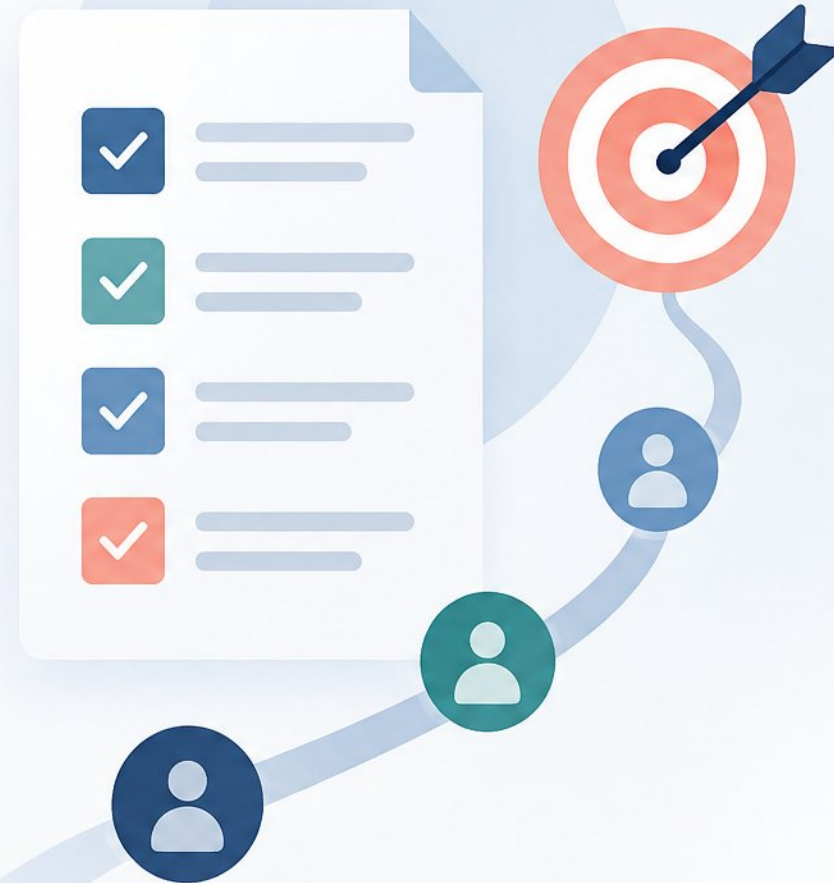


User Research Plan: From Goals to Execution

- A research plan is a decision document, not a form.
- It names the decision, questions, method, sample, and findings use.
- Course arc: decision framing → questions → methods → sampling and ethics.
- Then execution logistics → analysis and reporting → pitfalls → hands-on drafting.
- Every choice should trace back to a stated goal and decision.



Start with the Decision, Not the Method

-  Write one sentence: what will the team do differently based on what we hear?
-  Name the decision owner and deadline — the deadline constrains the method.
-  Separate the business decision from the research goal; keep one primary goal.
-  Pressure-test: "So what?" and "Would any answer change the plan?"
-  Strong: "Which onboarding steps drive drop-off?"
Weak: "Understand onboarding."
-  Confirm stakeholder alignment on the decision before choosing methods or recruiting.

THE DECISION

We will simplify the onboarding experience based on what we hear.

OWNER



Alex

DEADLINE



Apr 30

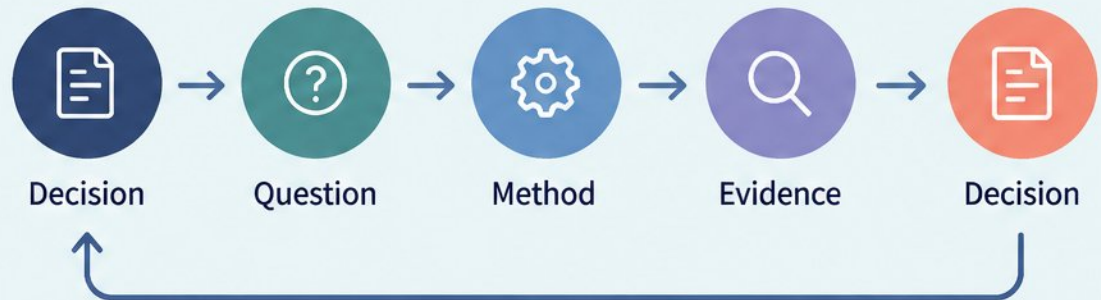
A STUDY THAT CHANGED NOTHING



"Understand onboarding."



