

[Open in app](#)[Get started](#)

Published in UX Collective

This is your **last** free member-only story this month.

[Sign up for Medium and get an extra one](#)



Oriol Banus

[Follow](#)Sep 14, 2020 · 5 min read ★ · [Listen](#)

Save



Basic guide for UX Research planning

Learn a 4 steps process to conduct user research, starting from formulating research questions to finish presenting findings to stakeholders. This guide's aim is to help you shape your own research framework.



What is user research?

User research's sacred mission is to observe the user to figure out how people interpret



[Open in app](#)[Get started](#)

There is a collection of methods or techniques conducted before or during design that will help create a product that is usable, successful, and useful for the user to others that are frustrating for all. After the product is launched, user research will help to improve the experience or change the strategy to build something new.

As Mike Kuniaysky quotes in his book “Observing the user experience”, user research is:

“The process of understanding the impact of design on an audience.”

. . .

How to approach user research

Every researcher or product team creates their own user research framework that better fits the company structure. Usually, these frameworks are flexible as each project has a different scope, timing and budget.

One of my favourite research frameworks is “The Spiral” created by Erin Sanders. It has five distinct steps, which you go through when gathering information from people to fill a gap in your knowledge. It is built to be replicable and can fit into any part of the design process. It is used to help designers answer questions and overcome obstacles when trying to understand what direction to take when creating or moving a design-forward.

Inspired by this framework, I created my 4 steps method to understand the user:

1. Define Research Goals and Questions

What are the questions we are trying to answer? What is the knowledge we need to gain to understand the user? We need to formulate and answer the question, so we know what we need to discover and learn during the research.

During this stage, we need to define questions to validate or not the hypothesis that emanates from the team’s assumptions. What do we think we already know? What do



[Open in app](#)[Get started](#)

learn the attitudes, behaviours and needs of the users.

2. Research Plan (and research methods)

A research plan helps guide the entire process. These address how we plan to fill the gaps in our knowledge and helps yourself to organise as well as giving visibility to stakeholders and team members. This document is a live diary of the project and ensures that everyone is on the same page.

- Objectives and research questions
- Recruitment and how to recruit
- Research methods
- Documentation: screeners and scripts.
- Budget
- Timelines and milestones.
- Insights and conclusions.

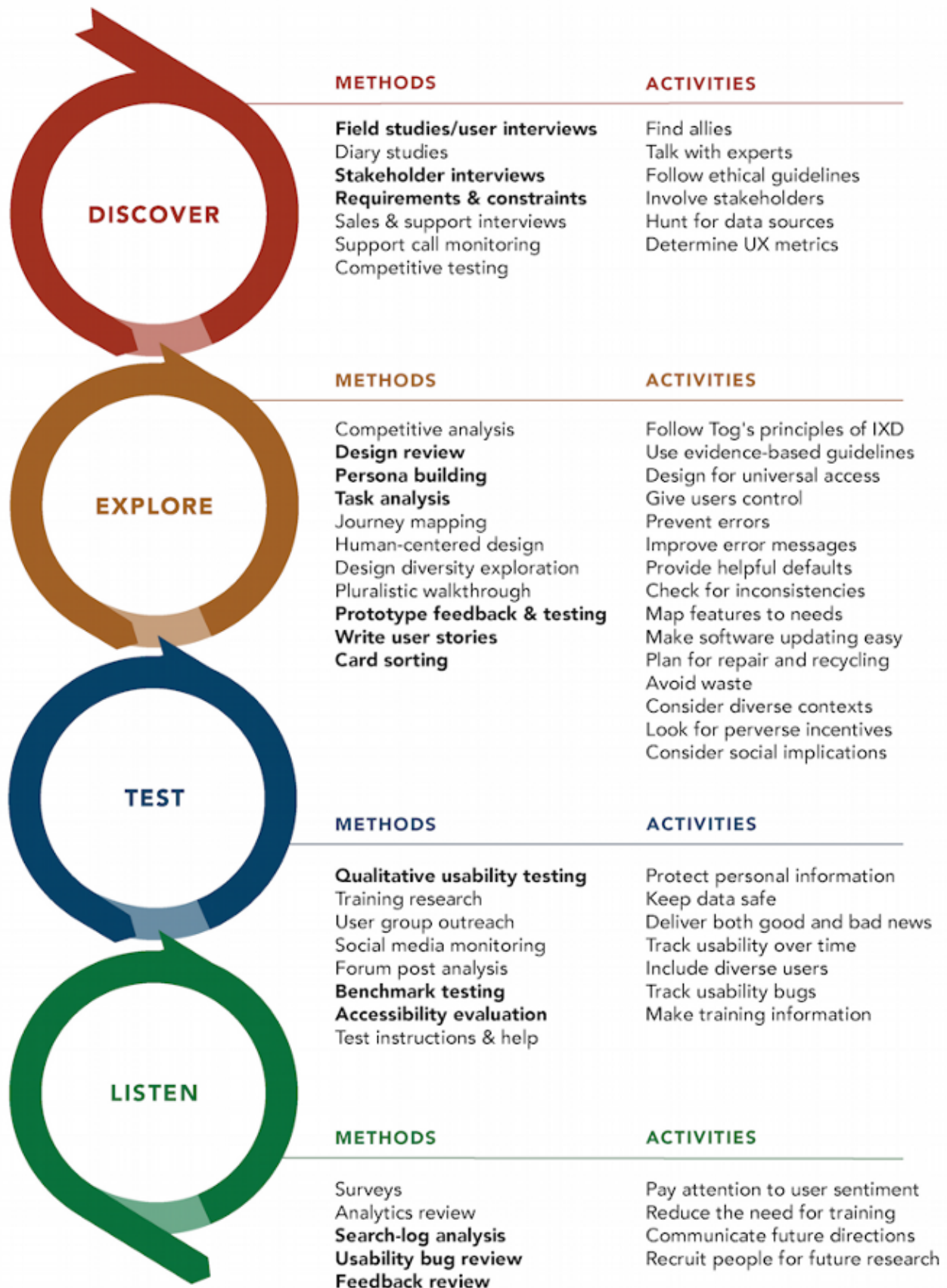
This is your source of truth for what you're doing and what's happening with a particular research project, and this ensures that everyone is on the same page. There are different templates out there you can use, but I like this one presented by [Taylor Nguyen](#) on her article "[User research plan template](#)". Browse, explore and create your own template to document all the process.

