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RESEARCH PLANNING

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Sample Pack

Research Planning

A supervisor-ready research plan example (mixed-methods)

Prepared by ResearchEdit4u Solutions• Jan 2026

This document demonstrates what a finished research plan can look like. It is a self-contained example, written to be readable, respectful, and publication-oriented.

At a glance

Working title	**Determinants of adoption of a new digital research workflow tool among university researchers: an explanatory sequential mixed-methods study**
Core decision	Quantitative survey to map key drivers, followed by qualitative interviews to explain the 'why' behind the patterns
Primary outcome	Behavioral intention to adopt, and self-reported adoption status (pilot/active use)
Population & setting	PhD scholars, faculty, and research staff in universities and research institutes (illustrative setting: India; adaptable to any region/domain)
Data types	Survey (Likert-scale constructs) + semi-structured interviews (experience-based narratives)
Planned analysis	Reliability checks, descriptive statistics, regression/SEM (depending on sample), thematic analysis, and explicit integration
Reporting lens	STROBE (survey/cross-sectional elements), GRAMMS (mixed-methods), SRQR/COREQ (interview reporting), plus strong data-availability and ethics transparency expectations

Contents

If you treat this plan like a conversation with a future reader: the supervisor, the examiner, and the editor. If any one of them pauses and asks, "How do you know?" or "Why this choice?", you may want the answer already here.

1. Purpose and boundary of support

This sample focuses on planning: the logic of the study, the decisions that make the work publishable, and the transparency that protects credibility. The research remains owned by the researcher; the plan is a scaffold for independent work, not a substitute for it.

2. The problem, stated plainly

Digital tools promise to make research more reproducible and less chaotic: clearer versioning, traceable decisions, better collaboration, fewer lost files. Yet across many labs and research groups, adoption is uneven. Some teams embrace new workflows quickly; others avoid them, abandon them, or use them only superficially.

The question I keep returning to is simple: if adoption is beneficial, why does it still stall? This study aims to convert that vague frustration into measurable drivers, and then translate those drivers into practical recommendations that can be implemented in real institutions.

3. Research gap and contribution

The adoption literature is large, but many studies remain either purely quantitative (high-level correlations without lived explanation) or purely qualitative (rich narratives without a clear sense of how common each barrier is). This plan deliberately mixes both: first mapping patterns across a broader sample, then sitting with a smaller set of participants to understand how those patterns formed.

The intended contribution is threefold: (i) a transparent and testable model of adoption drivers within research environments, (ii) an evidence-based explanation of the barriers/enablers that matter most in practice, and (iii) an institution-ready set of actions (training, incentives, infrastructure) that align with the findings.

4. Who should care (audience and fit)

I am writing for readers who manage or participate in research work: supervisors, lab heads, research administrators, and researchers deciding whether to change their workflow. The scope is not the

technology itself; it is the adoption process—what helps researchers move from intention to sustained use.

5. Aim, objectives, and research questions

Aim: To identify and explain the determinants of adoption of a new digital research workflow tool among university researchers.

Objectives:

- Estimate the current level of awareness, trial, and active use of digital workflow tools in the target population.
- Quantify how key adoption constructs (e.g., perceived usefulness, ease of use, social influence, facilitating conditions) relate to intention and adoption.
- Explore lived experiences that explain why certain drivers matter more than others (including organizational culture and resource constraints).
- Integrate quantitative and qualitative findings to produce actionable recommendations for institutions and research leaders.

Research questions (with the answers this plan intends to earn):

- RQ1: What proportion of researchers are aware of, have tried, and currently use a digital research workflow tool?
- RQ2: Which factors best predict intention to adopt, and which factors distinguish sustained users from non-users?
- RQ3: What barriers and enabling conditions do researchers describe, and how do these narratives explain the statistical patterns?
- RQ4: What institutional actions are most likely to increase meaningful adoption while respecting research constraints and ethics?

Hypotheses (quantitative component):

- H1: Higher perceived usefulness (performance expectancy) is associated with higher intention to adopt.
- H2: Higher perceived ease of use (effort expectancy) is associated with higher intention to adopt.
- H3: Stronger facilitating conditions (training, support, infrastructure) are associated with higher intention and higher likelihood of adoption.
- H4: Social influence (peer/supervisor norms) is associated with intention to adopt.

- H5: Perceived risk (data privacy, compliance concerns) is negatively associated with intention to adopt.

6. Study design and reporting lenses

Design: Explanatory sequential mixed-methods. I begin with a cross-sectional survey to map the landscape and test associations, then follow with semi-structured interviews to explain the patterns, especially any surprising results, contradictions, or subgroup differences.

