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Checklist: How to Drive Action Before and After You Conduct Research

Research leader Eniola Abioye offers tactical tips for architecting a project that will drive engagement and results in the long run.

You want your research to make an impact on your company's product and next steps—so where do you start? This checklist offers the core questions you need to ask, in addition to tips and approaches that will strengthen your research's outcomes.

Eniola Abioye is the founder of UX Outloud and a Lead UX Researcher at Meta. This checklist is based on a conversation with her, which you can watch in its entirety here.

Before the research begins

1. Establish a baseline

- [ ] What stage of the product development process is the product in currently?
- [ ] What is working well?
- [ ] What's not working well?
- [ ] What does our overall current state look like?
- [ ] What key metrics are we most interested in tracking?

→ Metrics your company is already tracking are usually the ones that the organization is most dedicated to changing.

→ Base your objectives around or where the product is going next.

2. Understand your timeline

- [ ] What does the product timeline look like?
- [ ] When are people are looking to launch?
- [ ] What are the politics are around the timing of your research?

→ If you can line up your timeline to when people are looking for value to be added, even if the research is not completely done, it make the conversation and shareout much more relevant for all parties.

3. Prepare relevant questions

→ Ask cross-functional partners to share questions beforehand.

→ They don't have to be neat and pretty and in a discussion guide yet, it just helps to have core questions that will influence people's work handy.

4. Gather hypotheses

What are your existing hypotheses? For example…

- [ ] What do we know now?
- [ ] How are we going to answer X question?
- [ ] If we couldn't do the research, what would that likely answer be?

5. Establish the intended impact

- [ ] After the research, what's next?
- [ ] What are we going to do with the results?
- [ ] If we get a positive response to X, what's the next step?
- [ ] If we get a negative response to X, what's the next step?
- [ ] What's the next step to the product that we might build in the future?

→ If people have a hard time answering these questions, that's a big sign that you need to take a step back and have a sprint meeting with relevant parties to align first.

→ The point where engagement is highest—when people are looking forward to something and don't know what's coming yet—is the most buy-in you're going to get. Be careful to set the intended impact beforehand.

6. Document everything for reference

→ As you develop insights, always refer back to your objectives and baseline metrics to ensure your findings are framed within the context of your original goals

→ Keep in mind, because you're already speaking the language that people are familiar with, you're already answering the questions and hitting upon the things that are most relevant to the business.

After you've wrapped your project

7. Name your constraints

→ For example, if you're under a time crunch and, for that reason, you choose an unmoderated research, a survey, or something for speed, it's important to name that in your readout if you want to gather buy-in from stakeholders.

8. Build empathy with stakeholders

- [ ] When it comes to our PMs, what do their journeys look like?
- [ ] What do their goals look like?
- [ ] What metrics are they held accountable for?
- [ ] How do they structure their product roadmaps?
- [ ] How do they move products forward and hit their goals?

→ Consider sharing video clips or sizzle reels to build empathy with stakeholders who aren't necessarily used to user research yet.

→ Leverage your existing data, whether it's implicit data or market data, as you go into your research.

→ Treat stakeholders like they're users. Think about how to build empathy with users—what they say, what they think, how they feel, what they do.

9. Diversify how you share information

→ Try iteration through trial and error.

→ Not everyone engages well in a big readout. Some people are more engaged with…

- One-on-one or two-on-one conversations
- Reading through findings on their own
- 20 or 30 minutes to present the insights that are most pertinent to a specific team

10. Work on building relationships

- Talk to folks one-on-one.
- If you have the chance to do immersive research, invite people you work closely with to come and immerse themselves in it.

11. Invite a wide array of people

- Everyone can be on the calendar invite. Cast a really wide net when you send out invitations.
- Cross-team and cross-org outreach prevents you from pigeonholing yourself into just sharing with your team.

12. Do a roadshow

- Try hopping into meetings, or even one-on-ones, ask questions, and share insights in smaller settings.
- Some people are more engaged in those spaces or engage differently with new information. Your partners don't just need to hear the insights, they need to digest them.
- Take the top five insights and recommendations on a roadshow and start there. Then you can send people the full readout.

13. Regroup and debrief with other researchers

- Go to research team meetings and think about what you're going to share, and if you're missing anything.
- Get advice and a chance to talk through it out loud with other researchers. Seed it with them to hear anything that's relevant to this research.
- If you're a solo researcher, or if you do feel siloed in your role, find online communities. For example, UX Outloud or People Nerds. Hop into a Slack group and connect with other folks who can help you bounce ideas.

14. Pull the most relevant points

- Have as many examples as possible so people can see, touch, and feel the insights.
- Pull in examples that are most relevant to the teams that you're talking to.
- Go back to that baseline of what's working well and who users are, and put together scenarios or even bring in case studies.

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