UX Research Plan: <Study Name>

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| --- | --- | --- | --- |
| **Prepared by:** | <Name of team member leading study> | **Updated on:** | <Date this document was updated> |
| **Requested by:** | <Who requested this research study?> | **Timeframe:** | <When do you hope to complete the study?> |
| **Stakeholders:** | <Who else needs to be involved in or informed about the design of the research study? This should include anyone who will likely take action using the insights from the study.> | | |

Overview

|  |  |
| --- | --- |
| **Business problem:** | <Considerations:   * What is the business problem that you want to solve? * What were the signals or hypotheses that led to this research study? * What is the overarching departmental/organizational goal that this project aligns with? * [Check out how to define problems through “how might we” questions](https://www.nngroup.com/articles/how-might-we-questions/)> |
| **Research goal(s):** | <Considerations:   * What do you hope to achieve with the research study? * What insights are you hoping to generate? * How will the insights be used? * What (design) decisions will be made based on those insights? * What information do you need to know about the user (target user persona), products, competition, or organization? * [Check out this video on how to make UX research goals specific](https://www.nngroup.com/videos/making-ux-research-goals-specific/)> |
| **Hypotheses:** | <What are the expected results from the study based on prior research or experience? What do you want to validate with this study?> |
| **Research Participants / Data source(s):** | <Where will the data come from? Which individuals/groups will be asked to participate in the study? What are the key characteristics of your target user persona? What is the target sample size? Also consider who you might want to exclude from the study.> |
| **Research Methodology:** | <Examples: Survey, Usability test, User interview, SME interview, Live intercept, Focus group, Workshop, Field study, Analytics review, Card sort, Tree test, Click test, A/B test, Secondary research> |
| **Comments:** | <Add any other details or background that help provide context> |

Scope

<Outline the scope and approach for the research. What topics/themes will be covered? Will there be multiple research methodologies used? Will this be done in phase? If there is a survey, interview, usability test, focus group, or workshop, please include questions or add a link to the document/file with questions in the appendix>

Communications

<Include a high-level plan of how the results will be communicated or published, including when and how results will be communicated back to participants>

Budget

<Outline any budgetary concerns if additional spend is required. If not, delete this section>

Schedule

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| --- | --- | --- |
| **Date** | **Milestone** | **Owner** |
| <MMM DD, YYYY> | <e.g. Research goal defined and participants identified/recruited> | <Name of lead> |
| <MMM DD, YYYY> | <e.g. Survey questions drafted> | <Name of lead> |
| <MMM DD, YYYY> | <e.g. Survey questions reviewed/approved> | <Name of lead> |
| <MMM DD, YYYY> | <e.g. Survey sent out to participants> | <Name of lead> |
| <MMM DD, YYYY> | <e.g. Results collected & analyzed> | <Name of lead> |
| <MMM DD, YYYY> | <e.g. Results report reviewed/approved> | <Name of lead> |
| <MMM DD, YYYY> | <e.g. Results published> | <Name of lead> |

Appendix

<Additional background information or context>

<Link(s) to relevant user persona(s)>

<Participant list (or link to participant enrollment log)>

<Survey, interview, or scenario/task questions (or link to separate plan)>

<Focus group or workshop agenda and questions (or link to separate plan)>