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Remote UX Work: Guidelines and Resources

Summary: Even though in-person UX sessions are typically ideal, sometimes budget or travel restrictions necessitate remote UX work. This article presents guidelines for remote user research, UX workshops or presentations, and collaboration.

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Topics:
[Remote UX Work](#), [Ideation](#), [UX Teams](#), [Design Process](#)

When it comes to conducting user research, presenting UX work, or collaborating with other team members or stakeholders, we know that face-to-face interaction can have a lot of advantages: It's easier for participants to build trust and rapport in person than remotely, and attendees are likely to pay attention and be cooperative for longer.

However, we can't always conduct UX activities face to face. Sometimes, budget or time limitations, travel restrictions, or other unforeseen circumstances make in-person sessions impossible, unaffordable, or even unsafe. In these cases, remote sessions can offer immense value in maintaining the flow of insights and ideas.

Additionally, remote UX sessions offer many benefits that in-person sessions do not, regardless of the circumstances:

- **Flexibility in project funds:** Remote sessions lower travel expenses. This reduction might free up monetary resources for other valuable activities, such as recruiting additional research participants, doing extra rounds of research, or providing deeper analysis.
- **Increased inclusiveness:** Location and space are no longer limitations with remote sessions. For user research, this means access to a more diverse group of participants to whom you might not have access locally. For [UX workshops](#) and presentations, it means nonlocal colleagues can easily attend and more people in general can participate. (However, it doesn't mean that *everyone* should attend. Continue to limit attendance to relevant roles.)
- **Attendee convenience:** Participants might be more willing and able to attend remote sessions that don't require them to leave their office or home. They'll save the commute time (whether that's a couple of hours driving to a research facility or a few days traveling to a workshop in another city), and they can participate from the comfort of their own space. Especially with [remote, unmoderated research](#) or remote, asynchronous [ideation](#), participants can complete tasks on their own schedule.

Given these advantages, remote UX work can be a useful solution to many project challenges. This article provides guidelines and resources for transitioning 3 types of common UX activities to the digital sphere:

1. Conducting user research
2. Facilitating and presenting
3. Collaborating and brainstorming

Remote User Research

Generally, we recommend in-person [usability testing](#) and [user interviews](#) whenever possible. It's simply easier to catch and read participant body language and recognize which [breaks in dialogue](#) are appropriate times to probe or ask followup questions. However, remote testing is preferable to no testing at all, and remote user research can accelerate insights on tight timelines and budgets.

Tips for Remote User Research

- **Practice using the technology:** Even if you are familiar with the tool you'll be using, do a practice run with a colleague or friend. Particularly for remote, unmoderated sessions, make sure instructions for signing in and completing tasks are clear. Plan initial [pilot testing](#) with a few users so you can adjust technology and other factors as needed, before launching the study.
- **Recruit additional users:** With remote, unmoderated research, you can't help if a handful of [remote interviews](#) or usability tests are rendered useless due to unsolvable surprise technology issues on the user's end, such as firewalls. Recruit more users than you think you need in order to create a proactive safety net.
- **Plan for technology challenges:** Technology mishaps will occur. Assume technology challenges will happen, and don't panic when they do. Have a backup plan ready, such as a phone dial-in in addition to a web link for user interviews and, whenever possible, use a platform that doesn't require participants to download anything to join the session.
- **Provide instructions:** If the technology tool is complex or users will be setting it up and using it over an extended time, create documentation specific to the features you'll ask them to use. For example, for our digital [diary studies](#) using shared Evernote notebooks, we provide detailed documentation for participants on how to set up and use the platform.
- **Adjust consent forms:** If you'll be recording the participant's face, voice, or screen while conducting a remote session, update your consent form to ask for explicit permission for each of these items. If you plan on asking additional researchers to join the session or if you'll share recordings among the team during postsession analysis, outline and ask for consent on these items, as well.

Tools for Remote User Research

Consider tools that match the needs of your study, and, as always, match appropriate research methods to your study goals. Remote research is certainly better than no research at all; however, invalid insights are not helpful in any

situation.

- **Remote, unmoderated sessions:** Tools such as Lookback, dscout, and Userbrain help capture qualitative insights from video recordings and think-aloud narration from users. Tools such as Konzept App and Maze capture quantitative metrics such as time spent and success rate. Many platforms have both qualitative and quantitative capabilities, such as UserZoom and UserTesting. (Be sure to check whether these tools work well with mobile applications, as needed.)
- **Remote, moderated sessions:** Any video conferencing platform that has screensharing, call recording and the ability to schedule meetings in advance is likely to meet the needs of most teams. Zoom, GoToMeeting, and Google Hangouts Meet are frequently used. (Remember to consider platforms that do not require participants to download anything to join the meeting.)

