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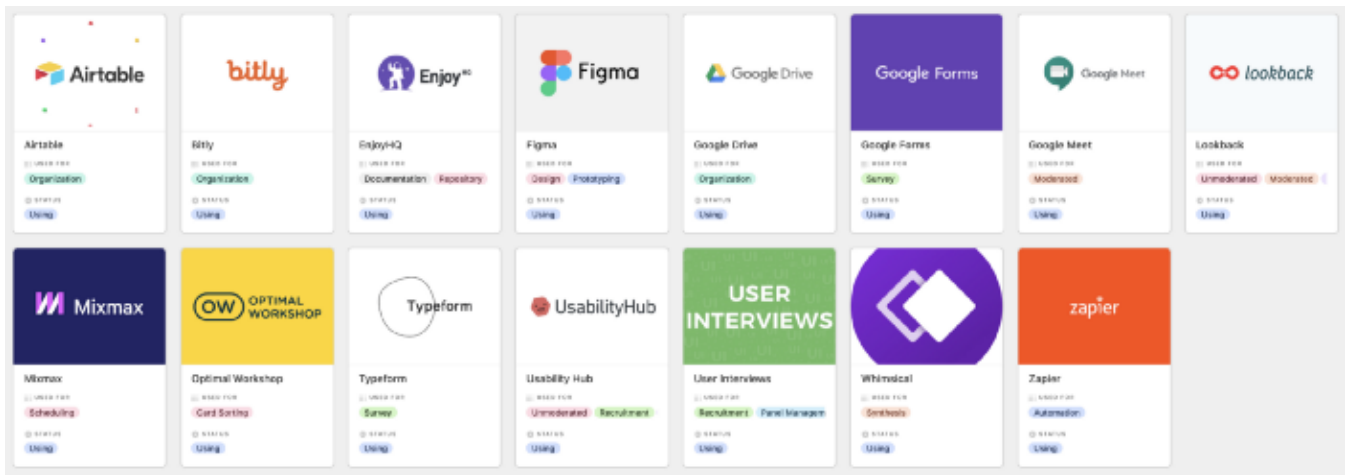
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Lindsay Boylan

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My UX Research toolbox as a team of one



Our UX Research Toolbox

I've written before about how creating and utilizing a research repository helps me run a research practice for a growing organization as a team of one. But there are many other tools I lean on, free and paid, to help keep research tasks automated and scalable.

I was inspired by Roy Opata Olende who wrote about Zapier's UX Research Tech Stack.

Here are some of the awesome tools I rely on to keep me sane and organized on a day-to-day basis:

I've broken them up into the following categories: **organization & automation, design, moderated research, unmoderated research, surveys, recruitment, panel management, & scheduling, and synthesis.**



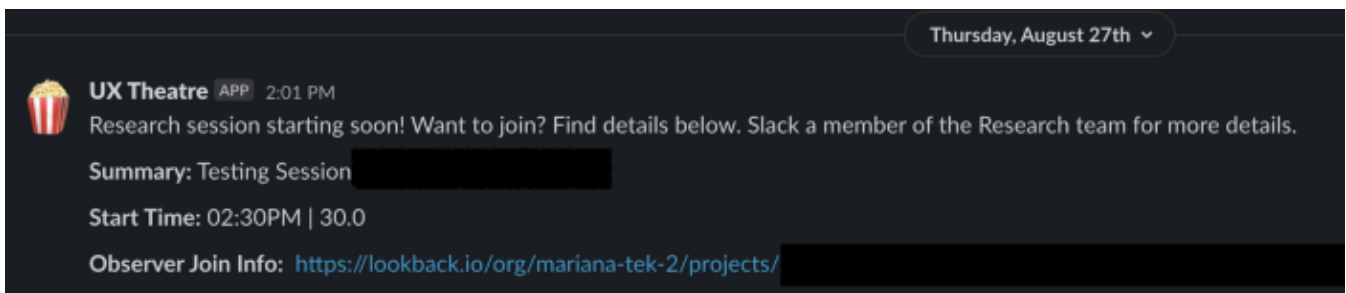
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I'm doing in many areas of the business and cross-brand.

Airtable

Currently, I use Airtable for: our research toolbox, sales feedback, budgeting, opt-ins for our research programs, and other miscellaneous stuff like that. In the past, I've used it for competitive analysis, our research panel, and even our research repository. I generally see how far I can push Airtable before opting for a more tailored solution.

