

Complete UX Research Starter Kit

Plan a focused study, run respectful sessions and turn observations into decisions.

Research plan

Interview + test scripts

Findings templates

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A lightweight research workflow you can actually use

Research is most useful when it begins with a decision, not a method. This kit helps a designer or small product team define what they need to learn, choose a suitable approach, recruit relevant participants, run consistent sessions and synthesize findings without overstating the evidence.

HOW TO USE THIS RESOURCE

Copy the sections you need into a working document. Start with the decision and research questions. Use the interview guide for discovery, the usability script for evaluating an interface, and the findings template to communicate evidence and limitations.

Study snapshot

STUDY NAME Short descriptive title	DECISION OWNER Who will act on the findings?
RESEARCH LEAD Name and contact	DATES Planning, sessions and readout
PRODUCT STAGE Discovery, concept, prototype or live product	PRIMARY METHOD Interview, usability test or mixed approach

1 Research plan

Define the decision before choosing the method

DECISION

What decision will this research inform? Who needs to make it and by when?

BACKGROUND

What is already known? Include previous research, analytics, support data or business context.

RESEARCH QUESTIONS

Write 3-5 questions about behavior, needs, comprehension or task performance.

OUT OF SCOPE

What will this study not answer?

METHOD AND RATIONALE

Why is this method suitable for the questions and product stage?

PARTICIPANTS

Who has relevant experience? Include inclusion and exclusion criteria.

OUTPUTS

Readout, clips, findings report, journey, prioritized issues or design decisions.

Study logistics

SESSION LENGTH Minutes	NUMBER OF PARTICIPANTS Target and minimum
LOCATION Remote or in person	RECORDING Yes / no and approved storage
INCENTIVE Amount and delivery method	ACCESSIBILITY NEEDS How participants can request accommodations

2 Method selection guide

Method	Best for	Use when	Watch out for
User interview	Needs, behaviors, context and past experiences	Discovery or early exploration	Avoid asking users to predict future behavior.
Moderated usability test	Where and why people struggle with a design	Prototype or live experience	Test the interface, not the participant.
Contextual inquiry	How work happens in the real environment	Complex workflows or physical context	Plan carefully for privacy and observation effects.
Diary study	Behavior and experiences that unfold over time	Repeated or infrequent activities	Keep reporting effort manageable.
Survey	Patterns across a larger sample	Questions with defined answer options	A survey does not explain behavior by itself.
Analytics review	What is happening at scale	Live digital products	Behavioral data still needs interpretation.

3 Recruitment screener

TARGET PARTICIPANT

Describe the experience, behavior or context that makes someone relevant to this study.

EXCLUSION CRITERIA

List conflicts, professional expertise, recent participation or other factors that would invalidate the fit.

Screener questions

#	Review question	Evidence / score
1	When did you last complete [relevant task]?	0 1 2 N/A
2	How often do you complete this task?	0 1 2 N/A
3	Which tools, services or workarounds do you currently use?	0 1 2 N/A
4	What role do you play in making or approving the relevant decision?	0 1 2 N/A
5	Which device, environment or assistive technology do you normally use?	0 1 2 N/A
6	Have you participated in similar research recently?	0 1 2 N/A
7	Are you available for the session length, recording conditions and follow-up described?	0 1 2 N/A

QUOTA AND DIVERSITY PLAN

Identify experience levels, devices, language, disability or other relevant variation. Recruit for the product context rather than demographic variety without purpose.

4 Consent and participant care

Use this as a preparation checklist, not a legal consent form. Requirements vary by organization, study topic and jurisdiction.

