

## Checklist for designing and building UX Labs

UX-Study specialises in building UX Labs & design spaces. We created this checklist to help people before they begin to build a lab.

If you're considering building a UX Lab, you're about to embark on a long journey requiring you to learn many new skills.

The checklist will help you to frame your requirements, and will be useful to give to whoever is designing and building the various elements of your new lab - *physical, technical, aesthetic, and support*.

Below are areas in which you will need to provide requirements and guidance over the course of *designing, building, and maintaining* your lab. This list is not exhaustive, but will give you a good insight into the areas you need to focus on.

CONSTRUCTION	AUDIO VISUAL	IT	FACILITIES	OTHER
Layout of room/s Wall construction Wall reinforcement Cable conduits Acoustics Soundproofing Electrical Lighting	Lab technology Control system Video Conferencing Streaming Maintenance Ongoing upgrades Training A/V Support	Network Wifi Digital Security Asset storage IT management Policy compliance Hosting / managing IT Support	Location of lab Participant journey Physical security Access management Aesthetics Access to toilets Waiting area Signage	Privacy / GDPR Research furniture Curtains / blinds Compliance Accessibility Non-research uses One-way mirrors CAD drawing

## Checklist for designing and building UX Labs

The goal of this checklist is to help identify the current state and plans. The building process is usually long and it contains many steps that are not visible in the beginning, but need to be planned ahead. Otherwise, you will repeatedly encounter the issue: *'it's too late to change anything'*. By explicitly dealing with stages and steps, this checklist helps frame your thoughts on what you need from your lab, how it will be used, and who will be responsible for various elements and processes during planning, design, implementation, and ongoing use.

If you have questions, or would like to discuss plans for designing and building labs, feel free to contact us:

[contact@ux-study.com](mailto:contact@ux-study.com)

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## General Information



### Our organisation is:

- Small (<100 employees)
- Mid-size (100 - 500 employees)
- Large (500 - 1500 employees)
- Global / multinational
- Don't know

The size of your organisation is a proxy for many elements of your lab's design and usage - it is useful information for anyone designing and building your lab.

For example, building a lab in a multinational organisation where the next lab needs to be built in a different county might require a radically different approach on planning, standardisation, maintenance, procurement, installation etc.

### We are a:

- Private Company
  - Government Agency
  - Charity
  - Research Agency
  - Other:
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Each type of organisation is different in terms of metrics for measuring success of the UX Lab, types of secondary activities performed in labs, ownership of spaces and technology, speed of making decisions, procurement rules, etc.

The design of your lab may differ based on the type of organisation using it (and the size and makeup of the research team).

## Timescale & Coordination



**The planned *first day of business* for our lab is:**

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All teams need to have the same timeline to synchronise their work.

Delays in construction projects are common, but everyone needs to be aware of the current planned completion date.

**Teams involved in building our lab:**

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The internal process of building or updating spaces is complicated.

There are usually multiple teams involved in making decisions. It is common to have at least a dozen people constantly involved in building labs.

If researchers are not aware of the teams and people involved, critical decisions can be made without considering UX requirements.

**The person from the research team in charge of the lab build project is:**

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Someone from the Research team should be the go-to person for the entire project.

They should not have to act as a Project Manager... rather, they should be the interface between the Research team and other stakeholders / project teams.

There will be multiple questions and changes during the construction process and everyone in the team should know who represents the internal client for the project.

**The person from the facilities / other team in charge of the lab build project is:**

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This should be the PM assigned to the project (usually by Facilities).

Facilities team to be in overall charge of the building of the lab. They should NOT design / plan the lab, but they should be responsible for ensuring it is constructed to plans.

**The part of our organisation that will be responsible for technical support once the lab is built is:**

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No system can be fully self-regulating - support is always needed, and must be designed-in from the early stages.

This step is usually missing during planning and as a result the construction team is not incentivised to build labs that are easy to maintain.

You need a dedicated technical support system in place to ensure your research team continues to have the facilities they need.

**We have a dedicated *Research Operations* role or department:**

- Yes
- No
- Don't know

Each lab has unique nuances, limitations, and areas for development.

