UX Research Plan Template

[Project Title]: UX Research Plan

Created by: [Primary Researcher's Name]

Background & Purpose

- A brief description of the project background
- A description about how this research project fits with any existing roadmap, objectives, metrics (e.g. KPIs or success criteria, UX and business objectives), previous projects (e.g., analysis of ROI, research, design projects, etc.)
    - Examples of business objectives: revenue growth, customer growth, customer loyalty, efficiency, etc.
        - Explain how the research can impact these objectives
- Any existing hypotheses that led to this research that might need to be validated or explored
- Optional (include if this helps describe the purpose or objectives):
    - What qualitative and quantitative information about users will be collected?
    - Which documents or artifacts will be produced as a result of this research?
    - Which decisions can be made with these research insights?
- Link to existing project pages (if this doesn't exist reach out to relevant stakeholders as needed)

Research Questions & Scope

- About 3-6 high level research questions
- Optional (include if this is not clear in RQs): describe the scope of the research questions and focus area

Methods

- State the research method(s) being used
    - Example secondary research methods (aka desk research): document review, analytics review, competitive analysis
    - Example primary research: internal or external interviews, contextual inquiry, usability tests, surveys, a/b testing
    - List number of participants required for this method

Timeline, Tasks, and Constraints

Note: Include Jira tickets. Information in table should be a rough outline for the research plan all progress updates can be described in Jira tickets to avoid duplicating information

Name / Role	Task	Constraints or Dependencies	Start and Due Dates	Relevant Links
Name / Designer	e.g., Mockups for usability testing	Describe the constraint, the impact of it, and how it can be mitigated	A date or sprint	Link to mockups
Name / PM	e.g., provide use cases, project level goals, non-goals, etc.			
Name / Researcher	e.g., Planning			
	e.g., Recruiting			
	e.g., creating Moderation guide			
	e.g., confirm remuneration			
	e.g., Run studies			
	e.g., perform analysis			
	e.g., create presentations			
	e.g., refine action items			

Required Materials Checklist

Note: not all material needs to be completely ready and linked to get LGTMs on the Research Plan

- Any equipment or design material
- Consent Form
    - This lets the participant know what the study will be about, the procedure (e.g., how long an interview will be and if it is going to be recorded), its purpose, and the compensation
- Recruitment materials
    - Usually, a consent form is attached to this or can be done when confirming participation as a response to a recruitment request
    - A description of where and how recruitment materials will be sent
- Link to moderation guide or protocols

Participants and Compensation

- Which users will be recruited (e.g., TSE 1-4, customers, etc.) and how many
- Link to participant list (not on Confluence)
    - For internal use only (only visible to those running the studies e.g., investigators, notetakers)
        - Silent observers can be added to meeting invites
    - Who has been recruited
    - Who has accepted/declined
    - When they will be participating
- How participants will be compensated (e.g., $10 Amazon gift card, AllStar)

Sign-off/LGTMs

Date of LGTM Required: dd/mm/yyyy

Name	LGTM	Date of LGTM
	Yes, No or Conditional Yes with comments on what needs to be addressed to get an LGTM	