

Project Preparation and Proposal Template

Prepping for a project

Have a list of questions. Here is a list of questions that I use to understand the ins and outs of what they are looking for and if there's a potential for scope creep:

- Tell me about your organization. What is the business model? What do you help your customers with? Who are your customers? Who are your competitors?
- What are you trying to accomplish with this project?
- What problem are you trying to solve (for users and the business) through this project?
- What type of information do you hope to have by the end?
- Have you worked with a user researcher before? What has the experience been? What does the team think of user research?
- Why are you looking for user research on this particular project?
- What is the timeline of the project?
- How would you define success for this project?
- What are you hoping to have by the end of this project?
- What decisions are you trying to make?
- What tools do you have for user research?
- What is the budget for this project?
- What data have you gathered on this project already?
- Do you have customers you can speak to easily? What is recruitment like?
- Which segment are you targeting and why?
- What teams would I be working with on this project?
- What domain-specific knowledge should I know/learn before starting on this project?

Ask to speak to someone on the project.

Here is the list of questions I ask when I get to talk to a stakeholder directly:

- Have you worked with a user researcher before? What has the experience been? What does the team think of user research?
- What are the specific goals of the team? What are they trying to accomplish through this project?
- How does the team feel about insights that go against what they believe? What happens when research doesn't align with what stakeholders want to hear?
- How have teams responded to research in the past?
- Do teams have an idea of the methodology yet? How have they reached that conclusion?
- How do teams currently act on feedback?
- How open are the teams to different approaches and methods?
- What was the last research project that made an impact?
- How would you define success for this project?
- What data have you gathered on this project already? What data do you have access to?
- Do you have customers you can speak to easily? What is recruitment like?
- Are there any tech constraints I should know about?

Proposal template

Context

This is where you talk about the background of the particular project and talk about generally your responsibilities and tasks within this project, including:

What is included with the project

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What responsibilities you have

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-

Who you will be working with

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-

The preferred communication method

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-

Working hours

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-

Project details

Here you talk about the project details, such as

Goals of the project:

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-

Planned research activities:

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Expected outcomes & resources

Here you talk about the expected outcomes from the project and anything the client can expect from you in terms of resources (ex: raw data)

Expected outcomes and deliverables:

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Resources:

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-

Timeline

In here, you talk about the overall timeline for the particular project. It's best to give as much detail into this as you can.

- Kick-off call: CW
- Recruitment begins: CW
- Recruitment ends: CW
- Research begins: CW
- Research ends: CW
- Analysis: CW
- The survey begins: CW
- The survey ends: CW
- Qualitative share-out/insights available: CW
- Survey analysis: CW
- Quantitative share-out/insights available: CW

Investment

This is where you include the price of the project

Payment schedule

This is where you include a clear payment schedule. I often ask for a deposit to be made two weeks before the project starts (or upon signing this proposal) to secure the spot. If the deposit isn't made, I can give the spot to another project and my work availability is no longer guaranteed.

I also usually ask for the final payment to be made seven days **before** the end of the project to ensure I get paid on time. For every late payment, a percentage of interest accrues and is added.

Qualifications

I have [insert number of years] years of experience conducting user research for a variety of clients across different industries. I hold a degree in [insert relevant field] and have completed advanced training in user research methodologies. My previous clients include [insert names of relevant clients or projects]

Proposal packages

Offer two packages. I typically give clients a choice between a lean and strategic package. The lean package includes the "basics" of the project, everything we discussed, and nothing more. The strategic package includes additional time in education and gives more back-and-forth and flexibility within the project's scope. Below are examples of a lean and strategic model:

Lean model:

1. Stakeholder interviews & project prio/review **(5 hours)**
 - a. Calls with stakeholders
 - b. Reviewing potential projects (if they already have some)
 - c. Reviewing previous RELEVANT research (if applicable)
2. Project planning and collaboration - align on research question, goals, expected outcomes **(4 hours)**
 - a. One call for kick-off, create a research plan, rest async
3. Recruitment & scheduling **(6 hours)**
 - a. Async
4. Creating and reviewing the discussion guide **(2 hours)**
 - a. Async
5. Familiarising with prototypes, if evaluative **(1 hour)**
 - a. async (ex: Loom video)
6. Assigning roles, such as notetakers, observers **(1 hour)**
 - a. Async
7. Running the sessions, assuming one-hour sessions **(See below for options)**
 - a. Collaborative
8. Debrief after each session **(Based on session number)**
 - a. Collaborative, 15-20 mins after each session
9. Synthesis **(1 hour for review)**
 - a. Team brings together the findings on their own
10. Report creation **(6 hours)**
 - a. Async
11. Report presentation(s) **(1 hour)**
 - a. Collaborative
 - b. 1 shareout
12. Next steps collaboration with designers/team to help put insights into action **(1 hour)**
 - a. Collaborative, 1-hour call

Extra back-and-forth for general emailing and scheduling: **3 hours**

Total hours (assuming one hour sessions):

- Assuming 5 participants per study: 37 hours
- Assuming 7 participants per study: 41 hours
- Assuming 10 participants per study: 45 hours

Strategic model:

1. Stakeholder interviews & project prio/review **(7 hours)**
 - a. Calls with stakeholders

- b. Reviewing potential projects (if they already have some)
 - c. Reviewing previous RELEVANT research (if applicable)
2. Project planning and collaboration - align on research question, goals, expected outcomes **(6 hours)**
 - a. One call for kick-off, async work, additional call for questions or last-minute comments
3. Recruitment & scheduling **(6 hours)**
 - a. Async
4. Creating and reviewing the discussion guide **(3 hours)**
 - a. One call, rest async
5. Familiarising with prototypes, if evaluative **(2 hours)**
 - a. Call to review prototype
 - b. 30-45 min dry run
6. Assigning role, such as notetakers, observers **(1 hour)**
 - a. Async
7. Running the sessions, assuming one hour sessions **(See below for options)**
 - a. collaborative
8. Debrief after each session **(See below for options)**
 - a. Collaborative, 20-30 mins after each session
9. Analysis & synthesis session **(8 hours)**
 - a. Collaborative session run by researcher, 2-3 hours
10. Report creation **(6 hours)**
 - a. Async
11. Report presentation(s) **(2 hours)**
 - a. Collaborative
 - b. 1-3 shareouts
12. Next steps collaboration with designers/team to help put insights into action **(3 hours)**
 - a. Collaborative ideation session run by researcher

Extra back-and-forth for general emailing and scheduling: 3 hours

Total hours:

- Assuming 5 participants per study: 54 hours
- Assuming 7 participants per study: 59 hours
- Assuming 10 participants per study: 64 hours

Have an option for add-ons. People are not great at estimating, even if you prompt them with a million questions. If you feel comfortable, I recommend giving options for add-ons, such as:

- Adding an extra segment to a project
- Testing additional prototypes
- An additional round of testing
- Workshop facilitation
- Iteration help
- Additional readouts