Foundational UX Research—Process Best Practices

Alwyn Sekhri(✉)

Google LLC, 1600 Amphitheatre Pkwy, Mountain View, CA, USA
alwyn.sekhri@gmail.com

Abstract. The need to create a set of Process Best Practices specifically for Foundational User Experience (UX) Research becomes essential in driving an increase in the success of this type of research, and the continued positioning of UX Research as a strategic partner contributing to ongoing product strategy and business success. These Best Practices have been crafted by author's over 17 years of professional UX Research & Strategy experience across a variety of industries (medical, mobile, printing, IT) and companies (Baxter, Motorola, HP, Google); and they will continue to evolve as emerging technologies and new methodologies continue to impact the UX Research landscape. These foundational projects have varied in scope, depth, and objectives; however, the following of these Best Practices has remained consistent and contributed to many successful and impactful projects over the years. The results of these research projects have directly impacted entire business units, driven the future direction of product portfolios, pivoted product strategy, and created new business opportunities. The Process Best Practices described in this paper are designed to successfully guide a research practitioner step-by-step through a Foundational UX Research project from initiation through insight integration.

Keywords: User experience research · UX research · Foundational user experience research · Front end UX research · User research best practices · UX research process best practices · Design strategy

1 Background and Definitions

User experience (UX) researchers are tasked with investigating users and translating their behaviors, needs, motivations, and responses into appropriate and actionable insights relevant to a multitude of stakeholders. These investigations can take place across different stages of development utilizing different methodologies as deemed appropriate by different researchers. UX researchers start with the objectives or questions that need to be answered and then go through a complex multi-step process aligning the research type and methodologie(s) while incorporating a variety of dimensions from timelines and budgets to product priorities and business objectives.

In an ideal world once the research plan is created, there would be immediate and unilateral buy-in from all stakeholders, budgets would be limitless, time would not exist, research parameters would operate in lab-type settings under full control, and all

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insights would be immediately integrated into product strategy. Alas in the real professional world that most of us work in today, this is rarely if ever the case! A majority of our day-to-day activities center not around the actual creation of a solid research plan or even conducting the research itself; but rather in focusing on all of the *other* process steps involved including logistics, communication, coordination, stakeholder buy-in, awareness, education, and insight implementation. The well-known (and commonly associated) *usability studies* that a majority of our stakeholders understand do not typically demand this multitude of steps. It is when a larger ambiguous foundational project is initiated that the importance of implementing those aforementioned process steps really becomes critical in driving a successful foundational project. When using the term ‘Foundational’ it is important to take a step back and define what this means by distinguishing how it differs from other research phases while referencing the product development process. This differentiation will help to better explain the complexities (scope, timeline, output) involved when tackling a more ambiguous and larger foundational project as compared to other research projects. These research phases are not to be confused with Research *Methods* (Exploratory, Generative, Evaluative) as various methods or combinations of methods can be used during any UX Research Phase. The following three different research phases are author defined and referenced in this paper: Tactical, Strategic, and Foundational. Keep in mind that these definitions are focused on differentiating between the research phases with a goal of helping to identify when a project might fall into the ‘Foundational’ category. Variations of the names of each of these three phases might exist within different industries, UX teams, etc. The important thing to keep in mind are the distinguishing characteristics of each phase, potential output, and where along the product development process they fall (Fig. 1).

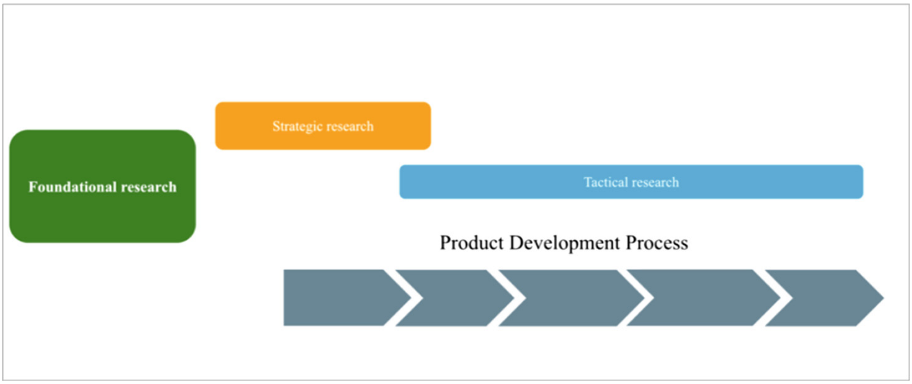

Fig. 1. Visual reference of each UX research phase as aligned with the product development process

