

Team Name
Research Protocol Owner Name
Date

RESEARCH ACTIVITY PURPOSE

State the business and user purpose.

RESEARCH ACTIVITY HYPOTHESIS

State the hypothesis the activity will test.

RESEARCH ACTIVITY OBJECTIVES

Written as statements or questions. Be explicit. What will you test, why, and how (specific methods)?

	Statement/question	Method(s)
Objective 1		
Objective 2		
Objective 3		

SCREENING CRITERIA

Create a screener to send to the recruiting firm or manually screen users before adding them to a study.

User groups

Number of users per group

Additional criteria (e.g. geography, market, expertise, experience, etc.)

Participant ID
Session Date
Session Start and End Times
Participant User Group

IBM team present:
Moderator
Notetaker
Others

INTRODUCTION

Set expectations for the participant and sign Agreement.

Part 1

Introduce yourself. Thank the participant. State the purpose of the research study and how long it will last. Remind the participant to be honest and that their feedback will be kept confidential.

Part 2

Summarize the appropriate Agreement. Collect their signature and consent. Describe the benefits of the study for both the participant (through honoraria or otherwise) and IBM.

Part 3

Explain what will happen during this research study. Provide the participant with the needed instructions or tasks. Ask if they have any questions before the session begins.

INITIAL STUDY QUESTIONS

Put the participant at ease with some warm-up questions and conversation.

Participant ID
Session Date
Session Start and End Times
Participant User Group

IBM team present:
Moderator
Notetaker
Others

SPECIFIC STUDY QUESTIONS

Get specific. Carefully frame the questions you want the participant answer and data you will collect.