Reporting lens: I intentionally align the write-up with widely used reporting expectations—STROBE for observational survey elements, GRAMMS for mixed-methods clarity, and SRQR/COREQ for interview transparency. These are not decorations; they are a shorthand for completeness.

7. Conceptual model (constructs)

The conceptual model blends widely used adoption constructs into a compact, testable structure. I keep the model simple on purpose: it must be readable, measurable, and explainable.

Construct	Plain-language meaning	Example indicator	Expected direction
Perceived usefulness	The tool genuinely helps me do better research work	"It reduces errors and saves time."	+
Perceived ease of use	The tool feels learnable and not exhausting	"I can use it without constant help."	+
Facilitating conditions	Support exists: training, IT, templates, time	"My institution makes this easy to adopt."	+
Social influence	People around me expect/endorse the change	"My supervisor/team encourages it."	+

Perceived risk	I worry about privacy, compliance, or misuse	"I'm not sure it's safe for my data."	−
Habit / routine fit	The tool fits into how I already work	"It matches my workflow."	+

8. Quantitative component (survey)

8.1 Population, inclusion, and sampling approach

Population: active researchers who routinely generate, analyze, or manage research outputs—PhD scholars, postgraduates, faculty, and research staff. Inclusion is defined by research activity in the last 12 months (proposal, data collection, analysis, writing, or supervision).

Sampling approach: multi-institution convenience sampling with purposeful diversity (discipline clusters, early-career vs senior, public vs private institutions). The intent is not national representativeness; it is robust inference about drivers within realistic constraints.

8.2 Sample size target (illustrative)

Target N = 250 survey responses, aiming for at least 200 complete cases after exclusions. This supports stable estimation for multi-variable models and subgroup exploration, while remaining feasible for a typical PhD timeline.

8.3 Measures (survey instrument overview)

All items are measured on a 5-point Likert scale (1 = strongly disagree to 5 = strongly agree), unless stated otherwise. The instrument is structured so that each construct has multiple indicators, allowing reliability checks.

Section	What is captured	Example items (illustrative)
A. Profile	Role, discipline cluster, research stage, institution type	Role; years of research; primary methods used
B. Adoption status	Awareness, trial, current use, frequency	Aware? Tried? Active use? Frequency/week
C. Usefulness	Perceived value for quality, speed, reproducibility	"Improves traceability of decisions."

D. Ease of use	Learnability, complexity, effort	"I can learn it quickly."
E. Facilitating conditions	Training, support, infrastructure, templates	"Help is available when I'm stuck."
F. Social influence	Team/supervisor expectations, peer norms	"People I respect recommend it."
G. Risk & trust	Privacy, compliance, data sensitivity	"I feel confident about data security." (reverse if needed)
H. Outcomes	Intention, sustained use indicators	"I intend to use it in my next project."

8.4 Primary outcomes and covariates

Primary outcomes: (i) intention to adopt (continuous), (ii) adoption status (binary/ordinal: never used vs tried vs active). Key covariates: research stage, discipline cluster, institutional support level, prior exposure to similar tools.

8.5 Quantitative analysis plan

We treat analysis like a promise made in advance. The plan is transparent about what is primary, what is exploratory, and what would count as an unexpected finding.

- Data screening: missingness patterns, response time outliers, straight-lining checks (with careful, documented exclusions).
- Construct reliability: Cronbach's alpha and item-total correlations (and revision decisions documented).
- Descriptive mapping: awareness, trial, adoption, frequency; subgroup comparisons where meaningful.
- Main modelling: regression (and/or SEM if sample and measurement quality support it) predicting intention and adoption status.
- Sensitivity checks: alternate model specifications, controlling for key covariates, and testing robustness of the main drivers.

9. Qualitative component (interviews)

9.1 Sampling and recruitment

Interview sampling is purposeful: I select participants to explain the survey patterns. That means I actively include: (i) enthusiastic adopters, (ii) reluctant adopters, (iii) people who tried and abandoned, and (iv) people who cannot adopt due to constraints (policy, resources, data sensitivity).

Target n = 18–24 interviews, adjusted to thematic sufficiency. Recruitment draws from survey volunteers plus referrals through institutional networks.

9.2 Interview guide (semi-structured)

The interview is designed to feel safe and non-judgmental. I am not testing participants; I am learning how their context shapes decisions.

