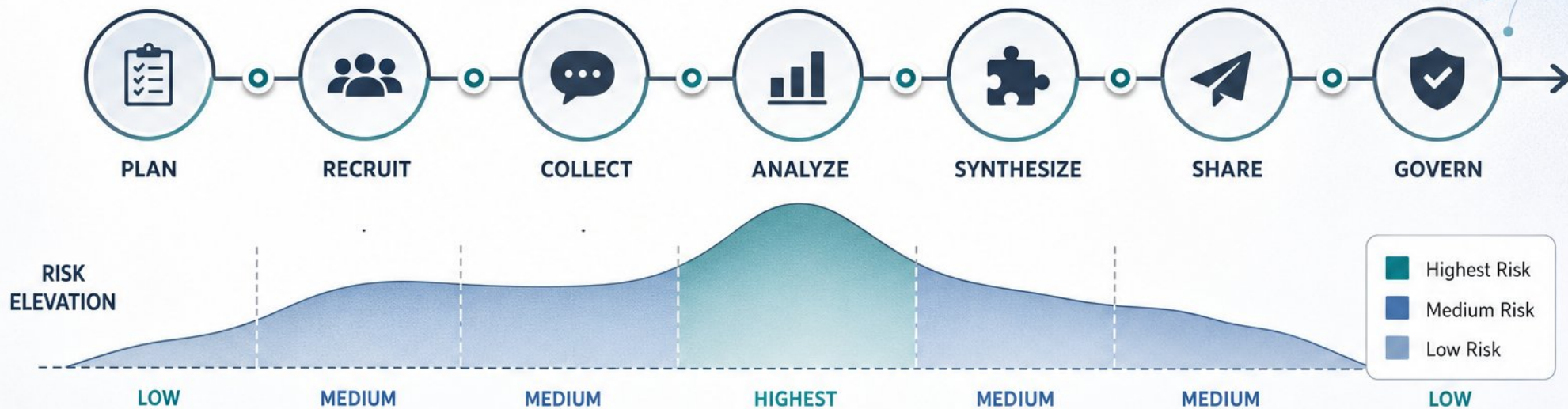


How to Use AI for User Experience Research: A Practical Workflow

- Course promise: a repeatable, privacy-conscious workflow from research question to insight delivery
- AI adoption is now baseline: 69% of researchers use it, up 19 points year over year
- 88% name AI-assisted analysis and synthesis as the defining trend of 2026
- Where AI earns its place: transcription, first-pass tagging, pattern detection, ops logistics
- Where it fails: fabricated quotes, biased summaries, privacy leakage, false confidence
- Non-negotiable: human judgment, participant welfare, and evidence traceability stay with researchers



The AI-Assisted Research Lifecycle at a Glance



-  | - Seven stages: plan, recruit, collect, analyze, synthesize, share, govern
-  | - Risk is uneven: planning low, sessions medium, analysis highest
-  | - Use AI for repetitive, pattern-heavy, time-boxed tasks; humans for interpretation
-  | - Define inputs and outputs per stage for clean handoffs
-  | - Add privacy and quality checkpoints before any output leaves the team



PRIVACY & QUALITY CHECKPOINTS

Checkpoints at every stage ensure privacy protection and quality standards are met before any output leaves the team.



Guardrails First: Privacy, Consent, and Data Handling



- Sensitive data: recordings, transcripts, screen shares, identifiers, vulnerable participants



- Consent must name AI analysis, third-party tools, recording, sharing, retention — separately



- De-identify and redact before any AI tool touches data; time your erasure workflow



