How to Learn User Research: A Practical Workflow

- **Goal:** a repeatable path from first question to decision-grade insight
- **Core idea:** learn research by running a workflow end to end
- **Six stages:** frame the decision → choose methods → recruit and consent → collect → synthesize → decide and share
- **Success criteria:** choose a method, run a small study, write a decision brief
- **Routes:** beginners, designers, product managers, methods teachers





What Learning Research Actually Requires

Learn by doing: run one small end-to-end study, not tutorials

Entry-level bar: basic methods fluency, analysis and synthesis, inclusive research

Synthesis and stakeholder communication separate juniors from seniors

Retire myths: research isn't interviews alone or just validation

Target: three to five small case studies with product-actionable recommendations



Learning Paths by Role

PEOPLE
PRACTICE
BETTER RESEARCH



Beginners

ethics, consent, interviewing basics, note-taking, then one supervised study



Designers

strong in problem framing and critique; unlearn solution-first reflexes



Product people

tie each study to a roadmap or metric decision; pre-commit



Teachers

adapt exercises, rubrics, and critique formats; practice before theory

Shared minimum

one end-to-end study with real users
plus a critique partner

CURIOSITY LEADS TO CLEARER DECISIONS

Frame the Decision Before Choosing a Method

- Start from the decision, not the method
- Test: if both answers lead to the same action, skip the study
- One-page brief: decision, owner, question, hypotheses, participants, timing
- Classify decision type: vision, strategy, definition, or evaluation
- Write one falsifiable question that names a moment
- State upfront what result would change your mind

One-Page Brief

- Decision
- Owner
- Question
- Hypotheses
- Participants
- Timing

Falsifiable Question

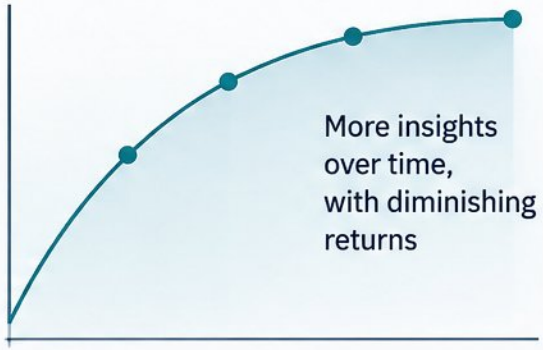
What Would Change Your Mind?



Choose the Method and Size the Sample

	Qualitative	Quantitative
Attitudinal Why people think and feel	Interviews	Surveys
Behavioral What people do	Contextual inquiry	Usability testing
Product-use context	In the lab, in the field, or in people's real environment	

Sample to saturation



Match method on three axes: attitudinal/behavioral, qualitative/quantitative, product-use context

Understand problems → 5–8 interviews per segment; test flow → 5–7 usability sessions

Validate at scale → 100+ survey responses; understand context → contextual inquiry

Sample to saturation, not a magic number: 5–8 narrow, 12–15 focused, 15–25+ heterogeneous

Screen behaviorally (recency beats demographics); add a 20–30% no-show buffer

Pilot one internal session before committing real participants

Recruit Participants, Get Consent, Protect People

- Recruit early with behavior-based screening; build in a no-show buffer
- Send information sheet and consent form before the session, in plain language
- Cover purpose, data collected, sharing, withdrawal rights, and how to complain
- Re-confirm consent verbally at start, before each activity, and at the end
- Watch non-verbal cues with vulnerable participants; stop if distress appears
- Use study IDs, separate identifiers, and set retention and deletion rules



Collect Data: Interviews and Usability Sessions

Interview craft: open-ended, past-behavior questions, active listening, well-timed probes, comfortable silence

Tasks name a goal in the user's language — never a UI element

Think aloud: "Tell me what you look at, expect, and try to do" — silence is data

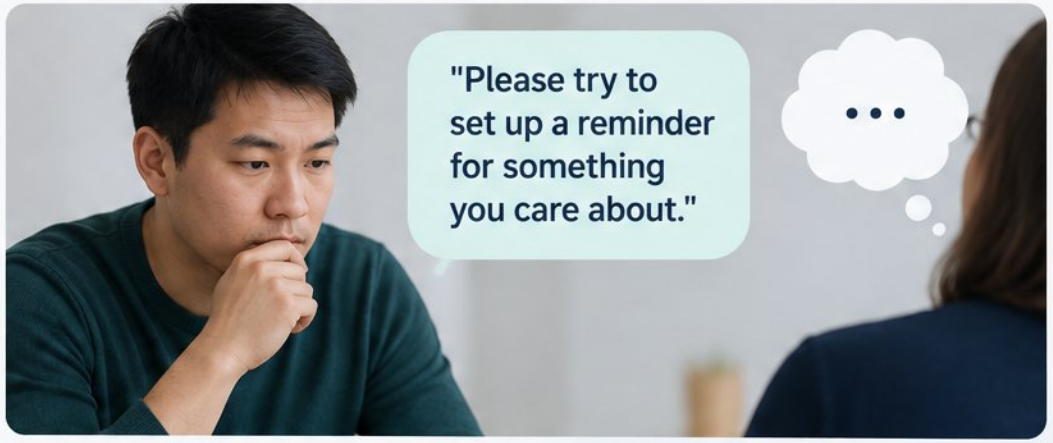
Ask, don't interrogate: "Thank you, keep going" beats "Perfect"

No leading questions: ask "How difficult or easy was it to find Preferences?"