Foundational research ideally takes place in the ‘fuzzy’ front end of development focusing on *attitudinal* and potentially *behavioral* aspect of users. Usually relationships with one or more larger focal areas (i.e. technology, commerce, devices, etc.) drive investigations with a variety of methodologies used. Some output examples of this phase might include personas, strategic frameworks, behavioral mappings, UX roadmaps, etc.

Strategic research is usually conducted either prior or during early requirements gathering. Bounded by a portfolio, product, or solution, yet still focusing on deeper understandings of user needs while gathering initial high-level feedback on proposed ideas/concepts. Some output examples of this phase might include mental model development, critical user journeys, concept resonance, etc.

Tactical research tends to be ongoing starting once initial concepts and early designs are created and continues through increased fidelity until designs are 'locked.' Focused on moving from multiple potential experiences to one ideal experience through different types of research methods. Some output examples of this phase might include usability assessments, user preferences, human performance metrics, comparative design analysis, etc.

The need to create a set of proven guidelines, or Best Practices, specifically for the Foundational Research Process becomes essential in driving an increase in successful Foundational UX Research projects, and the continued positioning of UX Research as a strategic partner contributing to ongoing product strategy and business success. These Best Practices have been crafted by author's over 17 years of professional UX Research & Strategy experience across a variety of industries (medical, mobile, printing, IT) and companies (Baxter, Motorola, HP, Google); and they will continue to evolve as emerging technologies and new methodologies continue to impact the UX Research landscape. These foundational projects have varied in scope, depth, and objectives; however, the following of these Best Practices has remained consistent and contributed to many successful and impactful projects over the years. The results of these research projects have directly impacted entire business units, driven the future direction of product portfolios, pivoted product strategy, and created new business opportunities.

2 Process Best Practices

These Process Best Practices are designed to successfully guide a research practitioner step-by-step through a Foundational UX Research project from initiation through insight integration. Not every project will warrant the entirety of tasks within each outlined process step, however it is still recommended to reference each step along the project timeline to help ensure success.

2.1 Identifying the Need

Understand the Space. The first step is to begin to understand the larger space that a foundational project will impact from a design, technology, and business perspective. The time and effort this requires can vary depending on factors like topic familiarity, industry experience, etc. Even if prior work or projects (or even a thesis!) was completed in a space it is still important to take a step back and ensure up to date knowledge is being leveraged prior to the start of a foundational project. The technology industry as an example changes quite quickly as emerging technologies are being discovered and human computer interactions continue to evolve.

Create an Initial List of Questions. An important tangible result of this initial understanding is to create an initial list of ALL of the questions from each different perspective (design, technology, business) within the space. This can initially be from just the researcher's perspective or from other stakeholders/partners as well. At this point there is no maximum or minimum to the amount of questions or the simplicity or complexity of questions, as it is really a divergent phase of thinking. It is critical to capture any and all questions at this stage knowing that not all will be answered with just one foundational project, however it can help provide an initial layout of a multi-year plan of research within that larger space.

Begin Prioritization of the List of Questions. Now it is time to start dividing and conquering that initial list through a variety of tasks.

Performing an Intensive Literature Review is one of the most important tasks in understanding what questions might already be answered and to what extent. This should be done both internally (within your current company) as well as externally (outside of your company). Reading reports, conversing with colleagues, setting up time with people outside of your department, and other ways of gathering information should be used at this stage.

