

# Collaborative User Research Toolkit

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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**

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**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

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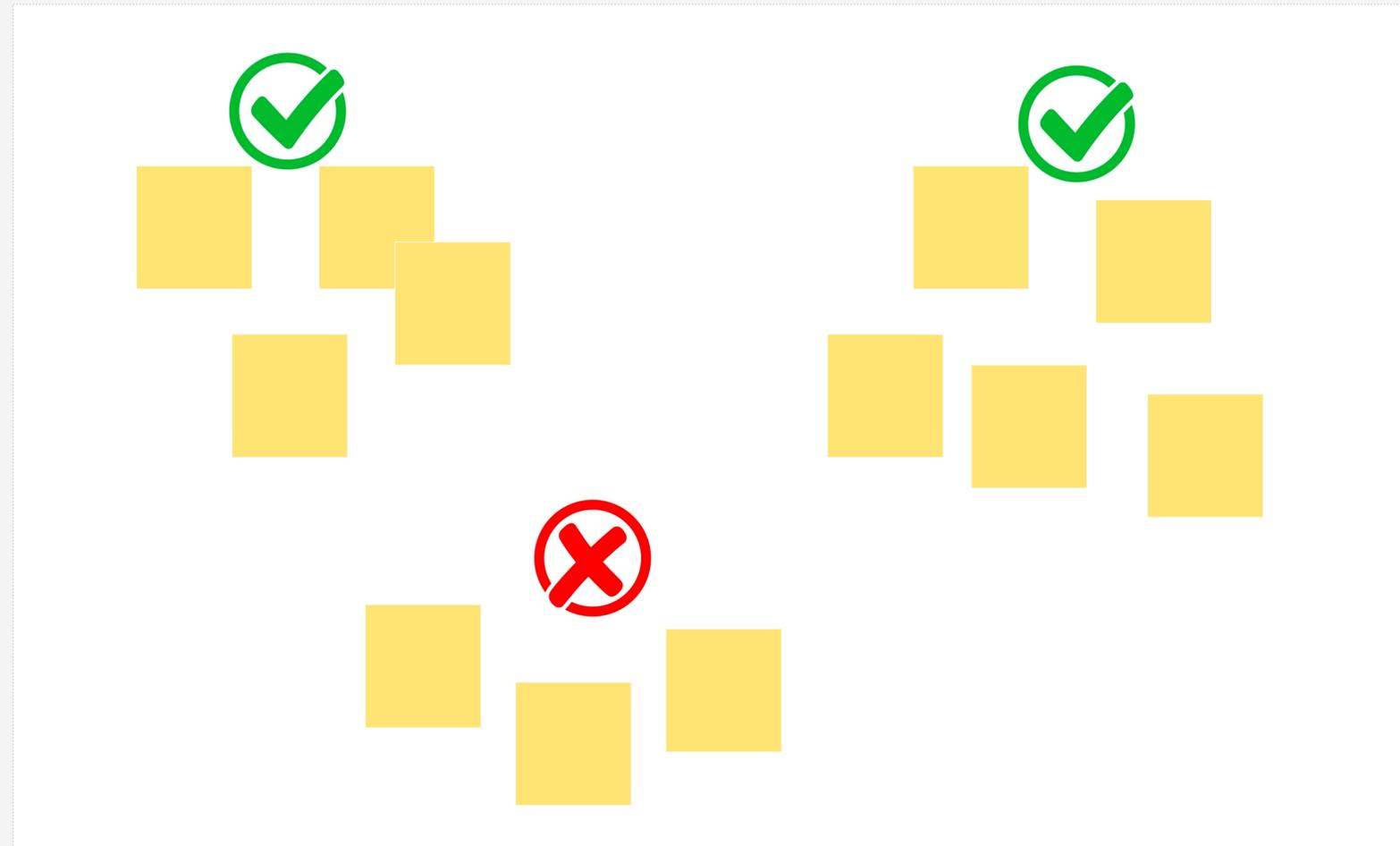
Take action on learnings

