



USER RESEARCH

Brief Builder Workbook

As a new or budding UX designer, organizing a user research interview can be a daunting task. To help kick it off, we've designed this simple step-by-step workbook to help you to build your first user research brief.



Step 1: Identify Your Audience

Getting good user research data relies on interviewing the right people. You want to select individuals who represent a large proportion of your users, rather than just anyone from the “general public”.

Before you start recruiting interviewees, take a minute to sketch out some of the key characteristics of your target audience. Your audience could be a very obvious group, such as university students, but sometimes your users may be a more diverse group. If you already have personas in mind, then this exercise will be easy. If not, think about your target user and sketch them out based on the following:



DEMOGRAPHIC

What is their demographic profile? Is your user predominantly one gender or age group? Where do they live? What do they do for a living? Do they make a particular income range? What about education level? If you have specific demographic requirements, write them down!

If you haven't already built your persona, use this worksheet to sketch it out. Just remember, any work you do now will be an assumption. Over time, your research may invalidate those assumptions.



Step 2: Goals, Research Objectives, And Hypotheses

Before starting your user research, you'll want to draft your hypotheses. These are statements that you will be testing with your research. You'll also want to write down your objectives - what you want to get out of the interviews. This, in turn, will help you to draft better questions.



OBJECTIVES

What are you trying to get out of the interview? What are the questions you are trying to answer? Are there any gaps of knowledge that need to be filled? Choose your top 3-5 questions and turn these into statements. Usually the statement will begin with “determine”, “understand”, or “identify.”

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Step 3: Prepare Good Questions

Once you've got your goals, objectives, and hypotheses down, you can start to plan your questions. When drafting your questions, you should think about how the answers will fill gaps of knowledge. Below, we've shared few question types to consider. You'll want to adapt them to your particular situation.



THE 5 W'S AND AN H

Every journalist knows the 5 W's: Who, what, when, where, why, and how. These questions go beyond the yes/no format to get the interviewee talking. What are they doing with your product? When, where, why, and how do they use it? Don't be afraid to ask deep, thought-provoking questions.

A series of ten horizontal dotted lines, spaced evenly, providing a template for writing notes or questions.



CONTEXT-GATHERING QUESTIONS

These questions help put the user and the product in context. Think about questions that describe a sequence, exceptions, relationships, organizational structure, or emotional cues. For example, ask them what are the first three things they do when they walk into their house or what they're feeling when they want to share a news story with their friends on Facebook.

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QUESTIONS TO UNCOVER A MENTAL MODEL

It's important to get inside a customer's head to understand their world view. To do this, ask questions that create contrasts. Have them compare different systems or talk you through what someone else would think.

Be careful of asking questions that can be answered with a "Yes" or "No." Also, steer clear of questions that lead the user in a direction.



Step 4: Setting Up The Interviews

Now that you've created your user research brief, you can move on to the next step - carrying out your interviews! Here are some important questions to consider:

- How will you recruit users from your chosen demographic? Do you want to target them online or offline, through an employer or organization?
- Which screener questions should you use to narrow down the group? Do you only want people who use social media regularly? People who are big into sports, or like shopping online?
- Do you want to interview users individually? Would a focus group be better?
- Where will you conduct the interviews? At your workplace, a hotel or conference center, or would on-site contextual interviews be more beneficial?



- Will multiple team members need to be present? If so, who will be doing what?
- How will you be recording the research? Will it be via written notes, video, or audio?
- Will you need to show or test concepts? If so, will you be using wireframes, cardsorting, paper prototypes, storyboards, or physical mockups?

If you're doing on-site research, don't forget to take pictures!

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