User Research Plan Template

**Project Name**

**Version xx (Date)**

# Background

* What were the signals or hypotheses that led to this research? What need to be validated or explored? (e.g. a user problem in the current-state, business problem or opportunity...)
* What have been done prior to this research? (e.g. any solution ideas, research, analysis of ROI…)
* What’s the purpose of this research? What insights will this research generate? How will those insights be used / what decisions will be made based on those insights?

# Objectives

**Business Objective & KPIs**

|  |  |
| --- | --- |
| **Objectives** | **KPIs** |
| E.g. Increase operational efficiency/ employee productivity | Time on task  Error rate  Adoption rate of new tool |

**Research Success Criteria**

* What qualitative and quantitative information about users will be collected?
* What documents or artifacts need to be created?
* What decisions need to be made with the research insights?

# 3. Research Methods

Note: Include one to two sentences explain what the method is and its purpose if your stakeholders aren’t familiar with user research.

**Secondary research**

* Document review
* Heuristic evaluation
* Analytics review
* Competitive analysis

**Primary research**

* SME interviews
* User interview
* Contextual inquiry
* Usability test
* Post-session survey

# 4. Research Scope & Focus Areas

**Question themes**

* 3-6 high-level topics of questions.
* E.g. Employee time management (how they manage their daily tasks, what they spend most time on, what activities are perceived as unnecessary…)

**Design focus components**

Choose main focus areas and delete the rest.

* Utility: Is the content or functionality useful to intended users?
* Learnability: How easy is it for users to accomplish basic tasks the first time they encounter the design?
* Efficiency: Once users have learned the design, how quickly can they perform tasks?
* Memorability: When users return to the design after a period of not using it, how easily can they reestablish proficiency?
* Errors: How many [errors](https://www.nngroup.com/articles/slips/) do users make, how severe are these errors, and how easily can they recover from the errors?
* Satisfaction: How pleasant is it to use the design?
* Persuasiveness: Are desired actions supported and motivated?

**Primary user scenarios**

* In what scenarios do the problem become most painful? What are the most common user scenarios? What are the edge cases you want to learn more about?
* E.g. Employee return to work after a three-week vacation

# Research Participant Profiles

Note: If it isn’t obvious why you choose these users, provide a brief explanation of what differences you expect to learn from these segments.

* User segment A (x5)
* User segment B (x5)
* Where/How to recruit:
* Include screener: Yes / No (Link to Screener)

# Appendix

Include information that have been discussed prior to creating the research plan, such as:

* A list of initial hypotheses uncovered through assumption mapping workshop with stakeholders
* User ecosystem map of who else interact with and influence users)
* Highlights of meeting notes (any noteworthy discussion, consideration etc.)

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*Hope this template is useful to you! If you need more details on how to use this template, please view the full article where this template comes from:* [*User research plan template*](https://uxdesign.cc/user-research-plan-template-d7e263ebee79)*.*

*More resources like this: [Free UX Research Templates](https://taylornguyen.ca/ux-research-templates).*