RESEARCH **PLANNING**

With so many different research methods to choose from, integrating them into your practice can seem overwhelming. Which do you choose? How will they benefit the project? Where do they fit into your already established process? How can you communicate the value of research-driven design to your clients?

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Writing a research plan at the beginning of a project can help organize your thoughts, guide your team, and help you bring key stakeholders on board.

It outlines what you're going to do, and why you're doing it. It's an essential communication tool, describing each team member's roles and assignments. This can provide transparency for the client, illustrating that creativity and innovation aren't magic—they're the results of hard work and informed decisions.

While every project is unique and requires customization around scope, timeline, and budget, there are some basics that can help you draft a research plan for any problem you're trying to solve. Consider the following sections of an adaptable general model:

Background: Outline project goals. Explain why the work was commissioned and what is to be achieved. Whenever possible, include information about audience. Background places the project in context. Putting it in writing also ensures that you and your client are on the same page. Perhaps some of this information has even been provided by them, when the project was initiated.

Assumptions: At the beginning of any new project, all members of the team have their own ideas regarding the assignment, the audience, possibly even the client. List those assumptions. They're essential for helping you ask the right questions later. Get them all out on the table early. It clears your head and simultaneously jump-starts your research. If appropriate, you may even involve stakeholders or constituents.

Research Questions: Draft questions relevant to project goals and what you've learned in the assumptions phase. Determine what you don't know, and what you'll need to have answered in order to move forward. Try to keep the list concise. Too many questions can mean that aspects of the project remain unclear, for you and the client. An unwieldy number of research questions is usually indicative of an unfocused project.

Methods: Once you have placed the project in context, and you know what questions need answered, select research methods appropriate to time frame and resources. Select tools that will give you the most valuable information as quickly and efficiently as possible.

Implications: Implications connect research methods back to project goals. This step outlines how the research contributes to a successful solution. Implications answer research questions and validate—or invalidate—assumptions. They also show your client the value of research, illustrating how doing the homework early can save money in the long run by avoiding costly missteps.

Resources: This part of the plan accounts for the impact of research on project timeline, budget, and staff. Integrating research exercises into project production schedules is helpful, providing a clear and shared understanding of who is responsible for what, and when. This also provides an estimate of time-on-task, accounting for research activities and their impact on project costs. It can reveal if the team will need outside assistance to help plan accordingly.

A research plan should be a living document. Treat it as a guide, not as dogma. Don't be afraid to adjust the plan as things evolve. Just make sure that your team and your client are in agreement when things start to shift. Regular updates on progress—both internal (to your team) and external (to your stakeholders)—keep the project on track, and that plan you've so carefully crafted from falling unused into an empty drawer.

Outline project assumptions with this simple process: Ask participants to write each assumption on a single sticky note. Place them on a wall or community work space. Individuals can write as many assumptions as they'd like. When the writing or conversation starts to lag, it's time to start looking for patterns. Group like concepts into clusters, creating categories. Once you're satisfied with those categories, start thinking about the best resources to dig a little deeper into the related assumptions (books, articles, videos, people). As you come up with answers to, 'How can I find out more about…?,' write them down and assign the work to team members. Give everyone time to investigate the assignments. Schedule a follow-up discussion to share what everyone has learned.

This exercise is intended to help the creative team focus, proving initial assumptions valid, or demonstrating that they are false. Either way, this step helps to clarify what to do next.

ASSUMPTIONS
EXERCISE