

Enterprise  
Design  
Thinking  
by IBM

TOOLKIT

# Research Plan

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**INTRODUCTION**

## Why should you use this activity?

A research plan allows you to define what you need to learn and how to find answers to your questions.

**INTRODUCTION**

## When should you use this activity?

A research plan is essential when starting a project. It fits in especially well right after you identify your team's Assumptions and Questions.

**SETUP**

Give your research plan a title.

Anyone should be able to understand the purpose of your research plan from its title.

Combine what you plan to study, the methods you will use, and your target user group.

**SETUP**

## Authorship and stakeholders

Document your full name and contact info. As you get your stakeholders' buy-in, add their names and contact info to keep everyone up to date on progress.

**SETUP**

## Brief background

In no more than a couple sentences, describe the project(s) this study relates to. Why is this study important to your work more broadly?

## Research Plan

60 min

### SETUP

Don't fear long titles. People with a stake in the research need to understand its purpose from the title.

Phase of the research plan:

**TotTime Mobile Team Research Plan**

Team Name	Tot Time Mobile Team
Research plan owner name	Min Y.
Date	10/19/2018

**Screening Criteria**  
Describe the users you need to talk to:

User Description
Number of users per group
Additional criteria*

\*e.g. geography, market, expertise, expertise

**Timeline**  
Outline the research phases & team members assigned to them:

Phase	Work to be done
Phase 1	
Phase 2	
Phase 3	

**Deliverables**  
State interim and/or predefined milestones:

RESEARCH PLAN PURPOSE:  
State the business purpose  
**UNDERSTAND THE DROP OFF OF USERS AFTER AVERAGE 30 DAYS. DRIVE ACTIVE USER NUMBERS IN 4Q.**

**Research Objectives**  
Written as statements or questions. Be explicit. What will you test, why, and how (specific methods)? An objective must be singular & measurable.

Objective	Statement/question	Research Method(s)
Objective 1	ASSUMPTION: USERS DROP OFF AFTER GETTING TO KNOW THEIR BABY'S SLEEP SCHEDULE.	CONTEXTUAL INQUIRY
Objective 2	WHAT ARE PARENTS' TOP GOALS FOR BABIES AFTER THE FIRST MONTH?	CONTEXTUAL INQUIRY
Objective 3	HOW MUCH TIME DO NEW PARENTS SPEND ON THEIR PHONES RELATIVE TO PRE-BABY?	CONTEXTUAL INQUIRY
Objective 4		
Objective 5		

A black pen lies diagonally across the top right corner of the document.

**DEFINE GOALS**

Define the objective of the study.

In one sentence, briefly describe the objective of the study. What do you want to learn?

- **Example:** The objective of this study is to determine the effect light has on employee production.

**DEFINE GOALS**

## Draft research questions.

These are the specific questions you intend to answer with the study. They should all relate to your objective. **Do not** ask these questions to the participants of the study.

- **Examples:** What color of light is ideal for employee production? What is the ideal intensity of light for employee production? How will employees respond to different light levels throughout the day? Can the level of light be tied to employee happiness?

## Research Plan

60 min

### DEFINE GOALS

Involve your team, stakeholders, and clients in your brainstorm of research questions.

Screening Criteria  
Describe the users you need to talk to for each phase of the research plan.

User Description	
Number of ... per group	
Additional...	

Timeline  
Outline the research timeline for each phase.

Phase 1	Work 1
Phase 2	Work 2
Phase 3	Work 3

Final date:  
10+

**Green Sprouts Client Team Research Plan**

Team Name	Green Sprouts
Research plan owner name	CINDY W
Date	11/10/2019

Research Plan Purpose  
State the business purpose

EVALUATE INITIAL DESIGN TO INFORM FIRST STAGE OF PRE-ORDER APP

Research Objectives  
Written as statements or questions. Be explicit. What will you test, why, and how (specific methods)? An objective must be singular & measurable.

Objective	Statement/question	Research Method(s)
Objective 1		
Objective 2		
Objective 3		
Objective 4		
Objective 5		

Target users  
~~don't~~ see the value of pre-order until experiencing directly  
---  
User interviews +  
(eg. walk thru)

