DIY Research Guide

(This guide is currently also in the [Forma Plan & Design Loop Space](#))

> 📌 **User Research is owned by XA***. This guide is meant to help with DIY User Research **in collaboration with a Forma XA member**.
>
> *Customer Success and VOC members who are conducting UR and are encouraged to follow the Guide and reach out to an XA member when appropriate.

▾ 🔗 Quick Links:

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🏋️ DIY Research Training

- [ARC Training](#)

- [Alida Training](#)

💰 Recruitment, CRA, and Compensation

- [Research Request / Recruitment Form](#) (via ARC)
- [Autodesk Customer Research Agreement](#) (CRA)
- [Guide to Compensating Users](#)

🛠️ Research Tool Access

- [Request Calendly Account](#) (through Shari Nemerovski)
- Maze Access (coming soon)
- [Dovetail Guide](#)
  - Dovetail Access: [#Tech_Dovetail](#)

💡 Other Valuable Resources

- [AEC Research Playbook Loop](#) (Methods, Tips, Tools, and more - coming soon)
- #XXX-XXX (Research Slack Channel - coming soon)

▾ ✅ In This Guide:

1. Filling out a research brief
2. Recruiting (and paying) participants
3. Conducting and documenting research
4. Analyzing and sharing findings
5. Research Tools and Access

▾ 🤷‍♀️ When should I conduct DIY User Research?

✅ DIY Research is right for the following types of

research objectives:

- Low-risk design walkthroughs, exploration

- Quick learnings (not to be used to make big bets)

- Getting a "signal" if an idea or concept is viable

- Foundational learnings or deep dives into Jobs To Be Done or workflows

🚫 DIY Research is NOT suitable for research objectives that requires statistical rigor, advanced methods, or high impact/risk—including but not limited to*:

- Go to Market or a net-new product development

- Testing a new concept / new mental model (e.g. entry point for FCC)

- Naming, Market Sizing, Monetization, Quantitative, or Competitor Research—as well as Diary Studies, AB Tests, PSAT, CSAT, or NPS†

- Big bets or validating work that requires statistical rigor or representation (quant sizing)

- Beta Testing (please reach out to UR to help you setup qual feedback)

- International Research

* Unless agreed upon by UR/XA Leadership due to constraints. † Please let UR know as soon as possible if you require these research approaches, as they require significant lead time and/or contractor support depending on UR bandwidth.

‼️ Important Notes:

- **All user research** in Forma Design should be **led/owned by a Forma XA member** (outside of VOC work). If you are here looking to do DIY Product Research and are NOT an XA or VOC member, please reach out to an XA member in your Product Area.

- A User Researcher should be involved from the start if your research questions directly relate to:

  - Key business metrics (Revenue, MAU, etc.)

- Large GTM launches or Beta testing

- Introducing a new UX, UI, or mental model into the product that might break the experience

- Anything you think needs to be "de-risked" or requires an advanced method. Trust your gut!

▾ ❓ FAQs

- **Answers coming soon!**

- When do(n't) we pay users for research?

- Why can't I just reach out to users I've talked to before?

- Why can't I—a non XA member—do user research?

- What if my research objectives aren't good for DIY research?

- What if I suspect someone is using AI in an interview/project?

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📕 Forma XA DIY Research Guide

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1. Research Brief

Before starting research, be sure to fill out a research brief.

▼ 📝**Research Brief Template**

[Link is here](#). Another template you may like can also be [found here](#).

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2. Recruiting (and Paying) Participants

> 📌 Please note that **recruiting users may take 3-4 weeks**. Where possible, consider **combining research questions** with other teammates who are interested in talking to the same users.

▼ 👟 Checklist for Participant Recruitment

1. ✅ **Define Objectives of Research:** The researcher/product team outline the goals and questions that the product research aims to answer.

2. ✅ **Identify Target Participants:** Identify ideal participants for the research and the appropriate screening questions to help identify them. This could include the following criteria: product usage, industry knowledge, experience level, behaviors, demographics, etc.

3. ✅ **Create Recruitment Messaging:** Develop clear and engaging messaging to communicate with potential participants, detailing the purpose of the research, their role, and any incentives offered.

4. ✅ **Screening and Selection:** Create a screening survey to gauge users interest in the research and ensure they meet the desired profile. The screening survey link is typically embedded within the recruitment message.

