

# Research Plan:

**Name of Project**

## Background:

Give a few sentences (2-3) on what your user research is about and why it is happening. Why is this research important for the user? How will this impact your company's goals?

This section should also include your problem statement, or the main question you're trying to answer with your findings. Overall, it's crucial to help your teams orient needs and expectations.

## Internal stakeholders:

Who are the people and teams involved that have a vested interest in the project and its outcomes? List all of the relevant stakeholders as well as their associated role and project-specific responsibilities.

## Research objectives:

Give 3-5 specific ideas for what you want to learn more about during research, and the questions you want answered.

They could be focused on:

- Understanding a users' thoughts, needs, and perceptions
- Exploring new ideas and concepts
- Improving a current experience
- Evaluating the performance of a product

Take your time with this section—it essentially drives the entire project. TIP: Refer back to your problem statement. It should already have the primary question you're trying to answer. Let it guide how you flesh this section out.

## Business objectives (optional):

Give a brief overview (2-3 sentences) on how your user research project impacts the company as a whole. This might include revenue, lead generation, conversions, and more.

## Methodology:

Give a brief overview of the methodology you'll employ for the project. Also, the reasons that particular methodology fits your project goals.

What methods are you going to use? Is this project more generative, calling for 1:1 interviews? Or is it more evaluative—like a usability test?

## Metrics:

These are the hard numbers and measurements by which you'll determine success.

Choose metrics relevant to your methodology. For usability testing, these could be session-grounded metrics, like time on task, task success, ease of use, etc. For generative research it could focus more on the deliverables you're hoping to develop (ie. personas, jobs stories, a journey map, etc.)

## Participants:

This is key. You need to talk to the right people in order to get the right kind of insights.

If you don't know exactly who your user might be, you can approximate your user—and include that approximation in your plan. This will optimize recruiting efforts to make sure you have the best participants you need in your study.

A few tactics to employ if you're stuck on this section:

- **Bring in internal stakeholders** that may have a good idea of what the target user will look like (such as marketing, sales, and customer support). Allot a day to sit in a room with them and define your target user. With these stakeholders you can create hypotheses about who your users are, which is a great starting point for who you should be talking to.
- **Look at competitors similar to you**, and recruit based on their audiences. You can even recruit people who use the competitor's product and, during the interview, ask them how they would make it better.
- **Write a great screener**, which will get you the participants you need. Is there a particular behavior you are looking for? Is it necessary they have used your product (or a competitor's product)? Do they need to be a certain age or hold a certain professional title? Make sure you include the right criteria in order to evaluate whether or not that person would be your target participant.

It's often useful to attach your screener questions to this part of the plan.

## Anticipated timeline:

Give a rough timeline of the project. How long will the research take from recruiting through analysis share out? Break this down into as many steps as possible to give your team a chance to alert you if something is unclear.

For moderated research, my interview guides consist of the following sections:

- **Introduction.** The details of what you'll say to the participant before you begin the session. It previews all the points you'll discuss. This gives the user the chance to clarify any lingering questions they might have and helps you acclimate if you're nervous about the session.
- **Questions.** These are open-ended questions you want to ask users during the session. These can be tricky to write. For most qual research, you won't have a long list of detailed questions since it's more of a conversation than an interview. But having a few open-ended questions on hand can help you follow up and serve as useful prep.
- **Wrap-up.** This is everything you'll want to mention at the end of an interview such as compensation, asking if they'd be interested in future research, and assuring them that you're grateful for their time.

### Resources:

In this section, make sure it's easy for everyone to find links to the research sessions, any synthesis documents, notes, the presentation, any development/design tickets, prototypes or concepts, and any follow-up information which would give context to the study.