Turn user questions back: "What would you expect it to mean here?"

Always pilot one internal session before real participants





Evidence lives in what people say



Synthesize Without Losing the Evidence

- Synthesize within 48 hours; start reviewing after session five
- Transcribe, then code with a fixed, human-authored codebook
- Affinity map raw observations into themes; keep quotes traceable to session ID and timestamp
- One voice is a data point; three independent voices make an insight
- Flag contradictions and outliers — the outlier is often the insight
- Use AI only as compression: transcribe, tag, draft — then spot-check every quote



Write Insights That Hold Up in a Decision Meeting

Clear findings. Credible evidence. Actionable decisions.

FROM EVIDENCE TO ACTION

Example Finding

One-line headline

Users struggle to find key information during onboarding.

Frequency count

9 of 12

Observation
Behavior and evidence

→

So what
Impact

→

Now what
Recommendation

Quotes (2–4)

> "I wasn't sure where to find this at first."
> Participant 3 | 00:14:27

> "I expected this to be easier to find."
> Participant 8 | 00:22:11

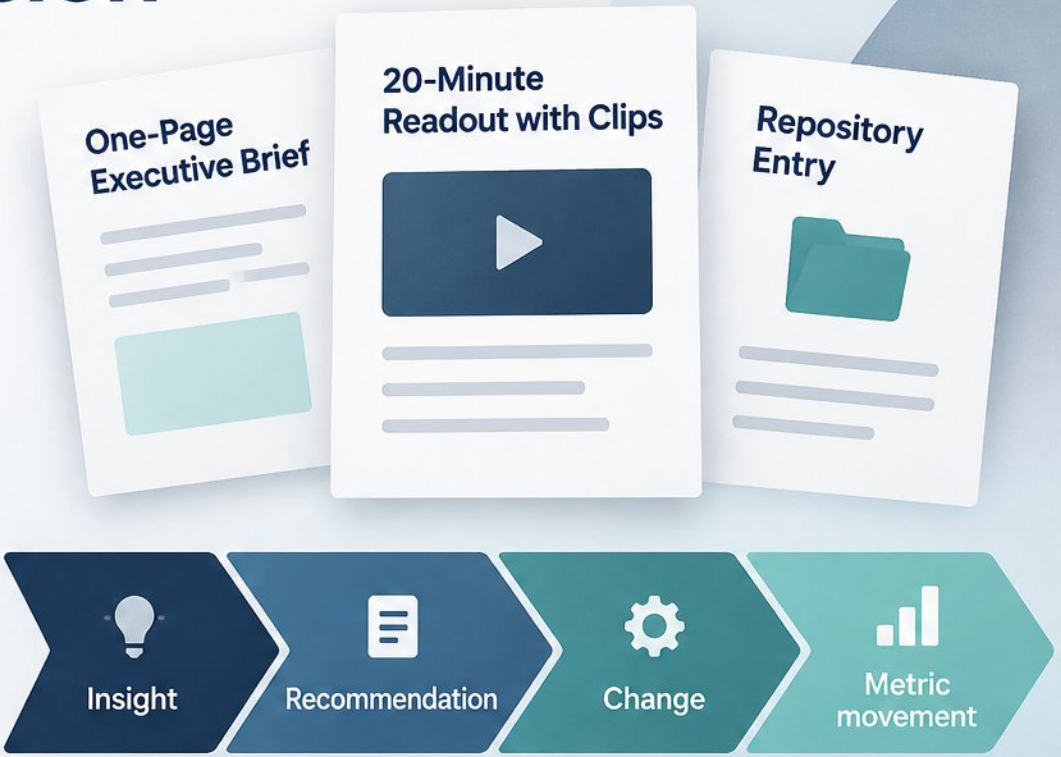
Implication for the decision

If we don't make this easier to find, new users may not reach key information, which could affect adoption.