A ResearchOps team or person is usually the best fit to manage the construction process from the Research side.

**The person responsible for *Research Operations* is:**

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Even if you do not have a dedicated ResearchOps person yet, someone usually performs that role.

Building a UX Lab might be a good opportunity to make that role more official by either opening a new position for such a person, or recognising the contribution someone (usually a researcher) is already making.

**We will have someone from the research team dedicated to managing / running the lab once it is finished:**

- Yes
- No
- Don't know

A UX lab does not run itself.

To keep a lab running to a high standard you will need someone to be a lab "manager" - to deal with issues that arise, to manage maintenance and upgrades, and to keep the lab in the same state as the day it opens.

**Our lab will be used by:**

- One Research Team
  - Multiple Research Teams
  - External / Freelance Researchers
  - Designers and Product teams
  - Non-researchers
  - Other:
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Lab spaces need to be multifunctional. If there are any special requirements by other teams that plan on using the lab, the requirements need to be known in advance.

For example, some designers record product presentations or internal podcasts in UX Labs and that might require better soundproofing and acoustic treatment.



# Planning & Construction



**Physical construction is planned to run**

**from \_\_\_\_\_ until \_\_\_\_\_**

The construction process starts long before the first person is on the site. Many plans, drawings, and major decisions are made early in the design process and are very difficult to change later.

Research teams are often invited to the process only when the walls are built and decoration started. In that case, the reply to any major change is: *"It is too late to change that"*.

Find out who is responsible for planning and drawings and speak to them about the deadline for major decisions.

**Construction plans include:**

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The construction process is divided into several stages. General decisions are made first and they include:

- space allocation
- main design principles
- general facilities
- lighting & ventilation
- types of flooring
- walls and ceilings

Each can critically affect the lab and render it unusable if done without considering specific UX requirements.

**Construction plans need to be finalised by:**

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For example, it's not uncommon to have meeting rooms built so that the soundproofing is at the level that you can hear people talking in adjacent rooms. If participants can hear the observers discussing the study, that makes the lab unusable.

You need to find who is responsible for the construction plans and get regular updates from them to make sure the final plan does not compromise critical lab requirements.

**Detailed plans need to be finalised by:**

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After the construction plans are finalised, the details can be specified and adjusted.

This includes multiple aspects, for example:

- Lab Technology
- Wireless connectivity
- VC technology
- Equipment location
- Floorboxes
- Wall reinforcement
- Aesthetics
- Furniture
- Acoustic treatment
- Drawable walls
- Access / security
- Storage

(and many others)

**We have access to relevant construction documents:**

- Yes
- No
- Don't know

To plan your lab effectively, you will need all documentation relating to the space, including:

- Construction
- Mechanical & Electrical
- Layout
- Wall elevations

(and many others)

These should be available from the project team in CAD (.dwg) format.

**Physical access to the lab will be controlled via:**

- Badge entry
  - Manual Lock - key
  - Manual lock - code
  - Remote locking system
  - Don't know
  - Other:
- 

You will need to control access to your lab for privacy reasons, and to enable you to keep the space usable and clean.

Decisions on access often need to be made early in a project, to ensure the relevant teams can plan around your needs.

**We plan to have a dedicated observation room attached to the lab:**

- Yes
- No
- Don't know

You may have a room next to your lab dedicated to observation, you may have a room elsewhere, or you may not have a dedicated room.

**We plan to have a one-way mirror between the Lab and Observation room:**

- Yes
- No
- Don't know
- n/a

There are benefits and drawbacks to fitting a one-way mirror between Lab & Obs rooms - don't be too hasty in deciding either way.

Make the decision as a team, based on proposed uses, methodologies, and plans for stakeholder engagement.

# Lab Usage



## Research Methodologies we will employ in the lab are:

- Usability testing
- User Interviews
- Desktop studies
- Mobile studies
- Physical product testing
- "Home" studies
- "Office" studies
- Card Sorting
- Focus Groups
- Remote studies

Other:

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Your lab should be designed to work with you. It should support all research methodologies you need to use now and plan to use in future.

A lab should enhance research, not hold it back nor change research processes.

