User Research Playbook + Overview

UXR Session 1

UXR Onboarding Overview

The UX Research onboarding will help familiarize you with Terakeet's UXR methodologies, best practices, and ethical considerations necessary to conduct effective user research for our clients. It aims to standardize our approach, ensuring consistency and quality across our research endeavors.

SESSIONS

1

UXR Onboarding + Overview

Introduction to user research at Terakeet and review of key UXR methodologies and best practices.

2

UXR Methods Deep Dive

Walkthrough of common delivery research methods and client research scenarios.

3

Prep, Materials, & Resources

Guidance on setting up the research, templates and delivery examples, best practice documents, and helpful links.

4

Synthesis & Deck Creation

Overview of the research synthesis process and tips for sharing research results with clients.

I. Understanding User Research

Objective of User Research

At Terakeet, user research is a vital part of the user experience design process that helps to understand the motivations behind user behaviors, uncover problems that need solving, and develop relevant solutions for our clients.

WHY WE DO IT

1

Identify user needs, pain points, and/or desires within an experience

This information guides the development of features and functionalities that better align with user expectations.

2

Validate/invalidate assumptions about user behavior and preferences

This can reduce the risk of implementing less ideal experiences and/or gain confidence in moving forward with proposed implementations.

When Is Research Useful?

BEFORE WEBSITE DESIGN (NEW CLIENT)

Understand User Needs & Goals:
You can identify who your users are, what they want, and how they interact with similar websites. This helps define the website's primary objectives and ensure it solves real user experience problems.

DURING WEBSITE/PAGE REDESIGN OR OPTIMIZATION

Identify Pain Points:
If users are already interacting with your site but you're not seeing the desired outcomes (e.g., high bounce rates, low conversions), research can uncover where users are getting stuck or frustrated.

WHEN INTRODUCING NEW FEATURES OR CONTENT

Test New Ideas with Target Users:
If you're introducing new types of content, features, or services, testing them with real users through surveys or focus groups can give you insight into how well they're received and whether they're intuitive.

AFTER A SITE OR PAGE LAUNCH

Track User Behavior:
After a site is live, ongoing research like user surveys, analytics, or feedback forms helps you monitor how users interact with the site and what might need refinement.

LIMITED DATA OR UNCLEAR GOALS

Clarify Uncertainty:
If you're unsure about your website's goals or aren't seeing the expected performance, user research helps clarify what's missing or misunderstood, ensuring you're aligned with your audience's needs.

TARGET DEMOGRAPHIC OR PRODUCT CHANGES

Understand Your Audience:
If the client is targeting a new demographic or changing their product/service offerings, user research helps ensure that the site's design and messaging resonate with this audience.

Delivery Research Process

Define	Prepare	Recruitment	Conduct	Analyze	Deliver
Define the Problem	Research Methodology	Participant Recruitment	Moderated/Unmoderated Research Sessions	Debrief	Prioritize Results
Establish Research Goal	Asset Creation	Scheduling		Consolidate and Analyze Data	Client Meeting
	Dry Run				

II. Preparing for User Research

Steps to Prepare for Research

Align on what to research	Identify audience or personas	Create a research plan	Find and recruit participants	Conduct a practice session
Work with the Strategy Director and Customer Success Manager to define the goals and identify key research questions that will provide insights into user behaviors, needs, or pain points.	Focus on the target demographic but be aware of diversity within the group and ensure representation across various demographics.	Share with client ahead of executing the study to ensure the research methods and objectives are aligned with their expectations and business goals.	Define participant criteria that aligns with the audience and research objectives. Recruit through Respondent, screening for desired criteria.	Prepare research materials, establish note-taking guidelines, and conduct a dry-run (or two) ahead of the actual sessions to make any necessary tweaks and ensure everything flows smoothly.

III. User Research Methods

Common User Research Methods

INTERVIEWS

Interview participants directly to learn more about the user, their mindset, expectations, motivations, and barriers.
This is a broad research method and is useful when we are not positive about what the user needs from the product or website.

CARD SORT

Card sorts allow participants to organize content or concepts into groupings representing content, features, or concepts to be sorted by participants according to possibly predefined categories/criteria.

TREE TESTING

Evaluate the effectiveness of a website's information architecture by having participants complete tasks using the navigation offered through the client site.

CONTENT TESTING

Evaluate participants' comprehension of content within an article or page through highlighter, recall, and/or cloze testing.

USABILITY TESTING

Establish tasks for participants to complete within a product or prototype to evaluate the usability.

SURVEYS

Collect information from participants by giving them a set of questions to answer, this approach is useful for gathering quantitative data to provide insight into demographics, patterns, behaviors, etc.

Conducting Research Sessions

This phase varies for each research method. It can include **moderated** sessions with users or **unmoderated** research via surveys / remote tools. The Moderated & Unmoderated Research Session Expectations guide includes further details on how to set up and run your sessions.

Scripts + Notes

Follow the discussion guide to ensure each session is consistent and take clear and concise notes. **Always get consent** from participants to record the interview.

Line of questioning on points of interest are encouraged, however, be mindful of time and that the information may not be relevant to the problem statement/research goal.

Moderator Tips

Be an objective, impartial moderator. Avoid leading or biasing participants, withhold praise or criticism, and probe users to share what they are thinking.

Let users struggle when completing a task and let them do most of the talking. This will provide more accurate data.

Usability Test Demo - Steve Krug

Tools

There are many research tools that can reduce the effort required by the moderator / researcher and help reduce natural human biases.

Each tool has a different focus area from heat maps and click tests to unmoderated user interviews and surveys.

IV. Analyzing & Sharing Data

Data Analysis

In order to share research with others, the data needs to be consolidated and analyzed to determine what the results mean without incorporating biases.

UX Research platforms like **Dovetail** or **Condens** can be used for analysis, if included in the budget.

Other AI tools such as **ChatGPT** can be leveraged but be sure to omit any identifiable participant or client information beforehand and double check results to ensure accuracy.

Data Analysis & Sharing Findings

Best Practices

Follow data compliance requirements

Comply with relevant laws, regulations, institutional and client policies. Handle data responsibly by saving the notes in the account’s Google drive and maintaining meticulous documentation.

When sharing findings, remove participants' data that could potentially identify them. If we need to share personal information, that must be stated in the beginning of the session to be sure we have proper consent.

Adhere to ethical principles

Prioritize participant well-being and rights by obtaining informed consent, protecting privacy, minimizing harm, and ensuring transparency.
Avoid biases, and communicate results honestly.

Focus on the research outcomes rather than the methods

Emphasize the value of the research in solving real user problems and achieving strategic objectives. By highlighting outcomes, you shift the conversation from *how* data was collected to *what* it means for the user experience and business goals, making the research more tangible and compelling.

V. Tools & Resources

Tools

Dependent on research methodology, we use a combination of tools to support all phases of the research process.

Zoom is used for conducting moderated research sessions since we have the capability to record.

Optimal Workshop is often used to conduct unmoderated research, such as tree tests or card sorting.

Maze is a platform for prototype testing, website testing, interviews, card sorting, and surveys

Respondent is our go-to platform for recruiting participants

Condens supports centralized storage, collaborative analysis and sharing of qualitative data from user interviews.

Figma / FigJam can be used for affinity mapping, organizing insights, and demonstrating results with visuals

See the [Abridged UX Research Tools Database] for more tools to support your research

Recommended Reading

- What does this mean? Tips for testing your words. By John Waterworth
- Triangulation: Get Better Research Results by Using Multiple UX Methods by NNG
- Secondary Research in UX by NNG
- Research Skills Framework: Researchers Researching Researchers by ResearchOps
- Atomic Research Cheat Sheet by glean.ly

How do I decide which type of research is best for my study?

Research Methodologies

Dimensions to consider:

WHAT

Attitude vs Behavior

This distinction can be summed up by contrasting "what people say" versus "what people do" (very often the two are quite different).

The purpose of attitudinal research is usually to understand or measure people's stated beliefs, which is why attitudinal research is used heavily in marketing departments.

HOW

Qualitative vs Quantitative

The distinction here is an important one, and goes well beyond the narrow view of qualitative as “open ended” as in an open-ended survey question.

Rather, studies that are **qualitative** in nature generate data about behaviors or attitudes based on observing them directly, whereas in **quantitative** studies, the data about the behavior or attitudes in question are gathered indirectly, through a measurement or an instrument such as a survey or an analytics tool.

SITUATION

Context

Context has to do with how and whether participants in the study are using the product or service in question.

This can be described as:

- Natural use of the product
- Scripted use of the product
- Not using the product during the study
- A hybrid of the above

User Research Methods
Deep Dive

UXR Session 2

Research Methodology

METHODOLOGY

There are many research methodologies that can be used to gather data on users attitudes (thoughts & opinions) and behaviors (what users do). These are typically measured either qualitatively or quantitatively.

It is important to select the appropriate methodology that will provide the data required to answer the problem statement and meet research goals. This part of the process is complex, but researchers should methodically choose the best research method to help find the appropriate information that align with the research goals and objectives.

CONSTRAINTS

Timelines depend on method and number of participants.

Increasing number of participants may lead to an increase in time to conduct and analyze; however, the methodology can be altered to include unmoderated sessions to reduce research effort / time.

“No research without action, no action without research”

KURT LEWIN

German-American social psychologist (1890-1947)

Research Methods

Brief Overview

INTERVIEWS

Interview participants directly to learn more about the user, their mindset, expectations, motivations, and barriers. This is a broad research method and is useful when we are not positive about what the user needs from the product or website.

CARD SORT

Card sorts allow participants to organize content or concepts into groupings representing content, features, or concepts to be sorted by participants according to possibly predefined categories/criteria.

TREE TESTING

Evaluate the effectiveness of a website's information architecture by having participants complete tasks using the navigation offered through the client site.

SURVEYS

Collect information from participants by giving them a set of questions to answer, this approach is useful for gathering quantitative data to provide insight into demographics, patterns, behaviors, etc.

CONTENT TESTING

Evaluate participants' comprehension of content within an article or page through highlighter, recall, and/or cloze testing.

