1.

Activity introduction

In this activity, you'll learn how to create a research plan to test the prototype you made for your portfolio project. A research plan is a process used as a template for the who, what, when, where, why, and how of UX research. A well-made research plan sets you up for success because it allows you to create a plan to test your design and compare the results to your research goals.
An effective research plan contains six elements:

. Project background: A short explanation of why you're doing the research and the things you want to learn from the research
. Research questions: Questions you plan to answer as a result of the usability study
. Key performance indicators, or KPIs: Indicators that evaluate progress towards your research goals
. Methodology: The way you'll conduct your research
. Participants: The people who will participate in your research
. Script: An interview script that has tasks and questions for participants

After completing this activity, you'll have the opportunity to compare your work to a completed exemplar in the following course item.

Step-by-step instructions

This activity builds on others in this course. If you haven't attempted the previous activities, go back and complete them before starting this exercise.
Step 1: Access the UX Research Study Plan template

To use the template for this course item, click the link below and select "Use Template."

Link to template: UX Research Study - Plan [Template].

OR

If you don't have a Google account, you can download the template directly from the attachment below.

UX Research Study - Plan [Template].pdf
PDF File

Step 2: Add project details and describe the background
Add your project's title, your name, any relevant stakeholders, and the date to the Introduction section of the template.
Then write a paragraph describing the project's background. It should briefly explain the purpose of your research and answer the question, "what led me to conduct this research in the first place?"
Step 3: Identify research goals
Add 1-2 specific research goals for your project to the Introduction. Make sure these goals address the problem your design is trying to solve. When identifying goals, ask yourself, "how might the results of the research impact my design decisions?"
Step 4: Choose research questions
Next, brainstorm 2-3 research questions for your project and enter them next to Research Questions. (In a real study, you should aim to include at least five questions.)
When drafting questions, consider what information you need from the study.
Make sure your research questions are:

Actionable: It should be clear how you'll get answers to the questions, and you should know when you've found the answers you need
Specific: Questions should have a clear focus and lead to useful data

Neutral: Questions should be phrased objectively, so they don't make assumptions

Qualitative or quantitative: Questions should be designed to collect either qualitative or quantitative data

Remember that research questions aren't survey questions, so you won't ask them during interviews. Instead, they represent the larger questions you want your study to answer.
Step 5: Decide which KPIs to use
Now it's time to choose KPIs to measure your progress towards your research goals. Choose at least one KPI from the list below and add it to the Key Performance Indicators (KPIs) section. The KPI(s) you select will help you evaluate how well your current design meets the original goals you set for the project.
KPIs give you feedback on what's working, what isn't, and what needs to be fixed. KPIs can measure different things, so think about what you need to know and how to measure that information.
You can choose from among the following common KPIs in UX research:

Time on task: How long it takes a user to complete a task. Be sure to account for all the factors that could affect your data, like participants with accessibility needs.
Use of navigation vs. search: The number of users who find things through browsing, compared to those who use the search function to find what they need
User error rates: How often users make mistakes while completing a task

Drop-off rates: The number of users who give up before accomplishing their goal

Conversion rates: The number of users who reach their goal successfully

System Usability Scale, or SUS: 10 questions evaluating how easy or hard your product is to use

Step 6: Describe the methodology
Next, describe your methodology in the Methodology section. Your methodology is the plan you'll follow when conducting your research, including how you'll collect and analyze the data.
Making your methodology part of your research plan documents your approach for stakeholders and allows other researchers to repeat your study.
The methodology section should include:

The *procedures* you'll use to collect information to answer your research questions

The *time* and *location* of usability tests and interviews

Who will conduct the tests

How the tests will be conducted

Step 7: Choose participants
Next, select 4-5 possible participants for your study. Try to include people with a range of backgrounds and experiences, including marginalized groups, to avoid biasing the results. Remember, not everyone is right for your research, so consider who can give you the most useful data. For this exercise, your participants can be people you know, like family, friends, neighbors, or coworkers.
Record your chosen participants in the Participants section. Then summarize their basic characteristics, including background, age, gender, and accessibility needs. You may also want to include ways to persuade potential participants to sign up (e.g., payment, gift cards, lunch, etc.)
Step 8: Write a script
Finally, write a script for your usability study. Also known as a discussion guide, a script introduces the study and lists the tasks and questions a researcher asks participants in an interview. A good script will help you gain insight into users' goals, thoughts, and problems.
Reflect on the steps of your research plan while writing your script. Make sure your questions address your goals, research questions, and KPIs. Your script should have four sections:

Introduction: Start by introducing yourself and greeting your participants. Let them know what to expect and describe the role of the interview in your larger project. Finally, don't forget to ask permission if you plan to record the session.
Warm-up: To get the conversation going, ask participants some basic questions about themselves and their general thoughts about products like yours.
Tasks and questions: Outline tasks you want your participants to perform and 3-5 questions to find out about their experience of completing those tasks.
Wrap-up and closing remarks: This is the time to ask any final questions and thank participants for their participation.

Your script should also be:

Consistent: Questions and tasks are worded the same way for each participant

Open-ended: Questions encourage discussion and reflection rather than "yes or no" responses
Objective: Questions and tasks don't lead participants toward a particular answers or convey the researcher's personal bias
Goal-oriented: Questions and tasks relate directly to the research goal