Project Research and Analysis checklist

Write out a research plan

- **Define the questions you will ask**
    - Review introduction to project by stakeholders
    - Map out assumed user journey
    - Explore questions, ideas and comments around each stage of the journey
    - Share your board with team members and stakeholders, and ask them if there's anything they can contribute
    - Once completed, write out the questions you need to ask, and put them in your shared workspace as a continually evolving document
- **Work out who you will speak to**
    - Work out how many people you will need to speak to, based upon the complexity and breadth of the project
    - Arrange with stakeholders for the right number of people, from each different role or geographical area
    - Always leave a little extra time, just in case you need to speak to anyone else
- **Work out how you're going to speak to them**
    - In-person interviews: the ideal way, if possible
    - Video interviews: a useful way of speaking with someone if you cannot meet up in person
    - Audio interviews: only a last resort if the two above aren't possible
    - Keep interviews on a one-to-one basis. If others wish to take part, ask them to just listen in and ask questions at the end, or, if you wish to take part, ask them if they wish to join another session, where they can share their views on their own
    - Try to ensure that you take recordings of the sessions that you can review later, but always check with the users that they are happy being recorded, and it's just for your own purposes

Getting the most out of your interviews

- **Put the user at ease**
    - Try to turn the interview into a conversation, not an interrogation
    - Put yourself at ease, just by focussing on the interview, instead of trying to do other things like take notes at the same time
    - Try following a structure such as the one below, so that subjects are related, and the user can think and expound upon their answers in a relaxed way:
        - Start by asking them to introduce themselves, and what they do in the context of the project, what their main responsibilities and goals are, and what gets in the way of achieving them.
        - Ask them to describe the end to end process that they go through to achieve those goals, like the user journey you previously outlined. Explore each step, and ask them what they do before they begin the process, and after they finish it.
        - If they say something interesting that you haven't considered, feel free to ask extra unscripted questions to explore that subject, and look for opportunities

that might outline delights and extra value for the project. If you get lost, just go back to your list of questions.
        - Ask them what their frustrations are, and ways in which they would improve the situation, just don't get overly caught up on working out solutions quite yet.
        - Finish by checking through your list, and asking any question which you have missed out. Ask them if they have any questions, thank them for their time, and always leave open the opportunity for getting back in touch later if there are further questions to ask.
- **Involve your team**
    - Ask team members and stakeholders if they would like to listen in to the interviews
    - Arrange for them to be able to hear the conversation, but not interrupt.
        - Make sure you are the only person asking questions
        - Put everyone else apart from you and the user on mute, or ask the team beforehand not to interrupt
        - Have an open text chat channel open, so that the team and stakeholders can ask questions on there, which you can see and place into the interview, when you are ready

Post-interview

- **Summarise the findings from the interviews**
    - Try and write up interviews as soon as possible after they happen
        - You can recall details more easily
        - You can use the time between interviews to do the work
        - It can help inform whether you have enough responses on a given question, and whether you need to adjust your list of questions
    - Listen to the interviews, and write out your observations in a bullet pointed list, one observation per bullet point
    - Once you have a list of observations for each interview, summarise all the findings by analysing the common themes between each interview
        - Make a new list, find a common observation from the interviews, and then add it to the first butler point
        - Make a note of who shares this opinion by adding their initials, or a designated number, next to them
- **Create personas from the findings**
    - Create a one-page poster, describing common opinions from everyone you have spoken to in that user type
    - Include details that are relevant to the project, such as:
        - Personal details, such as age and location
        - A quote, summarising their perspective on the problem
        - A description, giving some backstory on who they are and what they do
        - A list of goals that they are trying to achieve
        - A list of things that challenge them in achieving their aims
        - Metrics to show how important certain characteristics are to them
    - Share the personas in your findings with team members, and make sure that they are prominently displayed, either on office walls, or a shared workspace.

Analysing the research findings

- **Present your findings to your team and stakeholders**
    - This helps inform them about what you have found, and helps influence what they build to solve the problem
- **Explore the problem with your team, using your findings to draw a connection between user needs and the solution**
    - Try using exercises such as:
        - Filling out **User Empathy Maps**, to explore the perspective of the user. Ask them to present their work back to the team for discussion
        - Putting together **User Journeys**, to help explore the paths that users take through a process, and raise questions, problems and observations throughout. Get teams to work on a User Journey for each persona, and present them back to the wider group for discussion.
        - Hold an **Ideation** session, asking them to explore simple solutions to address the brief, using simple drawing techniques such as boxes and arrows. Time them, so that they don't get fixated on detail. Ask them to present their ideas back to the group for discussion.
- **Save all the artefacts created during this session**
    - display them prominently on office walls or in a shared workspace, to serve as reminders when questions are asked during the production process.