USABILITY TESTING

Establish tasks for participants to complete within a product or prototype to evaluate the usability.

MODERATED SESSIONS

Complete face-to-face sessions with participants virtually.

UNMODERATED SESSIONS

Provide activities for participants to complete without having to meet with each participant.

Crafting Effective Research Questions

[Asking Good Questions Guide]

[Seventeen Types of Interview Questions]

No Leading Questions

Create questions that allow users to make decisions on their answer without being swayed by the question itself.
Example: "How did the change improve your experience?" vs "How did the change make your experience better or worse?"

Open Ended

Ask questions that don't allow users to answer with a simple "yes" or "no" response to elicit more information, when applicable.
Example: "Did those changes enhance your experience?" vs. "How did the changes affect your experience?"

Catered to Objectives

Ensure each question asked is aligned with the objectives of the research. There is no need to ask questions outside of the objective as each question should have a purpose in trying to learn information to solve client problems.

Clear and Concise

Formulate direct questions that are clear and to the point to ensure participants understand what each question is asking without too much extraneous information.

How do I decide which type of research is best for my study?

Research Methodologies

Dimensions to consider:

WHAT

Attitude vs Behavior

This distinction can be summed up by contrasting "what people say" versus "what people do" (very often the two are quite different).

The purpose of attitudinal research is usually to understand or measure people's stated beliefs, which is why attitudinal research is used heavily in marketing departments.

HOW

Qualitative vs Quantitative

The distinction here is an important one, and goes well beyond the narrow view of qualitative as "open ended" as in an open-ended survey question.

Rather, studies that are **qualitative** in nature generate data about behaviors or attitudes based on observing them directly, whereas in **quantitative** studies, the data about the behavior or attitudes in question are gathered indirectly, through a measurement or an instrument such as a survey or an analytics tool.

SITUATION

Context

Context has to do with how and whether participants in the study are using the product or service in question.

This can be described as:

- Natural use of the product
- Scripted use of the product
- Not using the product during the study
- A hybrid of the above

Helpful Resource: When to Use Which User-Experience Research Methods by NNG

Research Methods

User Research

Research Methods focused on learning from users of the product/website

User Interviews

What are user interviews and when should I use them?

1

Talk to users directly

User interviews involve talking to users face-to-face (digitally) to ask them to provide their thoughts on the problem you are trying to solve or learn more about. This is generally the basis in which other research methodologies could be incorporated.

2

Gain insights

This broad research method is useful when we are not positive about what the user needs from the product or website.

Helpful to collect:

- Qualitative data
- Quantitative data
- Behavioral observations
- Attitudinal feedback

3

Learn from users

Use this method to learn more about the user, their mindset, expectations, motivations, and barriers in regards to the product or website your research is based around.

Helpful Resource: User Interviews 101

Types of Content Testing

Cloze Test

This test is like a “mad libs” that helps with comprehension.

The process:

- Choose the content to be tested
- Take out every 5th word and replace it with a blank space
- Ask participants to fill in the blank spaces and then score the test.

Recall Test

This test assesses how memorable the content was.

The process:

- Choose text to be tested
- Create questions the will assess the comprehension of the text
- Have the participant go through the content
- Ask the participant questions about what they read to assess how memorable the content was

Highlighter Test

These tests are effective for understanding what’s clear or unclear in a passage of text.

The process:

- Choose the content to be tested
- Copy the full content into a Google doc
- Define what highlighter colors mean (usually green = good; red = not good)
- Have participants read and highlight the text
- Review the passage to find themes/sentences that need to be rewritten

Helpful Resource: [3 Effective Methods for Content Tests (Beyond Usability Testing)] by dScout

User Interviews

Client Example

[redacted]

Jobs To Be Done

The goal of this study was to learn more about and identify the needs of the users within specific topics in the financial space, so the UX team conducted in-depth user interviews.

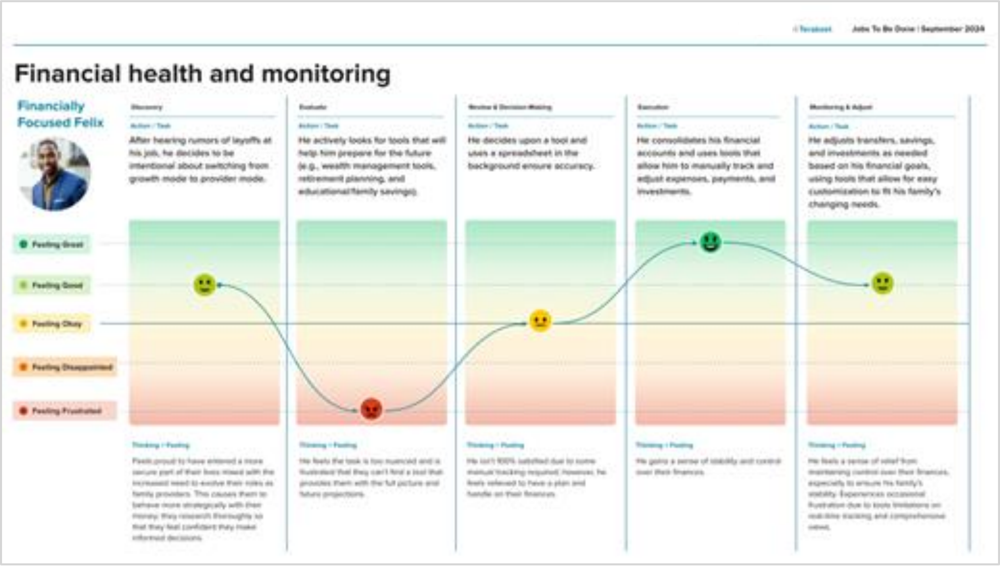
Participants were chosen based on age to fit within the specified user types, as well as participants with a range of experience with digital payment methods and tech abilities.

From this study, the team was able to identify tasks users wanted to accomplish within the site and topics users wanted to learn more about.

This study resulted in delivering:

- Key User Profiles
- Customer Journey Maps

These deliverables will help guide future design implementations through identifying areas the client is excelling in as well as opportunities for improvement.



User Interviews

Client Example

[redacted]

User Needs & Motivations

This study centered around wanting to better understand how potential prospects interact with the current site structure and perceive the law firm's online presence.

The insights garnered from this research study helped the team in making informed decisions about:

- the website design
- content strategy
- overall user engagement tactics
- future research considerations

This research directly initiated tree testing and usability testing to define the redesign of the main navigation.

Needs	Usability	Brand
Users expressed a desire for active and up-to-date content	Users demonstrated a preference for concise, skimmable content	Motley Rice online presence perceived as trustworthy, professional, and serious
Complex legal jargon disconnects users	Users preferred to use search over navigating through litigation areas	Majority of users miss Motley Rice's historic achieves as they browse
Poor communication leaves users feeling lost or forgotten	Users experience some difficulty navigating specific-case information	Boldness trademark tagline does not match with user expectations in hero
	Users responded positively to FAQ and help resources	

"I wish I just generally knew how working with a lawyer was because I'd never worked with a lawyer before." - Participant 3

"I'm not very intelligent when it comes to the law. I don't know a lot... I would just warn people to do their due diligence" - Participant 8

Card Sort

What is a card sort and when should I use it?

1

Define categories

Card sorts require participants to organize content, features, or concepts to be sorted into categories either predefined by the study or defined by participants themselves.

2

Guide participants

Implementation of this method involves guiding participants through each portion while encouraging them to think aloud to describe why they are categorizing items the way they are.

3

Gain insights

Use this research method when you want to learn more about how users link concepts together and/or how they might want to see categories organized in the navigation, on a hub page, or other instances were items might be organized into groups.

*Ideally card sorts are completed in a platform like Optimal Workshop where data is analyzed within the platform.

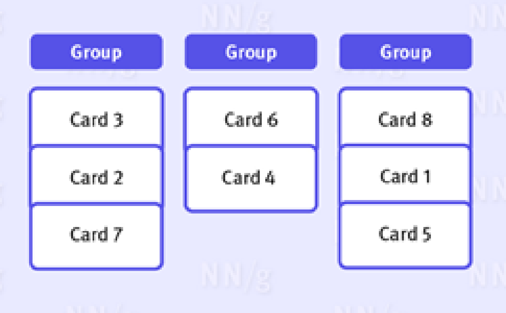
Helpful Resource: Card Sorting: Uncover Users' Mental Modals for Better Information Architecture

Card Sorts:
Open vs. Closed

Open Card Sorts

- No defined categories
- Participants create categories

This method is useful to get a more holistic view of users' mental models, and you may discover new ways to categorize certain items



Closed Card Sorts

- Defined categories
- Participants organize cards into predefined categories

This method is useful to either validate organization or learn to best organize content into client-defined categories.

Source & helpful article: https://www.nngroup.com/articles/card-sorting-definition/

Card Sorts

Client Example

[redacted]

Main Navigation Redesign

The main navigation housed 7 primary categories and over 50 secondary categories while continuing to expand the amount of content within the site.

The problem:

- The navigation was difficult to use and understand
- Information was difficult to find

The team conducted a hybrid card sort to learn how categories and subcategories could be better organized.

The study:

Users were given categories to organize content into as well as the option to add additional categories. The information gathered from this study guided new navigation structure and organization to better match user expectations.