## 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?

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### 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

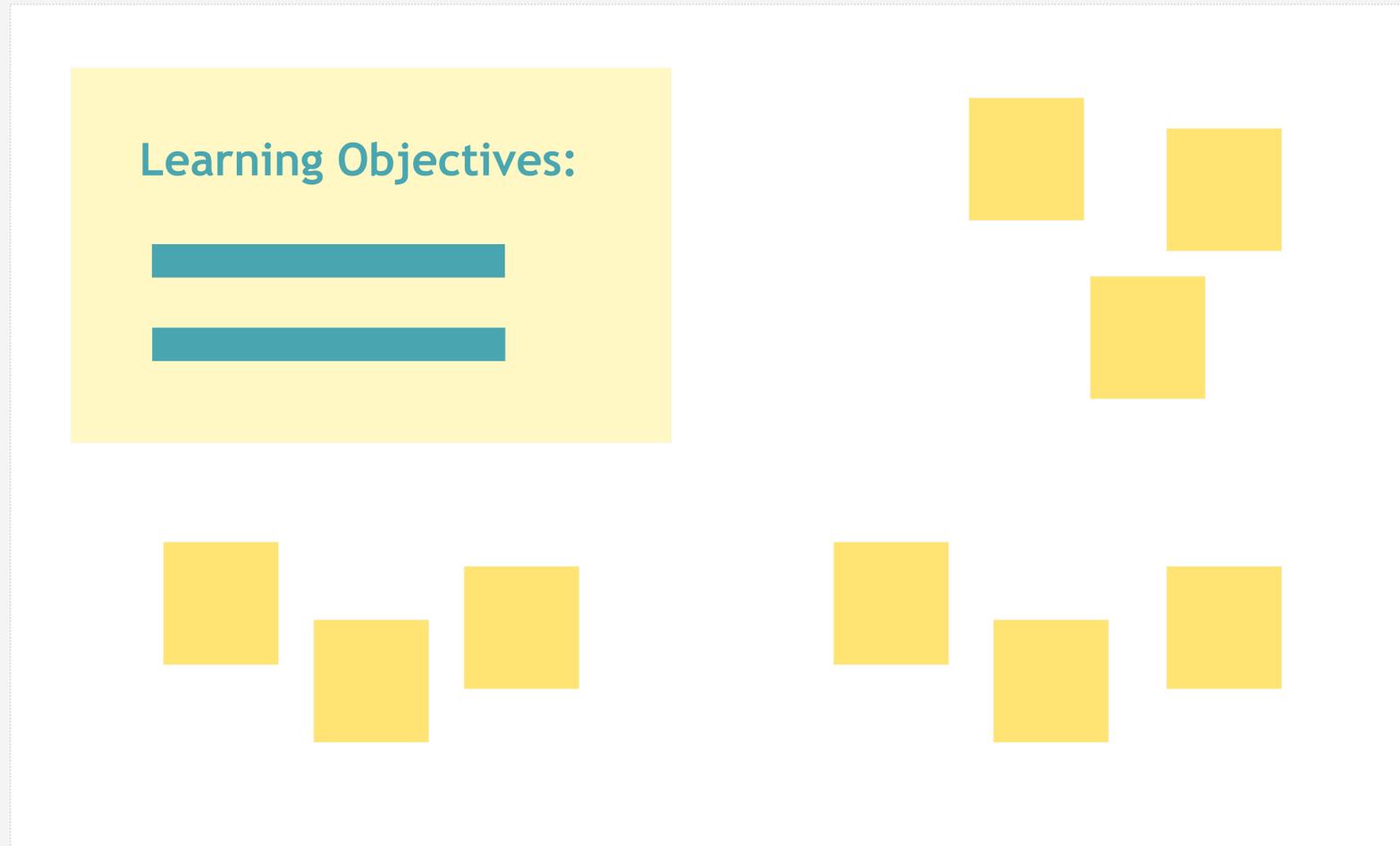
## DEBRIEF

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.