Internal reports and analysis can have more of an analogous business understanding associated with the work, while external references might have to be slightly extrapolated to be properly referenced. Also remember to look at how long ago some of these reports or work might have been completed. For some topics the knowledge may remain pertinent for a long time. For other topics, it may be necessary to re-answer a question or topic in order for it to be relevant (i.e. Market segmentation and Design Personas should be updated on a regular cadence depending on industry). At this stage an understanding of what questions have or haven't been properly answered should be clear.

Highlight Questions with Broader Behavioral or Attitudinal Aspects of a user or their relationship with topics relevant to the space. These questions can range from trying to understand ongoing user motivations, to holistically understanding a full day-in-the-life of a certain user group, to mapping out how/why/when users might interact with technology or product of interest.

2.2 Alignment and Buy-In

Disseminate the List. It is critical at this stage to ensure stakeholders are able to get up to speed on the prioritized list of questions and begin to provide their own perspectives. This can be accomplished in a number of ways depending on the number of stakeholders or company setup. Providing an editable digital copy for the team is always important to allow for time to digest and begin the addition of stakeholder questions. For certain projects it can also be important to hold an alignment meeting with key stakeholders to walk through the list of questions and begin to prioritize them. This will allow not only alignment but also buy-in from those stakeholders whose business needs your project will be addressing. Some will potentially become evangelizers of the work which is instrumental in helping to integrate the final insights as well as continuing to support and drive future Foundational UX Research projects.

Finalize Key Questions and Translate into Objectives. After gathering priorities from the different perspectives and stakeholders an important step is to align those foundational questions with top business objectives/goals for the quarter, year, upcoming year(s), etc. This could have already happened with initial stakeholder alignment, but if not, this really is a critical step for the researcher. Embarking on a foundational project will not be as successful or impactful if it does not relate to a larger business need. Focus at this stage on creating a *sweet spot* at the intersection of user + business needs. This will result in the insights and implications of the project really driving the design strategy.

Another important step at this stage is to translate those questions into UX Research objectives. You want to be very clear with the intent of the project and providing objectives is an effective way to do this. It is recommended (but not necessary) to use action verbs when highlighting these objectives (i.e. identify, discovery, understand, establish, etc.). Keeping in mind that multiple research *questions* might comprise a final research *objective* so be sure to organize and integrate the questions appropriately.

2.3 Kicking It Off

Once alignment has occurred it is time to start building momentum for this Foundational work. Identifying the 'core team' that will be contributing their time and energy is a critical first step. This should ideally be a cross discipline and cross functional group including key stakeholders (when possible) and potentially fellow researchers (depending on the size/scope of the work). This core team will also help to evangelize the work, as they will ideally be contributing to the project in some capacity from start to finish so choose wisely!

Scoping of timeline, budget, and resources is important in understanding the reality of how the project will progress. Not every foundational project will be the same size or require an enormous budget with a huge team. Global foundational projects typically require budget to help procure research vendor facilities (i.e. labs), recruiting, translation (for non-English speaking countries), etc. Non-global projects can also require vendor support; however, the amount of support might be less for a smaller project within just one region. Here are some initial scoping questions that have proved useful over the years:

- What is the total number of desired users for this project?
- When do the results of this research need to be delivered in order to appropriately impact the roadmap, portfolio, business, etc.?
- Does this research need to be run 'blind' (no user awareness of company) to prevent bias? [vendor support is needed]

- Does this research require a global vs. regional vs. local scale? Is the focus on developed versus emerging markets? (The industry, location of current + future users, and objectives should guide this question)
  - Example: Foundational research focused on understanding various aspects of how mobile technology permeates a user's life. Global understanding is important with locations in US, Europe, and Asia chosen although initial focus is only on developed markets.
- Is this research being run in locations where the primary language(s) of that location requires translation + moderation support? [vendor support might be needed]
- Does the timeline require running parallel locations simultaneously which then requires additional moderators, translators, and materials? [vendor support or more UX researchers might be needed]

Every company has a slightly different process for procuring vendors so making sure those processes are in place at this stage is critical if vendor support is needed. Ensure the project budget needs align with actual budget provided and escalate right away if there is a discrepancy. Finally, set an initial timeline thinking through everything from a kick-off through final report delivery and subsequent share-outs.