Optimal Workshop Card Sort Associated Labels

New Navigation Proposal

Card Sorts

Client Example

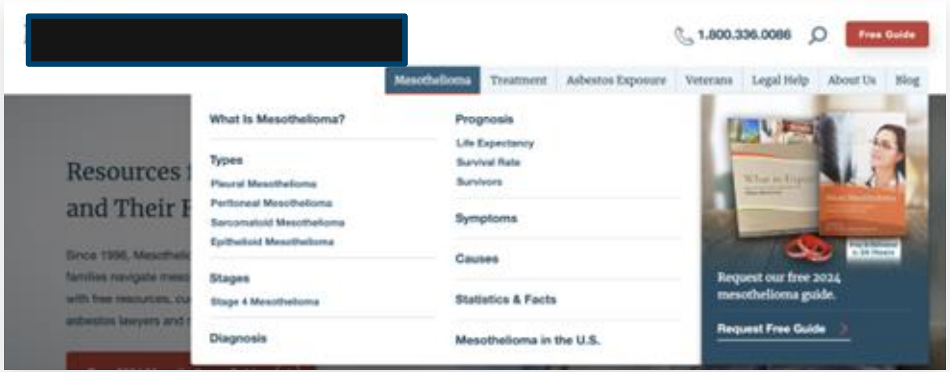
[redacted]

Main Navigation Redesign

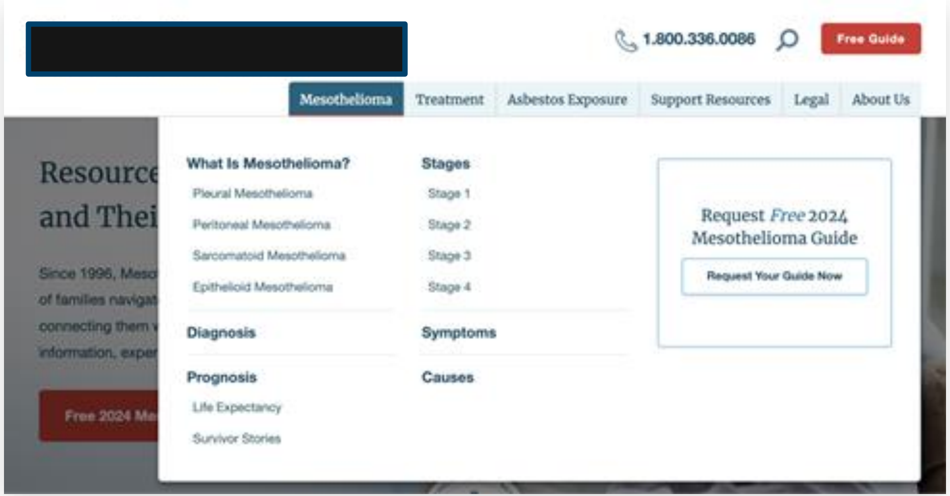
After observing and learning from the common category and subcategory organizations from the card sorting study, the team was able to create a new navigation system.

The team continues to monitor the effectiveness of the new navigation organization through usability testing and user interviews. This allows the team to continue to improve the user experience in being able to find the information they are looking for and improve the overall user flow through the site.

Pre



Post



Tree Testing

What is tree testing and when should I use it?

1

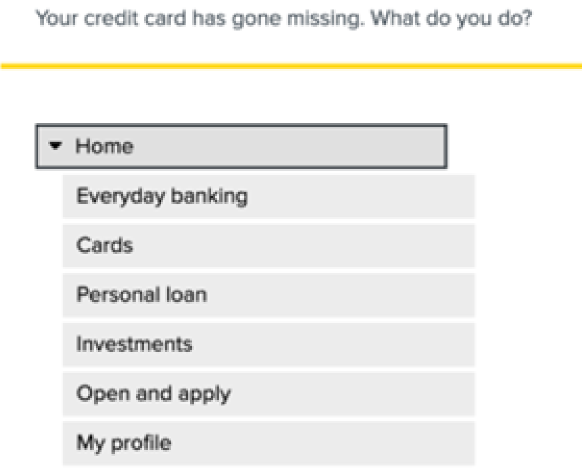
Information Architecture

Tree testing is used to test how effective a website's information architecture is and/or to test a new structure for a website's information architecture.

2

Task Oriented

In tree testing sessions, participants are given tasks to complete that users might want to accomplish when going to the website using the current or proposed structure.



Helpful Resources: [Tree Testing 101]() by Optimal Workshop
[Tree Testing: Fast, Iterative Evaluation of Menu Labels and Categories]() by NNG

Tree Testing

Client Examples

[redacted]

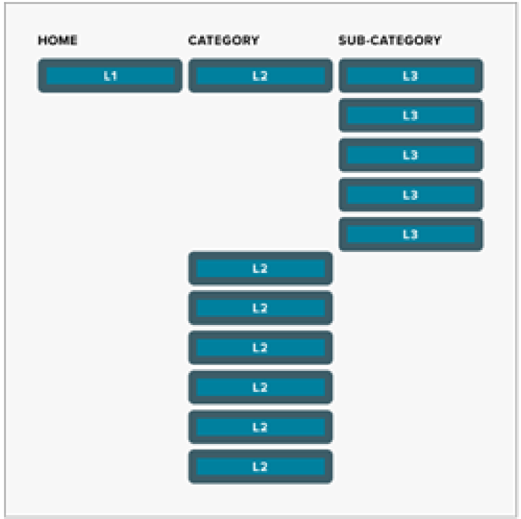
Navigation Restructure

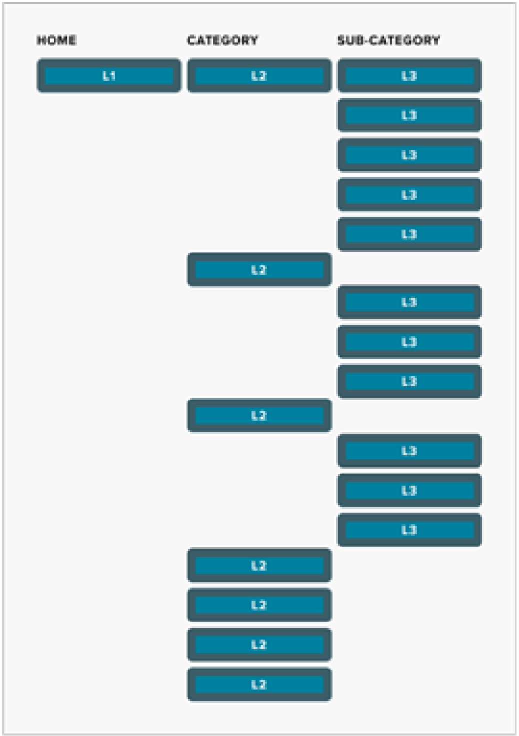
The implemented navigation was oversimplified to the point that users would have difficulty in finding the information they were looking for through the use of the navigation links. Instead, they would use the site search feature to help them navigate.

Chose to use tree testing to:

- Test current navigation
- Learn more about information users are looking for
- Observe how users currently understand legal jargon used throughout the site and within the navigation

Current Navigation vs. Proposed Navigation





Tree Testing

Client Examples

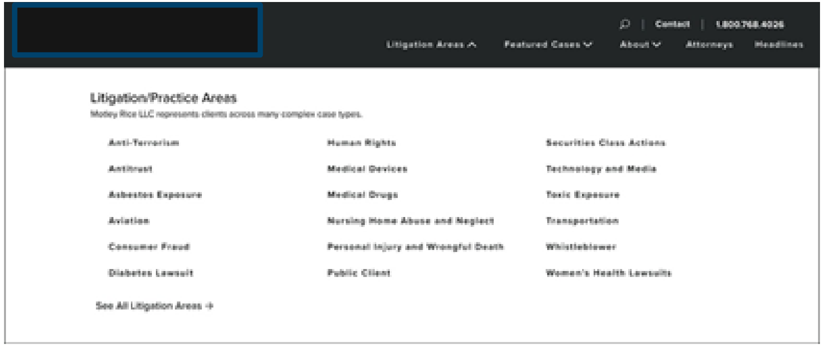
[redacted]

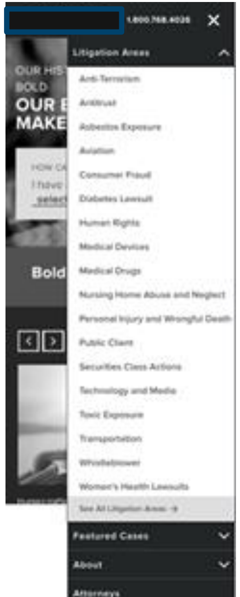
Navigation Restructure

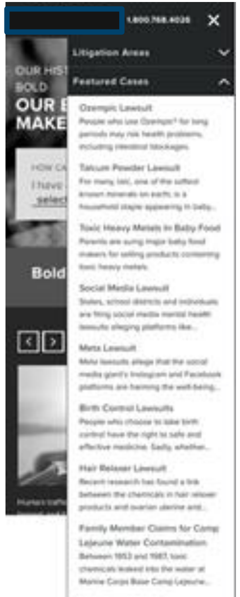
Led to a navigation restructure proposal to be tested in prototype usability testing before moving forward with implementation.

Potential outcomes upon implementation:

- Increase conversion rate
- Decrease bounce/exit rate
- Increase page visits
- Decrease time on page







Surveys

What are surveys and when should I use them?

1

Anonymous feedback

Collect information from participants by giving them a set of questions to answer.

2

Learn from users

Provide insight into demographics, patterns, behaviors, etc. through answering radio-select and/or scaled questions.

3

Experience monitoring

Use surveys within the client site to consistently monitor how users interact with the site and what might need refinement.

Helpful Resources: Types of sampling for market research by SurveyMonkey
Question and Questionnaire Design by Jon A. Krosnick and Stanley Presser

Content Testing

What is content testing and when should I use it?

1

Focus on content

Content testing involves providing users with content from or related to the client site and learning how users understand, remember, and interpret the content.

2

Comprehensive Experience

This method is useful to improve the full experience of client sites by ensuring the content users are interacting with matches their needs, potentially improving conversion rates, user retention, and acquiring new users.

3

Partner with the content team

Use this as an opportunity to team up with your client content team - they could provide insights into what to look for or ask participants as they are the subject matter experts.

You can also give the content team some great insights to help them create content in the future.

Helpful Resource: [How to Test Content with Users] by NNG

Types of Content Testing

Cloze Test

This test is like a "mad libs" that helps with comprehension.

The process:

- Choose the content to be tested
- Take out every 5th word and replace it with a blank space
- Ask participants to fill in the blank spaces and then score the test.

Recall Test

This test assesses how memorable the content was.

The process:

- Choose text to be tested
- Create questions the will assess the comprehension of the text
- Have the participant go through the content
- Ask the participant questions about what they read to assess how memorable the content was

Highlighter Test

These tests are effective for understanding what's clear or unclear in a passage of text.