#	Review question	Owner	Evidence / score
1	Explain the study purpose in language the participant can understand.	_____	0 1 2 N/A
2	Describe what the participant will do and how long it will take.	_____	0 1 2 N/A
3	State whether observers, screen sharing, audio, video or photographs are involved.	_____	0 1 2 N/A
4	Explain how recordings, notes and identifying information will be stored and used.	_____	0 1 2 N/A
5	Clarify that participation is voluntary and the participant may stop at any time.	_____	0 1 2 N/A
6	Explain compensation and whether payment changes if the session ends early.	_____	0 1 2 N/A
7	Provide a contact for questions, withdrawal or data concerns.	_____	0 1 2 N/A
8	Ask about accessibility, communication or scheduling accommodations before the session.	_____	0 1 2 N/A
9	Collect only the personal information required for the research purpose.	_____	0 1 2 N/A
10	Obtain the participant's informed agreement before recording or beginning research activities.	_____	0 1 2 N/A

5 User interview guide

For discovery and understanding past behavior

OPENING SCRIPT

Thank the participant. Explain that you are learning about their experience, there are no right answers, and they may skip a question or stop.

#	Review question	Evidence / score
1	Tell me about the last time you needed to [relevant goal].	0 1 2 N/A
2	What triggered the need and what did you do first?	0 1 2 N/A
3	Walk me through what happened, step by step.	0 1 2 N/A
4	What was difficult, uncertain or time-consuming?	0 1 2 N/A
5	What tools, people or information did you rely on?	0 1 2 N/A
6	Did you create a workaround? What made it necessary?	0 1 2 N/A
7	What would a successful outcome look like to you?	0 1 2 N/A
8	What happens if this task goes wrong or remains unfinished?	0 1 2 N/A
9	What have you tried before, and why did you continue or stop using it?	0 1 2 N/A
10	Is there anything important about this experience that I did not ask?	0 1 2 N/A

PROBES

Use neutral prompts: Tell me more. What happened next? Can you show me? What made that difficult? How did you decide?

CLOSING

Summarize what you heard, invite corrections, explain what happens next and thank the participant.

6 Moderated usability test script

WELCOME

Thank the participant, confirm pronunciation and explain the session format.

PERMISSION REMINDER

Confirm observers and recording. Make sure consent is complete before proceeding.

SET EXPECTATIONS

We are testing the design, not you. Some parts may not work. Please say what you are thinking.

WARM-UP

Ask about relevant experience without teaching the interface or revealing the expected path.

TASK DELIVERY

Give one realistic task at a time. Do not describe which controls to use.

NEUTRAL FOLLOW-UP

What did you expect? What made you choose that? How confident are you that the task is complete?

CLOSE

Ask final questions, check for observer questions, explain next steps and thank the participant.

7 Task template and session notes

SCENARIO

Give enough context for a realistic goal without revealing the path or interface labels.

TASK

Ask the participant to accomplish one observable outcome.

SUCCESS CRITERIA Observable completion condition	CRITICAL ERROR Action that creates failure or risk
TIME MARKER Optional - use carefully	POST-TASK QUESTION Ease, confidence or expectation

Observation notes

#	Review question	Owner	Evidence / score
1	What the participant tried first	_____	0 1 2 N/A
2	Where they paused, backtracked or asked for help	_____	0 1 2 N/A
3	Words or labels they misunderstood	_____	0 1 2 N/A
4	Workarounds or unexpected paths	_____	0 1 2 N/A
5	Errors and whether they recovered	_____	0 1 2 N/A
6	Direct quote that captures the experience	_____	0 1 2 N/A
7	Observed behavior versus stated preference	_____	0 1 2 N/A
8	Potential accessibility or inclusion issue	_____	0 1 2 N/A

8 Issue log and severity

Score	Level	Interpretation
0	Observation	Not a usability problem; retain as context.
1	Minor	Creates hesitation or small inefficiency; does not block the task.
2	Moderate	Causes repeated confusion, error or delay; recovery is possible.
3	Serious	Blocks an important task for some users or creates substantial risk.
4	Critical	Likely to cause broad task failure, harm, irreversible action or exclusion.

Issue record

ISSUE

Describe the observable problem without proposing a solution.

EVIDENCE

Participant, task, behavior, quote, frequency and context.

IMPACT

Who is affected and what becomes difficult, unsafe or impossible?

SEVERITY AND CONFIDENCE

Score 0-4 and state confidence in the evidence.