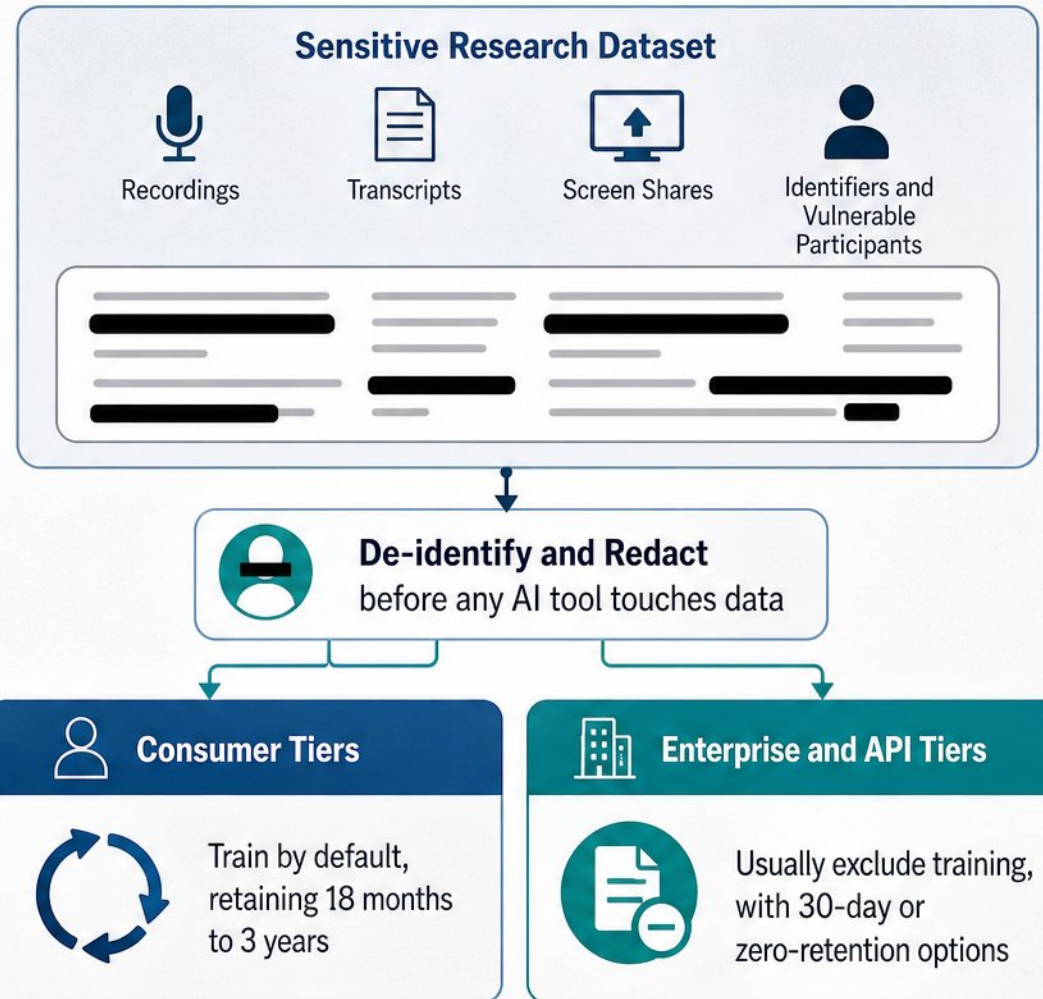
- Vendor due diligence: training on inputs, retention window, subprocessors, data residency



- Consumer tiers train by default, retaining 18 months to 3 years; enterprise and API tiers usually exclude training, with 30-day or zero-retention options



- Audit-proof rule: no participant data in public or consumer-grade AI tools



Audit-proof rule: no participant data in public or consumer-grade AI tools

Planning and Study Design with AI



- Deconstruct the plan; draft each part separately, not one finished prompt



- AI drafts questions, guides, screeners, recruitment copy; cut to fit



- Use the funnel: warm-up, exploration, probing, projective task, stimulus, wrap-up



