

Template

User Research Plan

This template helps you write a user research plan. Every project and research setting is different. This template leads you through the relevant plan sections ensuring that you have everything you need for your research project. Make a copy and go through each of the 5 sections and fill in your project details.

The listed questions will help you to get started by collecting the relevant information for your plan (and, therefore, your research project). Thinking through and entering this information will also help you identify areas to get feedback from your team and stakeholders before conducting the sessions.

Want to learn more about User Research Plans? Read the full article on [How to create a practical user research plan \[incl. expert tips\]](#).

Please make a copy of this template before you begin.

[1 Research Goal \(= the why\) 🎯](#)

[2 Participants \(= the who\) 👥](#)

[3 Method\(s\) \(= the what & where\) 🛠️](#)

[4 Timeline \(= the when\) ⌚](#)

[5 Outcomes \(= what next?\) 🔑](#)

Research project:

Researcher:

1 Research Goal (= the why) 🎯

Before jumping into research execution, ask yourself the following questions. This can relate e.g., to improving user experience, understanding user behavior, uncovering new opportunities. Walkthrough these questions to get started:

- What is the aim of the research, why is research needed?
- What needs to be investigated?
- What decisions is it going to inform?
- What do the stakeholders expect to learn?
- Which Business KPIs is this research tied to?
- What are the assumptions and/or questions that will be validated?
- What do we need to learn to make this research effective?
- What is already known? What needs to be uncovered?
- What are the pain points of using *product x*?
- Why are people not using *xyz*?

2 Participants (= the who) 👥

- Who is the user we will be researching with?
- How can we make sure participants are the fitting person?
- How will we find them? Do we need (external) support to recruit them?
- How can we recruit and value their participation?

3 Method(s) (= the what & where) 🛠️

Describe how you want to execute the upcoming research in this section.

- Do we need rather generative or evaluative approaches?
→ *Generative research focus: broader exploring, finding new opportunities.*
→ *Evaluative research focus: assessing existing solutions, concepts.*
- Which research method(s) will be used? (for example, user interviews, field studies, or usability tests)
- How many research sessions will we conduct? How long will one session take, and where will they take place (remote vs. in-person)?
- Which tools and devices do we need?
- Which methodological resources do we need? (for example, interview guide or usability test protocol)
- Which metrics will we look at? (for example, task success rate)
- What conditions must be met, and how can we ensure this? (e.g., budget information, completed preliminary projects)

4 Timeline (= the when) 🕒

In this section, enter information about the approximate schedule:

- When does the plan need to be validated?
- When will the research be executed?
- When will the results be analyzed and presented?

5 Outcomes (= what next?) 🔑

- How will the results be presented and shared?
- What are we going to do with the findings?
- How can research findings plug into planning and development cycles?
- How can we bring the results into practice after research conduction?
- Will there be other (follow-up) research projects or collaboration events?