Kick-Off Meeting. Holding a kick-off meeting is a very successful best practice that is recommended not to be skipped. This meeting could include a larger audience than the identified core team (referred to as extended team), especially if some of the research objectives cross into different businesses. This is a great opportunity to ensure a holistic perspective has been taken in the question prioritization and to gather any relevant internal business information. This meeting will provide an opportunity for the core + extended team to meet each other while allowing the researcher to continue to build rapport and trust.

Background and Introductions are important in ensuring a common starting point is established while everyone gets to know one another. When different disciplines from different business units are gathered together it is a perfect opportunity for sharing of expertise and business goals. Don't assume that everyone in the room knows each other, but rather take the opportunity to help build relationships around your Foundational UX Research project.

Scope, Expectations, and Timeline. There may be stakeholders that have never participated in this type of research (or any UX research for that matter) who are unsure of what is involved with this type of project. This is an opportunity to educate on this type of research (foundational) and your expectations from them as either core or extended team members. Take the time to discuss the research objectives and initial timeline created so that expectations of when involvement is asked for throughout the year – keep in mind that many stakeholders are balancing multiple projects/priorities - so the farther in advance they know of activities the greater chance they can be active participants.

Brainstorming Session. A critical aspect within this meeting is to hold a brainstorming session that frames the research objectives and allows everyone to voice their specific questions most relevant or important to them. One very effective (and one of my favorite) brainstorming techniques is the use Post-its to help capture ideas/questions from each participant. After framing the objectives set aside 10–20 min for silent brainstorming as folks capture their thoughts on post-its. Take the next 20–40 min to have each participant share their post-its one at a time while placing them on a wall, whiteboard, or other common physical space in the room. This tried-and-true technique allows for group sharing of thoughts and the ability to build upon questions, ideas, or even hypotheses. At the end of the session the researcher should spend some time doing a cluster analysis of the post-its to identify any key themes or important topics that have evolved. Taking photos and translating the findings into a share-able format is also recommended for reference and team reflection.

(Remember to take photos during this kick-off meeting to capture data but also capture the collaborative nature of this process step)

Stakeholder Interviews. There are certain stakeholders that are not always able to participate in the official kick-off or it might not be appropriate based on their level of involvement. Sometimes certain stakeholders are acting more as executive sponsors of the research (Sr. Directors, VPs, SVPs, etc.) while others just might not have the bandwidth to full participate but are vested in the results. For these stakeholders, plan on 'interviewing' them by sharing the research objectives and capturing any specific questions, hypotheses, or expectations they have.

2.4 Planning the Logistics

This is an important time to pause and incubate on all of the collaborations, discussions, brainstorming cluster analysis, emerging themes, and stakeholder interviews. Some ongoing questions to ponder might include:

- Are the identified objectives still relevant to answering both user and business needs?
- Does the scope need to be tweaked or are there any missing stakeholder perspectives that have yet to be gathered?
- How is the proposed timeline in relation to core team participation?
- Are any key hypotheses beginning to emerge?

Choose UX Research Method(s). One of the most critical pieces of this entire process is choosing the correct method or combination of methods that will best answer the research objectives with the proper amount of rigor. This paper will not go into great detail on how that can be accomplished, as there are many resources written on that topic that can be referenced. My recommendations at this stage are to make sure enough time is taken to research the research! Reach out to fellow researchers both internally and externally for their input. Look to the past (dust off academic references for research methods) and future (read articles, blogs, attend a conference on emerging UX Research techniques) for inspiration. Think through past experiences and successful methods used. Any and all are encouraged to ensure proper alignment of objectives with research method(s).