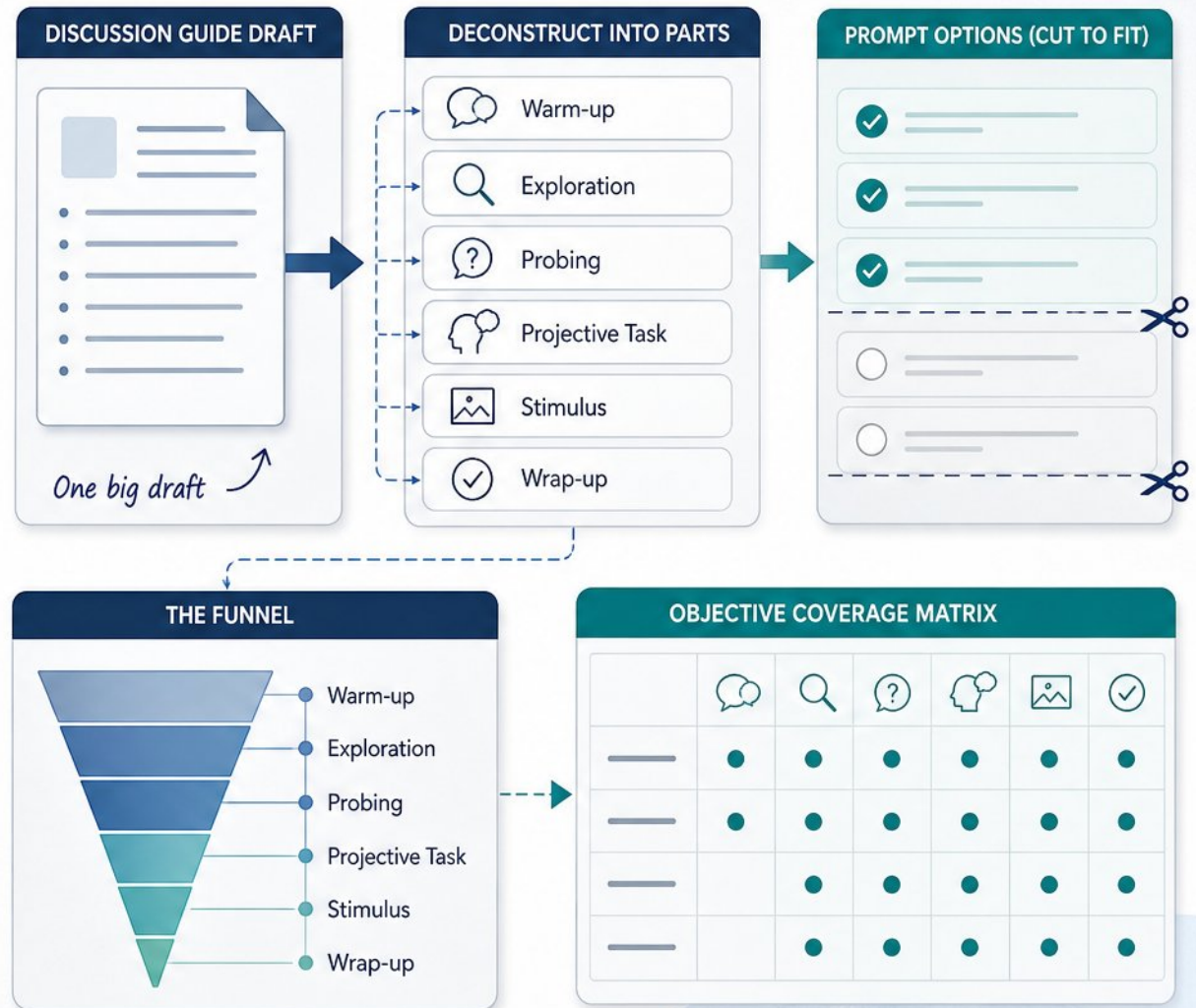
- Every question ladders to an objective; run the coverage matrix



- AI catches obvious leading and double-barreled questions; subtle ones need the bias checklist

