

Research Checklist



Planning and Recruiting (before the research)

- Kick-off meeting
 - Gather objectives
 - Consider appropriate research methods
 - Discuss possible criteria for participants
 - Consider possible recruitment methods

- Write research plan, including:
 - Goals and objectives
 - Overview of research method and approach
 - Activities and/or tasks
 - Roles such as facilitator, analyst, and note-taker
 - Schedule and location (may be physical or virtual)
 - Participant criteria
 - Recruitment method(s)
 - Participant incentives (if any)

- Book facilities (room or lab facility, if needed)
Consider extras like catering, observation, tables and chairs, A/V equipment, etc.

- Manage recruiting, including:
 - Author recruitment screener
 - Use screener to recruit or send to recruiter
 - Coordinate and monitor recruiting
 - Obtain incentives (if needed)
 - Prepare non-disclosure agreement (NDA) and recording waiver (if needed)

- Write Research Guide (script, survey, whatever is appropriate to your method)
- Prepare test materials (prototypes, cards, props, whatever is appropriate to your method)
- Verify product URLs, passwords, and sample data (if needed)
- Test the set-up of materials, applications and devices for conducting, recording and observing the research
- Prepare analysis/report template
- Do a test-run of the research (a.k.a. a pilot session)
- Revise script, prototype or other materials based on the pilot
- Book debrief session and/or final presentation meeting





Conducting (during the research)

RECRUITER:

- Remind participants the day before; fill any gaps (if possible)

FACILITATOR:

- Check the set-up
- Welcome participant(s)
- Collect NDA and recording waiver (if needed)
- Start recording
- Introduction
- Conduct research activities and/or tasks
- Wrap up and thank you
- Stop recording
- Prepare next set-up (if necessary)

ANALYST:

- Write notes based on what participants' do during sessions, specifically related to the research objectives
- Check recordings after each session (if possible)

NOTETAKER:

- Write notes based on what the participant's say during the sessions



Analyzing (after the research)

- Collect rough notes and recordings
- Conduct post-test debrief to get high-level input
- Start analysis (whatever is appropriate to your method)
- Write report
- Prepare final notes and recordings, as needed
- Prepare final presentation