Craft UX Research Plan. This will be the source of truth of all of the steps taken thus far and the constant reference of what will and will not be accomplished within this Foundational UX Research project. It should be the organized culmination of all information to date and should include the following:

- Project background (business landscape for the space, high level focus of project, references to past relevant research)
- Core + extended Team with contact information and role
- Research objectives
- Key Questions (this highlights the key questions that will feed into answering the objectives)
- Method(s) including details of location, high level participant criteria and overall rationale
- Timeline with a breakdown of each primary activity (Kick-off, Asset creation, Recruiting, In-field, Debriefs, Analysis, Report delivery, Share-outs)

In-Field—Signup and Best Practices. It is a good rule of thumb to adequately space out travel across different regions with 1 to 2 week breaks in between when possible (i.e. 2 week in-field break between US cities and European cities). It is not always reasonable for team members to be away from their other work responsibilities, family, or other commitments for extended periods of time, so please keep that in mind when scheduling all of the in-field work. Balancing the schedule with the amount of in-field participation is important. On the other extreme, there can be instances when working with a critical timeline can cause all locations to be back-to-back. If this is the case, ensure all team members are aware ahead of time and can plan accordingly.

For those foundational projects taking place across multiple cities or regions, it is recommended to have a sign-up sheet, so it is clear who is planning to attend what sessions and where. I would actually recommend this for every project with more than one location as it is a good way to keep track of the overall participation across different stakeholders. This sheet should list the dates, locations, and approximate times of sessions in each location. Including specific locations of sessions if a UX lab will be used can also help with planning travel logistics for hotel stays. Remember the capacity of each session may vary depending on the method chosen (ex. ethnography sessions should be kept to 2–4 total people versus in-lab study that can hold 20+ in the back room) so be sure to include the total number of allowable spots for each location. Remember that as the sole researcher your presence at every location is a critical part of the success of this foundational work. If you have multiple researchers supporting it can be easier to divide and conquer, although I would still recommend if this is your first Foundational UX Research project that you attend every location. Keep in mind you might not have to be at every *session* within that location but will still be responsible for running debriefs and championing the project along the way (continue reading to Sect. 2.5 In-Field below for more details).

Once there is an understanding of who will be traveling to each location, send out a some in-field best practices (list, packet, presentation, etc.) to ensure everyone knows what to expect. Again, keeping in mind, you might have stakeholders that have never participated in a project like this and will be unsure as to what to expect or how to act.

This is primarily needed for immersive research (in-home ethnographies, intercepts, field observations) as stakeholders will be in direct contact with end users. Some of these best practices might include:

- Refrain from wearing anything that could be deemed offensive, or with company logos (especially if running a blind study)
- Maintain an attentive body language during sessions
- Refrain from asking questions during a session until the researcher (or moderator) opens up the discussion to allow them
- Check with your researcher if bringing laptops vs. pen and paper is more appropriate
- Arrive at each destination a few minutes early with the ideal being to travel together as a team
- Don't take any photos in a user's home without making sure it is allowed first

2.5 In-Field

Roles & Responsibilities. Assigning every team member a role to play during each session provides a continued sense of active contribution as well as helping to maintain focus during longer (2+ hour) sessions. These roles may vary depending on the type of sessions (ethnographic vs. in-lab) and the number of stakeholders. Some roles might include pure notetaker, camera/audio setup and takedown, prototype prep, etc. These roles could be in addition to the ongoing capturing of notes (observations, reactions, questions, quotes, etc.). Please remember that the importance of note taking by each stakeholder is crucial in ensuring different perspectives are captured while in-field.

Debriefs. I have found the use of debrief sessions to be one of the most crucial activities conducted in-field. These sessions can happen at the end of each day in-field or after each individual session, depending on the type of research being conducted. The important thing is that they do happen in a timely fashion! I personally recommend holding debriefs after *each* session for ethnographic (or other more immersive techniques) where an in-lab study could go either way – after each session, or at the end of each day. These sessions allow the sharing of each stakeholder's observations and perspectives and should be viewed as the starting point for future analysis and synthesis. Some of my personal best practices include debriefing over food or caffeine breaks which help to naturally break up longer days in-field. Assume you will need about 30–60 min per debrief session depending on the number of stakeholders and complexity of sessions.
The structure of a debrief might vary but I recommend following something similar to the following (assuming each person has been capturing notes to some extent):

- Allow 5–10 min for each stakeholder (researcher/moderators included) to write down their top observations, notes, quotes, 'a-ha moments' etc.
  - Recommend using Post-its + Markers (i.e. Sharpie)
  - One idea/observation/quote per Post-it
  - Record participant number and location in the upper right or left of the Post-it (example: P3, Chicago)

- Allow each stakeholder time to share each of their Post-its to the group (rotating through the order of who starts after each session or debrief)
- Physically collect all Post-its at the end of each debrief
- Repeat as needed

Over the years I have found that in addition to these sessions I will also reflect at the end of each day and begin to jot down emerging themes, initial opportunities, cultural deltas, potential innovations, etc. I continue to track if future debriefs continue to support or oppose these initial perspectives as I find this greatly assists in upcoming synthesis.