5. ✅ **Sourcing Participants:** Utilize various channels, such as internal research communities, social media and external resources to post the recruitment message.

6. ✅ **Engagement/Scheduling:** Communicate with research respondents to

maintain their interest and commitment. Schedule qualified respondents to participate in the research in a timely manner.

7. ✅ **Incentive Disbursement:** After the research is conducted, ensure the participants receives the appropriate incentive for their participation.

▼ 🗺️ A Step-by-Step Guide

Step 1: Define Research Objectives:

The researcher/product team creates a research plan that outlines the goals and questions that the research aims to answer as well as the characteristics of the ideal participants. **Complete the [Research Request Form](#).**

Step 2: Screening & Selection of Target Participants:

Identify appropriate screening questions that will help identify qualified participants. This could include criteria such as: product usage, industry knowledge, experience level, behaviors, demographics, etc. Once the criteria is established, create the screener.

✅ Qualtrics is the Autodesk approved, GDPR compliant survey tool used for screening surveys. Request a Qualtrics account
(✈️ Application and access dashboard)

✅ Refer (🪟 here) for guidelines & tips for designing your screener

✅ All screeners/surveys need to be published by someone in Research Operations before it is live. Once the screener is complete, request it will be published by Shari Nemerovski.

Step 3: Create the Recruitment Messaging:

Develop clear and engaging messaging to communicate with potential participants, detailing the purpose of the research, how it will be conducted, length of the commitment for the participant and any incentives offered.

✅ Refer to the (🪟 templates) provided. Be sure to include the disclaimers about our gift card policies included in the templates.

Step 4: Source Participants

Utilize various channels, such as ADSK internal research communities, internal resources, external resources and in some cases, social media to post the recruitment message.

Here are typical recruitment sources to find research participants:

- ✅ **Alida**:

    - Alida is our default recruiting source with over 20,000 Autodesk customers who joined to participate in ADSK research.

    - **All active Alida members are covered under the Autodesk Customer Research Agreement**, which is essential before engaging customers in any Autodesk research.

    - Members of Alida tend to have many years of experience using our products. They tend to use ADSK products daily and are motivated to see our products improve.

    - If you are DIY recruiting using Alida, (🪟 share.autodesk.com) training is required.

    - After completing DIY Training with Alida, you can request access to Alida here: **#autodesk_research_community**

- ✅ **User Interviews** (UserInterviews.com):
  - User Interviews is an external recruiting source of people who want to participate in research.
  - These participants must complete the (⬈ Autodesk Customer Research Agreement) before engaging in the research. They are not covered under the Autodesk Customer Research Agreement.
  - UserInterviews is helpful for finding participants that use our competitor products, as well as customers who are less experienced in their career than those in the Alida community. A good source for finding architects/designers and some types of engineers. Does not yet have Revit structural engineers.
  - Fresh perspectives, many users new to engaging in Autodesk research
  - Requires diligent screening. This is **not** an Autodesk community. Research participants engage in all kinds of research. A key motivator for these participants is the incentive.
  - Cannot use Qualtrics to screen. Need to create the screener and scheduling on their platform only.
  - Need to screen out government employees. We cannot provide incentives to these participants.
  - **AEC Research has an account. Reach out to an account, please reach out to** (🪟 AEC Design Research Operations team mem…) **for an invitation to User Interviews.**
  - **Here are instructions on how to set up a recruitment in User Interviews:** (🪟 share.autodesk.com)
  - 💡 Recruitment Tip: **Verify participant credentials by asking them to share a link their LinkedIn profile (or other professional online link) in the screener.** This can

help weed out participants who are poor fits or are lying to receive compensation.

- ✅ **Respondent.io** (🔹 Recruit High-Quality Participants for User Re…): AEC Research has an account. Reach out to

  (🔲 AEC Design Research Operations team mem…) for information on how to access it.

  - External recruiting source very similar to User Interviews. Refer to information about User Interviews.

  - 💡 Recruitment Tip: **Verify participant credentials by asking them to share a link their LinkedIn profile (or other professional online link) in the screener**. This can help weed out participants who are poor fits or are lying to receive compensation.

- ✅ **Autodesk Forums** (◣ Autodesk Community)**:** Most ADSK products have a forum where employees can post a recruitment message for customers to view and respond.

