

The UX Research Moderator's Rubric

As UX researchers, our human-to-human interactions can lead to changes that have ripple effects on the products we use, creating experiences that touch millions of lives. We need to stay at the growing edge of the art of interviewing our users to maximize our opportunity to create positive change. We developed this rubric as a tool for discovering opportunities to develop your research strategies and skillset. It articulates distinct techniques of the research practice and outlines what skill looks like at different levels of accomplishment to encourage self-directed and peer-driven feedback. We hope you find it useful in deepening your research practice.

	Not yet proficient	Competent, proficient, professional	Fully integrated
Rapport Connecting with participant, putting the participant at ease	Introduction is incomplete; participant is ill-at-ease and has process questions that are only partially addressed; sudden transitions and endings; only able to connect with a narrow range of participants.	Thorough introduction that anticipates and addresses all process questions. Clear beginning, middle, and end to the session with smooth transitions between sections. Able to connect in a warm manner with the majority of participants, throughout the session.	Uses subtle body language to create attunement while guiding the experience from start to finish. Able to identify and address loss of rapport, navigate difficult moments, and re-establish connection. Embodies respect and kindness across a full range of participants and subject matters.
Time Management Optimizing time as a resource for developing understanding	Unable to acquire insights within allocated time frames. Unable to keep conversation on-track and relevant. Does not start on time and exceeds allocated time frame regularly.	Starts and ends on time. Able to redirect participant without sacrificing rapport. Generally acquires insights within allocated time limits.	Fully optimizes time as a resource for accessing insights; asks questions when they are most likely to yield rich insights. Able to redirect even very difficult participants, or participants sharing on very difficult/vulnerable topics, while maintaining rapport. Elicits collaboration around time limits from participants of all kinds.

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Improvisation

Use of follow-up or probing questions to reach objectives; dealing with difficulties as they arise

Obviously reads script in an automatic manner. Does not ask follow-up questions or asks follow-ups that are not relevant to research objectives. Misses relevant opportunities afforded by surprising events that occur during the session.

Makes micro-adjustments to questions and session flow to maximize learnings. Asks meaningful follow-up questions that illuminate areas relevant to insights. Able to graciously end a session that isn't working if needed.

Highly alert to the precise wording, timing, and tone of participants' responses; skillfully incorporates even tiny surprises when relevant. Able to engage constructively with sudden, shocking, or surprising moments.

Technical

Knowing all the tools, making them work, troubleshooting

Unsure how technical tools work and what is possible/not possible during the interview. Unsure how to get help to solve technical problems when they arise. No backup plans for technical failures. Loses valuable session time dealing with technical problems.

Familiar with all tools and online or physical spaces used to carry out interview, including their capabilities and limitations. Familiar with all tools used to share prototypes and has tested all stimulus in context. Has backup plans for tool failures. Knows how to access help when necessary.

Thoroughly familiar with all tools used including seldom-used features. Has carried out rehearsals with tools and has more than one backup plan. Able to access or implement help immediately.

Craftsmanship

The crafting of relevant, neutral, non-biasing questions that address research objectives

Asks leading questions or yes/no questions. Asks complicated, multi-part questions that require interpretation by the participant. Asks questions that are not clear, or are phrased in ways that are confusing. Asks questions that do not relate to research objectives.

Uses well-formed and clear questions that elicit relevant feedback. Mostly asks non-directive questions, usually avoids subtle ways of leading or biasing the participant, generally keeps language simple with occasional exceptions, experiments with intentional silence

Asks clear, non-leading questions that open up rich and relevant conversations. Uses full range of communication skills (e.g., body language, facial expressions, use of silence and sounds) to express curiosity and interest while maintaining neutrality and not biasing the participant.

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Accessible Ability to flex to ensure diverse needs are met and accommodated	Unaware of whether resources are available to support specific needs, what those resources are, and how to access them. Uncomfortable and unsure about how to help participant when they have specific needs that must be met in order for them to contribute to the session.	Able to accommodate a wide range of participants needs with some effort. Aware of resources to support participants' unique or specific needs (e.g., furniture, screen readers) and how to access them.	Fully capable of putting participants at ease across a full range of ages, body types, literacy levels, accents, ablenesses, and any other factors to access insights. Able to access resources that participant may need immediately.
Presentation Poise/ability to inspire trust and collaboration in all observers and manage their needs	Visibly nervous. Appearance, vocal tone, facial expressions, and/or gestures have an awkwardness that does not inspire stakeholders' or participants' trust. Unable to engage others during the session, or to incorporate real-time stakeholder probes and questions into the session.	Neutral, professional, poised appearance, inspires ease and trust. Able to interact with stakeholders while simultaneously conducting session. Some difficulty setting boundaries, occasionally undermining rapport with participants.	Embodies calm confidence expressed through many integrated details of self-presentation, evoking trust in a way that feels personal and authentic. Proactively manages stakeholder needs and addresses concerns as they arise, inspiring trust and collaboration.

We hope you find this useful in your career growth. For more UX insights from our research team, subscribe to our newsletter at [AnswerLab.com/subscribe](https://www.answerlab.com/subscribe).