

UX Research Plan Template

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Project name:	Write the project title here
Project lead:	Put the project lead or manager's name here
Project budget:	\$000,000,000

Overview

Summary

This UX Research Plan template is designed to guide UX researchers and teams through the process of planning and executing effective user research. By following this structured approach, you'll ensure that your research aligns with project objectives, addresses key questions, and ultimately contributes valuable insights into user behavior, needs, and preferences.

Problem Statement

Objective: Clearly define the problem or challenge your project aims to address. This could originate from user feedback, business objectives, or observed user struggles. Linking the problem statement to broader business goals and user needs helps underline the project's value.

- **Problem Statement:** Describe the core issue your research will address.
- **Connection to Business Goals:** Explain how resolving this problem aligns with the company's objectives.

Project Goals

Outline specific goals for the research project, incorporating insights from stakeholders such as product managers, designers, and developers.

Research Goal 1

Research Goal 2

Hypothesis, Goals, Research Questions

Develop hypothesis based on initial assumptions or insights. Link these hypothesis to your project goals and outline specific research questions that will guide your investigation.

Hypothesis	Goal	Research Question
Your Hypothesis	Associated Goal	Questions to validate the hypothesis

The Project Plan

The phases of UX research are integral in understanding user behaviors, needs, and challenges, guiding the design of user-centric products and services. These phases can be broadly categorized into preparatory work, data collection, and analysis, each serving a distinct purpose and contributing valuable insights to the overall research project.

Preparatory Work: This initial phase sets the foundation for successful research. It involves defining the research objectives, formulating hypotheses, selecting appropriate methodologies, and identifying the target user groups. Preparatory work is critical for aligning the research with business goals and ensuring that the efforts are focused on addressing the right problems. This phase may vary depending on the nature of the research—exploratory research aims to gather broad insights about user behaviors and needs, generative research focuses on identifying new opportunities for innovation, and evaluative research assesses the usability and effectiveness of specific design solutions.

Target User:

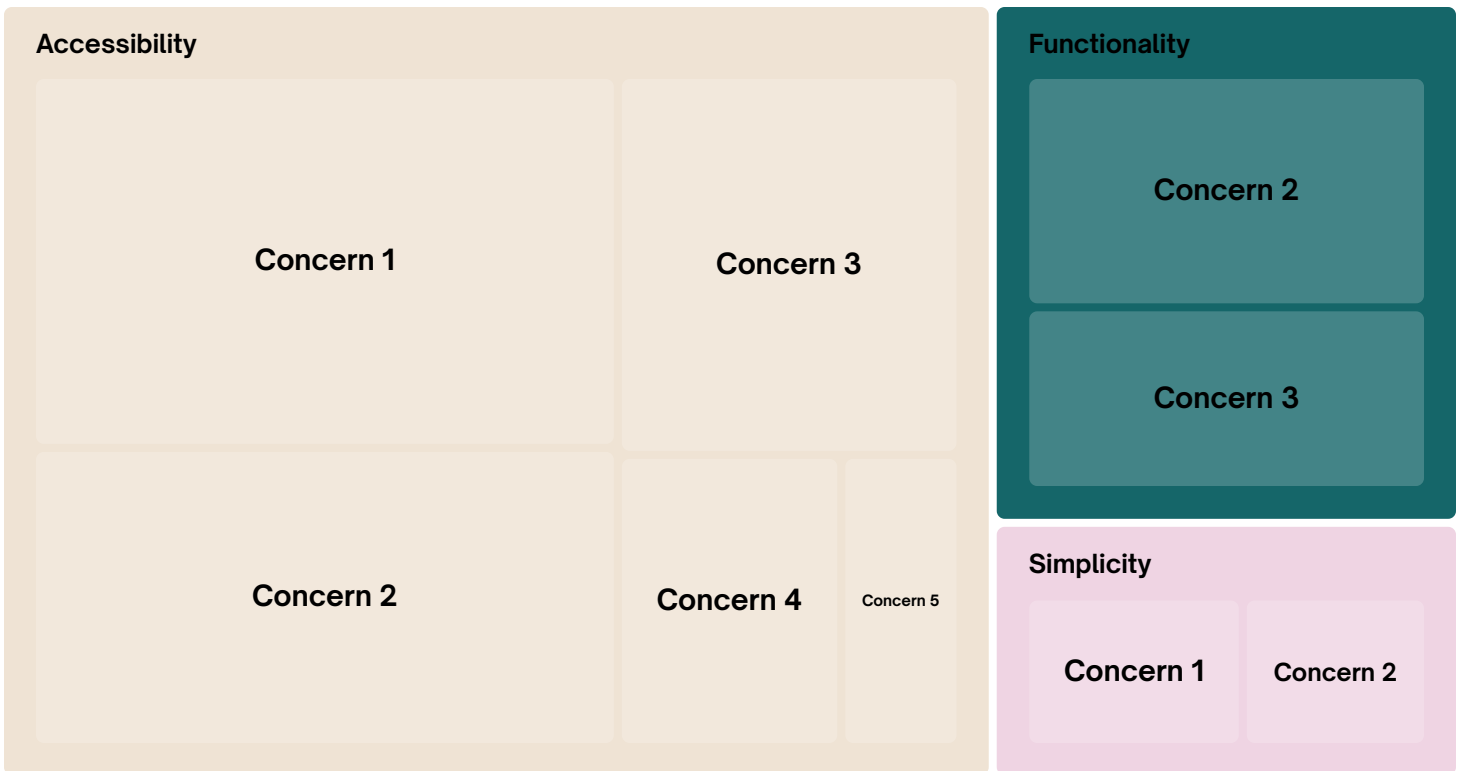
Identify the user groups or personas that the research will focus on. Understanding your target audience is crucial for designing effective research.