TRACEABILITY: FROM DECISION TO EVIDENCE AND BACK



Turning Goals into Research Questions and Hypotheses



Turn the decision into four to seven answerable questions



“Onboarding” is a topic; a question targets a moment or behavior



Good questions: specific, falsifiable, bounded, mappable to the decision



Separate discovery from validation; research questions from interview prompts



Hierarchy: primary, secondary, explicitly out of scope



Name assumptions, flag unknown-unknowns, review before methods lock

Primary Questions

- _____
- _____
- _____



Secondary Questions

- _____
- _____
- _____



Explicitly Out of Scope

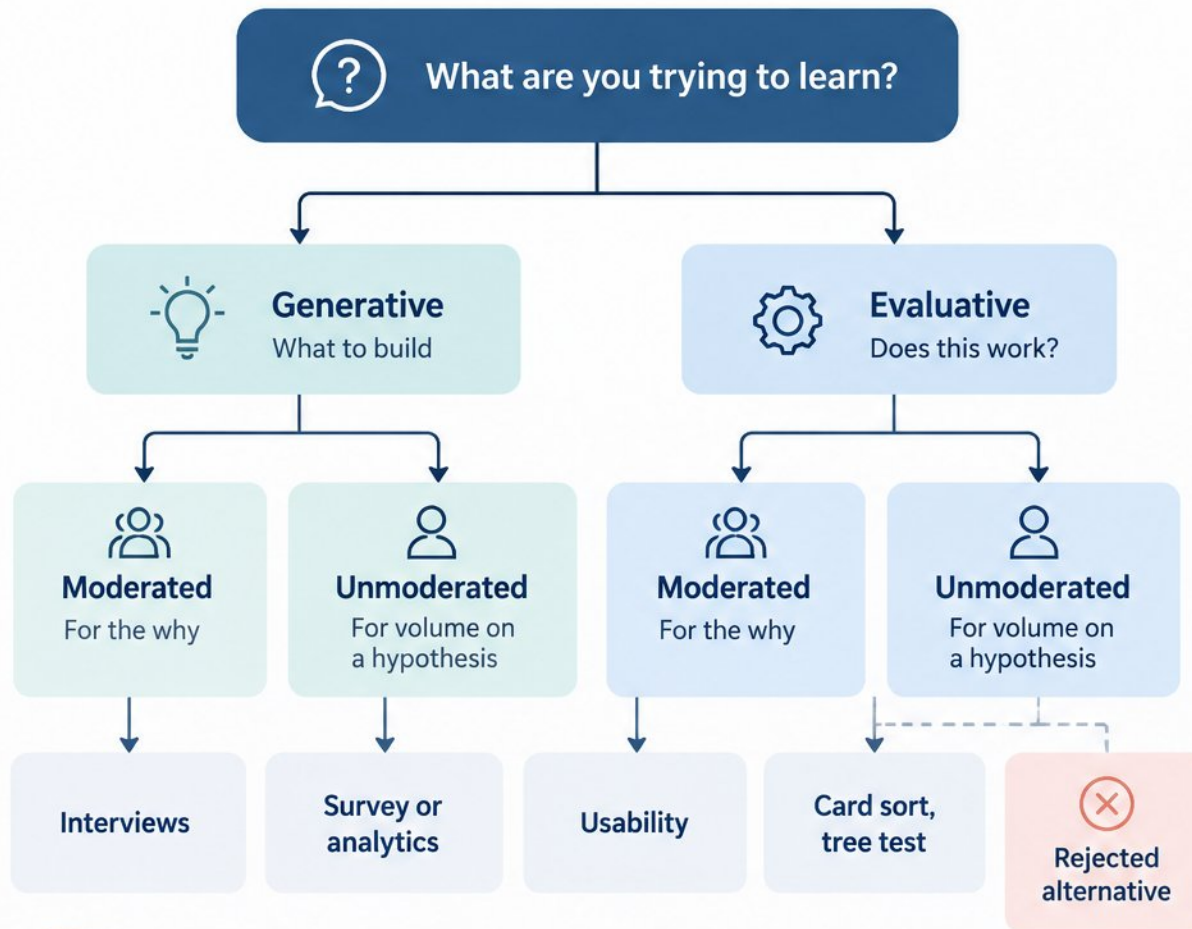
- _____
- _____
- _____

† Refine and focus here.

Different topic. Out of scope.

Selecting Methods That Match the Questions

Start with the question. Follow the path to a defensible choice.



BETTER QUESTIONS

CLEARER INSIGHTS



Generative vs. evaluative:
what to build, or does this work?



Moderated for the why;
unmoderated for volume on
a hypothesis



Map question shape: why →
interviews; can they complete →
usability



How many/often → survey or
analytics; **grouping** → card sort,
tree test



State rationale in one sentence
and one rejected alternative



Mixed methods: quant-then-qual,
or qual-then-quant at scale



Constraints — timeline, budget,
access, moderation, accessibility —
narrow the set

Sampling, Screening, and Sample Size Rationale

Plan a sample that fits your goals, finds the right people, and yields reliable insights.



