

A Getting Started Checklist for User Researchers

Whether you're beginning a new job, position, or project—here are a few fundamental “to-do”s to mark done ASAP.

I recently started as the first, and only, user researcher at a wonderful startup based in Berlin. It wasn't my first role in user research, nor was it my first coming in as the sole user researcher. So, while I had the normal pre-jitters associated with starting a new position, I still felt confident.

I had a small list of items I really wanted to accomplish in the first three months, and left the rest up to experience and memory. I had never really made a "getting started checklist" for any of my past roles, so why should this be different?

Now, three months later, I certainly wish I had this list in front of me when I started. It would've provided some much-needed focus and guidance as I parsed through some unanticipated roadblocks. Amongst the hurdles: dealing with GDPR, working with a newly formed scrum team, and setting up an annual budget (without knowing much about the overall company budget).

Needless to say, I got sidetracked from my normal routine, and found myself a little lost. I was thrown directly into new teams, and I didn't have the time to properly talk to the people I needed to talk to, or get the clarity I needed to hit the ground running.

So I put together a checklist to help others when starting a new user research



Nikki Anderson

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Your First Two Weeks

1. Know the industry ins and outs.

Take the time to develop a deep understanding of the industry by researching market trends, competitors and field-specific jargon. This will put you in a good place to understand where your product fits, and how it could improve in the space. It should also improve your capacity to understand research participants and project stakeholders down the line.

If you're not sure where to start: downloading Forrester's industry reports or taking a look at Crunchbase should make for a good jumping-off point. If you have the time, and really want to understand the industry, you could conduct (or push the strategy team to conduct) a full SWOT analysis.

2. Do walkthroughs of the product by yourself and with other team members.

Within the first two weeks, record yourself walking through the product, noting anything that doesn't currently make sense. Treat this almost like a loose heuristic evaluation.

Pro Tip: This is often a task worth taking on with other team members. It's a great way to meet your colleagues, enrich your knowledge, and introduce them to your new role.

3. Make time to meet with the people you'll be working with most frequently—including stakeholders across other departments.

Sitting down to talk with your legal team might not be the first thing on your to-do list. But if you'll have new data management or GDPR rules to fall in line with—it'll make sure you're tackling those roadblocks from the get-go.

We recommend talking to:

- + Manager/Upper management
- + Designers
- + Developers
- + Product owners/Team leads
- + Legal
- + Customer support/Success
- + Sales
- + Marketing
- + Data science/Analysts

Each of the following departments will either interact with your research processes or research data. Knowing the needs they have, the resources at their disposal, and their existing perspectives and biases can be instrumental to starting effective research.

Treat your first month or so as your own research project by “interviewing” individuals around the company. Get to know their needs, challenges, goals, and frustrations. While it might feel slow at first, this will give you insight into how things get done, the ability to tailor and communicate your findings effectively, and most importantly, establish relationships early.

Autumn Schultz

Director of User Experience, Mac & Mia

4. Set your own user research OKRs.

Towards the end of the two weeks, after having spoken with as many internal stakeholders as possible, start writing your own user research objective key results (OKRs). These should focus on what you would like to accomplish in the first three months. For example: conducting a certain number of research sessions, creating the first set of personas, developing initial customer journey maps, or helping support teams reach their goals.

5. Review any previous user research.

If any user research has been done in the past, pour through it. There could be really important insights that were previously overlooked, or great places for you to start with as you embark on your user research journey.

If you want to jump into research more effectively, go find out what research has already been done. It may be archived well, or, more likely, it's inconsistently documented in a number of different storage systems. Familiarize yourself with what's there - even if you aren't able to digest (or understand!) the past work. At least, when a topic comes up, you'll be able to say: 'Yes, we have some previous research about that—let me see what we already know before we plan any new research.' Even if it is perfectly archived, your stakeholders might be unaware without your reminders. It takes human effort to create that tribal knowledge that helps a research team be more efficient and responsive.

Steve Portigal

Principal, Portigal Consulting

Your First Month

1. Set up a user research framework for the company.

This is one of the most difficult areas to get traction on, especially if you're starting from scratch.

A basic blueprint: use a UX maturity matrix to assess the current status, and then talk to internal stakeholders to understand what's happening now, and how research might fit in.

This is especially important when it comes to development cycles. Here are the different points worth assessing:

What are the current processes?

- + How do development teams work? Agile, sprints, lean, etc.
- + What is in each team's current backlog, and how do they plan?
- + What is working well? What needs to be changed?
- + How do teams prioritize tasks and projects?

Has there been user research in the past?

- + How was it done, and how was it used? What was the quality of the research?

How will research impact planning and feature development?

When joining a team as a new UXR, it's important to meet with stakeholders, and educate them on your role. Put together a mini-portfolio of your experience and examples of studies, as most non-research stakeholders don't know what can be accomplished through research. Then set up meetings with each stakeholder to gauge their current wants and unmet needs. This will 1) help you learn about each team's 'state of the union,' and 2) help develop a rapport with each team.