Zapier



Research Session Zapier Bot

Two main uses here:

1. Sending a channel slack message when a research session is about to begin. I accomplish this by having a shared User Research calendar that all sessions are added to. A "UX Theatre" bot pings the research channel 30 minutes before with pertinent information and a join link. This is a great way to include other teams in on-going research without the nagging.
2. Capturing sales feedback. As I mentioned, we collect sales feedback via an Airtable form and ping a shared channel when it is submitted.

EnjoyHQ

See [here](#) for an in-depth look at how I use EnjoyHQ as a research repository.

Having a singular place for user feedback, especially as I begin to support multiple brands and teams, is essential to my sanity as a solo researcher.

Design




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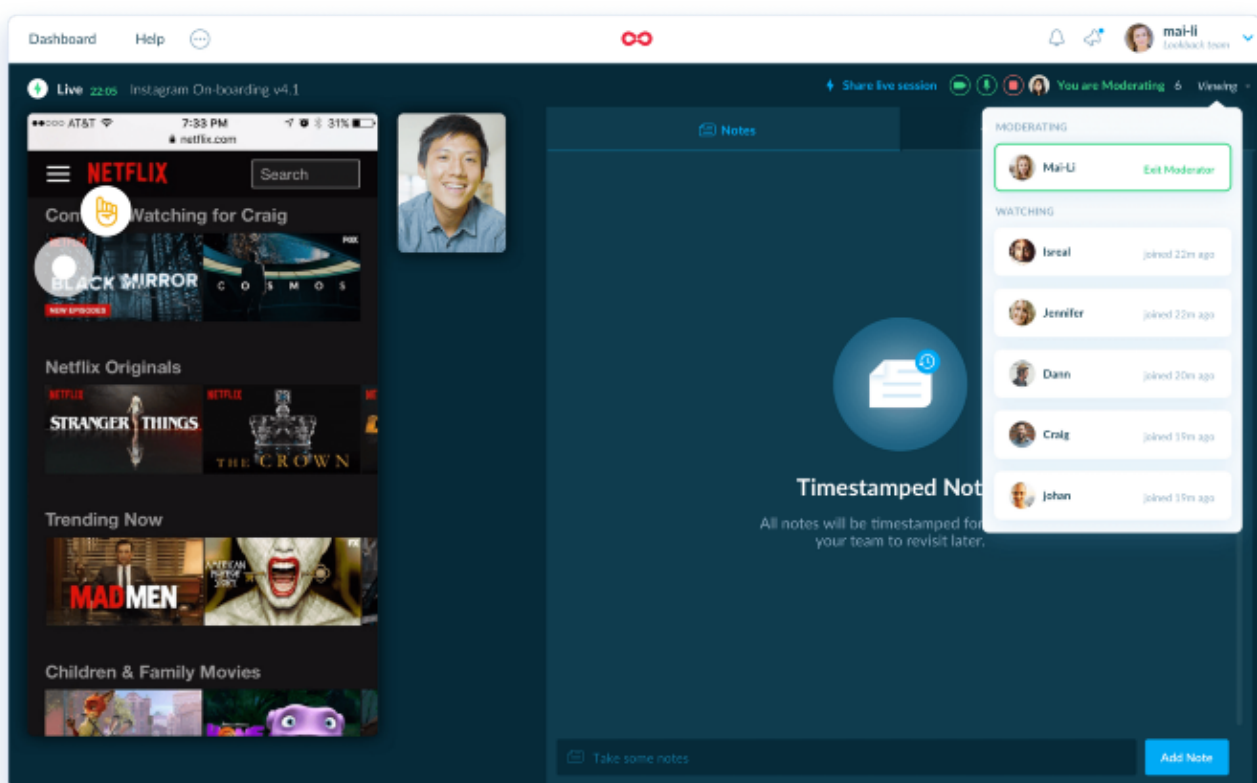
We're a Figma team. All prototyping is done in Figma, no matter which product we're testing. I love Figma for how collaborative it is and how easy it is to create live prototypes.

Moderated Research

The bulk of my “*doing research*.” Even before COVID-19, the majority of my interviews and usability tests were remote. It was important to me to have strong tooling in this area that was also within budget. Lookback and Google Meet meet these criteria.

Lookback

Ideally, all moderated sessions are stored in a Lookback project. I love how easy it is to write notes in-session, have observers join, and create highlights from sessions. It's also really simple to collaborate with other team members during and after a session.



