<Insert project, release> Research Plan

Plan owner:

Date:

## Research Plan Purpose

*State the business & user purpose of this work.*



## Research Objectives

*Write as statements or questions. Be explicit. This step is extremely important. Be clear on what you are testing, why you are testing it, and how (specific methods) you will measure it if the activity is evaluative.*

|  | Statement/question | Method(s) |
| --- | --- | --- |
| <Objective 1> |  |  |
| <Objective 2> |  |  |
| <Objective 3> |  |  |
| <Objective 4> |  |  |
|  |  |  |
|  |  |  |

## User screening criteria

*State your user groups for each phase of the research plan.*

* User groups (e.g. data engineers, oncologists, supply chain managers, people managers, etc.)
* Number of users per group:
* Additional criteria (e.g. geography, markets, gender, years of experience, etc.)

## Phases & estimated timelines

*Example:*

*Phase 1: Secondary research - Jan 15 – Jan 31*

*Phase 2: Global contextual inquiry - Feb 1 – Feb 28*

*Phase 3: Analysis & synthesis – March 1 – March 15*

|  |  |  |
| --- | --- | --- |
| <Phase 1> |  |  |
| <Phase 2> |  |  |
| <Phase 3> |  |  |
| <Phase 4> |  |  |
|  |  |  |
|  |  |  |

## Methods

*Be specific on which methods you will use, briefly describe the technique, why it is appropriate, and how it will be applied. (e.g. usability test, heuristic review, focus groups, contextual inquiry, etc.)*

## Data Analysis & Proposed Metrics

*How do you plan to make sense of the data you’re collecting? What does success look like? How will you prove or disprove your statements or questions? i.e.. Qualitative interview data – content analysis, quantitative data (e.g., number of repetitions of a specific activity) – descriptive statistics (e.g., range, frequency, mean, etc.)*

## Research team & roles

Moderator:

Notetaker:

Technology:

Observers:

Stakeholders:

## Deliverables

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

## Ethical Considerations

* Will the team publish/present the results internally or externally? Who will obtain any needed approvals?
* All persons involved in the research are required to adhere to the following ethical guidelines:
  + Performance of any research participant must not be individually attributable.
  + The individual research participant's name must not be documented in notes, recordings, or in the data logging system.
  + The individual participant’s identifying images (photos, videos) are to be viewed only in the context of the research.
  + Under no circumstances will any such imagery be used in any other instance, including but not limited to marketing and promotional activities.

## Budget & Resources

Specify research costs. Record the recruitment firm contact and purchasing order information as applicable.