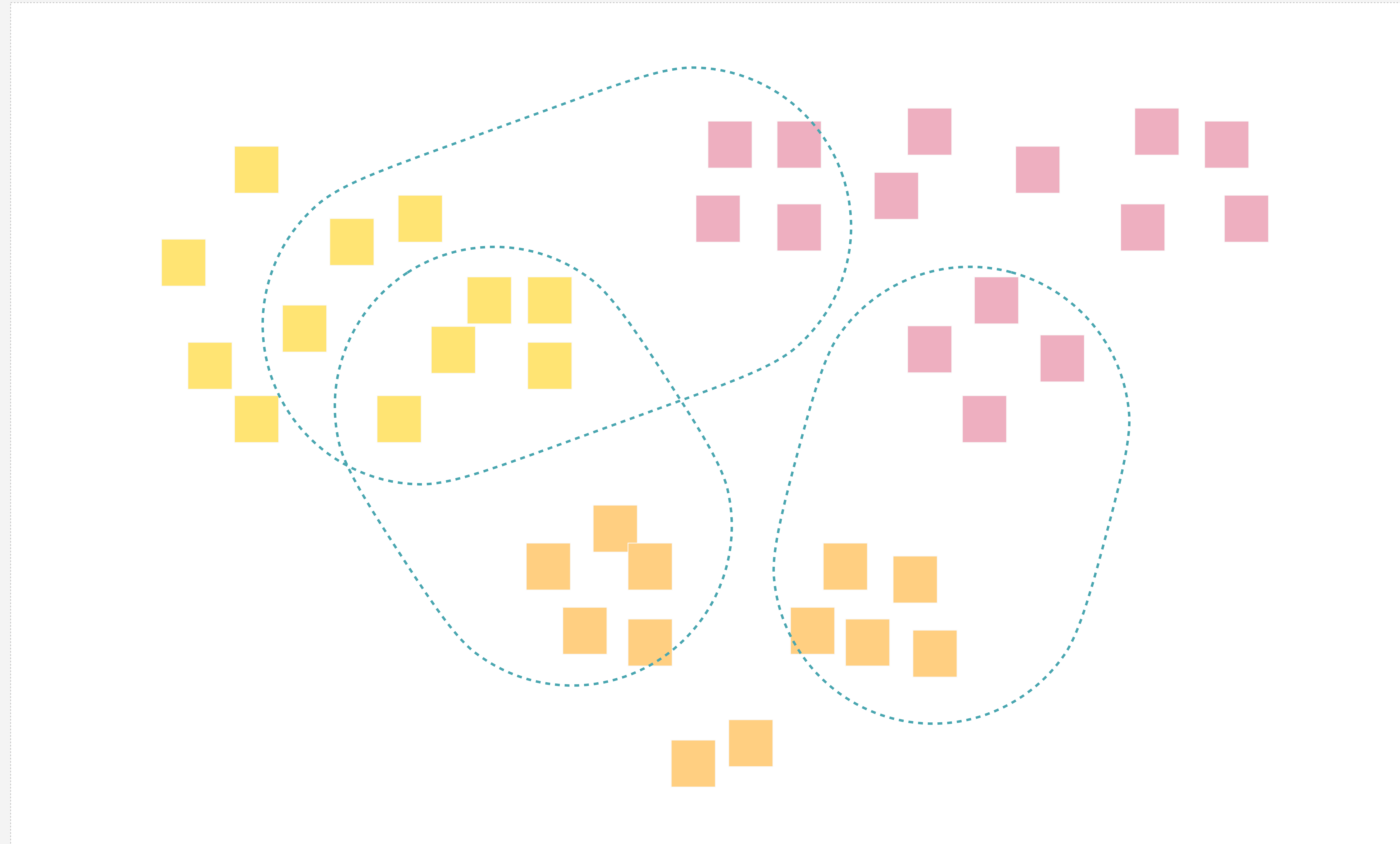


CROSS-CASE ANALYSIS

Look at data from several participants and create connections.

See where there are similarities and differences and discuss patterns.

Create themes based on the patterns and how it connects to your learning objectives.



Activity (5 minutes)

MORE IDEAS

What are other activities you do that meet the same goal as this activity?

Has this sparked any new ideas?

TIPS & TRICKS

Advice for someone trying to facilitate this activity.

Hacks, shortcuts, and pro tips

Pitfalls to avoid

QUESTIONS

Do you have any questions about this activity?

