Answers to your HCD Qs by research stage

2/16/18 - Your data collection Qs answered!

Greetings, Team! I'm Mark Trammell, a designer with 18F, and am excited to join Melissa as a resource for your ongoing design work. Please don't hesitate to drop me a line if there's anything I can do to help.

…and without further introduction: your recent questions answered!

Do we have a sufficient sample size of users to interview?

Don't worry too much about setting a sample size ahead of time; just get started with your first session. When to stop depends on the breadth and depth of the participant pool you build. (More on that in a bit.)

Do we need a letter from NRM leadership to introduce ourselves and sanction the interview?

Your official email address should be enough to prove your bona fides.

After my interviews, are there tools to help me make an experience map?

He's typing! :-) Melissa and I are here to help find the best way to synthesize and convey what you learn in your interviews. As for experience maps specifically, I like this guide written in part by 18F alumna Amber Reed: [Adaptive Path's Guide to Experience Mapping (PDF)](#). If collaborating with colleagues remotely, mural.ly is a useful tool to help you collect and organize your thoughts.

Thinking about bias as I find people to interview.

Knowing your initial pool of interview participants will be based on your current understanding of your product's users is half the battle. The trick is to have your pool widen—and in some areas, deepen—over the course of the interviews. One way to progressively expand your pool is to ask each interview participant who they think you

speak with. This not only gives you leads to track down any blind spots, but tells you who the participant sees as your product's users which can be useful in and of itself.

Will I find the people I need to reach out to have the time to do this?

So much of a successful research recruiting exercise depends on clearly stating both why you're contacting them and the value of their insight to your work. If your potential participant understands why they are important, they'll often take the time. Also, if you're approaching them through a referral from someone you've already spoken with, all the better.

1/26/18 - Your planning Questions answered!

At our retro a few weeks back, y'all shared your questions related to the planning stage of design research. Here I address each of those questions:

Will we have sufficient focus on this effort to get meaningful work done?
- This is something that can be chipped away at, although that's not always ideal (you don't want your research results getting stale, you don't want to be too late to informing design development!).
- It's also something you may be able to do as a part of project work that has already been scoped. If you think back to the slides from our workshop that map the phases of HCD to the SDLC *(attached)*: Can you shift some of your resources to do discovery research during your requirements gathering? Can you put prototypes in front of users as part of your technical design process? Can you draw on HCD principles in how you approach user acceptance testing?
- If you want individualized help with this, reach out to schedule a 1:1! I'd love to take a look at your schedule/resources/task list and help you problem solve.

Have we adequately researched our question?
- The undercurrent here is a lack of confidence in your research question. Is this the right place to start? Is our plan well-scoped?
- I've attached a *few exercises in framing/scoping* you can try that may help you feel more confident that you've looked at your project framing and research questions from all angles. If you do try some of these, and decide to refine your

plan, send along a revised draft so I can take a look (and post something about what you learn in Slack!)

- Also, it's all right to revise your question once you begin to work!

Do I have all the players and people identified?

- You may uncover that there are additional stakeholders you'll want to talk to to fill in your knowledge gaps, and that's ok! That being said, resist the temptation to fall into [analysis paralysis](). if you find that you're drawing out the research casting a wider and wider net to as not to potentially exclude anyone, consider whether you can bound your initial effort around a smaller subset of questions, and use what you learn to scope and plan follow on research to with those other users/stakeholders as needed.

We have 2 directions we can go. Trying to figure out which one makes the most sense for users.

- There are a few possible ways to interpret this question: do you mean there are 2 directions you can take the research or 2 directions you can take the application,and you're hoping the research will tell you which?

- To whoever wrote this question, schedule a 1:1 with me. I'd love to hear more!

Do I have all the pieces and parts necessary for this phase?

Here's a high-level checklist:

- Research plan
    - Research Qs/goals
    - Who you plan to talk to and how you'll connect with them
    - Methods you'll use
    - How you'll collect data (e.g., handwritten notes? Audio recording)
- Interview protocol(s)
    - Instructions to researchers for setting up the interview (e..g, screen sharing/recording)
    - Intro including reminders on informed consent
    - Interview Qs
    - Closing
- Informed consent form

I've also attached a *very detailed checklist* as another example for your reference.