Primer on conducting user research

It's all about the WHY

Rina Chang, Jan 2020. Revised Sep 2026

TL;DR:

1. Always seek to understand the "why" (the motivations of our users)
2. Ask good questions to help you understand the "why"

The goal of this doc is to help with #2, based on my experience.

Why you should care

What is "user research"?

"User research" is a term for what is simply **learning from people who use your products** (or could use your product in the future).

Why do we do user research?

For me, user research is about helping us figure out what is important to do and what isn't. The goal is to increase **empathy**: understanding what motivates our users to do what they do, or don't do. I'll also posit that the other cornerstone is **psychology**: understanding human tendencies, so that we can sidestep any pitfalls and redirect behaviors to be useful rather than counterproductive.

Ultimately, user research is important because it is how we know that our products/solutions are actually solving our users' needs, instead of what we or they *think* they need. People often describe a solution they want before explaining the problem behind it. Our job is to understand that underlying need.

When to do user research

User research can happen at any point you speak to a user. For example:

- Someone passes you in the hallway and asks for a feature. You might instinctively tell them yes or no to the request; but the opportunity here is to ask them why they want the feature, what are they trying to achieve, and perhaps you'll find there's a better solution than the feature they offered you.

- Someone asks for help to solve their problem on a Slack channel. You might just tell them how to do it; but the opportunity here is to understand (again) what they're trying to do, because perhaps they're not using the right words or there's a better way of achieving what their true goal is but without asking, you wouldn't know

The goal of this doc is to set you up for **asking the right questions in the right way** so as to maximize your time and opportunities with our users.

User research in practice

OK, let's get more detailed on how to do this.

Pre-work

I highly recommend that you read the first 40 pages of The Mom Test (you can read more if you like; it's an easy read). This book is couched from the perspective of a start-up, but you can easily apply it to our work by viewing any of our users as their "customers" and yourself as the "founder".

The more "formal kind" of user research

This is how I like to do (slightly) more formal "user research sessions". This is not "the only way" to conduct user research; this is what I do right now.

I like conducting more "formal" research sessions when I want to get a lot of information from different people on the same subject, because I think all of their perspectives will help shape what we do with that topic.

Setting up a user research session

Before setting up a session, I need to know:

1. What are we trying to learn?
2. Who are the subjects?
3. Who are the attendees?

What are we trying to learn?

AKA what do I want to get out of this session, AKA the goal, AKA what are the big questions that we need answers to? Make sure everyone is aligned on why we're even spending this time.

Examples

Some examples of past goals include (from more strategic to tactical):

- What is our user's workflow when trying to do X? What challenges do they encounter?
    - The point of this goal is **discovery**. We come from a place of knowing nothing about our users so that we can really understand what they do and why they do it. We want to leave our minds open to discovering new ways of looking at things, or interesting workarounds that we'd not noticed before.
    - TL;DR: We want to learn about what they're doing today.
- Does our product work well for this workflow? Why or why not?
    - The point of this goal is to use a stimulus (our product) to elicit more information about the user's workflow. If we simply stop at whether our product does a good job, we will have failed. We need to know why it works (or doesn't).
    - TL;DR: We want to find out if some kind of product in this space is appealing.
- Can a user envision themselves using this tool (or variants of them)? What is appealing vs. not useful?
    - The point of this goal is similar to the last one: use a stimulus (a tool, a mockup, etc.) to get more information about their workflow. Presenting multiple stimuli that each represent a different route to solve the same need often helps with rounding out the story of why something does or does not solve someone's core needs. Again, if we simply stop at which one they like the most, we fail.
    - TL;DR: We're putting ideas out there for the user to react to, in order to inform us what we build/design. (Sometimes they're ideas we'd never actually build, or are infeasible, but what we want is a reaction. The more extreme the idea, the bigger the reaction we get.)

Some examples of "bad" goals could be:

- Does the user like this product?
- What features would the user like to see in our product?

Note that these are only "bad" in that they don't go far enough. Follow up each of them with "why" and you'll get much better insights.

Creating a moderator's guide

"Moderator's guide" is a list of questions that you want to ask your users. Besides helping organize and ordering your thoughts (and getting feedback on them), the biggest benefit of writing these down is to help you with the phrasing of the questions. More on this in the "how to phrase questions" section.

Prep your stimuli

If you're asking for feedback on a particular product/idea, consider your medium.

If you're looking to gauge ease of use or usability, you'll probably want to ask participants to complete realistic tasks with the existing product or a prototype, depending on what you're trying to learn. Watch where they hesitate, get confused, or need help, and ask them to think aloud. This is usability testing.

If you're presenting some ideas that you want feedback on, say a mockup, I'll often print out copies of the designs for the subject to draw on. If possible (and if it gets the point across), I try to make the mockups/prototypes as low fidelity as possible, because people feel more comfortable offering suggestions to something that appears to be early stage. Sometimes I'll take a pen myself and start drawing what they're saying onto the paper so that they know they can, as well.

