

User Research Planning Workshop

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Facilitation Script

User Research Planning Workshop

Category: Research | Duration: 4 hours | Participants: 6-12

Workshop Overview

This accelerated workshop combines design thinking, rapid prototyping, and user validation in a time-boxed format. Teams will generate, test, and refine solutions using proven methodologies that maximize learning while minimizing risk.

Workshop Objectives

Provide participants with practical skills and frameworks to enhance their professional capabilities and drive meaningful outcomes in their design practice through collaborative learning and hands-on application.

Learning Outcomes

- Deep understanding of user needs, behaviors, and pain points
- Actionable research insights documented and prioritized
- Research-backed recommendations for product decisions
- Apply rapid design and validation methodologies to complex challenges
- Generate and test multiple solution concepts in compressed timeframes
- Learn user-centered design thinking and problem-solving approaches
- Develop skills in rapid prototyping and user validation techniques
- Create actionable roadmaps for solution development and implementation

Materials Required

Basic Materials - Large format paper (A1 or flip chart paper) - Sticky notes (multiple colors) - Sharpie markers (black, blue, red) - Fine-tip markers for detailed work - Pens and pencils for note-taking - Dot stickers for voting exercises - Masking tape for wall mounting - Timer or stopwatch for activities

Category-Specific Materials - Workshop-specific templates and worksheets - Relevant industry examples and case studies

Technology Requirements - Laptops/tablets for digital work - WiFi access for online collaboration tools - Digital camera for documentation - Presentation projector/screen - Power strips and extension cords - Backup printed materials

Venue Requirements - Large wall space for posting materials - Moveable tables for group work - Comfortable seating for all participants - Natural lighting or adequate artificial lighting - Quiet environment free from interruptions - Temperature control for participant comfort

Pre-Workshop Checklist

- Room setup complete with tables arranged for group work
- All materials prepared and distributed
- Technology tested (projector, slides, timer)
- Participant list and name tags ready
- Refreshments arranged (if applicable)
- Backup activities prepared in case of time adjustments
- Emergency contacts and room information noted

Workshop Agenda

Time	Duration	Activity	Facilitator Notes
9:00 AM	15 min	Activity	Encourage networking. Have refreshments ready.
9:15 AM	15 min	Activity	Encourage networking. Have refreshments ready.
9:30 AM	30 min	Activity	Research without objectives wastes time. Research Objective Setting defines what you need to learn b...
10:00 AM	30 min	Activity	Part of LUMA collection. --- Consider the broad spectrum of people who will be touched by your des...
10:30 AM	30 min	Activity	A comprehensive document outlining research objectives, methods, timeline, and deliverables to ensur...
11:00 AM	15 min	Activity	Encourage networking. Have refreshments ready.
11:15 AM	30 min	Activity	A structured framework for conducting user interviews that ensures consistent data collection while ...
11:45 AM	30 min	Activity	A questionnaire or interview protocol used to identify and select appropriate participants for user ...
12:15 PM	30 min	Activity	Guide participants through activity. Monitor group dynamics.
12:45 PM	15 min	Activity	Encourage networking. Have refreshments ready.

Facilitation Script

Opening (5-10 minutes)

SAY:

"Welcome everyone to the **User Research Planning Workshop**. I'm excited to have you here today. Over the next 4 hours, we'll be working together to [main objective]."

"Before we begin, let's go around and do quick introductions - your name, role, and one thing you're hoping to take away from today."

Facilitator Tip: Arrive 15-30 minutes early to set up the space and greet early arrivers. This builds rapport and helps participants feel comfortable.

Setting Expectations

SAY:

"Let me share a few ground rules for our time together:

- Every idea is valid - there are no bad ideas in brainstorming
- Build on each other's ideas - use 'Yes, and...' thinking
- Stay present - phones away unless for an emergency
- Timebox discussions - I'll keep us on track
- Have fun - the best ideas come when we're relaxed and engaged

Any questions before we dive in?"

Core Activities

IDEO - Interview Planning & Practice

75 minutes

Guided practice for interview preparation

FACILITATION APPROACH:

1. Introduce the activity and explain the purpose
2. Demonstrate or give an example if needed
3. Set the timer and let participants work
4. Give time warnings (halfway, 2 minutes left)
5. Facilitate sharing and discussion

Contextual Inquiry

120 minutes

Field research methodology for observing users in context

FACILITATION APPROACH:

1. Introduce the activity and explain the purpose
2. Demonstrate or give an example if needed
3. Set the timer and let participants work
4. Give time warnings (halfway, 2 minutes left)
5. Facilitate sharing and discussion

Stakeholder Interviews

180 minutes

Gathering internal perspectives before user research

FACILITATION APPROACH:

1. Introduce the activity and explain the purpose
2. Demonstrate or give an example if needed
3. Set the timer and let participants work
4. Give time warnings (halfway, 2 minutes left)
5. Facilitate sharing and discussion

Assumption Mapping

45 minutes

Identify and prioritize assumptions to test through research

FACILITATION APPROACH:

1. Introduce the activity and explain the purpose
2. Demonstrate or give an example if needed
3. Set the timer and let participants work
4. Give time warnings (halfway, 2 minutes left)
5. Facilitate sharing and discussion

Closing & Next Steps (10-15 minutes)

SAY:

"As we wrap up, let's take a moment to reflect on what we've accomplished today."

"I'd like each person to share one key insight or takeaway from our session."

Facilitator Tip: Capture action items on a flip chart or shared document. Assign owners and due dates for each action item before ending.

Post-Workshop Actions

- Send thank you email with workshop summary within 24 hours
- Share photos of artifacts (sticky notes, sketches, etc.)
- Distribute any promised resources or templates
- Schedule follow-up if needed
- Collect feedback via survey
- Document learnings for future workshops

Troubleshooting Guide

If Participants Are Quiet

- Use round-robin techniques to ensure everyone speaks
- Try silent writing exercises before group discussion
- Break into smaller groups of 2-3 people
- Ask specific individuals for their perspective

If Discussion Goes Off-Track

- Acknowledge the point and park it in a "Parking Lot"
- Redirect: "That's interesting - let's capture that and return to our focus area"
- Reference the agenda and time remaining

If Running Behind Schedule

- Shorten break times (but don't eliminate them)
- Combine related activities
- Move detailed discussions to follow-up sessions
- Be transparent with participants about time constraints

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This script is a guide - adapt it to your audience and context