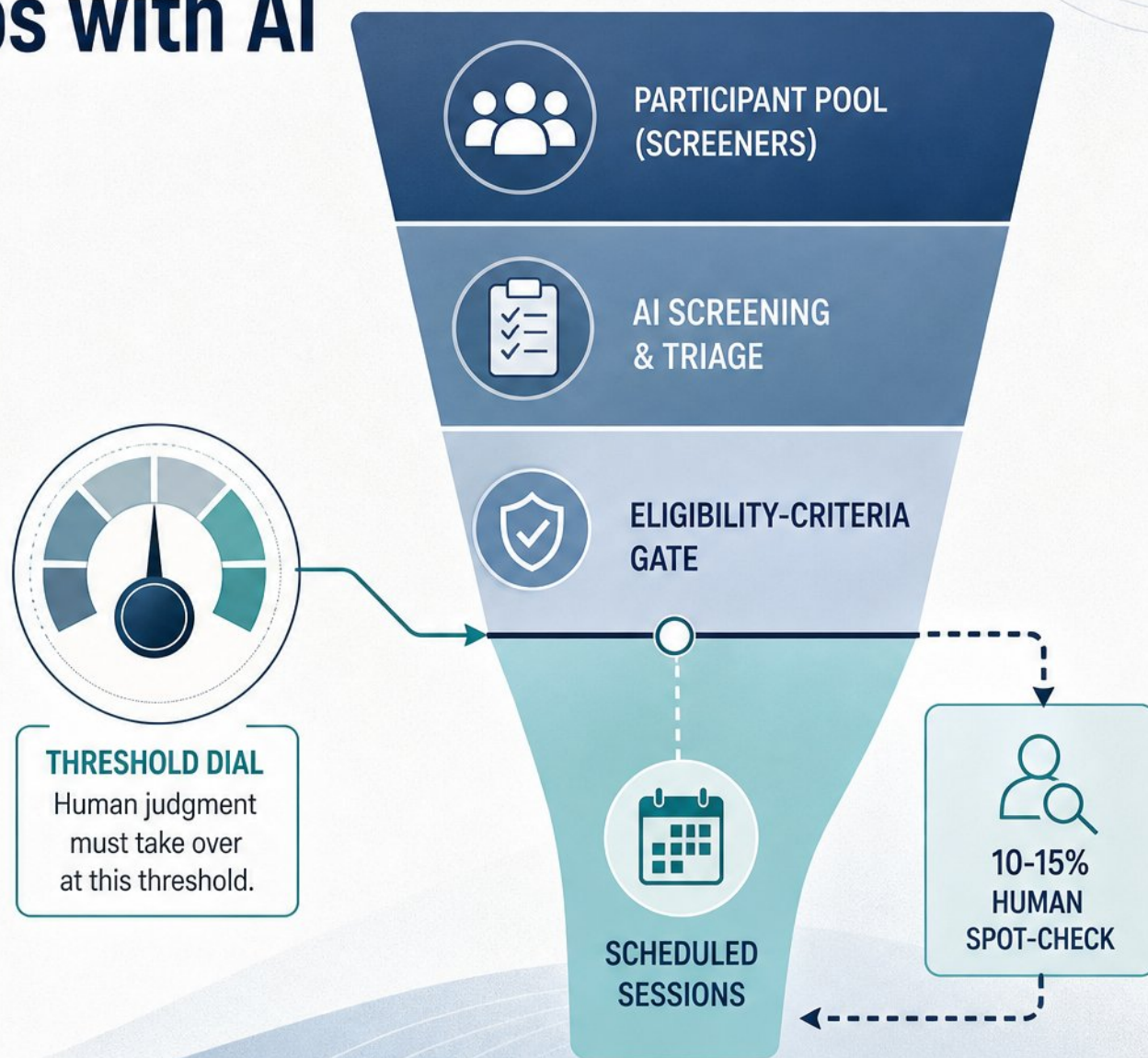


- Pre-mortem for risks, missing perspectives, and cultural bias, then verify yourself



Recruiting, Scheduling, and Research Ops with AI

- AI handles screening routing, reminders, scheduling, incentives, and no-show follow-ups
- Recruitment sees the biggest gains: 1-2 weeks cut to 24-72 hours
- Bias is conditional: identity alone barely shifts eligibility judgments
- Soft judgments on adherence and resources do shift: homelessness scored -0.595
- Keep eligibility tethered to written protocol language, not inference
- Human review before rejecting anyone; spot-check 10-15% of approvals
- Audit screeners trained on historical data for exclusion of underrepresented groups



AI in Live Sessions: Moderation, Notes, and Transcription



- AI transcribes in real time and probes consistently across parallel sessions



- It cannot read the room, sit with silence, or handle sensitive topics



- Consent must disclose whether a human or AI conducts the session



- Accuracy drops with accents, crosstalk, jargon, and low-resource languages



- Watch for dropped negations, wrong numbers, speaker misattribution, missing sections