The process:

- Choose the content to be tested
- Copy the full content into a Google doc
- Define what highlighter colors mean (usually green = good; red = not good)
- Have participants read and highlight the text
- Review the passage to find themes/sentences that need to be rewritten

Helpful Resource: [3 Effective Methods for Content Tests (Beyond Usability Testing)] by dScout

Content Testing

Client Example

[redacted]

Highlighter & Recall Test

The team conducted a series of content testing over several months at the beginning of each cycle of page-level audits. The goal of these studies was to identify what portions of the articles presented to participants were helpful, confusing, and/or redundant as well as understand what pieces of content were most memorable.

These insights helped guide:

- Content creation & improvements
- Page template optimizations
  - Labels
  - Layout
- CRO testing & projects

What Is Annual Percentage Rate (APR) And How Does It Work In Real Estate?

FEBRUARY 29, 2024 | 8-MINUTE READ

AUTHOR: DAN RAFTER

Looking for the most affordable mortgage loan? When shopping with lenders, you might focus only on the interest rates that each quotes. That seems logical: The larger your interest rate, the larger your monthly mortgage payment.

But there is a more accurate measure of your mortgage's true cost, its annual percentage rate, also known as its APR. When shopping for the most affordable mortgage loan, it's more important to look at this figure

What Is APR?

APR provides the best measure of how much borrowers pay for mortgage loans each year. It's an even more effective way of measuring your loan's annual cost than its interest rate.

Why? Because your APR does not just include how much you'll pay in interest for your mortgage. It also includes several other fees, to give you the total cost – not just the amount of interest you'll pay – of your loan.

What does APR include?

- Base interest rate: Your lender will charge you interest on the money that you borrow and will use that interest rate when calculating your monthly payments. The higher your rate, the higher your monthly payments. If your interest rate is 7.2%, you'll pay more each month than if your rate was 6.5%.
- Document preparation fees: Your lender usually charges fees for preparing the documents that you'll sign during your loan's closing. This cost is included in your mortgage's APR.
- Underwriting fees: Underwriting fees cover the costs of the research that your lender's underwriters perform when determining if you're willing and able to cover your new mortgage payment. Underwriters will review your credit score, bank statements, W-2s and paycheck stubs to verify your income and history with paying your bills.
- Origination fee: Your APR also includes the origination fee you'll pay to your lender for the work it does while originating your mortgage. Because APR includes this and other fees, it is always higher than your loan's interest rate.

How To Build Credit: A Helpful Guide And FAQs

SCOTT STEINBERG

13 - MINUTE READ

UPDATED: JUN 30, 2023

If you're looking to buy a house or car, or take out a loan of any kind, you'll find that learning how to build credit is one of the most important financial skills that you can ever add to your repertoire. The reason for this is because financial institutions such as banks, credit unions, online financial technology ("fintech") companies and credit card providers will look to your credit score to get a sense of how creditworthy you are, and how well you manage your funds. Based on your credit score, among other factors, they'll determine whether they're willing to lend you money – and on which specific conditions and terms.

Building good credit is a process that takes time and effort – it doesn't just happen overnight. But, there are also several steps that you can take to secure a better credit score for yourself without having to do a significant amount of heavy lifting. Simply read on to find out how you can build your credit history and boost your overall credit score.

Why Is Building Good Credit Important?

Think you might need to take out a home, auto, personal or student loan? In all instances, lenders will look to your credit history and credit score to decide whether you're a safe bet in their eyes.

Your credit history is effectively a record of your borrowing history and repayment habits over preceding months and years.

Content Testing

Client Example

Capital One

[Cloze Test]

Within the full research study that included a variety of different research methods, participants were asked to fill in the blanks of the prompt using a list of predetermined words. Participants were asked to think aloud and expand on their word choices during the exercise.

This study helped the team better understand:

- How users view the terms “starter” versus “builder” credit cards
- Users need for simpler terminology in the financial/credit card space

CONTEXT

Read the following carefully.

Looking for a way to *[blank]* your credit? Check out this Credit Card! It's perfect if you're *[blank]* to credit or working on *[blank]*. You'll get a credit line to make responsible purchases that *[blank]* your credit history. Plus, no need to worry about crazy fees – this card keeps it simple with a competitive APR and no annual charges. Whether you're *[blank]* credit or bouncing back from *[blank]* credit, this card can help you show off your credit skills and pave the way for a *[blank]* financial path ahead.

Usability Testing

What is usability testing and when should I use it?

1

Testing the experience

This type of testing starts with defining what the test objective would be to then move forward with creating tasks and success criteria to evaluate the usability of the live page or prototype.

2

Guide participants

To test the prototype or product, participants should be guided through the usability activities and watch their interactions, asking probing questions as necessary.

**This can be completed in moderated or unmoderated settings.*

3

User interactions

Use this testing method to learn how users interact with elements within the product or prototype to understand if the experience matches how users are actually interacting with and manipulating the product or prototype.

Helpful Resource: 3 Effective Methods for Content Tests (Beyond Usability Testing) by dScout

Qualitative vs. Quantitative Usability Testing

Qualitative	Quantitative
Focused on the *how*	Focused on the *numbers*
Observational findings	Based on metrics
Data about behaviors and attitudes	Data about behaviors and attitudes
Direct observation of behavior	Indirect observation of behavior
Measured from direct observation in face-to-face meetings or recordings	Measured through a tool or instrument such as a survey
Generates anecdotal data to explain user behaviors	Generates measurable data to quantify and/or compare behaviors

Helpful Resource: [Quan vs Qual]

Usability Testing

Client Example

[redacted]

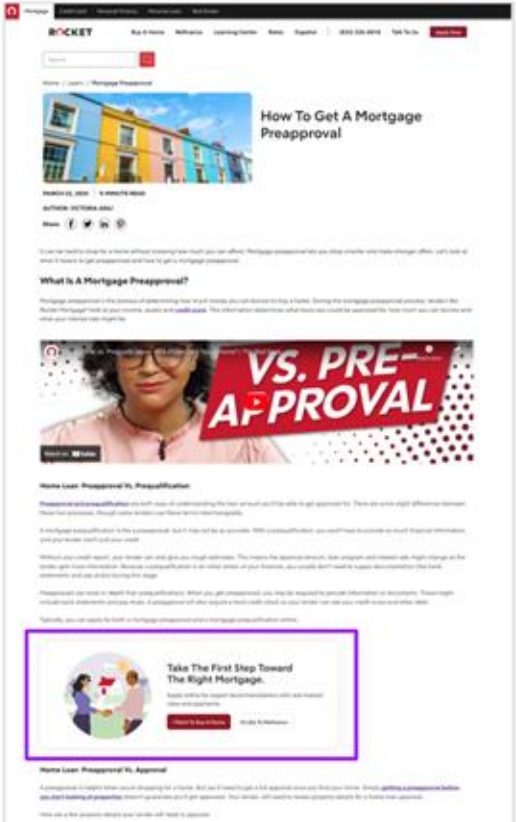
CTA Design Testing

When testing CTA designs to improve CRO, the team wondered if illustrations affected conversions/interaction rates. To test this, a usability test was conducted in which participants interacted with a prototype including the CTA designs in question.

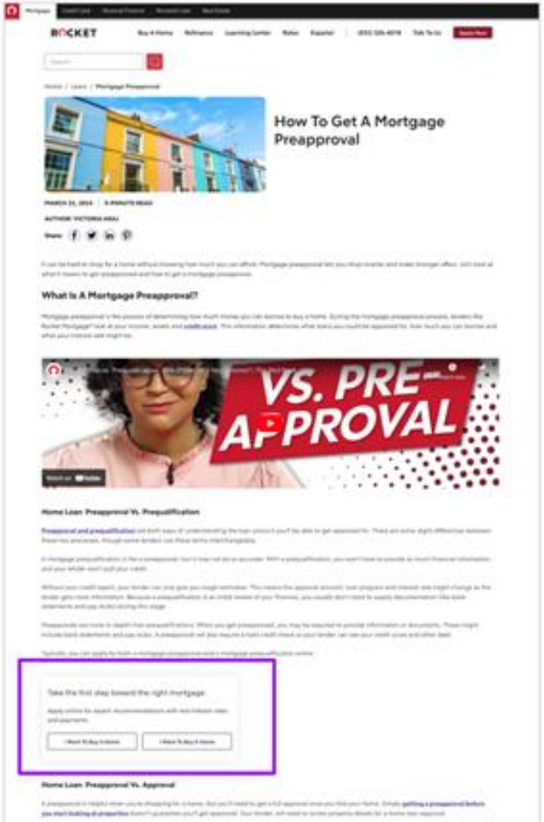
Each participant was asked to move forward with applying for a loan using any of the CTAs within the page. Participants were split into two experiences to view each CTA type first within the article to combat bias

The results showed that once users were ready to move onto the next steps, they interacted with the most convenient location first. This finding guided future testing ideas to improve conversions.

Illustration CTA placed first



Box CTA placed first



Competitive Research

Research Methods focused on learning from direct competitors of the product/website

Heuristics Evaluation

What is a heuristic evaluation and when should I use it?

1

Usability Heuristics

A heuristic evaluation is a method of evaluating a product or site using the 10 usability heuristics as a basis to identify design problems in a user interface.

2

Baseline Data

This broad research method is useful when a starting with a new client and/or as a consistent check-in to get baseline data and insights on the client site as well as find opportunities for improvement and/or future user research.