Derive participant profile from research questions: inclusion, exclusion, diversity criteria



Recruit 1.5x the number needed to absorb no-shows and cancellations



Behavioral criteria predict behavior better than demographics or stated intent



Sample size is method-determined: usability ~5–8, generative interviews ~8–12 per segment



Write a 10–15 question screener: eligibility first, opinions later, no leading items

Recruitment Matrix (Illustrative)

	Diversity Factor 1	Diversity Factor 2	Diversity Factor 3	Diversity Factor 4
Behavioral Segment 1				
Behavioral Segment 2				
Behavioral Segment 3				
Behavioral Segment 4				



Completed



Invited (1.5x buffer)

Screeners



The right participants lead to deeper insights.

Recruiting Operations, Incentives, and Inclusive Participation

Recruiting Plan



Channels



Invite copy



Screening



Scheduling



Reminders



Owned by one
named owner



Plan channels, invite copy, screening, scheduling, and reminders as one system with a named owner



Use more than one channel so recruitment never depends on a single source



Screen for functional needs and assistive technology, not diagnoses



Ask qualified participants what would help them take part



Set incentives against session length, opportunity cost, topic sensitivity, and reach difficulty



State time zone, link, prep, recording notice, and no-show rules clearly

Consent, Privacy, and Data Handling



Consent means understanding: purpose, data, recording, storage, access, withdrawal