  - It requires an Autodesk account.

  - This source doesn't yield lots of qualified responses.

  - **It is a public forum, keep the recruitment message very general for this audience. They are not under CRA so be careful not to provide any confidential or forward-looking information**

  - Customers tend to express their opinions and can be harsh at times. If someone posts a question or comment to your recruitment post, be sure to respond.

- ✅ **Telemetry/Analytics**: This source requires support from Research Operations and is used for very niche research participants. For example: When researching a new feature that is not yet commonly used,

requesting a customer list of customers using the feature, would be helpful. If conducting AEC research, contact Research Operations for this type of recruiting.

Step 6: Engage & Schedule Participants

- Contact an (🔲 AEC Design Research Operations team mem...) to request a Calendly account. Set the account up to link to your Outlook calendar and set up an event link.

- How to set up your Calendly account: <u>Calendly Set-up Instructions</u>

- After a recruitment has been posted, check for responses regularly. Download the responses from the Qualtrics screener and select respondents that you want to invite to your research.

- Send an email to qualified respondents to schedule a research session. Include the Calendly scheduling link. **Refer to "Email to schedule participants (Remote) template"** (🔲 here).

- Create and maintain a master spreadsheet that tracks all respondents & another tab for participants. Keep statuses updated for those who have been invited, scheduled and completed the research.

- Continue to check responses throughout the recruitment process. Continue to send out invitations to schedule until you have enough participants scheduled. Its best to schedule an extra one or two participants to allow for cancellations/no-shows.

- Once research has been completed, be sure to close the Qualtrics Screener

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Step 7: Incentive Disbursement:

- ✅ Ensure the participants receive the appropriate incentive for their participation in the research any time you speak to a customer and capturing insights or feedback. Please remember **that government**

employees are ineligible for compensation and are aware of this before doing research with them.

- ✅ After completing a research session, complete a request for an email with incentive options to be sent to the research participant. The vendor we use for incentives is Tango. **Refer** (🪟 here) **for incentive guidelines and to requests Tango incentives.**

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3. Conducting and Documenting Research

Learn more about how to conduct your interviews, including how to store and add your learnings to our Research Repository.

▼ 📽️ Checklist for Conducting Interviews

- ✅ Ensure users has signed CRA
- ✅ Record interview whenever possible
- ✅ MORE COMING SOON

▼ 📕 Checklist for Documenting Research

- ✅ The Dovetail Guide is here
- ✅ Import interview video into Dovetail in the Forma section. You can create your own project folder.
- ✅ Setting up a project in Dovetail
- ✅ Using common tags
- ✅ Uploading and Transcribing Interviews
- ✅ Sharing Findings (Powerpoint Template) (coming soon)

▼ 📚 Additional Research/Method Resources

- Check out the [AEC Research Playbook](#) to dive deeper into some methodologies.
- Check out these past ProdUX Talks/Decks (COMING SOON)

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4. Analyzing and Sharing Research

MORE COMING SOON

▼ 📊 PowerPoint Template

Coming Soon

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5. Research Tools and Access

MORE COMING SOON

▼ 🕊️ Dovetail Guide

- Get an account by asking #tech_dovetail
  - If you want to get someone who just views the work, ask for view access only
- Dovetail Guide [is here](#)
- How to use Dovetail training video is: ◯ Loading

🧩Maze Guide

Coming soon.

Maze is a predominately quantitative tool that is paid by tokens, and managed by AEC Research Ops. Your UR or Re Ops partner can help you in getting setup in Maze.

📅Calendly Guide

- Once you have requested access to Calendly, [follow the instructions on this page](#) to set up your account.

👨‍💻UserInterviews.com Guide

Coming soon. (But use this as your absolute last resort. Seriously. I can't recommend it.)

STILL TO DO/ADD

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- Create and Add Slack Research Channel for Forma
- Create Research Powerpoint Template
  - Add Figma file link to Powerpoint template
- Add Research brief (Tamira's Brief Template [My Research Plan.loop](#))
- Link to Research Roadmap in Quick Links
- Fix Qualtrics instructions (may not need them here)
- Ask Shari for more Dovetail Seats or Forma XA accounts
- Create Dovetail Guide
- Create Maze Guide
- Add ProdUX Talks
- Get access to AEC Research Playbook

- Complete FAQs