Sarah Kennedy

Senior UX Researcher, Answerlab

2. Educate the company on user research.

Once you've met enough with stakeholders to understand the current lay of the land, it's really important to build an accessible presentation and document on what user research means at that particular company. Personalize the talk to the particular situation the company is in. Within this presentation/document, it's worth including:

- + An introduction to user research, and what the user research process looks like at X company
- + What value user research brings to X company

- + What are the different methodologies that'll be used and the value of each method
- + How long each method takes (end-to-end)
- + What you need from each team
- + A one-pager on how to work with a user researcher

3. Set up an annual budget.

Even if you're not creating the annual budget, make sure you're aware of it and why certain budgeting decisions were made. When creating any user research budget, I always have two versions—one which is more “shoot for the stars” research and one that takes a more lean approach—with the hopes the company will agree to something in between. Planning this, it's worth thinking about:

- + What types of research will be done in the upcoming quarters
- + How often the research will be conducted
- + Necessary incentives for research participation by methodology
- + Different tools needed for each stage of the process
- + Surveying, recruitment, feedback (ie. Usabilla, HotJar), repository (ie. Airtable), remote interviewing (ie. dscout), etc.

4. Do a heuristic evaluation and/or competitive analysis.

This is probably the only real time you'll have to do desk research, so do as much as possible. One potential approach: start off with a heuristic evaluation (using Jakob Nielsen's 10 usability heuristics), so you can give the product teams some quick feedback before you head into usability testing. Then, validate or disprove the heuristic evaluation with usability tests and generative research. If there hasn't been competitive analysis done, or it's outdated, take the time to dive in. Make sure to share what you've found with the team, and to add in any new recommendations.

5. Create recruitment and session processes.

Once you finally have your feet underneath you, get ahead of some projects by creating an overarching recruitment survey and consent form. Run all of these by Legal and HR as soon as possible, so they can ensure everything is in working order. That way, as soon as projects come your way, you can start recruiting. Alongside this process, write up a document that has research participant best practices, including how others can and should participate in research sessions.

When a UX researcher first joins a new team, I suggest conducting some ‘aimless initial encounters.’ I feel that ‘aimless’ has negative connotations, but aimless is not the same as pointless. In this context, it simply refers to research conducted without any particular goal in mind. That can be a marvelous way to immerse yourself with your users—who may be a very different group compared to the users you served in your last company. So rather than spending your entire first week sitting at your desk, going through endless HR-related tasks, and bloated onboarding documents: leave the office for a bit. Go talk to a few of your users, to hear about their experiences and simply to learn just a little about them as people. This will inspire you in countless ways you can’t even imagine, and give you a confidence boost for your upcoming ‘proper’ research projects.

Noam Segal

Director of User Research, Wealthfront

6. Create guides or templates for user research.

This is one of the most valuable initiatives you can take in the first month. You are not only setting yourself up for success, but also priming others to be successful for user research. Start building out anything you can template-ize: user research plans, survey writing best practices, interviewing guides, or usability testing reports.

Having these in place will help you educate colleagues on user research processes, and will empower them to play around with the research elements on their own. Additionally, it can make your life much easier once you start fielding requests. When you’re backlogged, you can point colleagues to a basic research plan template, and ask them to start on some of the legwork.

Your first three months

1. Help teams prioritize and plan.

You're representing the voice of the customer, and you need to make sure that voice stays heard—especially when it comes to planning the future. Do your best to be a part of sprint planning sessions, and always attend forward-thinking sessions that help shape product roadmaps.

As a rookie program director at Goodreads, I was well prepared with slides and process diagrams that spoke about institutionalizing research to yield a magical ROI. Unfortunately, I didn't really account for how the culture talked about goals and decision making or any of the other processes that were already in place. It took many, many presentations to realize that I had to do a better job of situating research within the organization's mental model of work, goals and action.

So, one of the first things I'd recommend doing when you're new to an org, is to effectively rethink your research materials as part of your discovery process to better reflect the schema of the organization. It's a simple step, but shows that you've made the effort.

Karl Mendonca

Design Research & Strategy, Google

2. Start recruiting participants for initial studies.

It makes sense to be constantly recruiting for generative (discovery) research sessions, since they're usually ongoing and not dependent on teams or prototypes. And, if you sit in on planning sessions, try to get as ahead as possible on recruiting for usability tests. If you do all of the recruiting manually, it can take up to a week (sometimes two) to recruit participants.

3. Conduct your first user research sessions.

Finally! Sometimes you can get research underway within the first month, but sometimes it can take a while to get a project up and running—particularly if you're on a small team, or a new team.

4. Send over research summaries after each session and project

Send out summarized versions (with the top 3-5 highlights) of each user research session, including links to notes and video/audio clips. This gives stakeholders an opportunity to digest the research in whichever way makes the most sense for them.

