When to Use Which Method in UX Research

Choosing the right research method can mean the difference between surface-level insights and deep understanding that drives meaningful product decisions. This guide helps UX researchers and product designers navigate the landscape of research methods, matching each approach to specific situations and desired outcomes.

Understand Current Workflows

When you're dealing with multi-step, cross-tool processes—like order-to-cash cycles, or patient intake—you need methods that reveal how work actually happens, not just how it's supposed to happen according to official procedures.

Contextual Inquiry

Observe people doing real work in their actual environment, asking clarifying questions as they go.

Best for: When official SOPs don't match reality and workarounds are hidden

Task Analysis

Break key jobs into discrete, user-centered steps: triggers, inputs, actions, and outputs.

Best for: Designing core workflows and quantifying time and error patterns

Workflow Mapping

Visualize processes across roles and systems using swimlane diagrams.

Best for: Multi-team handoffs requiring alignment between business and product

Contextual Inquiry in Practice

When to Use

Deploy contextual inquiry when you suspect the official standard operating procedure doesn't reflect actual practice. It's invaluable when Excel spreadsheets, email workarounds, and side systems proliferate—clear signals that product teams lack a complete understanding of daily operations.

This method shines in complex, regulated environments where informal processes develop to bridge gaps in official tools.

What You'll Learn

Key outputs include:

- Detailed notes on each step in the process
- Actors involved and their roles
- Tools used (official and unofficial)
- Common interruptions and context switches
- Critical decision points
- Physical and digital artifacts created

Uncover Pain Points and Mental Models

Understanding *why* people behave as they do—not just what they click—requires methods that dig into goals, frustrations, and decision-making processes. These approaches reveal the gap between what users say they do and what they actually do.

User Interviews

Semi-structured 1:1 conversations focusing on goals, frustrations, and decision-making patterns. Use when you need to understand role-specific needs or capture context around critical incidents.

Output: Themes on goals, pain points, expectations, user language, and mental models

Stakeholder Interviews

Similar structure to user interviews, but with people who influence the system—Product, IT, Compliance, and Operations leaders. Essential for aligning UX work with KPIs, constraints, and regulatory requirements.

Output: Success criteria, constraints, and hidden agendas shaping requirements

Diary Studies

Participants log tasks, issues, and thoughts over days or weeks during real work. Perfect for capturing low-frequency events like rare escalations or audits, and temporal patterns like shift changes or end-of-month crunches.

Output: Longitudinal view of pain points and workarounds invisible in single sessions

Validate Information Architecture

When users consistently say "I can't find anything," or when you're reorganizing navigation, menus, or content categories, IA validation methods provide concrete evidence for structural decisions. These techniques test findability before you invest in detailed design work.

01

Card Sorting

Users group and label items into categories that make sense to them. Generates candidate groupings and labels that inform navigation structure.

