All design starts with research, and all research starts with a plan. A research plan facilitates alignment between the team members and clients. Being clear about the approach is important to make sure we go out and return with relevant insights.

We have recently been engaged by an **Indonesian Bank** to look at the **current customer experience of everyday personal banking**. There’s a strong belief that the **young millennials** will very soon form the largest segment for the client and they want to be ready for it.

How well do we know the **millennials?**

We usually kick start our discovery journey by conducting **ethnographic research** to uncover their **intangible attitudes, behaviours, and motivations**. We do so by **talking to people and observing them in their natural context** to understand them at a deeper level. In order to conduct the research, we first devise a **research plan** to guide the team.

Using the resources provided below, assist the **client** with preparing a research plan. The plan should give anyone in the team a good understanding of **why, what, and how to go about conducting the research. Set your research window to 2 weeks.**

* **high-level research goals, team, budget and timeframe**
* **make sure everyone working on the project is clear on the objectives and timeframes.**
* **pursuing interesting conversations during user interviews and running usability tests**.
* **where, why, who, how and what of your research project.**

**UX Research Plan format:**

* ***Make a list of your stake holders*-** ***you think needs to be consulted and then start setting up catch-up sessions to get their input***
* ***Write your research questions*-*why’ of your research. Why are you carrying out this research? What do you hope to achieve by doing all of this work?***
* **Create a list of possible research questions, then prioritize them after speaking with stakeholders.**
* **What is your budget?**
* **Timeframe of the project-marketing team may be waiting for some of your exploratory research in order to build customer personas**
* **Understanding participant recruitment**
* **Which research methods you will use?**
* ***Develop research protocol-The tasks you want your participants to do (usability testing)***
* ***How much time you’ve set aside for the session***
* ***A script or description that you can use for every session***
* ***Your process for recording the interviews, including how you’ll look after participant data.***

***Structure of UX Research Plan:***

* A title – it should be obvious but over the years we’ve come to realize it isn’t always. Labelling a document makes it easier for someone to know what it’s about.
* Authorship details – if people have feedback on the plan; who should they give it to?
* Stakeholder details – who else is the plan being shared with? This helps stakeholders identify other relevant parties (if you’ve omitted anyone).
* The date – this should also include any revision dates. People want to be certain they’re working with the latest version of a document.
* Document control – if your company uses a document control system; it’s a good idea to follow it in your titles, filing, etc.
* An introduction – this is your background. A quick paragraph on why the research is needed and any history that is relevant.
* Objectives – what are you trying to achieve? One short statement. Research is best when it tries to satisfy a single objective; if you have dozens of objectives – you’re over-reaching and you need to plan again.
* The questions to be asked – another short list. You can’t get the answers to hundreds of questions from any piece of research; 3-5 is probably best but no more than ten.
* The methods to be used – what will you do, where will you do it and how long do you need.
* The people involved – it’s always a good idea to define the users you will do your research with. Use broad brush strokes and keep detail to a minimum.
* The time needed –it’s always a good idea to keep people informed as to when they will see results from a plan. If a project is a long one; you might want to include some preliminary milestones so that people can check on progress as well as a final reporting date.
* Where supporting information can be found – if there’s any other data that might be relevant; you can signpost it. This can include both previous studies, results, etc. and the suggested scripts that you use in the research.
* Background — a few sentences on what the research is about and why it is happening, which helps get people on the same page as to *why* this research is recurring, and what we hope to understand at the end. Arguably, this part is the most important for teams to align on first
* Stakeholders involved — the relevant internal team members who will be impacted by this research, and, potentially, the teams that initially came up with the research initiative
* Research objectives — what the teams want to learn from the research, or what they would like the outcomes to be. I like to put objectives this way: we should be able to answer all the objectives at the end of the research project, so, whether we are looking to understand an end-to-end journey or evaluate a new set of features, we should be able to come to conclusions about these objectives at the end. Read about how to write and elevate your research objectives [here](https://uxdesign.cc/elevate-your-research-objectives-745cf9415d5b)
* Methods — choose which research methods should be used in order to answer the research objectives. Mostly I am choosing between more generative methods in order to uncover motivations or broader insights, or usability testing to evaluate a current product or prototype
* Business objectives (optional, but recommended) — this is where you can discuss what business KPIs might be impacted through this research project, such as revenue, retention, acquisition, etc.
* Participants — who are the participants you are targeting for this particular project, such as demographics, geography, non-users versus users
* Interview guide — a cheat sheet containing topics/questions to follow during the interview
* UX Metrics (more applicable for usability tests) — what criteria would determine success, such as time on task or task success for a usability test
* Timeline — a general overview of how long the research will take