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My Research Plan

Source of template: [Nielsen Norman research plan](#)

Squad name:

Leads:

Primary stakeholders:

Informed stakeholders:

Last updated:

line

Study Purpose & Context

Objectives

The purpose of this study is to [achieve x/learn about X]. This research will be used to inform:

- A product
- A project
- Something else

Research goals, questions, assumptions and hypotheses

In this study, we'd like to learn:

- Write research questions here
- Start with the following words
- What, when, why, which, how

	☰ Research Goals	☰ Question(s)	☰ Assumptions	☰ Methodology
1				
2				
3				

Participants

Sampling method

We will recruit participants through [name the source and the type of sampling method]

Sample size

We will recruit [X number of target users]. Describe why this number was selected.

Inclusion criteria

To participate in the study, a participant must:

- Have a specific characteristic
- Have done this thing before
- Have a specific background

Exclusion criteria

If a potential participant has any of the following characteristics, they will be excluded from the study during the screening process.

- Name the exclusion criteria
- Don't just write the negative of your inclusion criteria
- An example of someone who might be excluded is someone who's participated in a lot of user research recently.

The sample should represent a mix of the following characteristics:

- Add any characteristics that you'd balance here
- Often this includes things like demographics
- Or things like experience with technology or your product

Screening questionnaire

Participants will be screened through the following questionnaire:

- [Include link or add to document]

Method

Write out the method you will use and describe it for people who are unfamiliar. For example:

We will conduct moderated, remote, qualitative usability tests using think-aloud protocol. In a moderated, qualitative usability test, the researcher provides tasks for the participant to complete on the design and watches their behavior. The researcher is careful not to lead participants by asking non-leading, probing, and clarifying questions throughout the session.

Procedure

Participants will join a 60-minute session in [tool] via their [device]. The 60-minute session will follow the following format.

	≡ Time	≡ Activity
1	15 minutes	<ul style="list-style-type: none"> • Introduction • Short interview (2-3 questions) • Set up screen-sharing
2	40 minutes	<ul style="list-style-type: none"> • 5 - 8 tasks will be administered • Researcher asks follow-up questions after each task
3	5 minutes	<ul style="list-style-type: none"> • Researcher asks final questions • Observers invited to ask any remaining questions

Initial questions

- Tell me a bit about yourself
- Walk me through a typical day for you
- Have you ever used [the app/website] before?
 - What do you use [the app/website] for?

Tasks

As many of the following tasks will be given to participants to attempt. If participants finish tasks earlier, they will be provided with further tasks (which are prepared below).

	≡ Task #	≡ Top Task	≡ Task Instruction for participants
1	Task 1	type of tasks e.g. set up your first site	
2	Task 2		

Closing questions

We will ask some wrap-up questions after participants have attempted all prepared tasks.

1. What do you think of using the [app/website] for the activities you did today?

2. Is there anything that was particularly easy or difficult for you when you were using the [app/website] today?
 - a. What made this easy/difficult?
3. Is there anything that you wish could be improved in the [app/website]?
 - a. Why is that?
- b. Is there anything else we didn't look at today that you'd like to share with us about using the [app/website]?

Observation

Team members are welcome to observe the live sessions. We ask that observers are limited to 2 per session to avoid making participants feel uncomfortable. When observing a usability test session, observers should:

- Join the session 5-10 minutes early to avoid disrupting the session when it begins
- Keep their cameras and microphones off throughout the session
- Save any questions for the participant for the end of the session. (The researcher will allow observers to ask questions in the final minutes of the session.)

Schedule

	≡ Date/time	≡ Facilitator	≡ Participants scheduled
1	Date/time	Name	Participant 1: Role or info about participant
2			

Notetaking

Team members will be asked to take notes during the session to support the analysis. When taking notes try to:

- Write one observation on one sticky note
- Stick to what you observed or heard, rather than solution ideas or conclusions
- Try to make the note understandable to others

An example of a poor note and a better note is given below.

Poor: User was confused.

Good: P1 expected to find pictures when clicking 'find out more'.

Relevant documents

Include or add links to all relevant study documentation for record-keeping purposes.

- [Consent form](#)

- Recruitment emails
- Screener questionnaire(s)
- Facilitator guides or scripts
- Checklists
- Prototype links