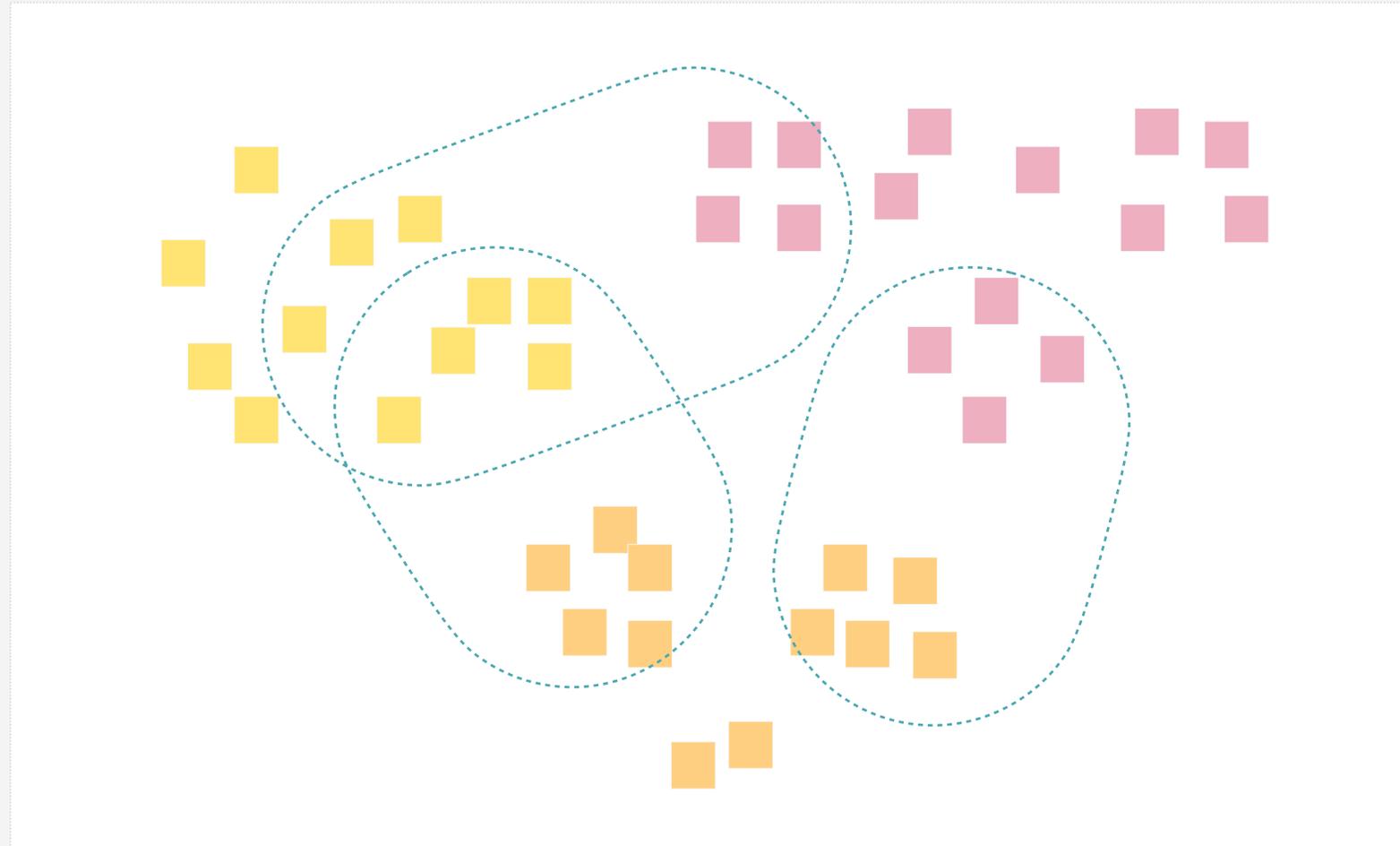


### CROSS-CASE ANALYSIS

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.