3

Learn from competitors

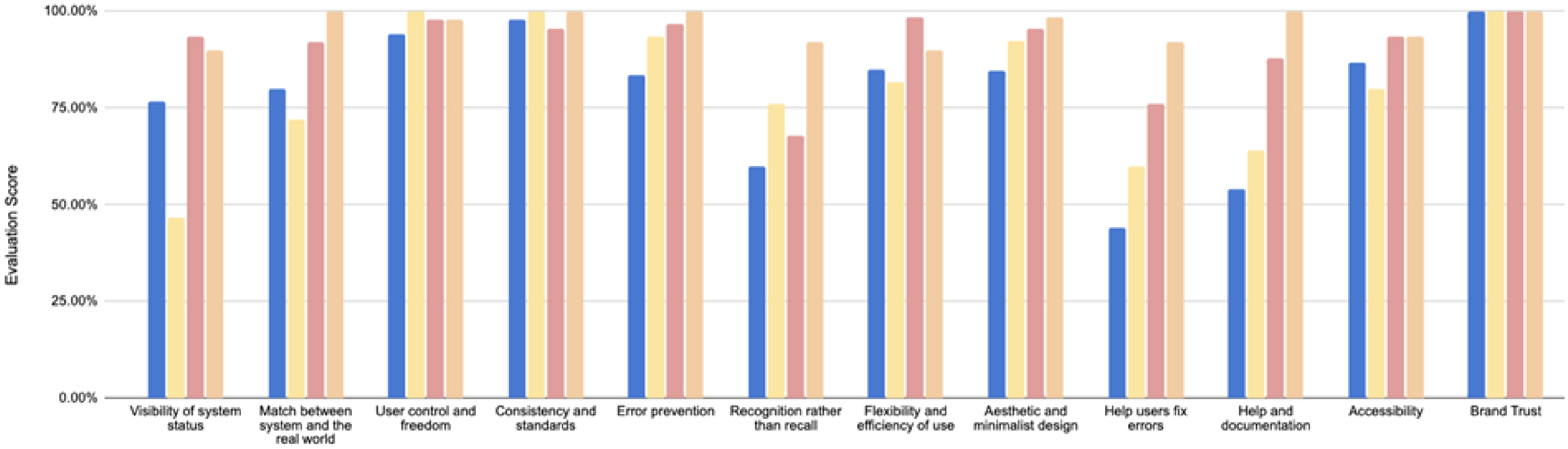
Use this method to learn more about what the client's direct competitors are doing on their sites in comparison to the client's site to understand what areas the client is excelling in and what areas are lacking to help focus UX initiatives.

Helpful Resource: How to Conduct a Heuristic Evaluation by NNG

Usability Testing

Using the [Google Sheets Checklist], rate the client against the identified competitors to create a graph to better understand how the client compares to the competitive landscape.

**The checklist is meant to be a starting point and can/should be adjusted to meet each client's needs.*



Heuristic Evaluation

Client Example

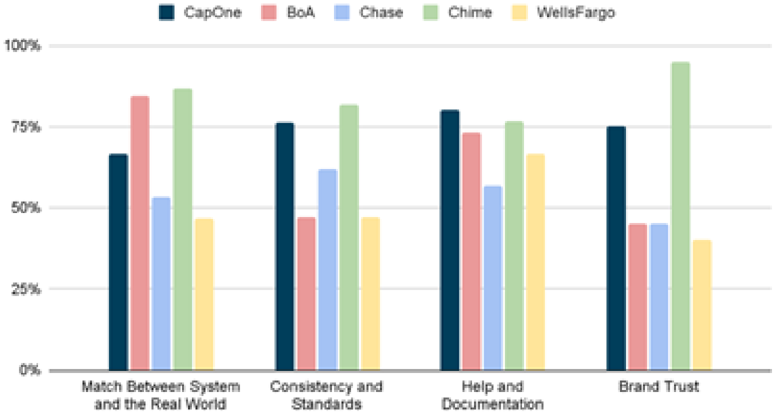
[redacted]

[Competitive Benchmark 2024]

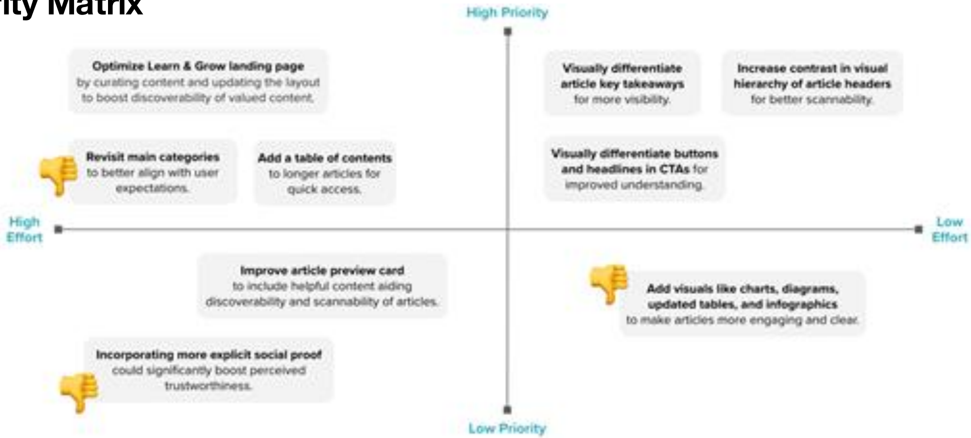
A competitive heuristic evaluation was conducted to gain a comprehensive understanding of the competitive landscape for [redacted], specifically focusing on how competitors are gaining customer trust and increase user engagement.

From the study, the team was able to understand how [redacted] is performing in the 4 identified categories against competitors and create next steps, organized by priority and effort level, to decide on what projects to implement next on the account.

Heuristic Rankings



Priority Matrix



User Research Prep,
Materials and Resources

UXR Session 3

User Research Prep, Materials & Resources Overview

In this session, we will share

- Guidance on **defining the problem** & research goals, designing **questions**, and conducting a **dry run**
- An overview of **key templates** to support asset creation and help you conduct research more effectively

ADDITIONAL RESOURCES

1

UXR FYIs & Findings

This document includes tips for setting up research and lessons learned from previous studies.

2

Confluence

You can find even more UXR resources in the UX Confluence Hub.

Preparing for Research

Define the Problem & Research Goals

Problem Statement → what we want to learn and why

How might we understand tech-savvy money managers' core jobs, pivotal moments in their financial journey, and unmet social and emotional needs to deliver solutions that resonate deeply, enhance empathy, and improve user experiences.

Research Goal → how we will learn it

Understand user needs in order to identify key moments in time, emotional and social drivers (jobs to be done) behind the adoption and use of financial tools, and "help me" statements that uncover unmet customer needs and goals.

Scope

Financial management via digital tools

Target Users

Tech-savvy money managers

Goal

Deliver solutions that will improve user experiences

Measure

User sentiment across interactions with digital tools

Asset Creation | Research Plan

What it is

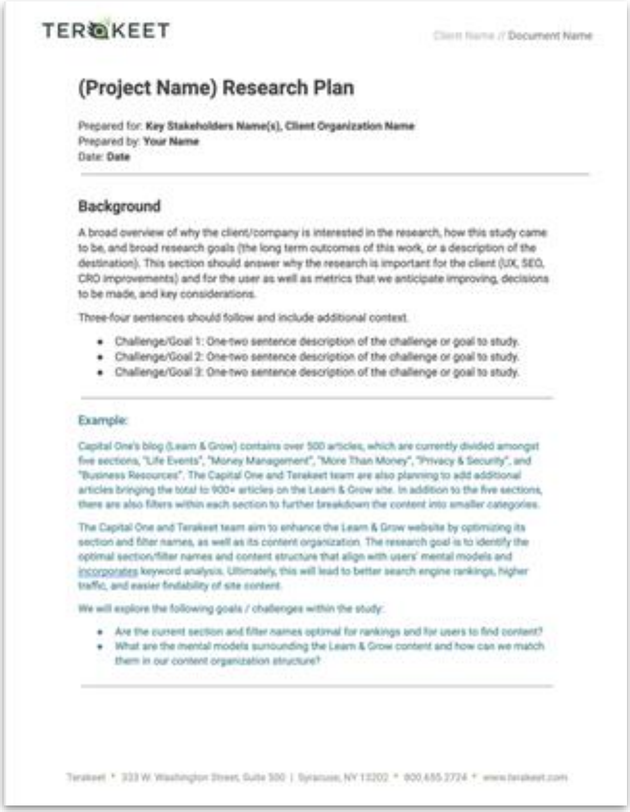
Overview of the research including goals and objectives, assumptions/hypotheses, methods and approach, and proposed timeline.

When to use it

Once the initial brief has been shared or the client has agreed to an initial research idea, this document provides more detailed information on the main objectives and how we plan to conduct the research.

This information is helpful to share with the client stakeholders before beginning the research to establish a schedule and ensure alignment on research objectives and methods.

[RESEARCH PLAN TEMPLATE]


Client Name // Document Name

(Project Name) Research Plan

Prepared for: **Key Stakeholders Name(s), Client Organization Name**
Prepared by: **Your Name**
Date: **Date**

Background

A broad overview of why the client/company is interested in the research, how this study came to be, and broad research goals (the long term outcomes of this work, or a description of the destination). This section should answer why the research is important for the client (UX, SEO, CRO improvements) and for the user as well as metrics that we anticipate improving, decisions to be made, and key considerations.

Three-four sentences should follow and include additional context.

- Challenge/Goal 1: One-two sentence description of the challenge or goal to study.
- Challenge/Goal 2: One-two sentence description of the challenge or goal to study.
- Challenge/Goal 3: One-two sentence description of the challenge or goal to study.

Example:

Capital One's blog (Learn & Grow) contains over 500 articles, which are currently divided amongst five sections, "Life Events", "Money Management", "More Than Money", "Privacy & Security", and "Business Resources". The Capital One and Terakeet team are also planning to add additional articles bringing the total to 900+ articles on the Learn & Grow site. In addition to the five sections, there are also filters within each section to further breakdown the content into smaller categories.

The Capital One and Terakeet team aim to enhance the Learn & Grow website by optimizing its section and filter names, as well as its content organization. The research goal is to identify the optimal section/filter names and content structure that align with users' mental models and incorporates keyword analysis. Ultimately, this will lead to better search engine rankings, higher traffic, and easier findability of site content.

We will explore the following goals / challenges within the study:

- Are the current section and filter names optimal for rankings and for users to find content?
- What are the mental models surrounding the Learn & Grow content and how can we match them in our content organization structure?

