



Context:

Before we start a research study, we need to create a plan that will help us stay focused throughout the process:

1. Success & KPIs:

How will we know if this research is successful?  
What are our Key Performance Indicators (KPIs)?
2. Research questions:

What are the main things we want to learn from this research?
3. Decisions:

What decisions will we make based on this research?
4. Participant profile:

What kind of person do we want to speak with?
5. Research methods:

What methods will we use?

1

Success & KPIs

What do we want to achieve?  
What are our KPIs?

2

Research questions

What do we want to learn?  
*(Not the actual questions you plan to ask in interviews).*

Tips:

Consider both what you want to learn and why:  
What are the main research questions we want to answer?  
What do we need to learn to make decisions with confidence?  
What keeps our team awake at night?  
What is our team most "in the dark" about?  
How will answering these questions help us achieve our goals?

After writing the questions, read them out loud & evaluate:  
Do the questions capture what we want to learn about?  
Is each question one sentence that's crystal-clear to someone who's not familiar with your work? Ask around to find out.  
When do we need to present the research in order to make a real impact? Can we answer these questions before that deadline?

3

Decisions

What decisions will we make once the research is complete?

Tips:

Why are we discussing our final decisions at such an early stage?  
Because we want to ensure that our research findings will be actionable.  
In other words, what will change based on this research?  
For example: Decide which features are most valuable to prioritize for the next quarter.

4

Participant profile

Write out your ideal participant's demographics, behavioral patterns, or other relevant attributes.

5

Research method

Choose one or more.

☐ Interviews

☐ A/B testing

☐ Survey

☐ In context observations

☐ Diary study

☐ Workshop

☐ Card sorting

☐ Usability testing:

☐ Moderated (live interview)  
☐ Unmoderated (recorded session without you)

☐ Other