- When did you first hear about the tool (or similar tools), and what was your first reaction?
- What would you say the tool promised you? What did it actually deliver?
- Tell me about a moment when the tool genuinely helped—or genuinely frustrated—you.
- What does "support" look like in your environment (training, peers, IT, supervisor)?
- If you chose not to adopt, what was the deciding reason? Was it one factor or many?
- How do data sensitivity, privacy, or compliance concerns influence your choices?
- What would have to change for adoption to become easy for you?
- How does this tool fit (or clash) with your existing workflow and habits?
- If a new PhD scholar asked you for advice about adopting it, what would you tell them?
- What should institutions do differently if they want adoption without pressure or blame?

9.3 Qualitative analysis plan

We should use reflexive thematic analysis with a transparent audit trail: coding decisions, theme definitions, and example quotations are documented. Where possible, a second reader reviews a subset of transcripts for interpretive challenge and clarity.

- Transcription and de-identification (removing names, institutions, and sensitive project details).
- Initial coding (inductive + construct-informed), keeping memos for contradictions and surprises.
- Theme development (barriers, enablers, turning points, and context constraints).
- Quality checks: negative cases, alternative explanations, and participant-type contrasts (adopters vs non-adopters).

10. Integration (how the two strands meet)

Integration is treated as a visible step, not an afterthought. I integrate at three points: (i) interview sampling based on survey patterns, (ii) interview questions shaped by quantitative surprises, and (iii) a joint display that aligns statistical drivers with narrative explanations.

Quantitative signal	Interview focus	How it may translate to action
Usefulness strongly predicts intention	Stories where quality/speed improved; what 'useful' means in real work	Training around high-value use cases; showcase concrete workflows
Risk negatively predicts intention	Specific fears (data sensitivity, compliance, surveillance)	Clear governance, security documentation, safe-use boundaries
Facilitating conditions matter most	What support actually worked (peer champions vs IT tickets)	Peer champion model + quick-start templates + office hours

11. Ethics, integrity, and transparency plan

Ethics is treated as design, not paperwork. Participation is voluntary; data are de-identified; and no participant is asked to reveal confidential research content. Interview excerpts are anonymized and carefully screened for indirect identifiers.

Authorship and contributorship are documented transparently. Conflicts of interest (funding, institutional roles, commercial relationships with tool vendors) are disclosed clearly. If any AI-enabled tools are used in drafting or analysis support, their role is described openly, with human accountability retained.

12. Data management and availability statement (illustrative)

Data are stored in an encrypted institutional drive with access limited to the research team. A de-identified, minimal dataset required to reproduce the main quantitative findings is prepared, along with a data dictionary. Interview transcripts are not publicly shared due to re-identification risk; instead, a coded excerpt set and theme definitions are shared where feasible.

Data availability statement (example wording):

"De-identified quantitative data and analysis code supporting the findings of this study are available from the corresponding author upon reasonable request. To protect participant confidentiality, full interview transcripts are not publicly shared; a de-identified excerpt set and codebook are available upon request."

13. Anticipated limitations (stated without apology)

- Cross-sectional survey data limit causal claims; results are framed as associations.
- Convenience sampling may bias estimates of prevalence; the study emphasizes drivers and explanations over population rates.
- Self-report measures may inflate adoption; triangulation via interview narratives and consistency checks reduces overclaiming.
- Institutional diversity can introduce unmeasured confounding; subgroup analyses are treated as exploratory.

14. Risk register (What risks might emerge and need to be addressed)

Risk	How it shows up	Mitigation	Owner
Low survey response	N too small for planned model	Multi-channel recruitment; reminders; shorter instrument; institutional champions	Researcher
Social desirability bias	Overstated adoption or intention	Anonymous survey; neutral wording; emphasize no evaluation	Researcher
Interview hesitation	Participants avoid sensitive details	Clear consent; boundaries; allow skip; anonymization assurance	Researcher

Tool/vendor politics	Participants fear institutional monitoring	Explicit independence; avoid vendor identifiers; focus on workflow not brand	Researcher

15. Timeline and milestones (12 weeks example)

Week	Milestone	Output
1–2	Finalize instrument and interview guide; ethics submission	Protocol draft + instruments + consent forms
3–5	Survey recruitment and data collection	Cleaned survey dataset (v1)
6	Initial quantitative analysis; identify patterns	Descriptives + initial model results
7–9	Interviews (sampling from survey patterns)	De-identified transcripts + memos
10	Qualitative coding and themes	Theme map + exemplar quotations
11	Integration (joint display) + recommendations	Integrated results table + action list
12	Supervisor-ready plan and manuscript outline	One-page brief + draft outline

16. Supervisor Check One pager brief

Title: Determinants of adoption of a digital research workflow tool among university researchers (mixed-methods).