Share consent information before the session; confirm and record at the start



Collect minimum personal data; treat disability and health data as sensitive



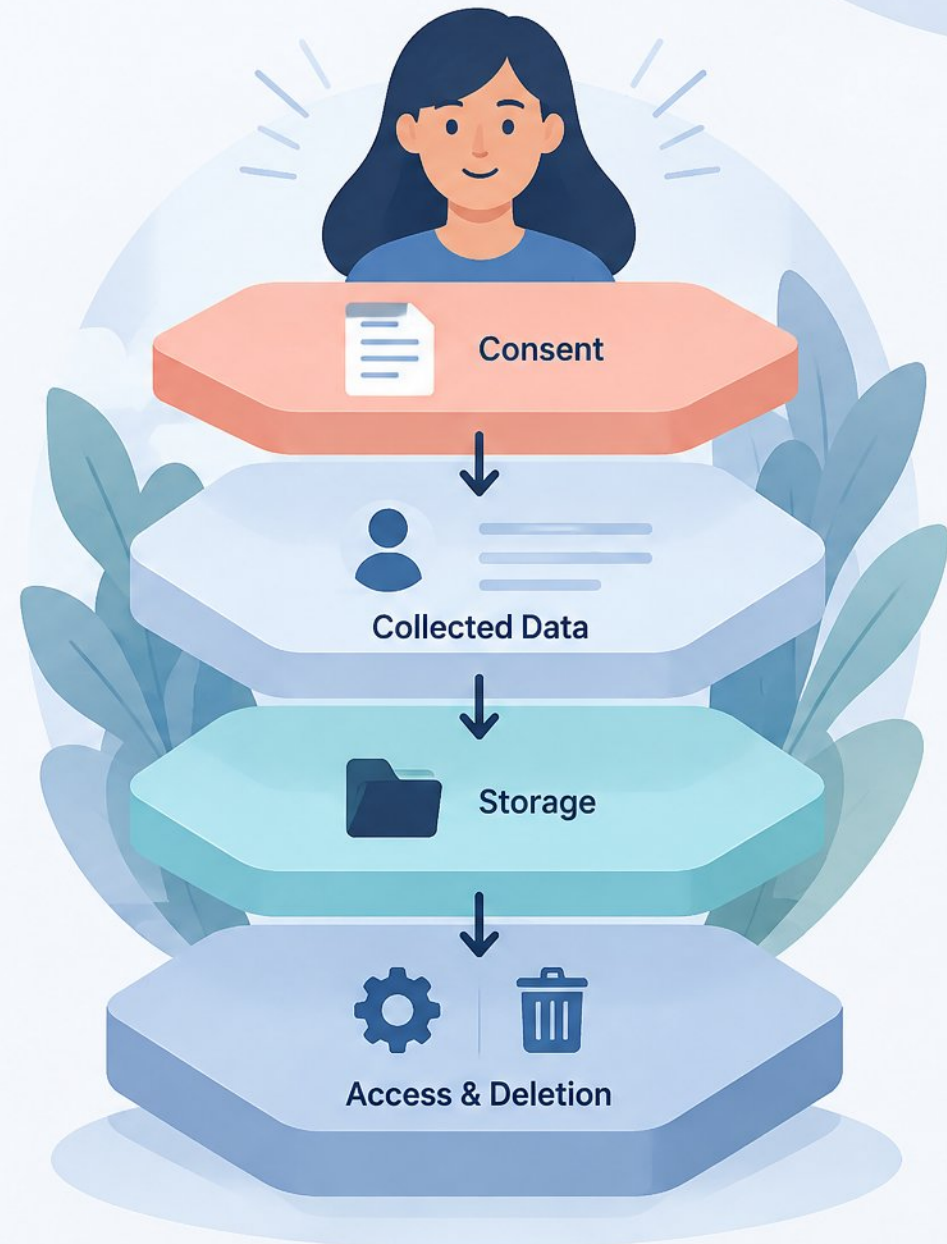
Restrict screener access, set retention and deletion points, avoid scattered files



Never repurpose research contacts for marketing; disclose AI moderation



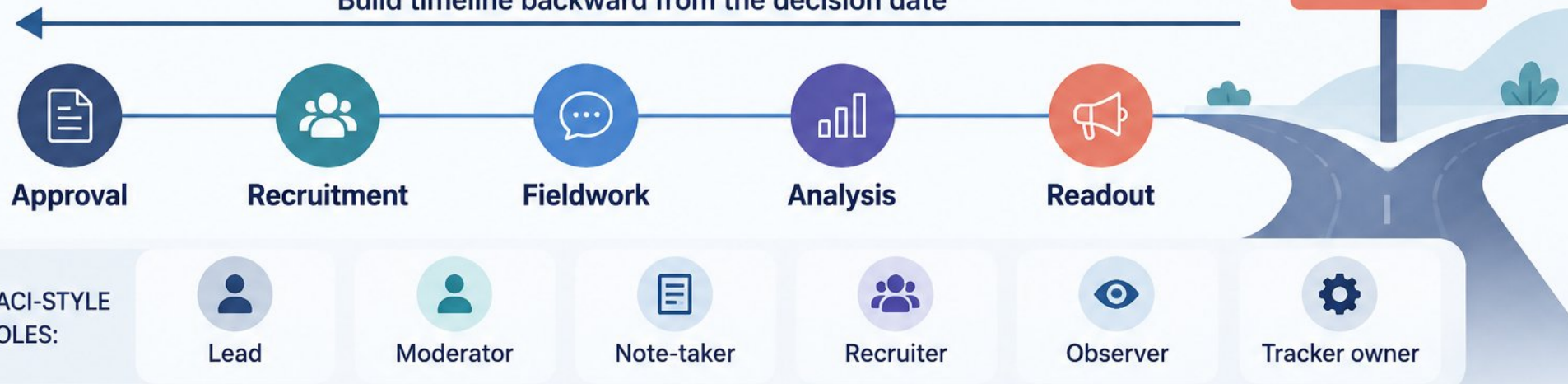
Minors need guardian consent plus participant assent in plain language