USER RESEARCH PROCESS

Plan

Set learning objectives and hypotheses

Establish methods and a research plan

Recruit participants

Prep team, stakeholders, and logistics

Learn

Conduct research

Analyze and summarize learnings

Synthesize learnings

Summarize insights

Share & Apply Learnings

Format learnings for your audience

Share learnings and stories

Gain consensus and answer questions

Take action on learnings

Share & apply learnings

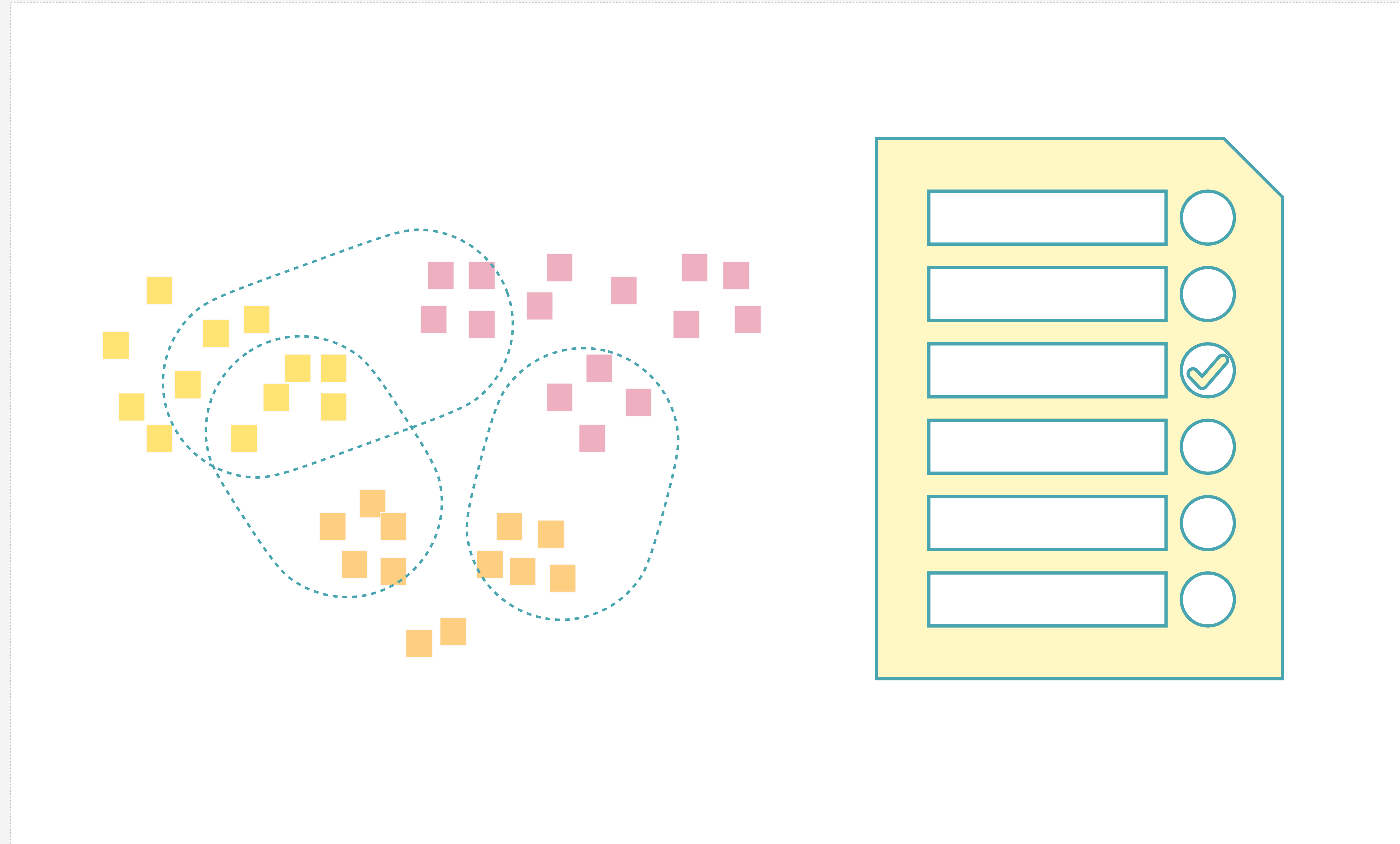
Take action on learnings

RECOMMENDATIONS

Discuss findings and their implications.

Based off recommendations, talk through action items with different team members.

Follow-up on tasks.



Activity (5 minutes)

MORE IDEAS

What are other activities you do that meet the same goal as this activity?

Has this sparked any new ideas?

TIPS & TRICKS

Advice for someone trying to facilitate this activity.

Hacks, shortcuts, and pro tips

Pitfalls to avoid

QUESTIONS

Do you have any questions about this activity?

Wrapping up

New things you learned?

In summary

You can't expect **everyone** to be involved **all** of the time

You can get people **more** involved

Hands-on experiences are powerful