<Insert project, release> Research Protocol

Protocol owner:

Date:

## Research Protocol Purpose

*State the business & user purpose of this work.*



## Research activity hypothesis

*Write as statements or questions. Be explicit. This step is extremely important. Be clear on what you are learning or testing, why you are observing or testing it, and how (specific methods) you will measure it if the activity is evaluative.*

|  | Statement/question | Method(s) |
| --- | --- | --- |
| <Objective 1> |  |  |
| <Objective 2> |  |  |
| <Objective 3> |  |  |
| <Objective 4> |  |  |
|  |  |  |

## User screening criteria

*State your user groups for each phase of the research plan.*

* User groups (e.g. data engineers, oncologists, supply chain managers, people managers, etc.)
* Number of users per group:
* Additional criteria (e.g. geography, markets, gender, years of experience, etc.)

## Introduction

Set expectations for your participants and have them sign any required consents or agreements.

Part 1

Introduce yourself and your colleagues. Thank the participant (not for their time but for their participation, experiences, and feedback). State the purpose of the research activity and how long it will last. Remind the participant to be honest and that their information willbe kept confidential.

Part 2

Introduce yourself and your colleagues. Thank the participant (not for their time but for their participation, experiences, and feedback). State the purpose of the research activity and how long it will last. Remind the participant to be honest and that their information will be kept confidential.

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. Offer to pause if needed at any time during the session.

## Warm-up questions

*Put the participant at ease with some warm-up questions and conversation. Look for opportunities to learn more about their role and what they value. Open-ended questions are best.*

## Specific study questions

*Get specific. Carefully frame the questions you want the participant to answer and data you will collect. Make sure you stay focused on asking questions in service of your objectives. Resist the urge to add too many questions that stray from objectives. Ask open-ended questions that uncover stories and experiences.*

## Wrap-up questions

*Ask if there is anything that you haven’t covered but they would like to share. Ask a blue-sky question like, “If you had a magic wand and could change anything what would it be?”*

*Thank the participant once again (not for their time but for their participation, experiences, and feedback).*