

User Research Plan Template

(created by Aurelius for public use: 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.

2. 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:

3. 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>:

4. Existing Research to Reference (optional)

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

5. 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
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6. Metrics

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

7. 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?

8. 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:

9. 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	

10. 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]:

11. 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)

12. 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