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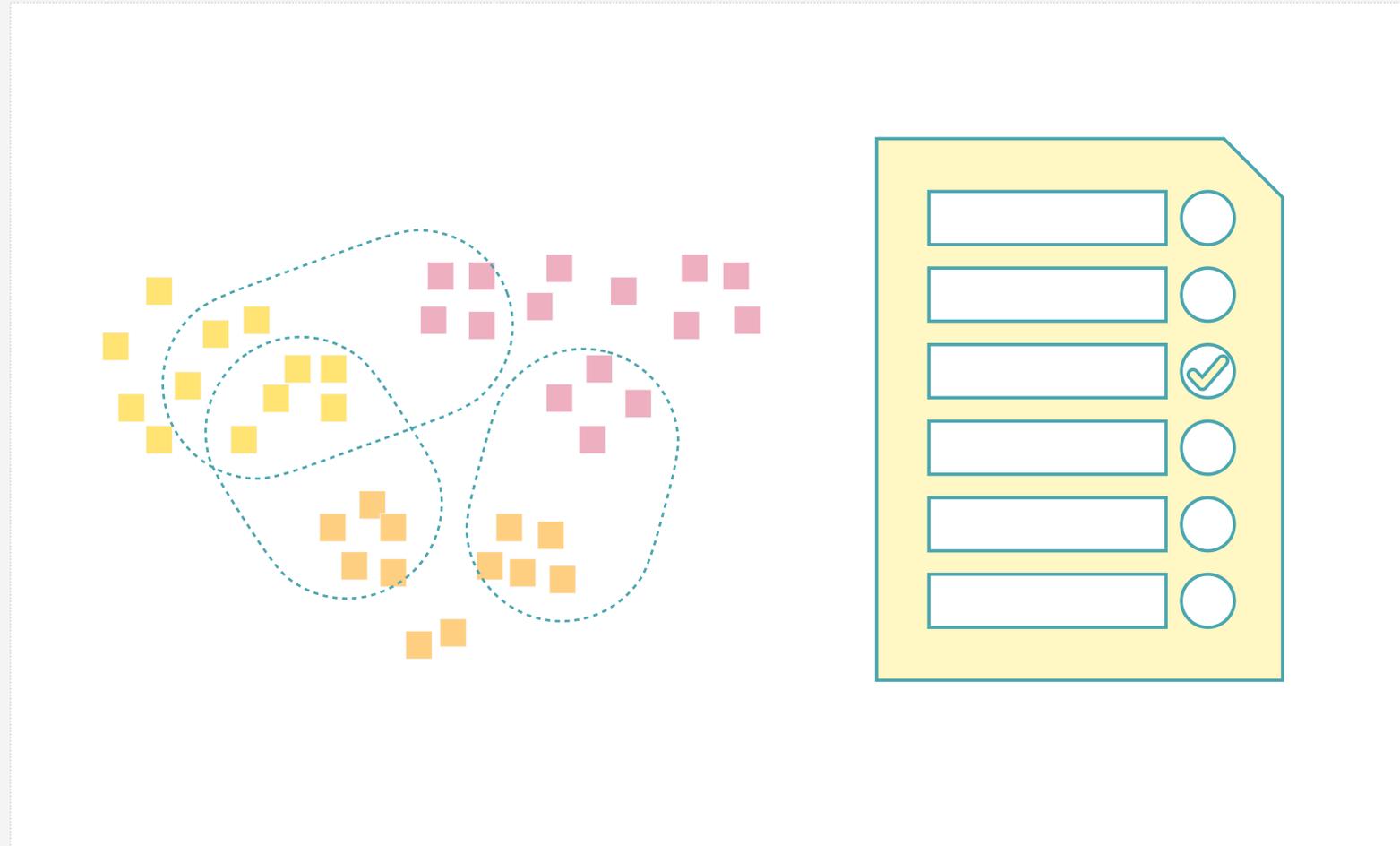
## Take action on learnings

### RECOMMENDATIONS

Discuss findings and their implications.

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

Follow-up on tasks.



Activity (5 minutes)

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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