**User Research Plan Template**

(created by Aurelius for public use: [www.aureliuslab.com](http://www.aureliuslab.com))

[insert project name here]

1. **Background**

*The background section should be brief. Tell stakeholders and clients about the recent history of the project, why you’re conducting the research, and what you’re going to accomplish.*

1. **Objectives & Goals**

*Why are you conducting user research? What problems do you hope to solve? What is the end goal after completing the research? Share all relevant details here*

**GOAL 1:**

**GOAL 2:**

**GOAL 3:**

1. **Stakeholders & Team**

*List each stakeholder and team member participating in the research along with their roles. (Bonus: add any responsibilities and expectations of each person for clarity)*

**<person name and title>:** include whether each person is a stakeholder or research team member + responsibilities and expectations

**<person name and title>:**

**<person name and title>:**

**<person name and title>:**

1. **Existing Research to Reference *(optional)***

*Reference any past research projects, insights and outcomes relevant to this new study for context, where possible.*

1. **Audience & Participant Recruiting**

* **Persona/Customer segment (include the # of people you want to include from this group):** add a description here of this recruiting segment with more details
* **Persona/Customer segment (include the # of people you want to include from this group):** add a description here of this recruiting segment with more details
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1. **Metrics**

| Goal | Metric(s) |
| --- | --- |
| e.g. “Improve usability of the sign up process” | * reduce time on task * Increase sign up count |
|  |  |
|  |  |
|  |  |

1. **Research Focus & Scope**

*Why are you conducting user research? What problems do you hope to solve? What is the end goal after completing the research?*

1. **Research Questions**

*Share questions you’ll ask in the research or even question themes more broadly*

**Question/Question theme 1:**

**Question/Question theme 2:**

**Question/Question theme 3:**

1. **Budget**

*Provide a quick summary of the cost and breakdown of that cost for the research to be conducted*

| Item | Cost |
| --- | --- |
| e.g. recruiting participant fee (per person) | $50 |
|  |  |
|  |  |
| Total |  |

1. **Timeline**

*List key milestones for the research, when they will begin and finish with dates*

**Milestone [date mm/dd/yyyy]:**

**Milestone [date mm/dd/yyyy]:**

**Milestone [date mm/dd/yyyy]:**

**Milestone [date mm/dd/yyyy]:**

1. **Method(s)**

*Share details on the specific method(s) you’ll use to conduct research and a brief description of what they are (bonus: share any specific reasons why these methods help answer your research goals and specific needs of the project)*

1. **Tool(s)**

*List the tool(s) to be used to deploy, conduct, analyze and share the research and insights or outcomes so the team knows what to expect*