

# 27 Tips & Tricks to Conducting Successful User Research in the Field

## BEFORE THE STUDY

- 1 Determine when you need to deliver results.
- 2 Do a pilot study.
- 3 Prioritize questions and tasks.
- 4 Make an editable script for each session.
- 5 Understand that your questions could evolve or change over the sessions as you learn.
- 6 Arrange incentives and small tokens of appreciation for your hosts, or local collaborators.
- 7 Monitor recruiting closely.
- 8 Recruit diverse participants.
- 9 Weigh research locations carefully.
- 10 Reserve a conference room or another private area, for the researchers and observers to use when not in sessions.

## DURING THE STUDY

### Study Observers

- 11 Welcome observers, but limit their number per session.
- 12 Provide guidelines for observers.
- 13 Reserve time at the end of the session for observer questions.
- 14 Debrief observers after each session.
- 15 Make sketches.
- 16 Keep separate copies of original images and documents.
- 17 Date documents for version control.
- 18 Number participants and their documents.
- 19 Take good notes, even if you are allowed to make recordings.
- 20 Don't rely on others to remember to send you promised material after the session.
- 21 Pay attention to context CUEs.
- 22 Don't rely on your memory for anything.
- 23 Make debriefing notes.

## AFTER THE STUDY

- 24 The consent form could serve as your signed receipt for cash incentives.
- 25 Add data-confidentiality instructions and warnings at the beginning of each video or audio file.
- 26 Compile and share preliminary top findings as soon as possible.
- 27 Thank everyone who helped make the research effort successful.