

Planning Your Research Approach

Before diving into specific frameworks, planning your overall research approach increases efficiency and ensures comprehensive coverage. This template guides you through defining objectives, allocating resources, selecting methods, and establishing decision criteria.



How to Use This Template

Complete this planning template before starting detailed research. It serves as your roadmap, ensuring you allocate time and resources effectively while maintaining focus on critical questions. Review and update as your understanding evolves.

Part A: Research Objectives

What key decision(s) will this research inform?

What are the 3-5 most critical assumptions to validate?

1.

2.

3.

4.

5.

What would constitute "success" indicators that support proceeding?

What would constitute "failure" indicators suggesting pivot or abandonment?

Part B: Resource Planning

Time Available:

Budget Available:

People Available:

Key Constraints:

Part C: Secondary Research Plan

What industry reports or market studies should be reviewed?

What competitor information needs to be gathered?

What demographic or economic data is relevant?

What online sources (forums, social media, reviews) should be monitored?

Part D: Primary Research Plan

What questions require customer interviews?

What hypotheses should surveys test?

Would observational research or prototype testing be valuable?

How many research participants are needed for confidence?

Interviews: _____ participants

Surveys: _____ respondents

Other: _____

Part E: AI Tool Selection

What AI tools could accelerate secondary research?

☐ Web scraping tools

☐ Social listening platforms

☐ Competitor monitoring services

☐ Search trend analysis

☐ Other: _____

What AI tools could enhance primary research?

☐ Survey platforms with AI analysis

☐ Interview transcription services

☐ Sentiment analysis tools

☐ Data visualization platforms

☐ Other: _____

Budget allocation for AI tools: \$ _____

Part F: Framework Selection

Which analytical frameworks will be applied?

☐ DIFA (Demand, Innovation, Feasibility, Attraction)

☐ Business Model Canvas

☐ Pentagon Model

☐ Porter's Five Forces

☐ Ansoff Matrix

☐ Diffusion of Innovation

☐ Customer Segmentation

☐ Other: _____

Part G: Timeline

Week 1-2: _____

Week 3-4: _____

Week 5-6: _____

Week 7-8: _____

Part H: Decision Criteria

By the end of research, what specific questions must be answered?

What level of confidence is required to proceed?

Who needs to review research findings before decisions are made?

✓ Next Steps

Use this plan to guide your research execution. Update as you learn and priorities shift. With clear objectives, allocated resources, and defined decision criteria, you're ready to proceed to Chapter 3's AI-enhanced research methods.