Terakeet * 333 W. Washington Street, Suite 500 | Syracuse, NY 13202 * 800.655.2724 * www.terakeet.com

Participant Recruitment

RECRUITMENT

Recruiting the right participants ensures that the insights gathered are **representative** of the actual user base, leading to data-backed decisions and user-centered designs. **Ensure representation across demographics, such as age, gender, socio-economic status, or cultural background.**

Respondent is the platform typically used for participant recruitment.

This [How-to](#) **guide** will walk you through creating a project.

INCENTIVES

Incentives **motivate** participants to engage, ensuring diverse and reliable feedback while **compensating** them for their time and effort.

Factors to consider:

- Level of involvement
- Time commitment
- Activity complexity

Calculators

- [Ethnio Incentive Calculator](#)
- [User Interviews Incentive Calculator](#)

*Contently | ~Money Fit | ^CCG | -

Screener

What it is

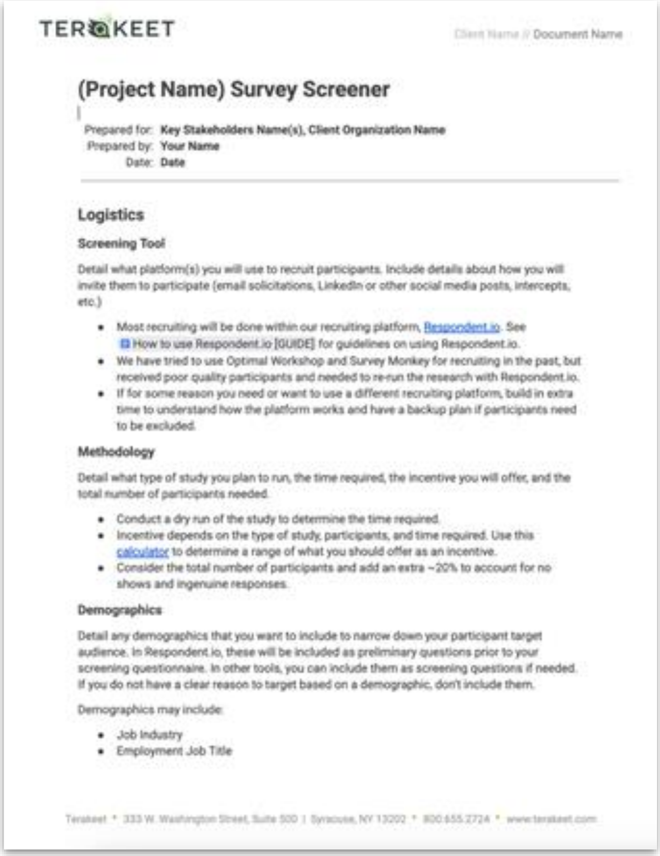
A set of questions designed to filter and select participants who meet specific criteria relevant to the research goals.

The screener helps ensure that the users chosen for the study have the characteristics, behaviors, or experiences necessary to provide valuable insights.

When to use it

Screeners are typically used during the participant recruitment process to confirm that participants fit the desired demographic, usage habits, or other relevant factors.

[SCREENER TEMPLATE]


TERAKEET Client Name // Document Name

(Project Name) Survey Screener

Prepared for: **Key Stakeholders Name(s), Client Organization Name**
Prepared by: **Your Name**
Date: **Date**

Logistics

Screening Tool

Detail what platform(s) you will use to recruit participants. Include details about how you will invite them to participate (email solicitations, LinkedIn or other social media posts, intercepts, etc.)

- Most recruiting will be done within our recruiting platform, Respondent.io. See How to use Respondent.io [GUIDE] for guidelines on using Respondent.io.
- We have tried to use Optimal Workshop and Survey Monkey for recruiting in the past, but received poor quality participants and needed to re-run the research with Respondent.io.
- If for some reason you need or want to use a different recruiting platform, build in extra time to understand how the platform works and have a backup plan if participants need to be excluded.

Methodology

Detail what type of study you plan to run, the time required, the incentive you will offer, and the total number of participants needed.

- Conduct a dry run of the study to determine the time required.
- Incentive depends on the type of study, participants, and time required. Use this calculator to determine a range of what you should offer as an incentive.
- Consider the total number of participants and add an extra ~20% to account for no shows and ingenuine responses.

Demographics

Detail any demographics that you want to include to narrow down your participant target audience. In Respondent.io, these will be included as preliminary questions prior to your screening questionnaire. In other tools, you can include them as screening questions if needed. If you do not have a clear reason to target based on a demographic, don't include them.

Demographics may include:

- Job Industry
- Employment Job Title

Terakeet • 333 W. Washington Street, Suite 500 | Syracuse, NY 13202 • 800.655.2724 • www.terakeet.com

Discussion Guide

What it is

A user research discussion guide is a structured outline used to facilitate and organize user interviews and studies. It’s an essential tool for gathering consistent, meaningful, and relevant data during qualitative research that typically includes a list of key topics, questions, and prompts designed to elicit insights into users' behaviors, needs, preferences, and experiences.

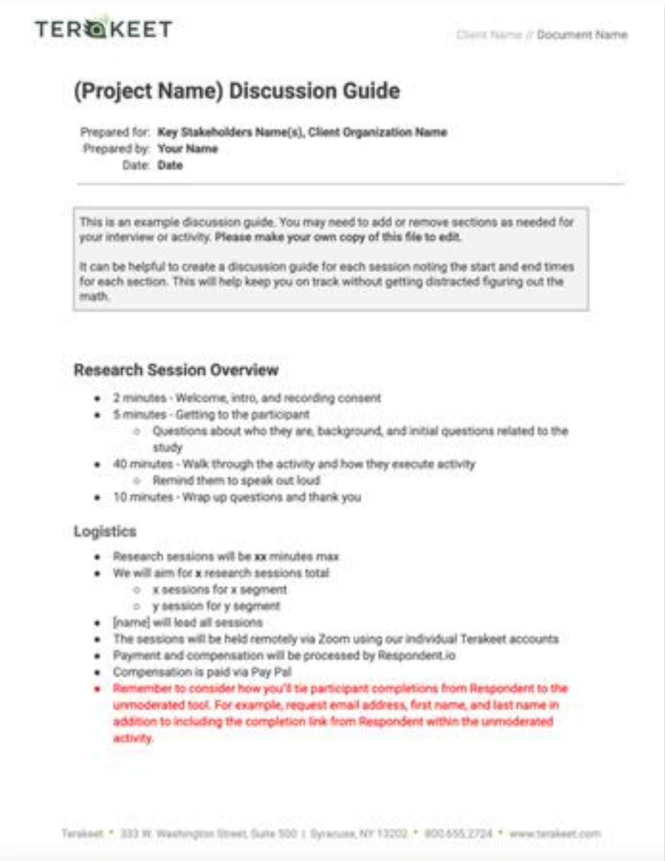
When to use it

The discussion guide is built out prior to conducting research sessions and used to ensure that the conversation stays focused while allowing for flexibility to explore interesting responses or follow up on important details.

DISCUSSION GUIDE TEMPLATE

PRO TIP

Determine what questions you want to answer. Consider pros / cons for each question type in order to obtain the right information while minimizing potential challenges (bias, analysis, accuracy, etc.).


TERAKEET Client Name // Document Name

(Project Name) Discussion Guide

Prepared for: **Key Stakeholders Name(s), Client Organization Name**
Prepared by: **Your Name**
Date: **Date**

This is an example discussion guide. You may need to add or remove sections as needed for your interview or activity. **Please make your own copy of this file to edit.**

It can be helpful to create a discussion guide for each session noting the start and end times for each section. This will help keep you on track without getting distracted figuring out the math.

Research Session Overview

- 2 minutes - Welcome, intro, and recording consent
- 5 minutes - Getting to the participant
  - Questions about who they are, background, and initial questions related to the study
- 40 minutes - Walk through the activity and how they execute activity
  - Remind them to speak out loud
- 10 minutes - Wrap up questions and thank you

Logistics

- Research sessions will be **xx** minutes max
- We will aim for **x** research sessions total
  - x sessions for x segment
  - y session for y segment
- [name] will lead all sessions
- The sessions will be held remotely via Zoom using our individual Terakeet accounts
- Payment and compensation will be processed by Respondent.io
- Compensation is paid via Pay Pal
- Remember to consider how you'll tie participant completions from Respondent to the unmoderated tool. For example, request email address, first name, and last name in addition to including the completion link from Respondent within the unmoderated activity.

Terakeet • 333 W. Washington Street, Suite 500 | Syracuse, NY 13202 • 800.655.2724 • www.terakeet.com

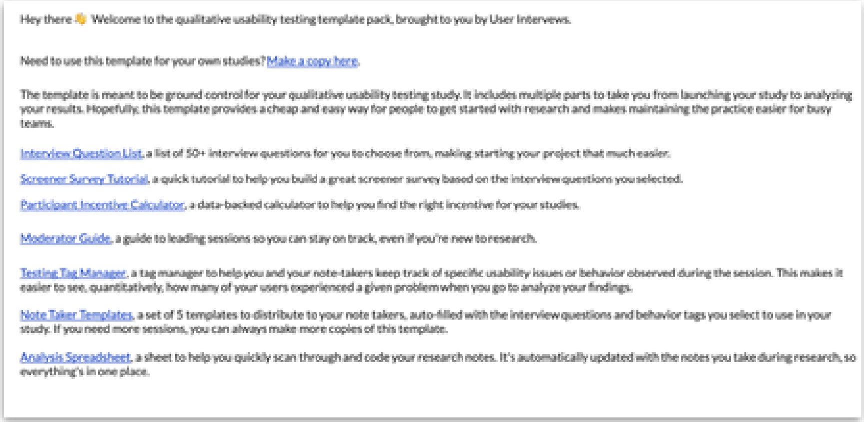
User Interview Guide

What it is

A comprehensive resource guide for developing and documenting usability studies including an interview questions list, screener survey tutorial, incentive calculator, tag manager, note-taking template, and analysis spreadsheet.

When to use it

This document can be used throughout the planning process, research sessions, and analysis to help you organize your research.



Hey there 👋 Welcome to the qualitative usability testing template pack, brought to you by User Interviews.

Need to use this template for your own studies? Make a copy here.