User	Preferences	Pain Points	Aspirations
<i>Martha Blevins</i>	<i>Accessible products</i>	<i>Complex products</i>	<i>To easily incorporate products and platforms in daily tasks</i>
List another user here	Enumerate the user's preferences	Share the challenges that the user experiences	Write what motivates the user or what they are aiming for with which Aimsphere's products can help

You may also add a chart or graph to elaborate on your research data.

Data Collection and Analysis: Following the preparatory phase, the research moves into data collection, where researchers employ various methods such as surveys, interviews, usability testing, and observation to gather data from users. The choice of methods depends on the research goals and can either be qualitative to understand user motivations and experiences deeply, or quantitative to measure user behavior and preferences statistically. After data collection, the analysis phase begins, where researchers synthesize and interpret the data to identify patterns, insights, and actionable recommendations. This phase is crucial for translating research findings into strategic decisions that can guide the design process, inform product improvements, and enhance user satisfaction.

Top user concerns fall under [product accessibility](#)



There are more concerns under accessibility cited by users than concerns combined under functionality and simplicity

Throughout these phases, it's important to remain flexible and open to new insights, allowing the research to adapt as needed. Whether the research is exploratory, evaluative, or generative,

each phase contributes to a deeper understanding of the user, informing a user-centered design approach that prioritizes the needs and preferences of the target audience.

Methods




Detail the methodologies you'll employ to gather data and insights. Justify each method's selection in relation to your research questions.

ID	Method	Type	Related Question	Why Chosen
M1	[Method Name]	[Research Type]	[Question ID]	[Rationale]

Timeline

	Month 1	Month 2	Month 3	Month 4
Phase 1 Provide further details here	What goes on at this stage?	What goes on at this stage?	What goes on at this stage?	
Phase 2 Provide further details here				
Phase 3 Provide further details here				

Define the Team & Responsibilities

Point Person	Role	Task	Status	Deadline	
 @name	Project Manager	Explain what needs to be done	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Done Ongoing Paused	Jan 22, 20...
 @name	UX Researcher	Make sure to include important details	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Done Ongoing Paused	Jan 22, 20...
 @name	Data Analyst	Add more rows as needed	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Done Ongoing Paused	Feb 4, 2030

Budget

Creating a budget for a UX research project involves estimating costs across various categories, such as personnel, tools, participant incentives, and other resources. Here's an example of how you might structure and estimate a budget for a hypothetical UX research project titled "User Experience Enhancement for E-commerce Platform".

Project Budget Example Categories

- **Personnel (Research Team)**
 - UX Researchers
 - Data Analyst
 - Project Manager
- **Research Tools and Software**
- **Vital Virtual Research Firm**
- **Participant Incentives**
- **Miscellaneous Expenses**
 - Recruitment services for participants: \$2,000
 - Travel and accommodations for field research (if applicable): \$3,000
 - Stationery, printing, and other materials: \$300

Deliverables

List the outputs your stakeholders can expect, such as reports, journey maps, or design recommendations. Linking to work-in-progress documents can foster transparency and collaboration.

- **Research Report:** Summarizes findings, methodology, and data analysis with key insights.

- **User Personas:** Represents user types based on research to guide design decisions.
- **Journey Maps:** Visual maps of user interactions with the product, highlighting experiences and pain points.
- **Usability Test Reports:** Details usability testing results, including participant feedback and recommendations for improvement.
- **User Needs and Requirements:** Lists identified user needs and preferences informing product features.
- **Executive Summary:** Offers a high-level overview of findings for executive stakeholders.
- **Workshop Debriefs:** Provides summaries of collaborative sessions on research findings and next steps.
- **Interactive Data Dashboards:** Presents research data interactively for in-depth analysis.
- **Video Highlights Reel:** Compiles key moments from user research sessions to convey user feedback vividly.
- **Recommendations Roadmap:** Outlines prioritized actions based on research insights, aligned with business goals.