A sketch-style library can signal that the design is still open to change, even when the prototype is interactive. With higher-fidelity prototypes, I explain what is working, what is simulated, and what feedback I'm seeking.

Who are the subjects?

AKA who am I asking questions of? Are they the appropriate recipients of these questions? Of course you want to interview subjects who actually do the workflow that you're curious about. It's also helpful to get the extremes: power users, or very un-familiar users, to see where the edges of the landscape are.

Typically I map out the different "segments" of users that I am interested in, and then shoot for 3-5 subjects of the same "segment." That's a starting point for a focused round, not a universal sample size. I adjust based on the questions, the differences between participants, and what remains unclear.

You definitely want to talk to the person who is going to use your product directly. In the past I've gotten to supervisors of people but was unable to get to the actual person on the ground; the resulting interview is not helpful because the supervisor does not experience the actual workflow in which we were interested. Talk to people about their own experiences, not others' experiences.

Some examples of user segments:

- New users vs power users for a complex product, because that is a reasonable proxy for which behaviors have been learned over time vs. how simple your product is to someone who hasn't had that learning
- Users of particular facets of your tool (e.g. if your product has 3 major "areas"), because that can inform you of usage, needs, and perception differences for those different areas…and, if they're supposed to be parts of a whole, whether the end-to-end experience works together cohesively or not
- Users with different JTBD (jobs to be done), e.g. business user versus technical user

    - Personally I prefer to NOT use people's job titles for this, unless they distinctly correlate to different JTBD, because oftentimes people are trying to accomplish the same job regardless of job title

BAD user recruiting mostly boils down to not talking to people across the entire spectrum of usage, talking to people you already talk to all the time (and who possibly know how the product is being built), and not having a theory on how the user segmentation might change the user's behavior and/or experience with your product. (For example, if you suspect that you might not know everyone who may want to use your product, then interviewing only people who already use your product would not be useful.)

Who are the attendees?

AKA who else is going to be receiving this information with me? Do they need to be there in person, or can they get notes later? I preferably have 2 required people (besides the subject): the moderator and the notetaker, and everyone else would be an observer.

The Moderator

The **moderator's** role is to **ask the questions** and be the person that interacts with the subject.

- If there are other people who want to ask questions of the subject, I like them to go through the moderator. E.g. have some other thing open, like Slack or a Word doc, in which other people can jot down the questions that they'd like the moderator to ask, but the moderator has control of the conversation.
- It is the moderator's judgement when to stray from the guide, especially if digging into a particularly meaty topic. It is also their responsibility to stay on topic and get the core questions answered.
- It's also the moderator's job to make sure to respect the subject's time.
- I prefer a separate note taker so the moderator can focus on listening and following up. With consent, recording and automated transcription can help capture the conversation, but someone should still note important moments, behavior, and questions to revisit.
- Ideally, the moderator is NOT someone who works on the product. (This isn't always possible.) This allows distance between the moderator and the topic being discussed, especially if there are product ideas or mockups involved, and makes it easier for the moderator to not answer questions during the session.
    - If you've got no other choice but to have the moderator be someone who works on the product, then that person will need to distance themselves from all their "work-related" concerns. I try to set aside feasibility, effort, and roadmap concerns during the interview so I can understand the user's experience without steering the feedback.

The Note Taker

The note taker captures key observations and exact quotes, keeping them separate from interpretations. Record timestamps when possible so we can return to the original context. If we use automated transcripts, check important quotes against the recording before sharing them.

If you're doing user research in a facility with one-way mirrors, the notetaker would probably sit with the other observers in a different room, to help build the rapport between subject and moderator. If conducting research on coworkers at the office, it's easier to just have the note taker in the same room.

The Observer

Everyone else is an **observer**. Observers capture what they notice, keeping observations separate from interpretations and solution ideas. They send questions to the moderator, who decides when to ask without disrupting the conversation.

Observers can join from a separate room or remotely to reduce distractions. I explain who is observing and why, and keep the participant informed about any recording or transcription.

The Secondary Moderator

So in reality, there's likely a second person who is also equipped to be the moderator in the session as well (typically there's a PM+designer pair who is interoperable), in which case you can be much more flexible with who's asking and not having to route through a single person, especially if/when the understanding of the space is different between the two. The most important thing to keep in mind for anyone asking questions is to keep the questions focused on understanding the users' experience and their mental model, rather than trying to force your own perspective on them.

How long is this going to take?

You can figure this out after you get your moderator's guide in place. Depending on the number of questions, how expert/knowledgeable the user being interviewed is, and how deep you'd like to go, I'd usually schedule 30 minutes to 1 hour with each subject. I would rather have more time with them to allow them to mentally/verbally wander (and sometimes into very interesting places) rather than have too little time.

Conducting the interview

After you got everything scheduled and everyone squared away, when you're in the room talking to the subject, the moderator has the most difficult job of actually running the interview.

Setup

The subject may have never done one of these types of interviews before, so I usually start each session by telling them about what's going to happen.