RECOMMENDATION

Describe the experience outcome needed, not only a UI preference.

9 Synthesis and findings

EVIDENCE INVENTORY

List interviews, sessions, analytics, support data and existing research included in synthesis.

#	Review question	Evidence / score
1	Separate observation from interpretation before grouping notes.	0 1 2 N/A
2	Group related evidence by behavior, need, obstacle or decision - not by participant alone.	0 1 2 N/A
3	Name each theme as a clear statement rather than a broad topic.	0 1 2 N/A
4	Look for contradictions, edge cases and participants who do not fit the dominant pattern.	0 1 2 N/A
5	Connect every finding to evidence and identify the confidence level.	0 1 2 N/A
6	Prioritize findings by user impact, frequency, risk and relevance to the decision.	0 1 2 N/A
7	Translate findings into decisions, experiments or questions - not a feature wish list.	0 1 2 N/A

FINDING

State the pattern as one clear sentence.

EVIDENCE

Behavior, quote, count, context and affected participant group.

WHY IT MATTERS

Explain the effect on the user and the decision.

CONFIDENCE AND LIMITATION

High, medium or low - and what remains unknown.

RECOMMENDED NEXT STEP

Decision, design change, measurement or follow-up research.

10 Research readout

EXECUTIVE SUMMARY

What was studied, what was learned and what decision should follow? Keep it under 150 words.

TOP FINDING 1

Finding, evidence, impact and recommendation.

TOP FINDING 2

Finding, evidence, impact and recommendation.

TOP FINDING 3

Finding, evidence, impact and recommendation.

LIMITATIONS

Sample, recruitment, prototype, method, timing or data limitations.

DECISIONS AND OWNERS

What will change, who owns it and when will it be reviewed?

OPEN QUESTIONS

What remains uncertain and how might it be answered?

Pre-session and post-study checklist

#	Review question	Owner	Evidence / score
1	The study is tied to a real decision and has a named decision owner.	_____	0 1 2 N/A
2	Research questions are neutral and answerable with the selected method.	_____	0 1 2 N/A
3	Participants match the relevant experience and exclusion criteria.	_____	0 1 2 N/A
4	Consent, recording, data storage and accessibility accommodations are prepared.	_____	0 1 2 N/A
5	The script was piloted and task wording does not reveal the intended solution.	_____	0 1 2 N/A
6	Observers understand how to take notes without distracting the participant.	_____	0 1 2 N/A
7	Findings distinguish evidence, interpretation and recommendation.	_____	0 1 2 N/A
8	Limitations and contradictory evidence are included in the readout.	_____	0 1 2 N/A
9	Decisions, owners and follow-up measures are documented.	_____	0 1 2 N/A
10	Recordings and personal data will be retained or deleted according to the approved plan.	_____	0 1 2 N/A

References and responsible use

This kit supports planning and facilitation. It does not replace legal review, research ethics requirements, accessibility expertise or organizational privacy policies.

Nielsen Norman Group: Research Plans - Organize, Document, Inform

Guidance and a template for aligning a study around goals, scope, documentation and stakeholders.

<https://www.nngroup.com/articles/pm-research-plan/>

Nielsen Norman Group: User Interviews 101

Research-based guidance for learning about users' experiences, needs and behavior.

<https://www.nngroup.com/articles/user-interviews/>

Nielsen Norman Group: Checklist for Moderating a Usability Test

Ten practical steps covering preparation, consent, task delivery, follow-up and closing.

<https://www.nngroup.com/articles/usability-checklist/>

Nielsen Norman Group: Obtaining Consent for User Research

Explains informed consent and the role of a research consent form. <https://www.nngroup.com/articles/informed-consent/>

W3C: Involving Users in Evaluating Web Accessibility

Considerations for involving disabled people in usability and accessibility evaluation. <https://www.w3.org/WAI/test-evaluate/involving-users/>

W3C: Accessibility, Usability and Inclusion

Explains why usability research should include the needs of people with disabilities.

<https://www.w3.org/WAI/fundamentals/accessibility-usability-inclusion/>

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