NN/g Articles About Remote User Research

We've written previously about when and how to conduct both moderated and unmoderated remote usability tests, as well as put together a guide for selecting tools for remote usability testing:

- [Remote Usability Tests: Moderated and Unmoderated](#)
- [Remote Moderated Usability Tests: How and Why to Do Them](#)
- [Tools for Unmoderated Usability Testing](#)
- [Unmoderated User Tests: How and Why to Do Them](#)

Remote Facilitating and Presenting

Remote facilitating and presenting can feel especially daunting. Most of the challenges of in-person workshop facilitation and presentation are simply exacerbated by remote scenarios; however the right tool selection and additional planning can mitigate many of these challenges.

Tips for Remote Facilitating and Presenting

- **Turn on your camera:** Showing your face can help establish rapport and trust with participants and help them see you as a real person, not just a voice. This

sense of connection can be critical when you are seeking buy-in or attempting to guide a group to consensus about UX or design decisions.

- **Enable connection:** Plan for additional time in the agenda for relationship building with a digital [icebreaker](#), especially if participants do not know each other. For virtual UX workshops, help participants engage with each other throughout the session by encouraging everyone to respond to each other using people's names and making use of breakout groups, polling, and chat.
- **Create ground rules:** At the beginning of the session, share ground rules that will help mitigate the inevitable communication challenges of digital meetings. These rules might include asking participants to agree to state their names before speaking, not speak over anyone, and avoid multitasking.
- **Assign homework:** Provide participants short homework assignments that allow them to practice using the technology before the session. For example, if you plan on using a virtual whiteboard application during a [design workshop](#), you could ask participants to create an artifact to introduce themselves using that same application before the workshop, and have them share it as an icebreaker at the beginning of the workshop.
- **Adapt the structure:** Resist the urge to take an existing [workshop structure](#) presentation format and simply reuse it for a remote session. Think thoughtfully about how to transition activities, slides, and content to a virtual format. This includes modifying [workshop agendas](#) and presentation timelines to accommodate for technology inconveniences and additional activities that allow participants to connect and engage.

Tools for Remote Facilitating and Presenting

- **Presenting UX work:** Zoom, GoToMeeting, and Google Hangouts Meet are a few of the many reliable video-conferencing platforms. When selecting a platform, consider which, if any, specific features you'll need (e.g., breakout rooms, autorecord, gallery view), and be mindful of any limitations of free versions. (For example, the free version of Zoom caps meetings with more than two attendees at 40 minutes—not something you'd want to realize for the first time in the middle of a presentation about your latest design recommendations!)

- **Generative workshop activities:** If your goal is to generate a large amount of ideas or other contributions, use tools that make it easy to quickly add an item to a list or virtual whiteboard. Google Draw, Microsoft Visio, Sketch, MURAL, and Miro are a few examples that might work for this context.
- **Evaluative workshop activities:** If your goal is to group or prioritize ideas or contributions, consider platforms with built-in prioritization matrices such as MURAL or Miro. Alternatively, use survey tools such as SurveyMonkey or CrowdSignal, or live polling apps such as Poll Everywhere that you can insert directly into your slides.

A remote, internal meeting among NN/g colleagues using gallery view on Zoom. Gallery view allows participants to see everyone in the virtual meeting at the same time, which is useful for reading body language in small groups. (This was a remote meeting about how to transform our live conferences to virtual events in light of COVID-19, which may explain our glum facial expressions, but the outcome of the meeting was good!)

NN/g Articles About Remote Facilitating and Presenting

See our previous articles for specific guidelines on tool selection for remote UX workshops, remote journey-mapping workshops, and overall tips for presenting UX work remotely:

- [Tools for Remote UX Workshops](https://www.nngroup.com/articles/remote-ux/)

- [Remote Customer Journey Mapping](#)
- [5 Strategies for Presenting UX Remotely](#)

Remote Collaboration and Brainstorming

Using digital tools can be an effective way for teams who are spread across locations or time zones to collaborate and brainstorm. What's more, remote ideation actually opens up new and different options for generating group ideas, making it a useful method even for teams who could otherwise meet in the same physical space.

