Research Process - Moderated Interview Study

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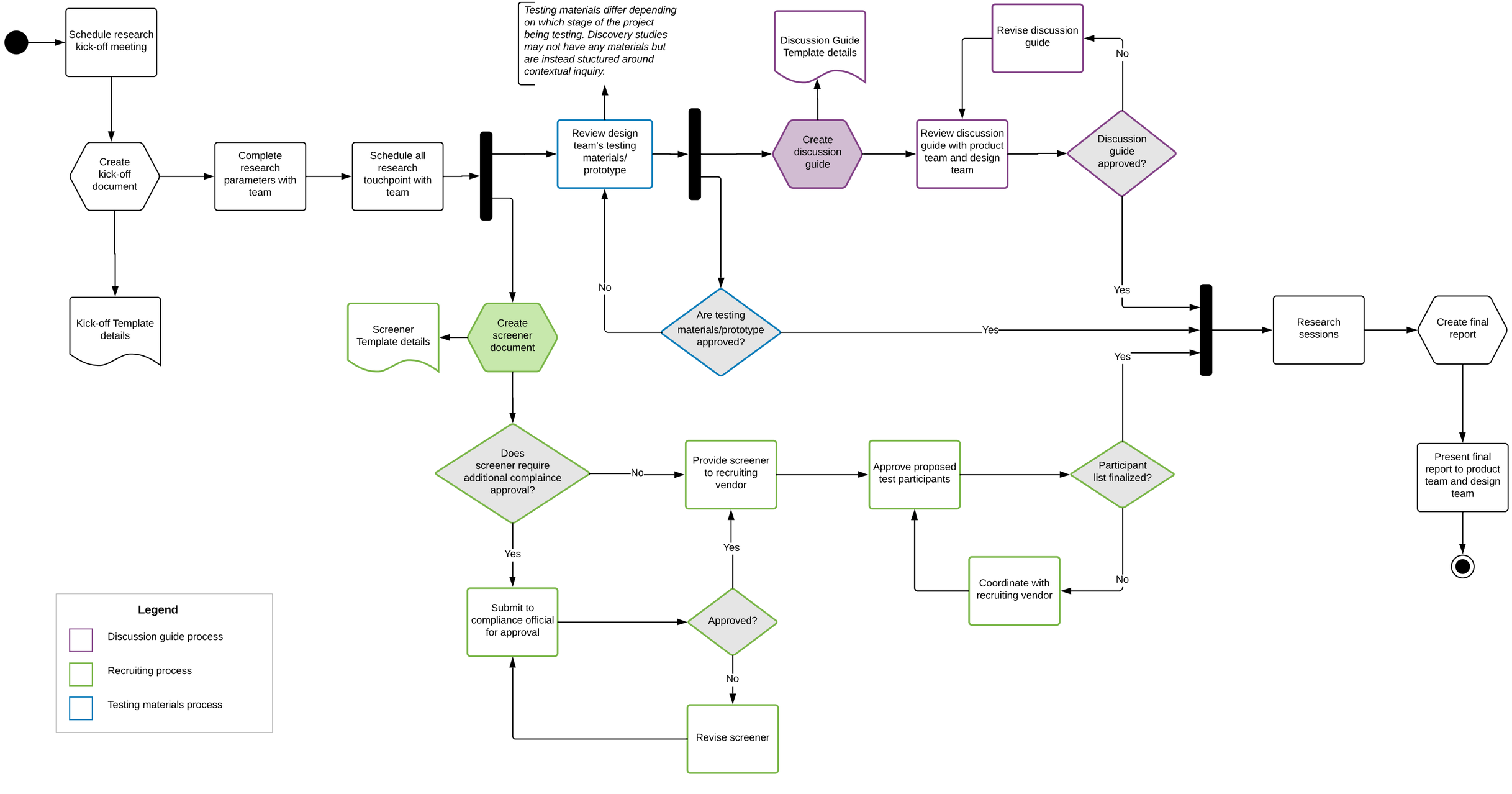

Project name

	Week of XX/XX/XX					Week of XX/XX/XX					Week of XX/XX/XX					Week of XX/XX/XX					Week of XX/XX/XX					Week of XX/XX/XX				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Kick-off meeting																														
Review design materials						Constant up to delivery of final testing materials																									
Create screener																														
Review screener for approval						Compliance review, if required																								
Coordinate with recruiting vendor						Constant up to day of sessions																								
Create discussion guide																														
Review 1st draft discussion guide																														
Revise discussion guide																														
Review final discussion guide																														
Final design testing materials due																														
Finalize participants																														
Research sessions																Testing window														
Research findings presentation																					Presentation window									

Kick-off template

Project description

2-3 sentences describing the project. Start with researcher assumptions but validate during the meeting.

Objectives

2-4 objectives is the most that can be reasonably covered in a one hour session depending on complexity. These are completed during the kick-off meeting and will be used to create the discussion guide for the sessions.

Participant criteria

These are completed during the kick-off meeting and will be used to create the recruiting screener. Be mindful of any legal compliance issues regarding discrimination.

Team

Start with researcher assumptions but validate during the kick-off meeting. These are completed during the kick-off meeting.

- **Product owner:** Looking for decision makers on the product side to be accountable during the research process.
- **Project manager:** if any
- **Design lead:** Looking for the person responsible for providing testing materials (mock ups, prototypes, etc…), if any.
- **Research lead:** Me!
- **Recruiters:** could be an outside vendor

Timeline: Actual dates set during the meeting. From kick-off to presentation is usually between 4-6 weeks. Researcher will send out invites after the kick-off to get on everyones' calendars. Participant is mandatory for responsible parties and strongly recommended for everyone else.

Touchpoints	Responsible	Due date
Kick off meeting	All	today
Review design testing materials	Researcher/ Design team	within 3 business days of kick-off
Review screener	All	email within 3 business days of kick-off
Coordinate with recruiting vendor	Researcher/ Recruiting	after screener approved
Review first draft of discussion guide	All	within 5 business days of reviewing test materials
Review final draft of discussion guide	All	within 5 business days of reviewing first draft
Final design testing materials due	Researcher/ Design team	3-5 business days before sessions
Finalize participants	Researcher/ Recruiting	2 business days before sessions
Research sessions	All	set during the kick-off meeting
Research findings presentation	All	1-2 weeks after sessions

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

Screener template

Demographics

These are based on information provided during the kick-off meeting. They are based on who the test participant is to represent the most likely user groups of the final product.

Without any constraints, researchers try to get a good mix of ages, genders, localities, educational backgrounds, etc… However, a project my be focused just on millennials or baby boomers and constrain to that specific age range.

X. What is your age range?

18-25	**DISMISS**
26-45	
46-60	**DISMISS**
61-70	**DISMISS**
71+	**DISMISS**

Skills/Behaviors needed

These are based on information provided during the kick-off meeting. They are necessary skills/behaviors to represent the most likely user groups of the final product.

For example, a mobile app study would need all test participants to be smartphone users. A mortgage study would require that all test participants were currently in the process of (or had in the recent past) obtaining a mortgage.

X. Which types of apps due you access on your phone on a regular basis (more than monthly)? Select all that apply.

Shopping	
Banking	**If not selected, dismiss**
Reading	
News	
Games	

Legal requirements

Find out if there are any compliance approvals needed for screener. Some companies are sensitive to any perceived discrimination and require legal approval of screeners. This can add up to two weeks to the timeline.

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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.

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.

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