The Execution Plan: Timeline, Roles, and Logistics

A clear plan, the right people, and the right preparation lead to confident decisions.

Build timeline backward from the decision date



Build timeline backward from the decision date



Five milestones: approval, recruitment, fieldwork, analysis, readout



Baseline for scoped work: 14 days recruitment, 14 fieldwork, 10 analysis, 4 delivery



Assign RACI-style roles: lead, moderator, note-taker, recruiter, observer, tracker owner



Prepare materials: guide, prototype, recording, consent, observer briefing



Pilot sessions with go/no-go criteria, then read first transcripts fully



Write a disruption protocol for failures, access breaks, and distress

Drafting the Guide and Predefining Analysis

Participant-Facing Prompt Guide



Research questions guide the study; prompts gather evidence



Keep 4–8 open, concrete, participant-facing prompts



Ask about past behavior, not future predictions



Tune prompt shape to method: interview, diary, usability

*Keep it
open and
concrete.*

Predefined Analysis Plan



Predefine what evidence answers each question before fieldwork



Turn each research question into a deductive code

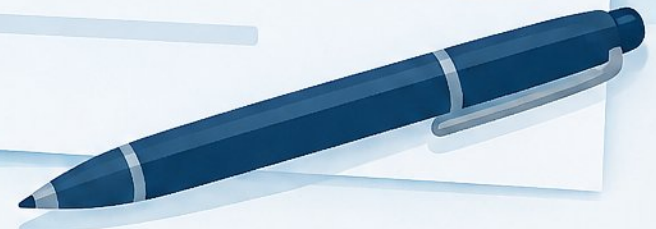


Reserve an inductive pass; name the human reviewer



Define analysis approach, outlier handling, and source traceability

*Plan
ahead
for clarity.*



Traceability from Insights to Decision



Every insight traces back to a research question and forward to the decision



Separate observed evidence from proposed design response



Label contradictions and limitations — never smooth them over



Match format to decision: memo, one-pager, deck, or clip bank



Share three emerging themes weekly while fieldwork is still running



Write down decisions this study will not inform



Define where raw data, transcripts, and tags live, plus access rules



Common Pitfalls and Course Corrections

Common Pitfall

Course Correction



No decision attached:
rescope or stop before
spending



Attach a clear decision;
rescope or stop before
spending.



Goals written as topics,
not answerable questions



Write goals as
answerable questions.



Method-first thinking:
comfort method before
the question



Start with the question,
then choose the method.



Sample size guessed;
demographics used as
behavior proxy



Define sample thoughtfully;
use behavior, not demographics,
as a proxy.



Recruitment treated as
a sub-task, risking
schedule delay



Treat recruitment as core
work to protect the schedule.



Leading questions,
confirmation bias, no
neutral moderator



Use neutral, unbiased
questions and a neutral
moderator.