02

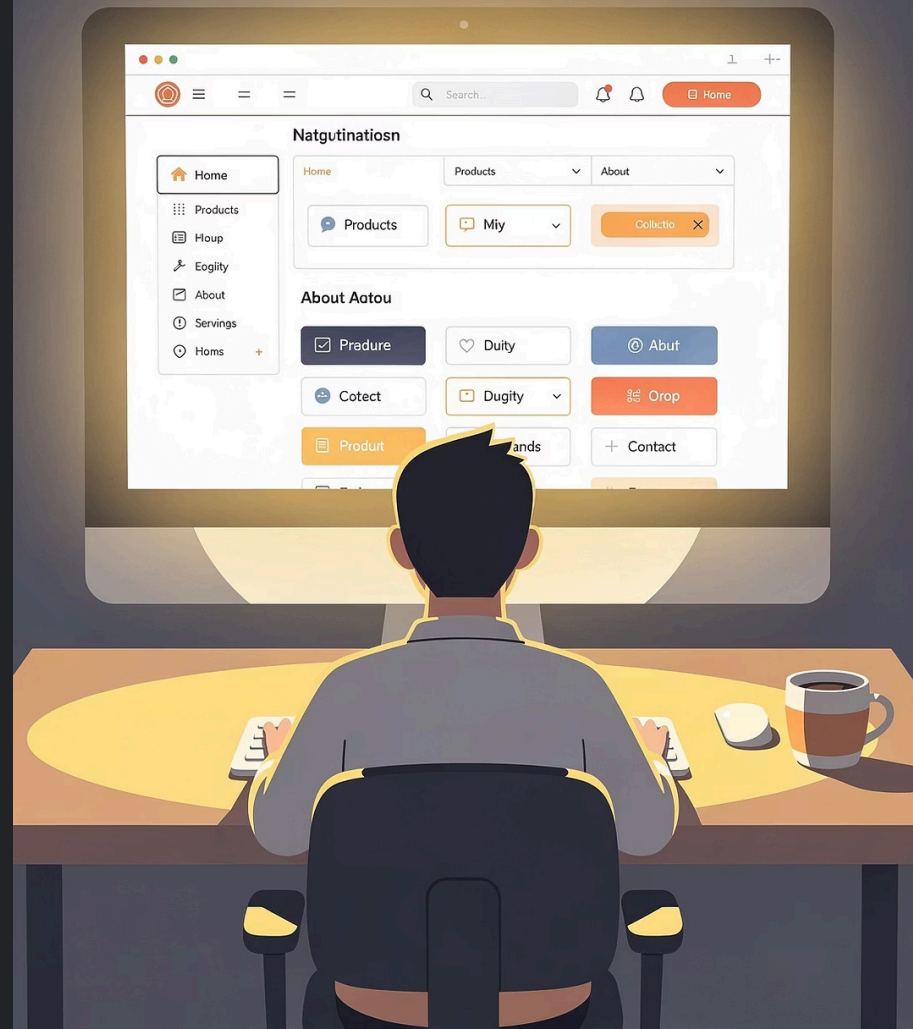
Tree Testing

Users complete tasks in a simplified text-only hierarchy. Provides quantitative success rates and reveals where people get lost.

03

First-Click Testing

Track where users first click for specific tasks. Validates screen layout and proves whether first clicks land on intended controls.



Test Usability of a Design

When you have concrete deliverables—flows, screens, or prototypes—usability testing evaluates how well they support real tasks. Choose your approach based on complexity, risk level, and the type of insights you need.

Moderated Usability Testing

A facilitator guides users through realistic scenarios while probing their thinking in real-time. This is your go-to method when workflows are complex, high-risk, or domain-heavy—think healthcare, finance, or safety-critical systems.

Why moderated matters: You need to understand not just *where* users struggle, but *why* they struggle. The facilitator can ask follow-up questions, explore unexpected behaviors, and capture rich context that explains the numbers.

Output: Issues prioritized by severity and frequency, supported by qualitative insight that drives design decisions.

Remote Unmoderated Testing

Participants complete tasks independently while you collect success rates, time-on-task, and recordings. Use this when you need scale or quick validation of smaller UI changes.

Best for: Well-defined tasks with lower risk where quantitative patterns matter more than deep understanding.

Output: Quantitative patterns across many users, often used to validate or benchmark.

Measure Adoption and Satisfaction

Once a feature is live or in pilot, you need to know if people are actually using it and whether it's meeting their needs. These methods provide the quantitative and qualitative feedback that proves (or disproves) your design's success in the real world.

Surveys

In-product or periodic surveys measuring satisfaction, ease-of-use, or perceived value. Perfect for broad coverage across geographies and roles, and essential for tracking trends over time.

Output: Quantified sentiment (CSAT, CES, SUS) plus open-text themes that explain the scores

Net Promoter Score

"How likely are you to recommend this product to a colleague?" provides a simple, executive-friendly indicator of loyalty. Segment advocates from detractors and understand their reasoning.

Output: High-level score with qualitative reasons that drive improvement priorities

Behavioral Analytics

Logs showing feature usage, session length, funnels, and error events. Reveals whether new workflows are actually adopted or still bypassed, with hard numbers on performance.

Output: Concrete before/after metrics tied to UX changes and business KPIs

Explore New Concepts or Features

When you're not yet sure *what to build* or whether an idea merits investment, exploratory methods help validate problem-solution fit before committing resources. These approaches reduce risk by testing assumptions early and often.

Concept Testing

Show early ideas—sketches, storyboards, rough flows—and gather reactions on value, clarity, and fit. Compare multiple concepts quickly to identify which resonate and what's missing.

Prototype Testing

Test interactive prototypes (low to high fidelity) with realistic tasks. De-risk detailed interaction patterns before engineering and fine-tune language, layout, and workflow details.

Co-Design Workshops

Facilitated sessions where users and stakeholders sketch flows and screens together. Builds buy-in and tackles greenfield or high-impact redesigns with aligned priorities.

Choosing the Right Method: A Decision Framework

Start with Your Question

The research question always determines the method. Ask yourself:

- Are you trying to understand current behavior or test future designs?
- Do you need qualitative depth or quantitative scale?
- Is the work exploratory, evaluative, or measuring success?
- What decisions will these insights inform?

Consider Context and Constraints

- **Timeline:** Diary studies take weeks; first-click tests take hours
- **Access:** Can you observe users in their environment?
- **Complexity:** High-risk workflows need moderated approaches
- **Stage:** Early concepts need different methods than live features

Discovery Phase

Contextual inquiry, user interviews, diary studies

Definition Phase

Card sorting, task analysis, workflow mapping

Design Phase

Concept testing, prototype testing, tree testing

Validation Phase

Usability testing, first-click testing, surveys

Measurement Phase

Behavioral analytics, NPS, satisfaction surveys

Key Takeaways

Match method to question, not preference

Your comfort with a method matters less than its fit with your research goals. Challenge yourself to use approaches that directly answer your specific questions, even if they're outside your usual toolkit.

Mix methods for richer insights

Triangulate findings by combining qualitative and quantitative approaches. Contextual inquiry reveals the "why" behind behavioral analytics; usability testing validates what surveys suggest.

Consider your constraints

Time, budget, and access shape what's possible. A quick first-click test today beats a perfect diary study six months from now. Choose the best method you can actually execute.

Start early, test often

Don't wait for perfect designs. Test concepts with rough sketches, validate IA with tree tests, and iterate based on findings. Early insights prevent expensive late-stage changes.

Thank You