Immersions. One of the benefits of conducting research in different areas of the world is the opportunity to fully immerse yourself in that culture. This can be directly related to your research objectives and specified within the UX Research plan, or it can be more of an ad-hoc series of activities. These immersions enrich the team's knowledge of that location and contribute towards building rapport among the core team. These shared experiences have a way of cementing team relationships and will prove vary valuable in the continued support of your Foundational UX Research project.

Let's say that you are doing Foundational UX Research in Hong Kong focused on understanding various aspects of how mobile technology permeates a user's life.

Specified Research. An example of a specified research immersion could be a shopping trip to the local mobile phone markets. This immersion could tackle the buying process of the mobile technology user journey specific to that market and would be in addition to specific user sessions planned in Hong Kong. For an immersion like this it should be organized in advance with native language speakers, clear goals for the immersion (i.e. successfully purchase 2 mobile phones), and transportation for the entire group of stakeholders.

Ad-hoc Activities. These might vary depending on the interest level and time in market with stakeholders. A trip to Victoria Peak to see the vast views of Hong Kong might be appropriate, or perhaps a visit to the Temple Street Night Market to sample local snacks and grab souvenirs. Try and understand interest in these activities prior to arriving in-field so that any needed reservations can be made ahead of time. Food immersions are one of my personal favorites (everyone has to eat) as it is a great way to indulge in a local culture.

2.6 Following Fieldwork

Now that all of the in-field travel has been completed (thousands of miles traveled, dozens of hotel stays, infinite coffee drinks, and hopefully hundreds of debrief Post-its) it is time analyze and synthesize all of the data into a cohesive story.

Project Debriefs. Once everyone has returned from field it is important to gather all in-field attendees in one room for some larger scale debriefs. These vary from the smaller in-field session debriefs in that the focus could be on the entire project, or for a specific region that just finished in-field work. As aforementioned, try to provide a week or two in between in-field regions, with the assumption of holding debriefs with all the stakeholders who attended that region (i.e. European debrief) *as well as* a final project debrief after ALL fieldwork has been completed.

These debriefs provide an opportunity for all those in-field attendees (present at one or multiple locations) to both share and learn while discussing different observations, findings, and initial insights. For smaller projects the entire core team could have attended all sessions, while for larger projects each team member could only have potentially participated in just one region. Regardless of the specific makeup, the primary goal of these gatherings should be to think holistically about the project and what has been discovered thus far. The structure of these sessions can vary depending upon project size and scope, but I typically recommend referencing the initial UX Research objectives, some key questions, sharing any initial themes/learnings, and then asking each team member to share some of the biggest take-aways from in-field. This step helps further probe on those emerging themes, opportunities, and insights tracked over the course of the project while allowing stakeholders to reiterate what was their biggest take-aways were.

Analysis Immersion. As a researcher and huge fan of immersions, I came up with this phrase to help describe the check-in with stakeholders completed in the midst of analysis. This should take place a few weeks (potentially longer depending on complexity) after project debriefs with a goal of sharing the progress made from an analysis and synthesis perspective. One of the reasons I call this an immersion is that I like to physically immerse stakeholders in my analysis and synthesis process. Some of the ways to accomplish this might include:

- Physically showcase all Post-its in their current state of cluster analysis
- Print out relevant in-field photos of users, homes, environments, etc.
- Print and post user scales (i.e. Likert Scale or Semantic Differentials)
- Showcase initial concept sketches

The physical placement of the different data gathered in-field shown in a mid-synthesis context is found to have a very powerful effect on stakeholders. It also provides a level of education while showcasing some of the very complex analysis processes many researchers go through with larger qualitative studies. I recommend providing all in-field attendees time to walk through the analysis immersion thinking through what they are seeing and how it relates to what they experienced while in-field. This is also an excellent time to take note of any missing focal areas voiced by stakeholders that they aren't seeing from the analysis as of yet. Repeat as necessary.