Tips for Remote Collaboration and Brainstorming

- **Consider both synchronous and asynchronous methods:** You might be able to shorten the length of virtual meetings by mixing [asynchronous and synchronous activities](#). For example, you could ask participants to contribute ideas to a shared document such as a prestructured Trello board or Google Sheets document over an assigned period of time, and then meet remotely to discuss or [rank generated ideas](#).
- **Enable mutual participation:** Open, free-for-all discussion in virtual meetings is challenging. Some participants might get lost behind the screen, and others might take over the conversation. Think of ways to structure discussion with activities that require participation by everyone in the session (e.g., giving participants contribution quotas for idea generation).
- **Respect schedules:** If team members are geographically distributed, be respectful of time zones and schedules. Using a meeting poll tool such as Doodle that automatically personalizes time zones and allows individuals to specify when they are available can take some of the operational headache out of finding a time that works for everyone.
- **Keep tools simple:** More often than not, you don't need anything new or complex to collaborate remotely. Think creatively about how you can make use of tools within the team's existing toolkit that everyone is familiar with. Using columns in Google Sheets for [affinity diagramming](#), for example, might be less intimidating for teams than learning a new virtual whiteboarding tool.

Tools for Remote Collaboration and Brainstorming

- **Synchronous, remote collaboration:** For teams seeking a shared virtual space, the options are vast. Any shared Google document (e.g., Sheets, Slides, Drawings) can act as a virtual “room,” as can virtual whiteboarding tools such as MURAL or Miro.
- **Asynchronous, remote collaboration:** Make use of tools that allow team members to freely post ideas as they think of them, while still providing some level of structure and organization, such as a dedicated Slack channel or Trello board.

NN/g Articles About Remote Collaboration and Brainstorming

We’ve previously shared guidelines for both synchronous and asynchronous, remote ideation, as well as our own experience collaborating as a 100%-remote company:

- [Remote Ideation: Synchronous and Asynchronous](#) (also: [video](#))
- [Remote UX Work: The NN/g Case Study](#)

General Guidelines for Remote UX Work

Because [NN/g is a 100%-remote company](#), we use digital tools frequently for all kinds of virtual UX work. Here are some of our own internal strategies for planning and conducting remote UX activities.

- **Practice, practice, practice:** Did I mention practice? Get familiar with the technology before logging in to present your research recommendations or lead a remote brainstorming session. Even if you are familiar with the tool you’ll be using, host a practice session with team members or friends to run through the features you plan on using. At NN/g, we sign up for practice sessions with colleagues in order to familiarize ourselves with new digital-tool features, such as the video breakout rooms in Zoom.
- **Carefully consider tools:** While MURAL or Miro are excellent tools for mapping activities and general collaboration that we as designers or researchers may already be familiar with, other colleagues might find them

intimidating or view them as a “design-team tool.” Think creatively: Content for [journey maps](#) or [service blueprints](#) can be captured in a shared Google Sheets template. Activities that rely heavily on sticky notes such as postups and affinity diagramming can be completed with free digital tools such as stickies.io or even Google Drawings.

- **Keep it simple:** Tools should be few and familiar if you are transitioning traditionally physical activities to a digital format. Don’t plan on having participants switch back and forth between several tools. (There’s already enough complexity to manage.) And eliminate potential technical headaches by using technology that does not have tons of features that you won’t use anyway.
- **Stick to the known:** The general advice for any tool selection is always: use the tools your team already knows, to avoid wasting time on the inevitable snafus when using something new. However, this rule is most important when working on time-critical or super-important projects. From time to time, when your people are less stressed, it’s nice to try out some of the many new tools that constantly appear.
- **Ask for help:** Solicit technical assistance, especially if you will be leading a complex remote workshop or conducting a remote UX-research session for the first time. A colleague serving as a technical assistant during the session can manage questions about the technology, help make observations about where and how to improve digital activities, and take part in [retrospectives](#) with the facilitator so that delivery can continue to improve over time.

Conclusion

Planning remote UX activities can feel ambitious and demanding, but careful tool selection, contingency planning, and proactive measures help mitigate potential oversights and challenges. And, in many cases, the benefits of remote UX work, such as decreased expenses, increased inclusiveness and convenience, and abundance of platform options, might even outweigh those additional challenges. Even if it’s not a necessity for your team, consider when remote user research, virtual UX workshops, and remote collaboration and brainstorming might introduce added value to your projects and workflow.

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