When creating your plan you have to pick the research techniques you want to apply to your investigation. This can be overwhelming sometimes, but here you can see an overview of the UX methods and activities available in various project stages:




[Open in app](#)
[Get started](#)

UX ACTIVITIES IN THE PRODUCT & SERVICE DESIGN CYCLE



[Open in app](#)[Get started](#)Image from [Nielsen Norman Group](#)

3. Conduct user research methods

Time to find answers. You have everything ready, objectives are noted, research questions formulated and the research methods picked. This is the moment where you start conducting the research to gather data to answer all the questions previously formulated.

Find more about research methods on my article [“A guide to top UX Research methods”](#).

Two important notes here:

- **Do a pilot:** It's not easy to nail it at first, so you better rehearse to find if you have the right questions or something else is missing. Piloting your studies (whether interviews, surveys, usability tests, card sorts etc etc) will help you identify whether you're asking the right questions, using the right methods, and help you catch mistakes.
- **Recruitment:** Start the process of recruiting a week before. Recruitment can take a considerable amount of time to plan depending on a number of factors including your user group.

4. Results & Insights

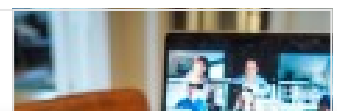
This is a crucial time for you as a researcher to make the user's voice be heard by the stakeholders. You have work hard finding the user's needs and now is showtime.

Answer the research questions, and prove or disprove our hypotheses.

“In synthesis, you're trying to find meaning in your data,” says Serota.

You can learn more of how to present UX research results here:

Top tips for presenting UX results to executives | BetterUX Blog



[Open in app](#)[Get started](#)

• • •

The best way of learning is actually practicing user research. You can go and read all kind of books, watch videos or do tutorials, but the best way for you to learn is practicing. Explore and consider this framework as a base to define your own research plan that fits your design approach and the business needs of the company you work at. It can be scary at first, but it gets simpler and as the quote says “practice makes perfection”.

• • •

References

[A guide to top UX Research methods](#)

[Empathic design: Research strategies](#)

[When to use which user-experience research methods](#)

[Rapid UX research framework](#)

[Skip user research unless you're doing it right seriously](#)

• • •

Thank you for reading! I'm Oriol, a product designer. I solve problems through research and design ✨. Feel free to reach me via [LinkedIn](#) or my portfolio [website](#).



[Open in app](#)[Get started](#)

A weekly, ad-free newsletter that helps designers stay in the know, be productive, and think more critically about their work. [Take a look.](#)

[Get this newsletter](#)