- Verify transcripts against audio; flag uncertainty explicitly

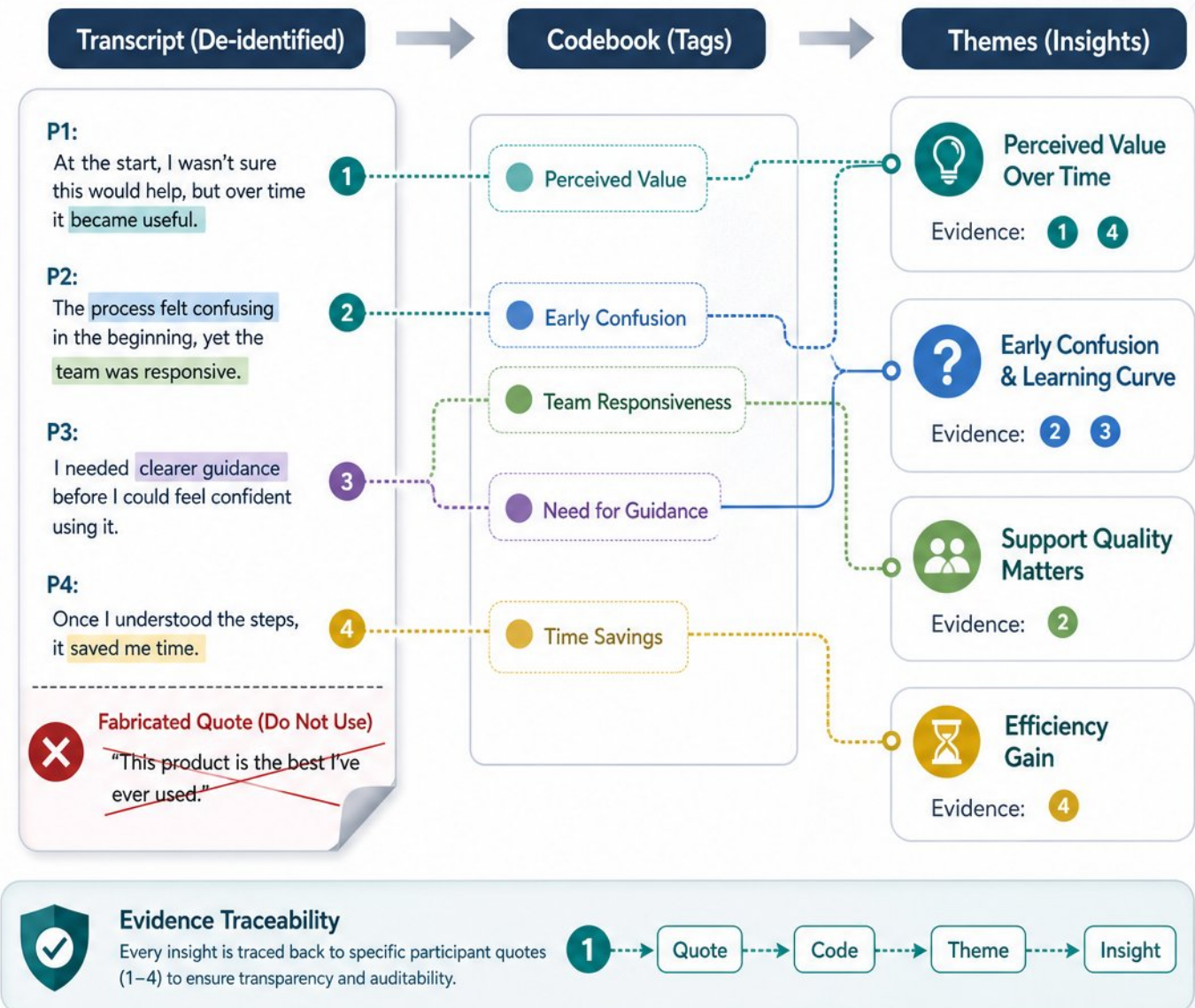


- English audio approaches near-human accuracy; quality varies widely

LIVE SESSION AUDIO	AI TRANSCRIPT
 Clear speaker	“ We will not proceed without stakeholder input. ”
 Accent	“ We will proceed without stakeholder input. ” ⚠ Dropped negation
 Crosstalk	“ Can you send the file to the team after the meeting?” “ Yeah, sure. ” ⚠ Speaker misattribution
 Jargon / domain terms	“ Let’s leverage the solution for the synergy. ” ⚠ Jargon simplified / incorrect
 Low-resource language	(Section not captured) ⚠ Missing section

From Raw Data to Themes: AI-Assisted Analysis and Coding

- Start with clean, de-identified datasets and a written codebook
- AI excels at description and surface-level extraction, not interpretation
- Documented failure signatures: fabricated quotes, themes only from transcript openings, no participant spread, no disconfirming cases
- Prompt for supporting evidence, counterexamples, uncertainty, and coverage gaps — not a clean five-theme summary
- Human verification: trace every theme to participant quotes and audit over-merged codes
- Review outliers and low-frequency codes deliberately — AI quietly drops what doesn't fit



Synthesis, Storytelling, and Artifacts People Act On



- Convert verified themes into insight statements, each with supporting evidence



- AI drafts journey maps and personas as critique-ready drafts, not final artifacts



- GenAI personas risk hallucinated detail, stereotype leakage, persona collapse, sycophantic agreement



- Use synthetic artifacts as a compass for direction, never as the map for decisions



- Publish a verification checklist with links back to source transcripts for AI summaries

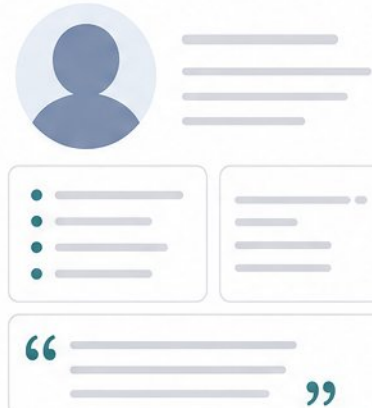
Journey Map (Draft)



**SYNTHETIC-USER ARTIFACT
NON-EVIDENTIARY**

Critique-Ready Draft

Persona (Draft)



