

Name of Study (include methodology and project, e.g., "Website x Card Sort")

Date

Notes: Here is where you would put information that would be helpful to understand the context of the project, such as whether it is part of a series of research or an initial engagement, what client and project this is for, and who else is involved. This should be no longer than one paragraph.

Executive Summary: An executive summary provides a very high-level review of the study goals, method, and participants. This should be no longer than one paragraph.

Goals

Here is where you state the key questions you're trying to answer with this research. You should narrow the focus of each study to about three goals and plan additional studies to cover other questions. Here are some example goals:

- Help understand your target users' goals, needs, behaviors, or expectations.
- Help set the roadmap by prioritizing items that are most needed for your target users.
- Uncover new possible features or items based on unmet needs in your target users.
- Help you decide among design alternatives, leading you to select the solution that your target users are most likely to prefer.
- Highlight what might disengage, support, or not matter to a user.
- Identify areas of opportunity to enhance the user experience.

Methodology

This is where you give a brief overview of the type of method you used and why as well as include any logistical information, such as necessary tools to bring if performing field research and logins for online tools. This is particularly useful when working on a project with multiple phases or with teams that need to review results or do follow-up research and also to set clear expectations for everyone involved.

Participant Details

Here is your chance to describe your participants, such as personas and key behaviors, how many are participating, and how you recruited them. This is helpful for setting expectations, tying participants to existing personas, and documenting methodology in case you need to repeat or revisit it.

Team Information

Include any helpful information about who is on the project team and what roles they play to set clear expectations for everyone involved. This is especially helpful when conducting a large study with multiple facilitators and stakeholders.

Schedule

This is a good place to give the entire project team an understanding of key dates, such as when recruiting begins and ends, when sessions are so they can try to observe, and when key follow-up meetings will occur.

Script

Introduction. During nearly any UX research, you'll want to begin by welcoming participants, reminding them that you are a neutral party and they won't be judged, asking them to talk aloud (if appropriate), and setting expectations for time commitment.

Tasks and questions. You'll want to provide specific details about the types of questions you'll ask in the particular type of method you're performing. This is including but not limited to specific tasks for a usability test, questions for a survey, and target topic areas of discussion for an interview.