Initial Report Share-Out. At this stage you should be in process of compiling an initial layout of the report to be shared out and referenced (hopefully) for many years. The exact form this report may take can vary across projects, however an initial structure commonly seen may include sections like research objectives, methods, executive summary, literature review, insights, implications and opportunity spaces. In addition to your own critical assessment of the report, it is advantageous to have an initial report share-out with only those stakeholders (core team or extended) that have been heavily involved throughout the research process. These people have awareness of where the project started, the in-field work, multiple debriefs, and knowledge of the analysis process. They are an excellent audience to test out key insights and implications as well as giving feedback on the overall flow of the report. They should be able to provide a critical eye as well as supportive feedback which will only improve your final report.

Opportunity Brainstorming Session. This final step might be optional depending on the research objectives but still worth noting. If one of the outcomes of the foundational work is opportunity spaces, it can be worthwhile to hold some deep dive brainstorming sessions with specific core or extended team members. These sessions should be geared towards discussing the opportunity spaces with a focus on prioritization, relevance, potential solutions, etc. It is important to keep in mind that as a researcher it is part of our job to properly analyze and synthesize data in order to craft insights, implications, and opportunity spaces, however the further dissection of opportunity spaces can benefit from a collaborative approach with multiple disciplines with varying overall knowledge of the space.

2.7 Sharing the Story

Now the time has finally come to officially share the story. For every Foundational UX Research project completed to date, there has always been a report. This report is the culmination of all of the incredible work accomplished along the Foundational UX Research journey and provides the opportunity to tell that project's story. This paper won't go into best practices for report writing but I will always recommend referencing those initial objectives and critically looking at what you discovered and how you are conveying your insights, implications, and any potential opportunity spaces.

Craft Multiple Versions. One important lesson I've learned over the years is to plan on crafting multiple versions of this research story. One primary reason for this is tied into the different audiences and potential contexts that the story will be shared. Keep a 'master copy' which has ALL of the extensive details of every step along the project journey, which very few people might ever fully read. Create more of an executive summary report intended for those Senior Stakeholders (VPs, SVPs, Directors) as well as multiple other versions specifically tailored towards other specific audiences (engineers vs. product managers vs. marketing vs design). Finally, it is very important to create at least one version of the report that is optimized for presenting (as opposed to reading). This presentation version can sometimes require even more work than initially writing the report, so please remember not to take it lightly.

Include Next Steps. A very impactful ending to every story is including a 'Next Steps' section. This is an opportunity to ensure the learnings from this research project have a forward trajectory and set the proper expectations with stakeholders. There can be a large variety of next steps included in this section ranging from a specific project direction decided, to a next phase of research needed, to a timeline showcasing when different opportunity spaces should be investigated. The important thing to remember here is that just because the research has been completed does not mean the *impact* of this research is complete. Think critically about how the insights from the research align with business goals to showcase that interaction sweet spot of user + business perspectives.

Share with Diverse Audiences. Plan on beginning share-outs with those stakeholders directly involved with the research, or within business units or groups related to the topic. After those have been completed, try to reach out to different teams or business groups in your larger organization to schedule share-outs. Initially this might not feel very relevant, but you would be surprised how many different groups of people will be interested in learning about not only your findings, but the overall Foundational UX Research process. Just as it is important to create those stakeholders who will evangelize the research, it is also important to be your own evangelizer of your current work. Opportunities might arise to work cross functionally or cross-organizationally on a future Foundational Research Project as well as continuing to educate the larger community on the importance of these types of UX Research projects.

2.8 Maintain the Momentum

With the report and associated share-outs complete, it might feel like it is time to move onto the next project. At this stage the process could be complete for a smaller project, or for a project with more narrow objectives. For those projects with more ambiguous objectives and multiple resulting insights or opportunity spaces, there are a few more activities that can help to really drive your Foundational UX Research home.