**SYNTHETIC-USER ARTIFACT
NON-EVIDENTIARY**

Critique-Ready Draft

Opportunity Area (Draft)



**SYNTHETIC-USER ARTIFACT
NON-EVIDENTIARY**

Critique-Ready Draft

EVIDENCE TRACEABILITY: QUOTE → THEME → INSIGHT



Source Quote

Verbatim participant quote from transcript

1



Theme

Analyst-verified pattern or theme

2



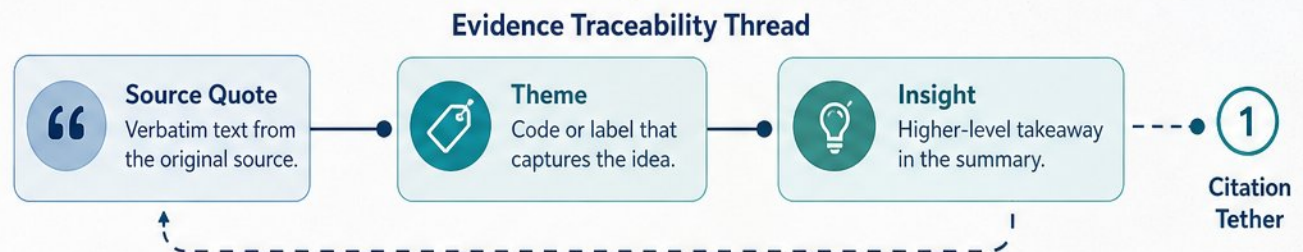
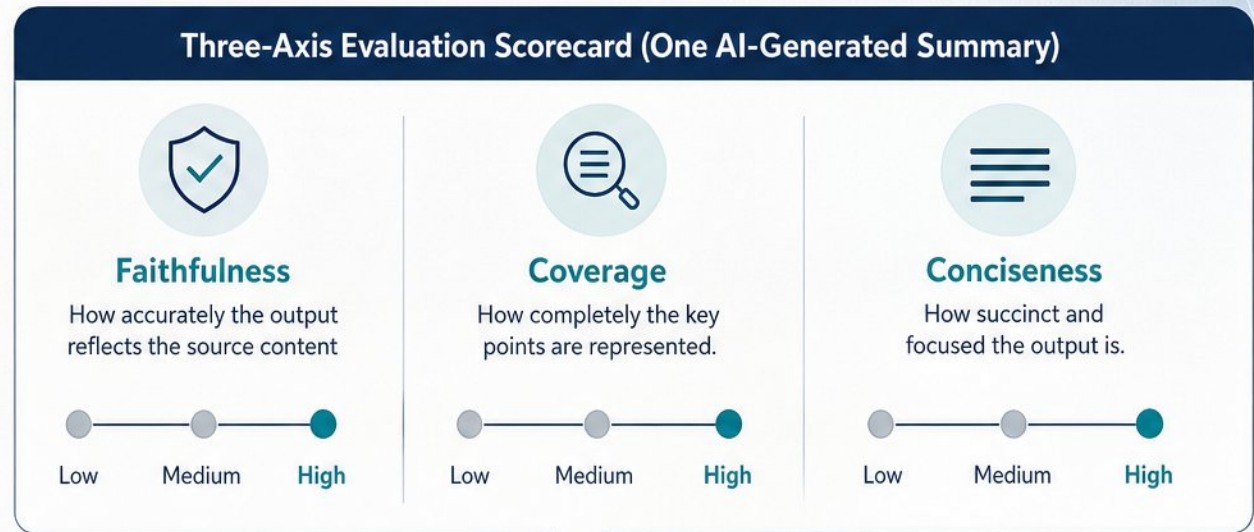
Insight Statement