The template is meant to be ground control for your qualitative usability testing study. It includes multiple parts to take you from launching your study to analyzing your results. Hopefully, this template provides a cheap and easy way for people to get started with research and makes maintaining the practice easier for busy teams.

Interview Question List, a list of 50+ interview questions for you to choose from, making starting your project that much easier.

Screener Survey Tutorial, a quick tutorial to help you build a great screener survey based on the interview questions you selected.

Participant Incentive Calculator, a data-backed calculator to help you find the right incentive for your studies.

Moderator Guide, a guide to leading sessions so you can stay on track, even if you're new to research.

Testing Tag Manager, a tag manager to help you and your note-takers keep track of specific usability issues or behavior observed during the session. This makes it easier to see, quantitatively, how many of your users experienced a given problem when you go to analyze your findings.

Note Taker Templates, a set of 5 templates to distribute to your note takers, auto-filled with the interview questions and behavior tags you select to use in your study. If you need more sessions, you can always make more copies of this template.

Analysis Spreadsheet, a sheet to help you quickly scan through and code your research notes. It's automatically updated with the notes you take during research, so everything's in one place.

USER INTERVIEWS TEMPLATE

Note-Taking Template

What it is

A note-taking guide and analysis sheet for consistently collecting and organizing user feedback and observations.

When to use it

This spreadsheet can be used by the note-taker during moderated interviews and usability study sessions.

Notes should be clear and concise. They should include only what is important based on the question asked and they should accurately represent what is seen/heard.

NOTE TAKING TEMPLATE

💡PRO TIP
Include two UXDs in each session – one designated to documenting feedback in the spreadsheet while the other is fully dedicated to facilitating the interview and engaging with the participant.

Example:
- [MLPI Navigation Study]

	[DATE]			
	Task #	**P1**	**P2**	**P3**
Task 1	Task			
	Verbal response			
	Other notes (non verbal cues, why is it important)			
	Time Stamp			
	Task Time			
	Number of attempts			
	User expectation			
Task 2	Task			
	Verbal response			
	Other notes (non verbal cues, why is it important)			
	Time Stamp			
	Task Time			
	Number of attempts			
	User expectation			
Overall	*Question order*			
	Likert Scale Rating			

Conducting a Dry Run

Before initiating formal interview sessions, it is essential to conduct a preliminary test run to ensure that all technical and logistical components are properly configured and functioning seamlessly. This proactive measure helps identify and address any potential issues in advance, ensuring a smooth and efficient interview/data collection process.

Here are some guidelines to ensure your study is set up for success.

ASSETS

Assets should be the same for all participants.

- Changing scripts, prototypes, questions, etc. in the middle of sessions will hurt the reliability of your findings and lower your confidence in results.

Test assets during the dry run to make any necessary updates.

- Include potential follow-up questions and anticipate challenging user responses and next steps.

TECHNOLOGY

Test all technology that will be used during the session to work out any issues.

- This includes remote tools, video/audio recordings, screen sharing, prototypes, etc.

TIMING

Research sessions and surveys should be kept short (under 45 min).

- This helps maintain focus throughout and improve the data collected.

Additional Research Templates

UX Competitive Benchmark

What it is

A competitive analysis that assesses how the site's current user experience compares to industry standards and top competitors across 12 heuristic categories to identify top opportunities to improve site performance.

When to use it

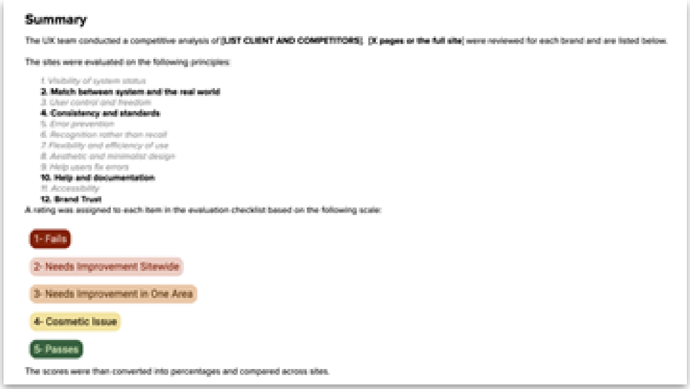
At the beginning of an engagement with a new client and annually thereafter to uncover any new issues or opportunities.

[UX COMPETITIVE BENCHMARK TEMPLATE]

[UX COMPETITIVE BENCHMARK SLIDES TEMPLATE]

Example:

- Client UX Competitive Benchmark



Summary

The UX team conducted a competitive analysis of **[LIST CLIENT AND COMPETITORS]**. **[X pages or the full site]** were reviewed for each brand and are listed below.

The sites were evaluated on the following principles:

1. Visibility of system status
2. **Match between system and the real world**
3. User control and freedom
4. **Consistency and standards**
5. Error prevention
6. Recognition rather than recall
7. Flexibility and efficiency of use
8. Aesthetic and minimalist design
9. Help users fix errors
10. **Help and documentation**
11. Accessibility
12. **Brand Trust**

A rating was assigned to each item in the evaluation checklist based on the following scale:

1- Fails

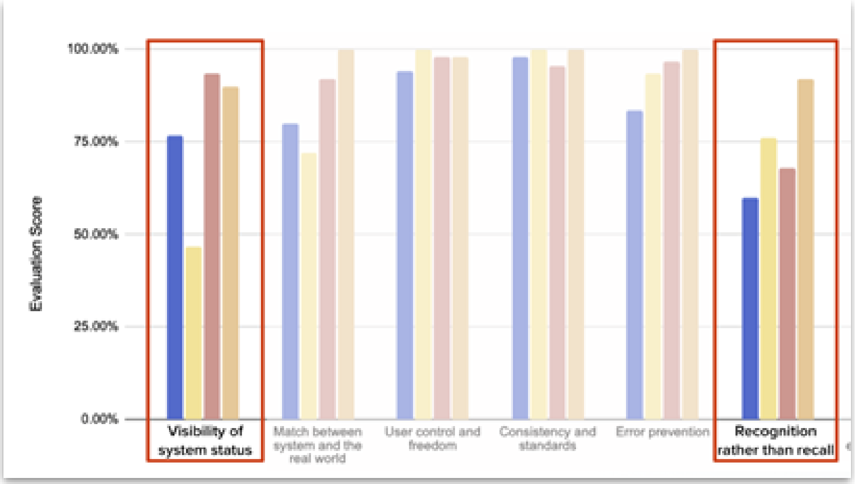
2- Needs Improvement Sitewide

3- Needs Improvement in One Area

4- Cosmetic Issue

5- Passes

The scores were than converted into percentages and compared across sites.



Client Discovery Questions

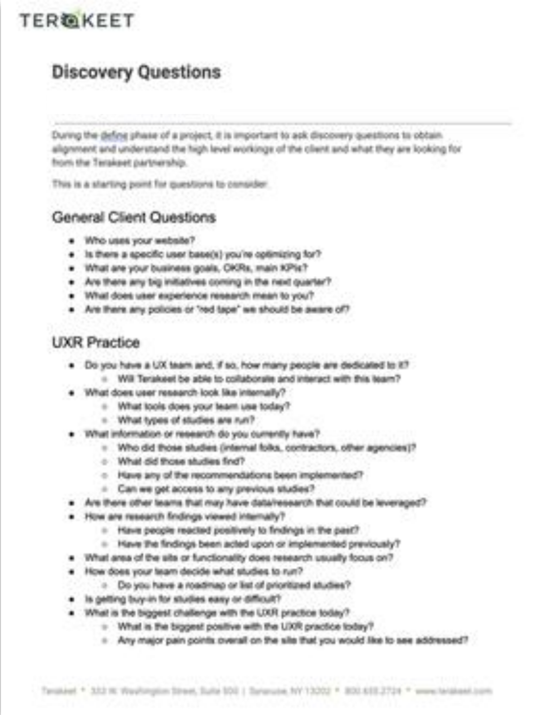
What it is

A list of general client and UX research practice questions to consider at the beginning of a new engagement.

When to use it

During the Define phase of a project to obtain alignment and understand the high level workings of the client and what they are looking for from the Terakeet partnership.

[CLIENT DISCOVERY QUESTIONS]



TERAKEET

Discovery Questions

During the define phase of a project, it is important to ask discovery questions to obtain alignment and understand the high level workings of the client and what they are looking for from the Terakeet partnership.

This is a starting point for questions to consider.

General Client Questions

- Who uses your website?
- Is there a specific user base(s) you're optimizing for?
- What are your business goals, OKRs, main KPIs?
- Are there any big initiatives coming in the next quarter?
- What does user experience research mean to you?
- Are there any policies or "red tape" we should be aware of?

UXR Practice

- Do you have a UX team and, if so, how many people are dedicated to it?
  - Will Terakeet be able to collaborate and interact with this team?
- What does user research look like internally?
  - What tools does your team use today?
  - What types of studies are run?
- What information or research do you currently have?
  - Who did those studies (internal folks, contractors, other agencies)?
  - What did those studies find?
  - Have any of the recommendations been implemented?
  - Can we get access to any previous studies?
- Are there other teams that may have data/research that could be leveraged?
- How are research findings viewed internally?
  - Have people reacted positively to findings in the past?
  - Have the findings been acted upon or implemented previously?
- What area of the site or functionality does research usually focus on?
- How does your team decide what studies to run?
  - Do you have a roadmap or list of prioritized studies?
- Is getting buy-in for studies easy or difficult?
- What is the biggest challenge with the UXR practice today?
  - What is the biggest positive with the UXR practice today?
  - Any major pain points overall on the site that you would like to see addressed?

User Research Synthesis & Deck Creation

UXR Session 4

Synthesis Methods & Platforms

Research Synthesis Process

1. Consolidate

Review observations on a question/task basis and compare across participants.

Organize and centralize all research data from various sources (interviews, surveys, usability tests) into a central repository or tool.

Systematically categorize and tag data points based on themes, user types, or research objectives to facilitate easier retrieval and analysis.

2. Analyze

Refer back to the research objectives to create a narrow, focused scope when analyzing data. This will help avoid analyzing all observations, which is time-consuming and may not even answer the original questions.