Lookback Live Share (courtesy of Lookback)

Google Meet

If I'm having one-off calls, or Lookback isn't working for the participant, I use Google



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Unmoderated Research

We don't do a *ton* of unmoderated research, but we're working toward it. When we do conduct unmoderated sessions, we lean on Lookback, [Optimal Workshop](#), and [Usability Hub](#).

Lookback

Lookback has great functionality for unmoderated testing, whether it be “Self-Test” or “Tasks”

Our team loves watching the recordings of users working through a prototype on their own.

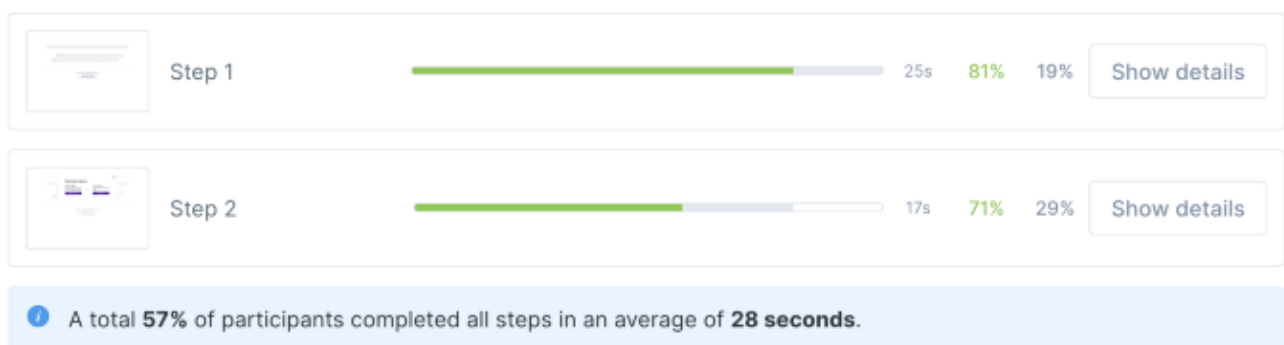
Optimal Workshop

I only use Optimal Workshop for card sorting right now. We've done card sorting for priority as well as information architecture exercises.

Usability Hub

For short navigation tests, preference testing, one-click tests, and design surveys, the team loves to use Usability Hub.

Usability Hub enables the design team to set up quick tests, recruit a target number of users, and have results back within the hour.



Usability Hub Results Example

Surveys

Another area I'm looking to beef up is our use of surveys. This is part of the toolbox that



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Typeform is our main survey tool. It's a great tool for simple surveys. We recently started using the integration with Intercom to deliver contextual surveys. My only need is for more robust analysis available in the results section.

Google Forms

When I need a single page form, I turn to Google Forms. It's included in our GSuite and a familiar software for most users.

Recruitment, Panel Management, & Scheduling

This was the first problem I tackled. I was spending a looooot of time tracking down participants, going back and forth on scheduling, and re-writing the same emails. The tools have changed a few times, but the objective remains these same: spend the least amount of man-hours coordinating sessions as possible. I accomplish this with a combo of [Mixmax](#) and [User Interviews](#).

Mixmax with Gmail

I use Mixmax for email templating, scheduling, and email tracking. Most project-based communication flows through User Interviews, but it's helpful to have another tool to create canned emails and to share my calendar.

User Interviews

I just started using User Interviews as our research panel. I love that it has recruitment, panel, calendar, auto-emails, and incentives all in one. 99% of our recruitment is done in-house, so I rely heavily on their opt-in form functionality. It's linked on our marketing site for easy circulation.



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USER INTERVIEWS

Hi Lindsay,

Congrats on the hard work! Here's a summary of your recent research:

27

sessions
completed

31

hours
saved

6

projects
worked on



92 people qualified for your studies. You completed 27 sessions, so lots more folks to talk to if you need them.

Summary of User Interviews activity in the last month

Synthesis

In the “olden days” (pre-March 2020), there were lots of stickies involved here. I’m embracing remote synthesis with Whimsical as a way to better document and share findings.

Whimsical

I’ve used a lot of digital whiteboard tools in the past. The design team loves Whimsical for mind mapping, prototyping, flowcharts, and more. It’s easy for the team to collaborate on and helps keep all research and design work in the same space.

My goal with creating this toolbox is to free up as much time as possible to *doing research* and *creating a research strategy for my company*. As a team of one, it's often challenging to stay organized and maximize the hours you have each week. The tools



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