When it comes to disseminating findings, the most important thing is that your audience actually consumes it. You have to figure out the best delivery method for your user and deliver it. I still do readouts, but I'll also give a weekly update via email—literally bullet points of the findings from the week before. I'm still do reports in slides, but I also have different Slack channels where I'll post insights.

Jen Romano-Bergstrom

Director of User Experience Research, Bridgewater Associates

5. Meet continuously with product owners and teams.

If your company isn't used to having a dedicated user researcher, you may have to do a bit of chasing and follow-up. In this case, set up consistent meetings with product owners, designers and relevant teams to ensure research needs are being met and to get ahead of any upcoming projects. Start by scheduling bi-weekly meetings with product owners, tech leads, and designers to specifically discuss what is needed over the next 2-4 weeks, and to figure out any next steps for previously conducted research.

6. Run synthesis sessions after project is complete (seven sessions for usability, after every six sessions for generative research).

After completing several usability or generative research sessions, run a half-day or full-day workshop to synthesize the research insights (start this after every seven sessions for usability, after every six sessions for generative research, and modify as you find useful). Include the entire team. For usability testing synthesis, this includes the product owner, tech lead, designer and developers. For generative research synthesis, this includes all product owners, tech leads and designers. The point of these sessions is to come to a shared understanding of the research that has been done up to that particular point, and to ensure insights are spread and don't simply stay with the researcher.

Continuously, as you grow

1. Consistently run brainstorming and ideation sessions with teams through design studios (at least once per quarter).

Run brainstorming and ideation sessions as often as possible; it gets people to think outside the box. Pick a particular problem a team is struggling with, or an area you could potentially innovate in. Then have people draw ideas, vote on the best plans, and then prototype the winner. It's essentially a design sprint in a day.

2. Host quarterly showcases of research projects.

Get creative with how you share research. Yes, there's value in well-prepared presentations, summaries, and reports. But there are other great ways to share key insights. A few example ideas:

- + Host a usability testing movie night (popcorn included), and show clips of users struggling with the product, or delighting in a feature.
- + Put together a mini-museum night, displaying personas, journey maps and insights for people to browse through with a glass of wine, and some cheese and crackers.

Try to do these once a quarter as a fun way to spread user research knowledge around the company.

3. Every month, send each team a focused summary of the research most relevant to their work.

At the end of every month, make it a point to share the top research insights from that month for that particular team. If they have already taken action on some of the insights, include the next most important ones. It's a gentle reminder of how valuable research is to their work, and it keeps your findings top-of-mind as they plan.

4. Teach product owners and designers how to do basic research.

This will keep you sane in times when you're suddenly slammed with research requests. Once you've educated colleagues on the importance of research and provided them with some templates/guides, take the time to teach them how to do basic user research. Specifically, usability tests. First, have them shadow several of your sessions. Then, go through creating the research plan and interview guide together. After, have them practice a usability test on internal stakeholders. Finally, set them free to research users, and observe.

The first thing you should do at a new company if you want to jump into research more effectively is to apply your skills inward and research your stakeholders. Go on a listening tour with folks around the company to uncover their goals, behaviors, and needs. What problems are they facing and how can research help them succeed? You could even consider sharing what you find with the team as your first deliverable. This internal research will help you prioritize and get a strong start.”

Lowell Reade

Senior UX Researcher, Duolingo

5. Identify research allies, and forge a strong relationship with your manager.

Having people in your corner who can help push projects forward, clear roadblocks, and stress the importance of your work can go a long way to ensuring more work gets done. Beyond that, they can provide guidance for your overarching career trajectory.

Checklist

1. First two weeks

- Know the industry ins and outs (market trends, competitors and field-specific jargon)
- Do walkthroughs of the product—by yourself and with other team members
- Make time to meet stakeholders
 - Manager/Upper management
 - Designers
 - Developers
 - Product owners/Squad leads
 - Legal
 - Customer support
 - Marketing
 - Data science/Analysts
- Review prior user research
- Set new user research OKRs

2. First month

- Develop user research frameworks
- Assess user research maturity using a UX maturity matrix
- Learn how teams work, and what their timelines look like
- Figure out how user research has been implemented in the past
- Educate your company on user research
- Propose, and be prepared to defend, an annual budget
- Run a heuristic evaluation and/or competitive analysis

- Develop recruitment and session processes
- Build any guides or templates for user research

3. First three months

- Insert yourself into team planning workflows/meetings
- Start recruiting participants for initial studies
- Conduct your first user research sessions
- Send over research summaries after each session and project
- Meet continuously with product owners and teams
- Run synthesis sessions after a project is complete

4. Continuously, as you grow

- Run brainstorming and ideation sessions with teams (once per quarter)
- Host quarterly showcases of research projects
- Send each team a team-focused summary of the research most relevant for them
- Teach product owners and designers how to do basic research
- Identify research allies, and forge a strong relationship with your manager

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