



# **Jordan the Counselor UX Research Proposal**

## **UX Research Project Proposal: Enhancing Clinician Practices and Client Rosters (through Gamified Processes?)**

Project Goals: Identify... Develop... Design...

UX research project would aim to investigate and enhance the user experience for clinicians seeking to establish their practice and increase their client roster/sales. Primary objective is to develop a comprehensive understanding of the needs, preferences, pain points, and motivations of clinicians in securing company services to assist with their professional growth. (Additionally, may explore integration of gamification elements to improve engagement, motivation, and effectiveness in achieving stakeholder and client goals).

### **Research Process**

Ways we will approach this research include:

#### **1. Generative/Exploratory Research: (~10-15 hours)**

Discovery which will help us gain a deeper understanding of internal project goals, audience (motivation, needs, etc.), and current market conditions. Goal is to unearth opportunities to innovate new solutions that will meet a specific and real need in the market (i.e. what will make your services stand out and not be seen as “too good to be true”/perceived as a scam with compelling CTA for clients to work with you as end goal).

- Stakeholder Interviews. What are your goals in initiating research? Goal to gain more insight into current processes and assumed changes that need to be made for future success.
  - What do I want to know? What don't I know? How will I know when I've learned it? What company goals will this work support? What decision will this research enable? What are the anticipated outcomes of this research? What will define the success of this project? Etc.
- Complete Heuristic Evaluation of current company website
- Conduct a Competitive Analysis/Review existing insights from competitors/Literature Reviews
- Determine/finalize research plan (identify research goals/questions)

2. User Journey Mapping and Interviews: (At least 5 individuals to create a diverse sample. 30-45 mins each. If providing surveys at discretion of the user ~20 mins expected to complete. May need to consider incentivizing user for participating)

- Ethnographic research- observing how information is presented to potential clients and observing natural, real time behaviors (Direct observation only at this point so as not to influence user experience/end behaviors)
- Task flows/Journey Mapping. Determining all touchpoints that your potential client may have/has had with your company (ex: how they first heard of you, direct interactions with your product, website, support team, how/why they decided to sign up for webinar, etc. and all additional actions they takes to complete (or decline) end goal/objective. Can help answer questions related to client expectations, brand presence, company trustworthiness,
- Create Interview script/guide
- Source interviewees: Would need to lean on you both to identify these individuals (current clients/those who declined services, people who reached out and didn't follow through, those you provided free consultations to, etc.)
  - Conduct interviews with existing customers (or provide survey to complete pending availability/willingness)
  - Conduct interviews with potential or lost customers (if you have this information available)
- Creating User Personas (potentially)

3. Analysis (of qualitative) data/Deliverables (~30+ hours. Timeframe subjective depending on number of participants, deliverables needed, and if presentation (s) provided)

- Review notes (determine means of recording interviews/storage for later access) and create affinity diagrams/maps
  - Thematic analysis
  - Affinity mapping provides critical feedback and insight into potential problems, pain points, and possible changes required (based on observations, negative quotes, positive quotes, and "errors")

- Create Qualitative Personas (potentially)
- Synthesize data to identify results (inquire about analysis software)
- Deliverables: Qualitative Research report to include actionable insights that will inform next steps