One-sentence purpose: Understand what drives adoption (and what blocks it) so institutions can support meaningful, ethical uptake.

- **Design**: Explanatory sequential mixed-methods (survey first, interviews second, explicit integration).
- **Primary outcomes**: Intention to adopt; adoption status (trial/active use).
- **Key predictors**: Usefulness, ease of use, facilitating conditions, social influence, perceived risk, routine fit.
- **Sample targets**: Survey N≈250; interviews n≈18–24 (purposeful based on survey patterns).
- **Analysis**: Reliability + regression/SEM; reflexive thematic analysis; joint display integration.
- **Ethics**: voluntary participation; de-identification; transparency in contributorship and disclosures; careful data sharing.
- **Supervisor feedback focus**: feasibility of sampling plan; alignment of constructs to discipline context; ethics boundary review.

17. Editorial screening readiness notes

This plan is designed so that early screening concerns are already addressed in the structure: scope is explicit, the claimed advance is modest and evidence-linked, ethics boundaries are visible, methods are detailed enough to be reproducible, and data availability is stated in plain language.

- Scope and readership fit are stated upfront, keeping the study about adoption (not tool marketing).
- The methods section is written to withstand the “could a reader repeat this?” question.
- Ethics and disclosures are treated as part of the design, not an afterthought.
- References and reporting lenses are chosen to support completeness and transparency.

Embedded template (blank layout)

Research Planning

Working title: [.....]

Population/setting: [.....]

Study type: [Quant / Qual / Mixed / Review]

Reporting lens: [.....]

A. Problem and contribution

Problem statement (plain language):

[.....]

Research gap:

[.....]

Contribution (what changes if this study succeeds):

[.....]

B. Aim, objectives, research questions

Aim:

[.....]

Objectives:

- [.....]
- [.....]
- [.....]
- [.....]

Research questions:

- [.....]
- [.....]
- [.....]
- [.....]

C. Methods blueprint

Design overview:

[.....]

Population and inclusion/exclusion:

[.....]

Sampling approach and sample size target:

[.....]

Variables/themes table:

Construct/Theme	Definition	Indicator/Question	Role

D. Analysis plan

Quantitative analyses (if applicable):

- [.....]
- [.....]
- [.....]
- [.....]

Qualitative analyses (if applicable):

- [.....]
- [.....]
- [.....]
- [.....]

Integration (if mixed-methods):

[.....]

E. Ethics and transparency

Ethics approval/consent approach:

[.....]

Data management and availability statement (draft):

[.....]

Contributorship and disclosures:

[.....]

F. Timeline

Time period	Milestone	Output

References

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- Taylor & Francis Author Services. 5 top reasons for desk rejection – and how to avoid them. https://authorservices.taylorandfrancis.com/blog/get-published/5-reasons-for-desk-rejection-and-how-to-avoid-them/
- Elsevier. Eight reasons I rejected your article. https://www.elsevier.com/connect/8-reasons-i-rejected-your-article
- Nature Portfolio. Editorial policies: Reporting standards and availability of data, materials and code. https://www.nature.com/nature-portfolio/editorial-policies/reporting-standards
- PLOS ONE. Data availability policy (minimal dataset concept). https://journals.plos.org/plosone/s/data-availability
- ICMJE. Defining the role of authors and contributors. https://www.icmje.org/recommendations/browse/roles-and-responsibilities/defining-the-role-of-authors-and-contributors.html
- COPE. Authorship discussion document. https://publicationethics.org/guidance/discussion-document/authorship
- EQUATOR Network. STROBE reporting guideline. https://www.equator-network.org/reporting-guidelines/strobe/
- EQUATOR Network. COREQ reporting guideline. https://www.equator-network.org/reporting-guidelines/coreq/
- EQUATOR Network. SRQR reporting guideline. https://www.equator-network.org/reporting-guidelines/srqr/
- EQUATOR Network. GRAMMS reporting guideline for mixed-methods. https://www.equator-network.org/reporting-guidelines/the-quality-of-mixed-methods-studies-in-health-services-research/
- Center for Open Science. Registered Reports initiative. https://www.cos.io/initiatives/registered-reports
- PRISMA 2020. Checklist and resources. https://www.prisma-statement.org/prisma-2020-checklist
- CONSORT 2010. Checklist. https://www.consort-spirit.org/consort-2010

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