Actionable insight with supporting evidence

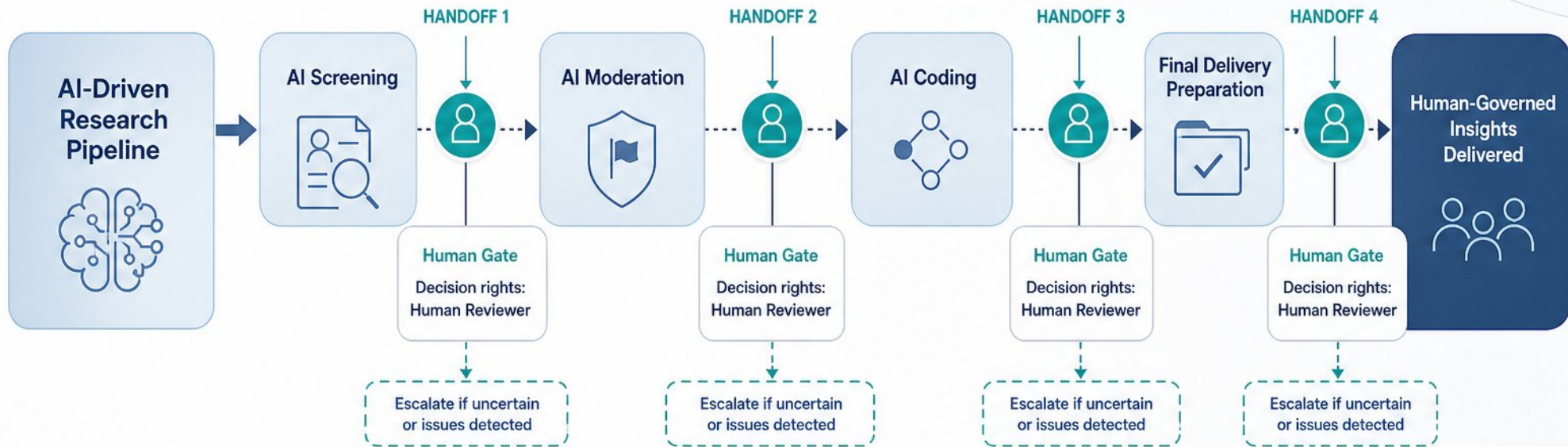
3

Evals and Quality Control for AI Research Outputs

- Score every output on three axes: faithfulness, coverage, conciseness
- These pull against each other — always score all three together
- Build a lightweight rubric; score summaries and themes before stakeholders see them
- Sample and spot-check; target problem areas flagged by validation signals
- Traceability is first-class: every theme maps back to a source quote
- Log model, prompt, data version, and settings for reproducible audits
- Define escalation rules and a review queue for flagged content



Four Critical Handoff Points in the Human-AI Workflow



- Handoff 1: after AI screening, spot-check 10-15% of approved profiles
- Handoff 2: after AI moderation, review flagged sessions and outlier transcripts
- Handoff 3: after AI coding, audit codebook for accuracy, coverage, over-merged codes
- Handoff 4: before final delivery, confirm every AI insight against raw data
- Name who holds decision rights for screening, adjudication, and governance
- Watch the oversight-burden trap: hallucinated rationales drive alert fatigue

Team Governance: Policy, Roles, and Training



- One-page policy: approved tools, prohibited data, review steps, disclosure standards



- Put no-training and retention terms in the order form, not a settings toggle



- Watch the tier boundary: enterprise and API exclude training; personal accounts leak data



- Role-based training with clear responsibilities and escalation paths for each team



- ResearchOps shifts from admin support to system design and eval discipline



- Re-audit quarterly — vendor terms and model versions move faster than annual reviews



TEAM POLICY (ONE-PAGE)



APPROVED TOOLS

Use only tools that are approved for our work.



PROHIBITED DATA

Do not input restricted, confidential, or personal data.



REVIEW STEPS

Follow required review and quality steps before sharing or publishing.



DISCLOSURE STANDARDS

Disclose AI use and adhere to transparency and attribution standards.



RESEARCHERS

Design studies, collect insights, analyze responsibly.



DESIGNERS

Create solutions, test with users, prototype ethically.



PMS

Set direction, prioritize value, align stakeholders.



RESEARCHOPS

Build systems, define standards, measure and improve.

THRESHOLD DIAL

Know where the boundary is and when human judgment must take over.



PERSONAL ACCOUNTS
Leak Data

TIER BOUNDARY
Use Human Judgment

ENTERPRISE & API
Exclude Training

A 30-Day Adoption Plan and Metrics That Matter

- Pick one high-time, low-value stage — usually transcription-and-tagging or synthesis
- One tool, one workflow, explicit evidence traceability, plus a human review step
- Week 1 policy and tool; week 2 live pilot; week 3 measure; week 4 decide
- Metrics: cycle time, time-to-first-insight, cost-per-insight, evidence quality, participant trust
- Track decision coverage over study volume
- Scale guardrails and enablement as adoption spreads

