

User Research Templates by Nikki Anderson



User Research Intake

Purpose of this document: Filling out this sheet is the first step in getting answers to your research questions. We will use this information to understand and align with your request, maintaining a high quality of our research output.

There are 15 questions total, expected time: 20-30 minutes

Please note:

- **This step does not guarantee that research will happen**, but rather helps us decide on priority, feasibility, approach, and timeline.
 - **Summarizing** rather than just pasting links shows us you've thought about your research needs and that your project is clear for our researchers, who may be unfamiliar with your topic. Though some ambiguity is fine, you should be able to fill in this document completely.
 - If you have questions about this document, please reach out to the researcher in contact.
-

Project Name:

Requesting Team & Contributors:

Date:

Background

1. What led you to request research support now?
For example, we completed desk research and found we need more information on X concept.
 - a.
2. What phase of your project are you in? Is it discovering new information, testing a concept or an idea, or something else?
 - a.

The Big Picture

3. Please talk about the impact this particular research will have on this particular team.

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- a.
4. If applicable, please explain how this research will impact other teams and the overarching organization.
 - a.

Deep-dive into Your Research Need

5. What level of support do you anticipate needing for this project?
For example, we offer support on recruitment, interview guide writing, interview guide review, interview moderation, and analysis. Please indicate all you believe you would need help with. If you have someone on your team experienced with user research, ask them to what level they are comfortable with running the study.
 - a.
6. What are your questions for the research project?
For example, we want to understand how customers think of X concept, uncover how users interact with the prototype, discover pain points on a current flow
 - a.
7. What groups of customers do you want to learn about?
For example age range, gender, users versus non-users, country, language, any special criteria (ex: needs to have bought X in the past Y months)
8. What customer problem/need are you trying to solve? If you have any documentation, like an Epic or Design Brief, summarize and link it here.
For example, we are testing an idea that helps customers achieve X or Y goal. Please include any documents here.
 - a.
9. How do you know this is a customer problem or a customer need?
For example, here are some quotes from other research that highlights the problem or analytics that show negative behaviors.
10. What would you do with the insights from this research? Is there someone (ex: designer, developers) “ready” to act on the insights generated from this research?
For example, we would like to know if our concept is going in the right direction or what changes we need to make with a prototype.

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11. **By when** do you need insights in your hands (i.e. analysis of the research is completed) to move forward?

For example, we need insights by X date because that is when Y is happening.

a.

12. Is there any other information you think is important and useful as we begin to discuss your project?

For example, we also found this competitor research that is super relevant. Please include any links to the information here.

Looking Back

13. How have you acted on previously completed research that backs up the solution you've designed (User Research, Market Research, Business Intelligence, on-site data, A/B testing, Analytics, customer care, NPS)?

For example, we have done discovery research or A/B testing that shows X, Y, and Z.

a.

14. What important and unanswered questions do you still have after evaluating past research that you want to address in this current research?

For example, although we have done quantitative research in the past, we are still unsure about *why* customers are behaving in certain ways

a.

15. Please include any links to solutions (ex: prototypes) you have considered.

For example, we have used previous research from other research sessions to create this prototype. Please link to any prototypes here.

a.

16. Please fill out the following statement:

- a. *I need (information you need) to answer (questions you have) by (your timeline) in order to make (the decisions you need to make).*

Timelines

Planning

Request review: 2-3 days

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Recruitment: 1-2 weeks, depending on criteria

Kick-off: 1 day

Research

Moderated usability testing (approx 5-7 participants): 1 week

Unmoderated usability testing (approx 15 participants): 3 days

1x1 interviews (approx 10-15 participants): 2 weeks

Synthesis

Usability testing synthesis: 2-5 days

1x1 interviews: 1-2 weeks

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