Integrate numerical data with qualitative insights for a more comprehensive understanding of user behavior.

There are many research tools that can be used during the conduct phase to reduce analysis effort, or the analysis can be done manually using Excel or an affinity mapping exercise.

Common Research Synthesis Methods

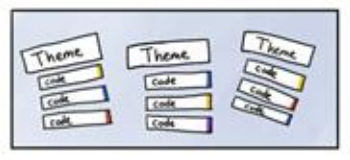
There is no one right way to conduct user research and many methods can be combined for a comprehensive analysis.

AFFINITY MAPPING

Cluster themes, identify common pain points, and prioritize design improvements.

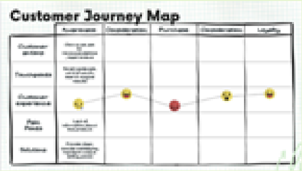
THEMATIC ANALYSIS

Tagging data segments with labels to categorize them helps capture recurring patterns or ideas.



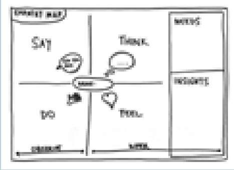
JOURNEY MAPPING

Visualize the user experience across different touchpoints, making it ideal for identifying pain points and opportunities.



EMPATHY MAPPING

Categorize information from interviews to support understanding of user emotions, thoughts, and behaviors.



Translating Insights into Client Recommendations

1 Identify Key Patterns

- Look for recurring themes across data sources
- Pay attention to outliers and unexpected findings

2 Contextualize Insights

- Consider broader user environment and external factors
- Connect insights to business goals and objectives

3 Prioritize Actionable Findings

- Focus on insights that can drive meaningful improvements
- Consider feasibility and potential impact of recommendations

4 Develop Clear Action Points

- Translate insights into specific, actionable strategies
- Provide concrete next steps for implementation

Sharing the Results

Communicating the Results

Research findings should always be delivered to the team; however, the medium, language, and style may vary depending on the intended audience.

Tailor the presentation

- For an **internal** team, a short deck and open discussion on priority /next steps may work well.
- For an **external** team or presentation to executives, a more formal deck with an executive overview and focus on action-oriented next steps might work better.

Both meetings should result in **alignment** on the highest priority **next steps** and **owner** for each.

Sharing Findings with the Client

Focus on Results & Next Steps

Client presentations should focus more on the **results** rather than how the research was conducted.

Finalizing research involves **prioritizing the findings** and creating / aligning on **actionable next steps**. Priority should be established by the full team based on cost, impact, and effort.

Keep It Engaging!

Google slides is usually the preferred method for sharing findings but if using a word document, be sure to format in a way to help the client understand key findings by highlighting and **bolding** key points.

Consider leveraging **Figma** to connect research findings to the site designs and convey key results to clients.

Client Research Readout Deck Examples:

- MLPI Navigation Research Study Readout Deck
- Finserv Research Readout Deck

UX Research Readout Slides

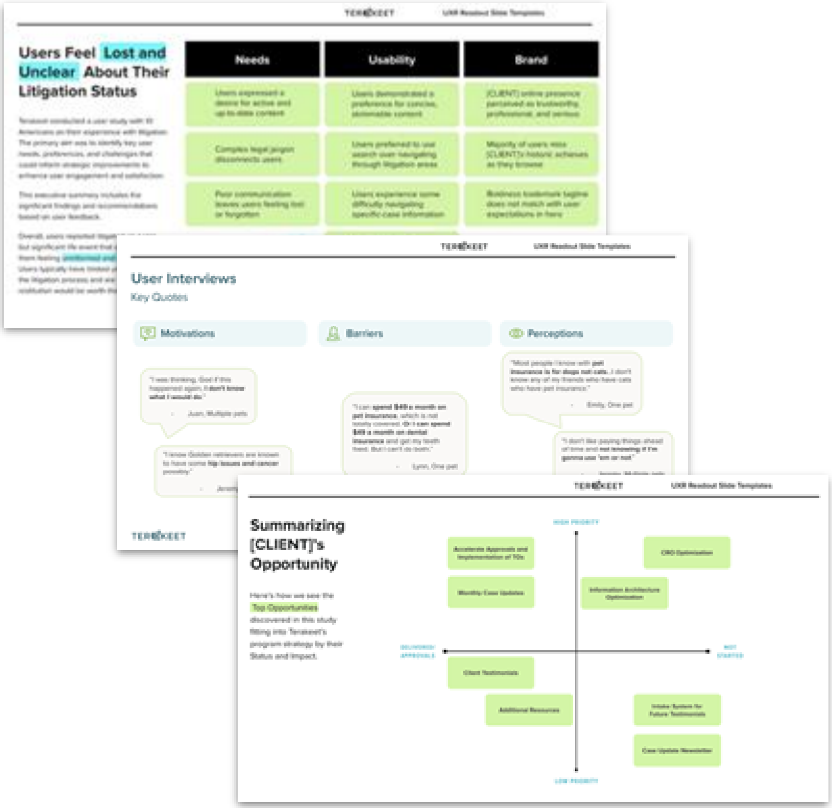
What it is

Google Slides templates with examples from previous delivery account user research presentations to help guide the creation of a deck readout.

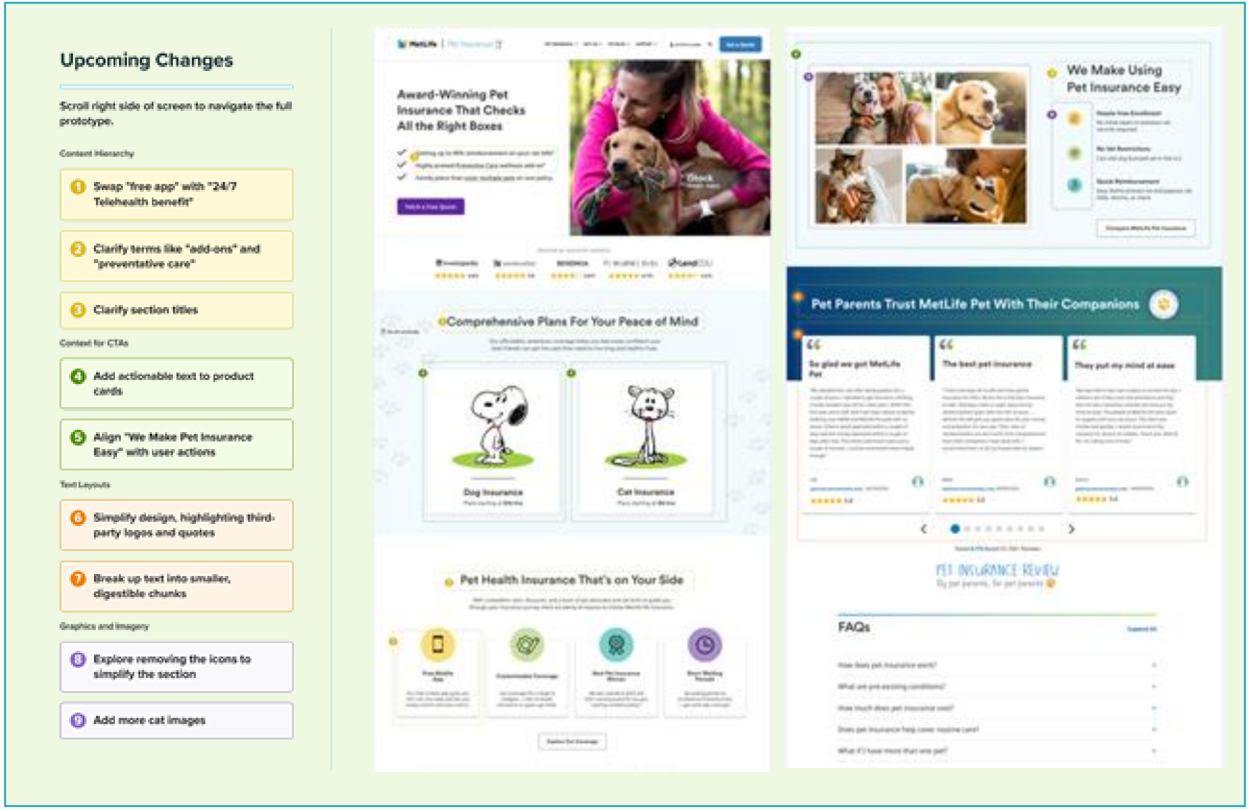
When to use it

These slides can be used at the final stage of the research process to consolidate and share findings with the client.

[UXR READOUT SLIDES TEMPLATE]



Leveraging Figma to Share Results



[Access the full report]

The Topline Report

A Topline Report is a modular document that highlights facts and insights. It is intended to be easy to read, brief, and concise.

💡PRO TIP

Provide links to additional information within the document to allow the reader dive deeper.

[INFLUENTIAL RESEARCHER COURSE REVIEW]

[Example] Topline News

Research Topline: Project Scholar Pricing and Feature Ranking

👍 If we support academics, they will support us

Highlights (or Guidance):

- Money is a limiting factor for academic researchers across the globe.
- Researchers aren't asking for the world; only 100 million data points or less.
- To win the hearts and minds of academics, we should prioritize a package that includes Historical Data Access and de-prioritize both a "no-code" solution and predetermined datasets.

Levels of Certainty - Quick Guide

- 🟢 High
- 🟡 More Likely Than Not
- 🟠 Less Likely Than Not
- 🔴 Low

For definitions on level of certainty, see key below.

What's Happening:

🟢 🚀 [Point of View] For our academic customers our initial price point should be between $75-$500 per research project while providing 100 million data points or less.

- Researchers get funding for data from multiple sources (e.g. grant, University, out of pocket),

HEADLINE
3-10 words to highlight the section

BYLINE
Tells the stakeholder what the whole section is about

HIGHLIGHTS
A paragraph or list of bullet items that highlights the overall document in a concise manner

LEVELS OF CERTAINTY
Provides a guide to communicate how confident each claim is throughout the report

POV
Provide your insights for each claim supported by data and signify the level of certainty (if applicable)

That’s all, folks!