'Next Steps' Prioritization Sync. After highlighting your proposed next steps in the report and potentially talking to them in a presentation, it is time to solidify the priority by bringing back together all relevant stakeholders. This is an opportunity to discuss what steps are realistic and in what timeframe according to your core and extended teams. Larger scale research can yield multiple implications and so it is important to realign from a business, technical, and design perspective to create a clear priority. Use this opportunity to integrate next steps directly into a quarterly business goals, product roadmaps, new portfolios, vision statements, etc.

Run a Sprint or Workshop. One very enjoyable post-report activity is bringing people together to deep dive on one of the learnings (insight, implication, opportunity space, etc.) from the project. Enough time has passed to incubate on learnings from those heavily involved with the UX Research and including fresh perspective from multiple disciplines is also highly recommended. I would recommend taking a prioritized learning (decided from the previous sync) and creating goals for the session based on what outcome would be most beneficial in moving that learning forward. As an example, if I am focusing on a prioritized opportunity space, I might run a Sprint tailored towards generating possible solutions using 'how might we' statements with a team of designers, engineers, product managers, and marketing teams.

Create Tangible Artifacts. This final momentum builder is not always possible or applicable but still something to ponder. At this stage try and think if there is a way to create any physical artifacts summarizing some key insights or learnings from your Foundational Research. Perhaps you created a framework, or day in the life mapping of an important target group that you could print out on a large poster and place in your workspace? Maybe design personas were a key output, and you create quick 'cheat sheet booklets' to be distributed to all team members (one of my personal favorites). Try to be creative at this stage remembering that there is something to be said about the power of physically taking up space when it comes to reminding those around us of key research learnings.

2.9 Reflection

We have finally reached the end of our Foundational UX Research Process which allows us to take a step back and reflect on the overall journey. This is a special last activity, because it allows the researcher to pause and focus on key highlights and lowlights of the project. There is no right or wrong way to do this as long as some time is spent in reflection. Some of the questions that are beneficial to ask might include:

- What 3 things went really well with this project?
- What 3 things did not go as smoothly with this project?
- What did I enjoy most on this project?
- What did I struggle most with on this project?
- What would I have done differently?
- What would I have done the exact same way?
- What did I learn about myself along this journey?
- Am I excited or leery about tackling another project like this?

As you are answering these, please record them while lightly categorizing where along the process these highs and lows fell, as sometimes patterns can emerge which helps pinpoint where some of your own strengths or weaknesses might lie. The focus of this reflection is to acknowledge the incredible work completed, and then add a lens of constant improvement knowing that it will only help you continue to improve upon your ability to successfully conduct these types of research projects.

3 Conclusion

In conclusion many steps and sub-steps have been outlined with the goal of helping any research practitioner successfully complete a Foundational UX Research project. As aforementioned, not every sub-step is necessary when conducting a project like this, however I strongly recommend following the larger step outline (2.1, 2.2, 2.3 etc.) ensuring some contributions from each are completed along the way.

These Process Best Practices are designed to be used across Foundational UX Research projects of varying size and scope from global to regional and developed to emerging markets. They were not created with just one specific research project in mind, but rather developed over many years taking various successes and lessons learned into account. If I were to summarize the key take-aways from this paper they would be as follows

- Communicate a clear story defining WHY the research is important to the user, the business, the industry, the company, etc. ensuring buy-in

- Drive stakeholder collaboration early and often to help educate and create forever ambassadors of the work
- Ensure all key stakeholders have directly contributed to the primary objectives or secondary questions of focus
- Be meticulous with your UXR Plan and use it as *the* source of truth
- Take advantage of time spent in-field with activities or immersions outside of the research sessions with your core/extended team
- Debrief, debrief, debrief
- Passionately tell the research story to as many people as you can get to listen
- Always continue the conversation utilizing your ‘next steps’ as a guide

I hope that you find these as useful as I did while compiling them, and that they serve as a guide in empowering you to effectively conduct your first or hundredth Foundational UX Research project.