Discussion guide template

Intro questions

These are easy questions to ease the participant into the process. I usually confirm what were already know from the screening process and get them to expand on that.

> "I see you just bought a house last year. What was that mortgage experience like?"

Tasks

Tasks are directly based on the research objectives from the kick-off meeting. So there are usually as many tasks as there are objectives. Each task has three components.

- **Scenario**: Set the scene for the participant. This is useful mainly in usability studies where a prototype exists.

  > "You want to transfer $500 from your checking account into your savings account."

- **Questions**

  - **Discovery:** "Walk me through the end-to-end process of a client review meeting from how you determine that it's time to schedule the meeting to post-meeting activities."
  - **Validation:** "Take a look at this mock up and tell me what you see." "What can you do on this screen?"
  - **Usability:** After completing the task in the prototype. "How was that experience?"

- **Observations**: This is just a placeholder for the moderator to make notes.

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Adjective list

The test participants are asked to select 5 adjectives that reflect their experience of the design they saw or used. It's not enough to collect the answers. The moderator must probe to find out what the participant meant. Those answers are sometimes the most insightful of the whole session.

Advanced	Difficult	High quality	Predictable
Annoying	Disconnected	Impersonal	Professional
Appealing	Disruptive	Impressive	Relevant
Approachable	Distracting	Incomprehensible	Reliable
Attractive	Dull	Inconsistent	Rigid
Boring	Easy-to-use	Ineffective	Satisfying
Business-like	Effective	Innovative	Secure
Busy	Efficient	Inspiring	Simplistic
Calm	Empowering	Integrated	Slow
Clean	Energetic	Intimidating	Sophisticated
Clear	Engaging	Intuitive	Stable
Comfortable	Entertaining	Inviting	Stimulating
Compatible	Enthusiastic	Irrelevant	Straight forward
Compelling	Essential	Low maintenance	Stressful
Complex	Exceptional	Meaningful	Time-consuming
Comprehensive	Exciting	Motivating	Time-saving
Confident	Expected	Not secure	Trustworthy
Confusing	Familiar	Not valuable	Unapproachable
Connected	Fast	Optimistic	Unattractive
Consistent	Flexible	Ordinary	Uncontrollable
Controllable	Fresh	Organized	Unconventional
Convenient	Friendly	Overbearing	Understandable
Creative	Frustrating	Overwhelming	Undesirable
Customizable	Fun	Patronizing	Unpredictable
Cutting edge	Gets in the way	Personal	Unrefined
Dated	Hard-to-use	Poor quality	Useful
Desirable	Helpful	Powerful	Valuable

Final questions

While the participant is selecting adjectives in the lab, I can ask observers if they have any additional questions.

Lastly, I ask the participant if they have any questions or feedback before releasing them.

This sample template is a recreation from memory. Due to strict NDAs, I don't have any of the original work that I did.

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