time + transportation  
are primary  
drivers to use  
pre-order  
-----  
some

what blockers  
keep users  
from first-time  
use?  
interviews

**METHODS**

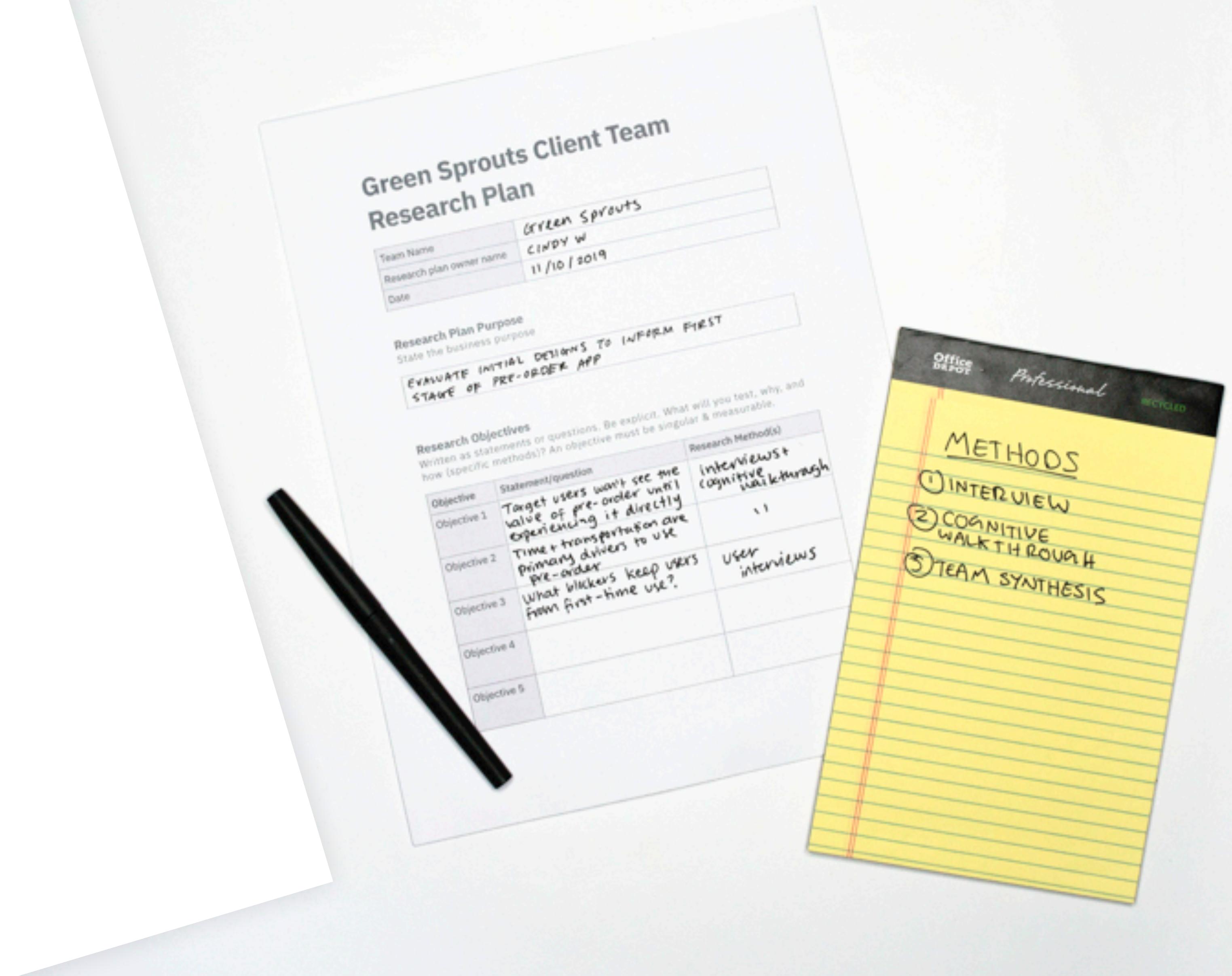
## What methods will you use?

Identify what you and your team will do to answer your research questions. Look through the Toolkit. Which **observe** activities will answer your research questions the most effectively and efficiently?

- **Note:** Each method will require further planning dependent on which activity you choose.

**METHODS**

Which methods will you use to answer your research questions?



**PEOPLE**

## Who are your participants?

Your participants should be representative of your users. If you already have a persona, use that as a starting point to identify real people who embody it best.

- **Example:** If your project is to develop a service for financial institutions, most likely you won't have a reason to include retired senior citizens living at home.

**SCHEDULE RESEARCH**

Use the results of your Empathy Maps to inform the participants of your research.



**SCHEDULE RESEARCH**

Create a schedule.

Draft a timeline for when you will recruit participants, when you plan on conducting each method, and when you expect results. Try to limit your plan to no more than a sprint or iteration.

- **Note:** You can also include a budget here as well. How much will each element of this study cost? Remember, part of creating research plan is to justify the time and cost it takes gather insights for your project.

## Research Plan

60 min

### SCHEDULE RESEARCH

Schedule research with the intention to get ahead of and inform decisions your team makes during its next iteration of work.

The image shows a wall calendar for April 2019, which has been annotated with red ink. Handwritten text includes "TESTING" with an arrow pointing from April 10 to April 12, and several dates circled in red: April 16, 19, 20, 23, 24, 26, and 28. A note on April 24 specifies "MAY Admin Professional Day". To the right of the calendar is a printed "Research Plan" document.

**Screening Criteria**  
Describe the users you need to talk to for each phase of the research plan.

User Description	NEW PARENTS	LIVE AT HOME ALONE RETIREES
Number of users per group	10	10
Additional criteria*	single car, no transport, homes outside of walking distance	

\*e.g. geography, market, expertise, experience

**Timeline**  
Outline the research phases needed and their estimated timelines. State the team members assigned to leading or assisting in each phase.

Phase	Work to be done	Dates	Team members
Phase 1	10 user interviews	4/16, 4/19, 4/25	Sean P.
Phase 2	10 cognitive walk-throughs	4/8 - 4/12	Joni S.
Phase 3	team synthesis of scenarios	4/26 - 5/3	WHOLE TEAM

**Deliverables**  
State interim and final deliverables (e.g. Playbacks, workshops, etc.) There is no predefined medium.

AS-IS SCENARIO + UPDATED PROTOTYPE

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