Research Planning Template

# How to use this template

## Purpose

This template is designed to help you quickly build out a research plan and schedule to align your team. While we’ve included many sections that you *could* use, you won’t need to get this in-the-weeds on every research plan. So you should feel free to add or delete sections as needed! At a minimum, your research plan should include:

## Background

It consists of a few sentences on what the research is about and why it is happening, which orients people to needs and expectations. The background also includes a problem statement (the central question you’re trying to answer with the research findings).

## Objectives

The specific ideas you want to learn more about during the research and the questions you want to be answered. Our research objectives should address what we want to learn and *how* we are going to study the problem statement.

## Participants

This should include clearly defining your target users, recruitment schedule, and participant screener questions.

## Methodology

The reasons behind why that particular method was chosen. For example, why you chose surveys instead of one-on-one interviews or secondary research over primary research. You can also list why you are choosing all of these methodologies.

### Test Methods

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### Outcomes & Methodologies

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## Interview Guide

Reminds you of which questions will help you meet your objectives, and can keep your discussions on track. Even if you don’t actively refer to your interview guide, writing one ensures everyone else on the team has a place to input their questions.

## Deliverables

This can be optional. This can include your initial analysis of findings. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

## Table XX: Deliverables

| **Deliverables** | |
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| **Deliverables** | **Description** |
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# Team

**Contractor Team**

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**Required Fearless Resources**

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**Team Roles & Responsibilities**

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## Table XX: Roles & Responsibilities

| **Roles & Responsibilities** | |  |
| --- | --- | --- |
| **Role** | **Company** | **Description** |
| **Role** | [Contractor or Fearless] | Lorem ipsum dolor  sit amet, consectetur adipiscing elit |
| **Role** | [Contractor or Fearless] | Lorem ipsum dolor  sit amet, consectetur adipiscing elit |
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## Approximate Timeline

This should include start and end dates for research planning, recruitment, interviewing, synthesis, and report out. The time ranges are estimates but provide team members and clients a roadmap for research.

## Table 1: Delivery Timeline

| **Delivery Timeline** | |
| --- | --- |
| **Milestone** | **Timeframe** |
| Research plan creation and review | XX/XX/XXXX-XX/XX/XXXX |
| Recruitment | XX/XX/XXXX-XX/XX/XXXX |
| Interviewing | XX/XX/XXXX-XX/XX/XXXX |
| Synthesis | XX/XX/XXXX-XX/XX/XXXX |
| Read Out/Share of Findings | XX/XX/XXXX-XX/XX/XXXX |

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