

Team Name
Research Plan Owner Name
Date

RESEARCH PLAN PURPOSE

State the business and user purpose.

RESEARCH OBJECTIVES

Written as statements or questions. Be explicit. What will you test, why, and how (specific methods)?

	Statement/question	Method(s)
Objective 1		
Objective 2		
Objective 3		

SCREENING CRITERIA

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

User groups

Number of users per group

Additional criteria (e.g. geography, market, expertise, experience, etc.)

PHASES, TEAM PARTICIPATION, METHODS, AND PROPOSED METRICS

Outline the research phases needed and their estimated timelines. State the team members assigned to leading or assisting in each phase. Specify each method, why the method is appropriate, and how it will be applied. How will you measure the quantitative and qualitative data collected? State metrics the team will use to determine success or failure.

Example	<p>Phase 1: Secondary research, Jan 15 - Jan 31 (Researchers: Becca and Tom) Mini-Playback Feb 1 (All team meeting)</p> <p>Phase 2: Contextual inquiry, Feb 1 - Feb 28 (Researchers: Deb and John) Mini-Playback Mar 1 (All team meeting)</p> <p>Phase 3: Synthesis and analysis, Mar 1- Mar 15 (Led by Deb and Tom) Analysis help from teammates w/ domain expertise (Vanessa and Bill) Playback 0: March 20 (All team and leads from relevant projects)</p>	<p>Collection method(s) Synthesis and analysis methods(s) Success metrics</p> <p>Collection method(s) Synthesis and analysis methods(s) Success metrics</p> <p>Collection method(s) Synthesis and analysis methods(s) Success metrics</p>
Phase 1		
Phase 2		
Phase 3		

DELIVERABLES

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

PUBLICATION AND PRESENTATIONS

Will the team publish/present the results internally or externally? Who will obtain any needed approvals?

BUDGET AND RESOURCES

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

RESEARCH ETHICS

All persons involved in the research are required to adhere to the following ethical guidelines here and further expanded upon online at: [w3.ibm.com/design/research/resources/standards-for-conduct](https://www.ibm.com/design/research/resources/standards-for-conduct)

1. The performance of any research participant must not be individually attributable.
2. The individual research participant's name must not be documented in notes, recordings, or in the data logging system.
3. 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.