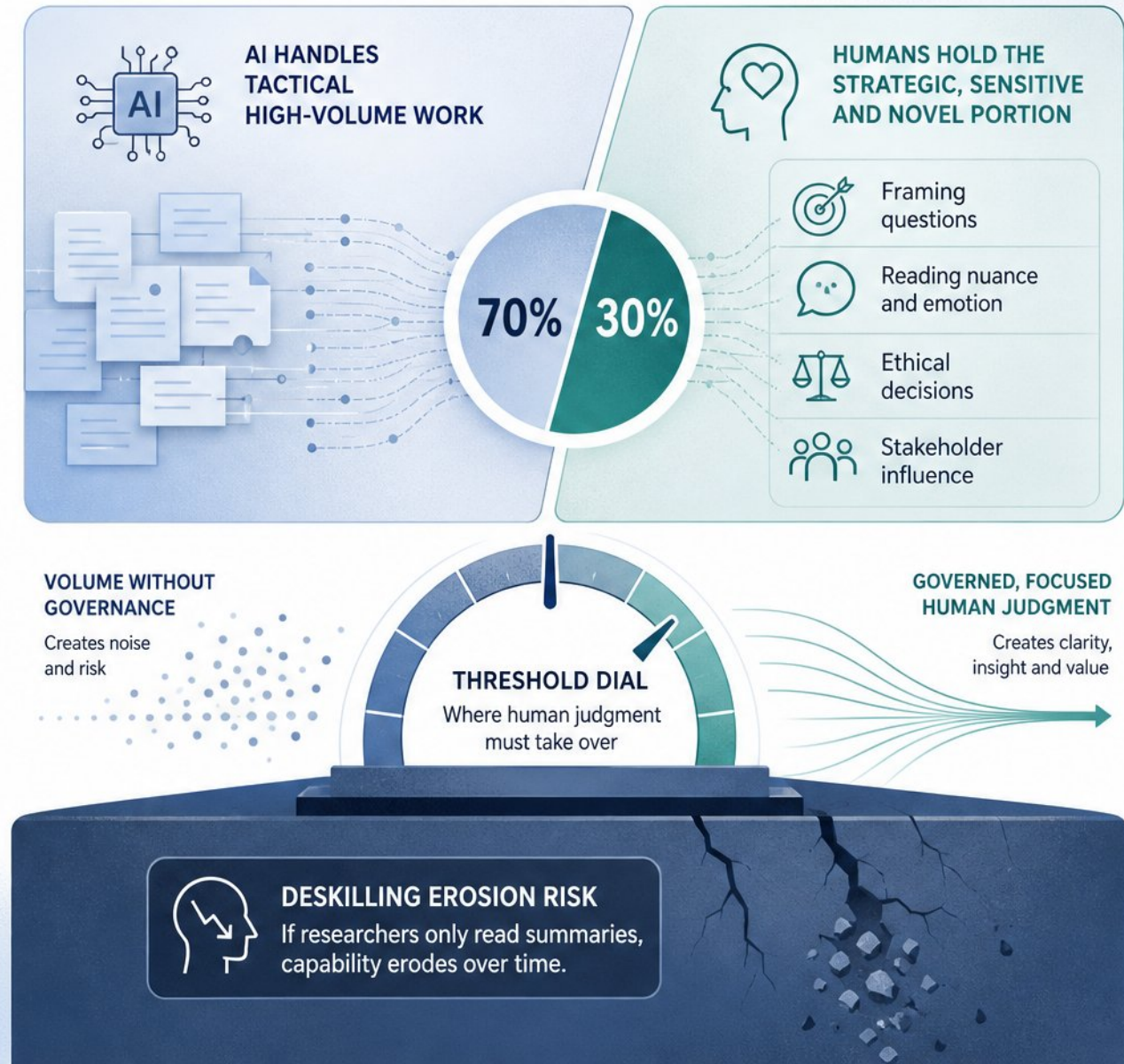


SEVEN-STAGE RESEARCH LIFECYCLE



What to Keep Human as Tools Keep Changing

- - 2026 pattern: AI for 70-80% of tactical research, humans for the strategic 20-30%
- - Usage has outrun trust: ~91% worry about accuracy and hallucination
- - Only ~8% trust fully AI-generated participants
- - Durable human edge: framing questions, reading nuance and emotion, ethical decisions, stakeholder influence
- - Biggest risk is ungoverned volume: more studies without shared standards produce noise
- - Deskilling is named risk: have researchers work the data, not just summaries



Hands-On Practice: Apply the Workflow to One Study Stage



Exercise 1: Brief AI to draft a section map and guide, then run the coverage matrix and bias checklist.



Exercise 2: Score a sample AI theme summary on faithfulness, coverage, and conciseness; flag traceability failures.



Exercise 3: Use vendor due-diligence questions to evaluate one tool your team already uses.



Exercise 4: Write the four handoff points and escalation rule for your next study.



Deliverable: a one-page workflow card covering approved tools, prohibited data, review steps, and metric.



Follow-up: a 30-day check-in to review pilot results and decide on expanding.



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