**The lab will also be used for these purposes:**

- Local Meetings
- Video Conferences
- Design sessions
- Design sprints
- Other:

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Your lab will be used for a variety of non-research purposes.

The design needs to accommodate secondary use cases.

The space and technology need to adapt to the different uses over time, without compromising the overall design nor the primary functions.

**We would like to control the lab:**

- From the Lab
- From the Observation room
- Remotely over the network
- Remotely over the public internet
- Some combination of options above
- Don't know
- Other:

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User experience of your UX lab is the most important and often neglected aspect. It is very rare for AV teams to make prototypes and test them with users. So if the system is custom built for your lab, the user experience of the future lab depends on you explicitly giving a full list of features and requirements.

One of the requirements is where the lab should be controlled from. You should plan to be able to control your lab from a range of spaces, to allow for future changes in working methods.

If you acquire an off-the-shelf lab system, you can evaluate it before buying.

**Our organisation tests large / specific hardware devices (other than computers and mobile devices):**

- Yes
- No
- Don't know

If you will need to test large physical devices like kiosks, your lab will need to be designed with this in mind. In that case the space and technology will likely need to be different from labs designed for more standard types of research.

**Specific technologies / systems used by the Research team that the lab must integrate with are:**

(examples could be: *Research repositories, media storage systems, design systems*)

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A usable lab must work with and complement your existing processes and systems, therefore it must work with specific technologies used by your team/s.

**Specific technologies / systems used by the Research team that we would like the lab to integrate with are:**

(examples could be: *Research repositories, media storage systems, design systems*)

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There are often technologies that Research teams would like to integrate with their workflows that are either currently in use, or planned to be used in future



# Technology



## Our organisation has existing lab technology

- Yes
- No
- Don't know

This is useful to know, as information about usage of current systems can help the designers of the new system to better understand your needs.

## The technology our organisation uses for video conferencing is:

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You will likely want to share your research sessions via video conferencing, so your lab will need to connect to your company's standard system.

You may also want to fit a VC system to your rooms for normal meetings.

**The technology our organisation uses for video streaming is:**

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Researchers will want to 'stream' sessions live to observers. Your lab should connect easily and securely to your existing streaming systems, and be able to change systems in future.

**Assets (video / audio / etc) created in the lab will be stored:**

- Locally, in the lab
- On an *on-premise* server  
(storage housed within our company's network)
- In a cloud storage system  
(e.g Google Drive / Dropbox / OneDrive)
- Don't know
- Other:

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A UX Lab creates a lot of data - video, audio, notes, etc. Your team needs quick, easy access to this data, and it needs to be managed in ways that maintain security and privacy.

Knowing options for storage early in the process can simplify the overall design of the lab systems.

**Our organisation uses this business platform:**

- Google / G-Suite
  - Microsoft / Outlook / Office 365
  - Facebook Workplace
  - ZoHo Workplace
  - Don't know
  - Other:
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Your lab needs to work with whatever standard platform your company uses.

There are multiple ways how such integration can work. For example, assets from the lab should appear automatically in shared, managed locations inside the secure systems already cleared by your privacy and security teams.

**Our organisation's data retention policy is:**

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There are usually extra limitations for asset management dictated by your company's *Privacy* and *Data Retention* policies.

Your lab needs to work with these policies - and be able to adapt as they change in future.

**Our organisation uses specific research methodologies that would benefit from the use of eye-tracking:**

- Yes
- No
- Don't know

Eye-tracking is useful for some very specific types of research (e.g. gaming, or for areas of research where gaze is of central importance).

## Misc



### We **must** source these elements internally / using preferred vendors:

(i.e. cannot be procured through 3rd party)

- Lab technology
- Video Conferencing
- Computer hardware
- Design Services
- Furniture
- Other:

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Some companies have strict policies on sourcing equipment (e.g. a “nominated furniture supplier”).

You need to be aware of these limitations early in the project, so you can either plan to use them or find ways to get around the restrictions where needed.

**Other relevant information:**

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Note down anything else you think might be relevant to your lab project, either for the Research team, the project team, or whoever is designing your labs and systems.

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