EXCEL WORKSHOP FOR UX RESEARCHERS

This one-day workshop is designed for UX researchers who want to strengthen their Excel skills for analyzing usability test data, survey results, and qualitative feedback. Through a scenario-based, hands-on approach, participants will gain confidence using Excel to structure mixed-method data, generate insights, and present findings effectively. By the end of the session, each participant will have created a compact, data-informed UX research summary suitable for stakeholder communication.

Data preparation for UX research

Learn how to clean, organize, and prepare usability and survey datasets:

- Format as Table for structured filtering and sorting
- Fix inconsistent labels and remove duplicates
- Use filters and Data Validation for data quality control

Exploring usability patterns with pivot tables

Summarize and explore user task data:

- Calculate task success/failure rates, average completion time, and error counts
- Use PivotTables with slicers to segment by user group or task type

Calculating ux metrics with formulas

Apply essential Excel formulas to extract meaning from usability data:

- Use AVERAGE, COUNTIF, SUMIF, IF, and ROUND
- Identify high-friction tasks and underperforming participant groups

Visualizing quantitative UX insights

Create stakeholder-ready visuals:

- Build bar, line, histogram, and pie charts to display success rates, time-on-task, or error trends, etc.
- Customize chart layouts, colors, and labels for clarity and storytelling

Survey analysis

Analyze user satisfaction and sentiment:

- Work with Likert scale and rating questions
- Visualize survey results by persona or segment

Working with coded qualitative feedback

Visualize patterns in interviews or open-text data:

- Apply conditional formatting to coded themes (e.g., confusion, delight)
- Highlight sentiment and frequency across user comments
- Track review status using icons or color coding

Building a UX research summary

Assemble insights into a usable research deliverable:

- Combine charts, metrics, and qualitative highlights
- Create a one-page UX research summary with supporting visuals
- Set up a reusable dashboard format for future reports

Exporting and sharing results

Learn how to finalize and distribute findings:

- Set print areas and layout views for a polished presentation
- Export summary and visuals as PDF
- Use templates to speed up future reporting cycles