1. Who people are
    a. As the moderator, I'll make sure to introduce the other people there with me and their role, and make it clear that they really only need to pay attention to me
    b. I explain my role honestly and make it clear that I'm looking for candid feedback, not approval of my work. If I helped design the product, I remind them that criticism is useful and won't hurt my feelings.
2. How I'd like them to behave
    a. I always tell them I want their honest opinion and to not hold back. I'll tell them it's valuable to hear what they think and that there's no wrong or right, and we're curious about their point of view. This can help put people at ease who are afraid of getting judged based on what they say.
    b. Especially if you're asking the subject to perform a task, it's often helpful to remind them to "think aloud" as they do so. Most people don't do this, so you may need to prompt them every so often if they're staring intently at the stimulus.
    c. If I have paper mockups, I'll hand the subject a pen and tell them to please feel free to draw on the paper so we can see their ideas.
3. Timing
    a. I'll usually remind them how long we'll have, and like an interview, that they can ask us any questions at the end (or along the way)
4. Recording consent
    a. Nowadays (2026) we have video recording and transcription for all of these things, so I'll make sure I have their consent for those. Sometimes people don't like video; for me personally, it's mostly the transcript that I need.

How to phrase questions

This is the hardest part. Here's a few rules of thumb that I find useful to think about:

1. **Do not lead**
    a. You don't want to put words in the user's mouth, you want them to use their vocabulary to tell you their things. Terminology in particular can be quite interesting, as the word choice could reveal someone's feelings about something. Don't lead them to your own words.
2. **Prompt for stories / no binary questions**
    a. Simply put, yes/no questions are boring and don't help illustrate what is going on. When in doubt, ask "tell me more".
    b. Good stories are also specific; if possible, ask for the last time something happened, rather than what "usually" happens.
3. **Let there be silence / talk less**

    a. Silence is really awkward in normal conversation and you'll most likely want to fill it up. Don't. The subject will sense that it's awkward too, and they'll probably also want to fill it up, so then they'll usually start elaborating on what they just said, or start telling a related but different story, and you can get some real gems from those tangents. So let them happen and don't be the person talking.
4. **Parrot it back**
    a. Another useful tool, just repeat what the subject said again. Or you could repeat it with slightly different words. This is usually interpreted as, you didn't understand 100% what they meant, so they'll usually start providing more detail.
5. **Don't answer questions**
    a. If the subject is looking at some stimuli and asks a question about it ("how would this work?", "what happens if you click on this?") DON'T ANSWER IT. Turn the question back on the subject and ask, "What do you think it does?" We want to know what they're imagining. We don't want to give them answers or put words in their mouths.
    b. If they're really dying for an answer you could say that you'll talk about it at the end of the session.
6. **Follow up on the "why"**
    a. If the user tells you something like "I think XYZ", you should follow up with "tell me more" or "You think XYZ because…?" to get them to talk more about their reasoning. What you're looking for is not "this user doesn't like using the UI" but "this user is concerned about repeatability, security, and having an audit trail, which is better served today by code-as-config rather than our UI"—aka get to the root or the "why" they think that way

You do have free rein to go off-script if you're feeling like there's a particularly meaty topic about to be touched on, or if there's nothing to be gained by going down a particular path with the user. For example, if the majority of your stimuli focuses on a particular flow, but this user doesn't actually use that particular flow in your product, then you can certainly show them the flow but you can expect them to then be talking about it theoretically, not how they'd actually use it (which is…not). So you could pivot to asking them about what's good or bad about their experience with your product, etc.

Wrapping up

1. Say thank you for their time and honest opinion
2. Give them an out: if they have any other ideas/thoughts that pop up, please let us know (and how), and that we always want to hear from them
3. If there is compensation (usually not for internal subjects), take care of that too

Post-interview

Debrief with the team

Do this as soon as possible, while the information is still fresh. Sit down with everyone who was present and talk through what you heard. Sometimes people will interpret the same sentence in different ways; this is OK, but this is always where it is important to have the user's verbatim words.

Oftentimes this is the best time to gather themes. If you're conducting a bunch of interviews in a row, it's helpful to write up what you heard as you go and create thematic clusters across users so you can see what's going on. Doing it along the way makes it much easier than doing it all at the end when you don't remember who said what in what tone of voice.

Also, remember that one person's opinion does not make (or break) a product. We look for themes and trends among all the subjects.

Tools to help

I sometimes use Dovetail to organize recordings, transcripts, quotes, and themes across sessions. It also helps me create clips of participants explaining important findings.

I also use Gemini Notebook to explore transcripts and suggest possible themes. I check its conclusions and supporting quotes against the original material. In one case, it treated my own summary as participant evidence, so I'm careful to distinguish what a participant said from my interpretation.

Share out findings

Of course, the research isn't useful if it doesn't lead to anything. Typically it will be the lead researcher's job (whoever that is) to synthesize the findings into the broad themes, supplemented with quotes. The call to action from the entire team is to understand the users, and then figure out what major opportunities exist that can be acted upon, and what solutions can be created to help solve their needs.

Personally I tend to create Google Slides; Dovetail also produces reports; you can choose your own adventure.