- Use **Observation → So what → Now what**: behavior, evidence, impact, recommendation
- Each finding: one-line headline, 2–4 quotes, frequency count ("9 of 12"), decision implication
- Qualify claims: state sample size, scope, limits, and what this round cannot tell you
- Recommendations name action, uncertainty, owner, and due date — never "improve onboarding"
- Separate severity from frequency: modal responses are not automatically most important
- Lead with the verdict; stakeholders read the first screen only

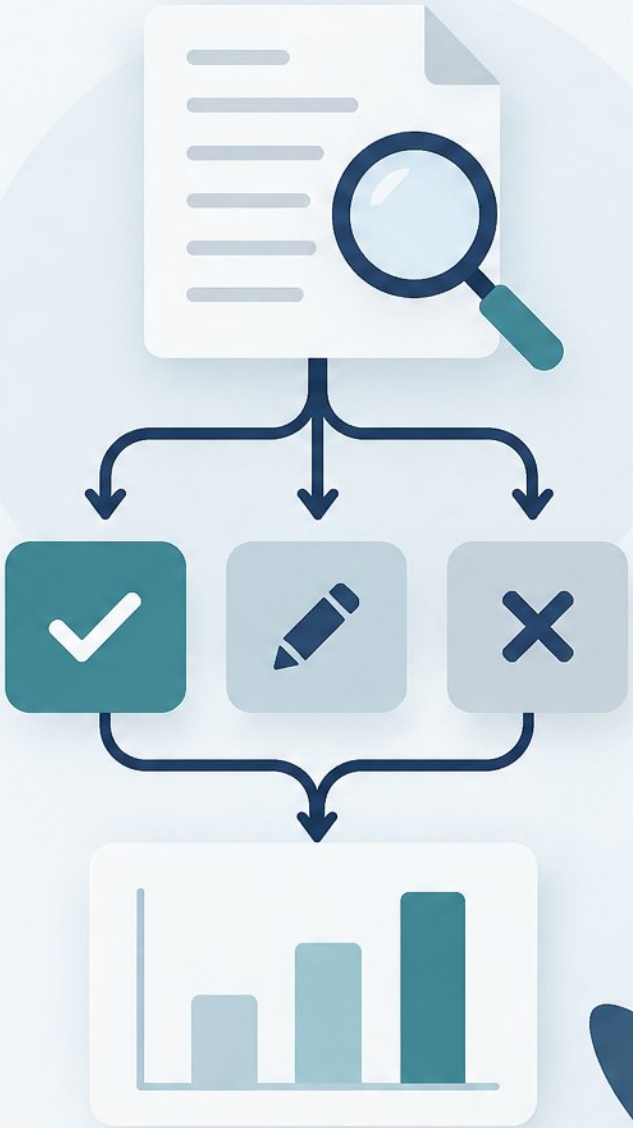
Share Findings and Document the Decision

- Verdict first, methodology last — most stakeholders read only screen one.
- One brief, one readout with clips, one repository entry; name audience and date.
- Reusable skeleton: summary → top three issues with evidence → what worked → backlog → limits → next round.
- Record the decision trail: Insight → Recommendation → Change → Metric movement.
- Keep a lightweight, searchable repository so evidence stays reusable.



Measure What the Research Changed

- Keep a running log: study, findings, and recommendation status
- Record adopted, modified, or ignored — and when a change shipped
- Use a contribution model: name research's role, acknowledge other factors
- Connect each change to one or two KPIs, with baseline and post-change data
- Aim for three to five impact narratives per quarter; quality over volume
- Document unimplemented recommendations too — future impact if they ship



PRACTICE
LEARN
GROW

Build a Six-Week Practice Plan



Week 1–2

pick a real problem, write decision-focused brief, run pilot



Weeks 3–4

run 4–6 sessions with consent and note-taker



Week 5

affinity map; write one-page brief with 3–5 findings



Week 6

critique, revise, publish as portfolio case study



No product access?

Volunteer with a nonprofit or startup



Aim for 3–4 varied case studies, not 10 shallow ones

SMALL STEPS
REAL SKILLS
BRIGHTER OPPORTUNITIES

Common Pitfalls and How to Avoid Them

Be thoughtful. Protect participants. Find credible insights.

BETTER QUESTIONS BRIGHTER INSIGHTS

Leading questions plant the answer; use neutral, balanced wording and ask about behavior

Rescuing a struggling participant too soon destroys the finding; probe instead

Small or convenience samples: label findings directional, not conclusive

Consent is ongoing, not a one-time signature; never synthesize alone

AI traps: fabricated quotes, frequency-as-importance, sycophantic synthesis, unapproved data exposure

Never synthesize from memory — live notes are lossy; work from transcripts



PEOPLE IN FOCUS ALWAYS

Self-Assessment and Continuing to Learn

CURIOSITY
PRACTICE
PROGRESS



Checklist: name the decision, write a falsifiable question, pick and justify a method, screen participants, get consent, moderate neutrally, synthesize traceable evidence

Rate each workflow stage awareness / working / practitioner; pick 2–3 skills to develop over 1–3 months

Peer critique: swap briefs and reports; check for leading questions, missing evidence links, vague recommendations

Sit in as note-taker or observer, then debrief; juniors build qualitative methods plus communication, seniors research strategy and AI judgment

Ask for the research question, not a method — the question dictates the method

BETTER
QUESTIONS
BRIGHTER INSIGHTS

PersonWise.

PersonWise • AI digital-human course platform

Scan the code or click anywhere to watch this course live, with voice Q&A

personwise.ai/t/cb022a13/public