Scope creep and analysis
drift: versioned plan as
corrective



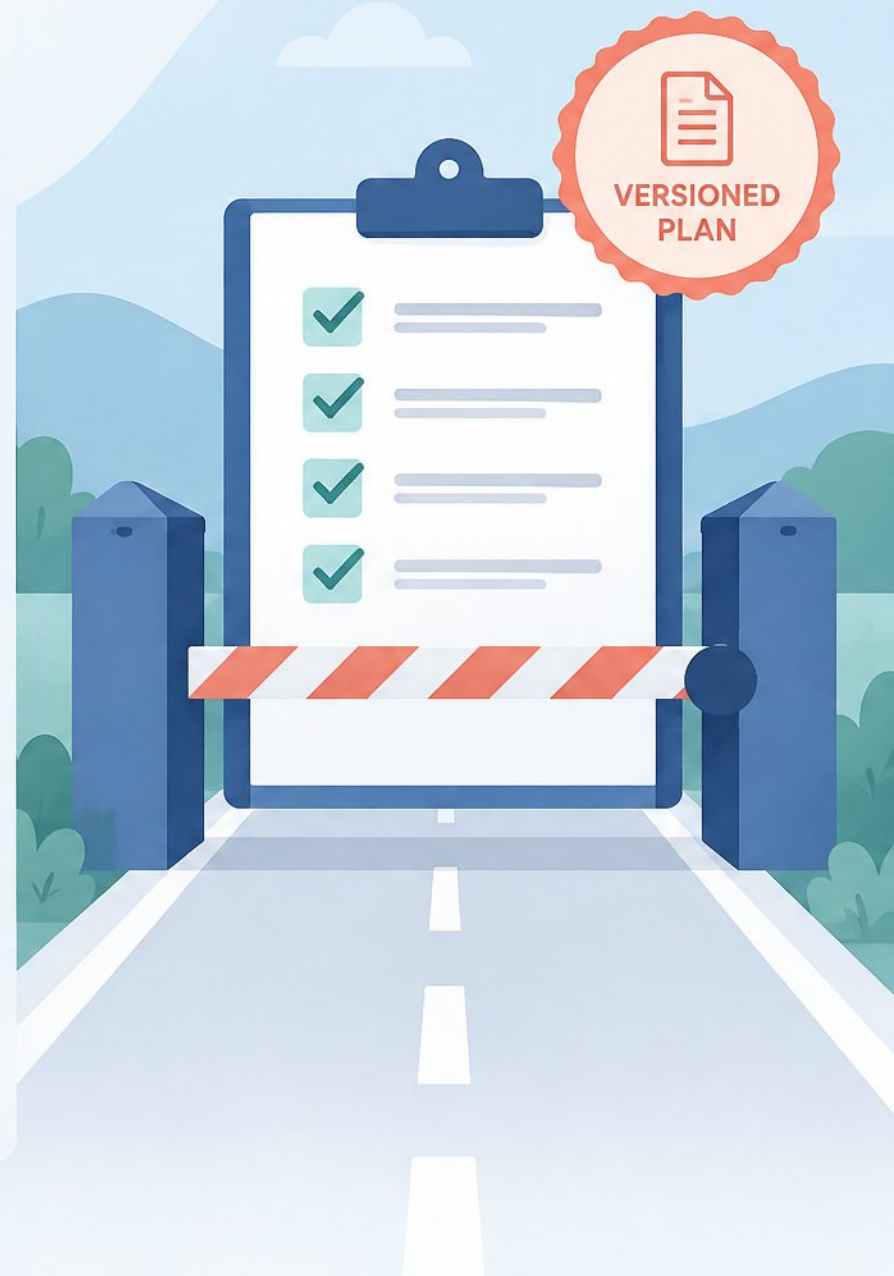
Keep a versioned plan
to prevent scope creep
and analysis drift.

Research Plan

- ☐ *Just a topic...*
- ☐
- ☐ *Think about the question first.*
- ☐ *People ≠ behavior*
- ☐ *Keep it on track.*

Score Your Plan Before You Launch

- ☐ Ten-point readiness scorecard required before fieldwork begins
- ☐ Decision owner, deadline, mapped questions, untested assumptions listed
- ☐ Method justified against alternative; inclusion, exclusion, quotas documented
- ☐ Consent discloses recording, AI moderation, retention, withdrawal
- ☐ Pilot scheduled with go/no-go criteria: AI codes reviewed by a human
- ☐ Living versioned plan: review before recruitment, after three to five responses
- ☐ Log deviations; keep it one to two pages so stakeholders actually read it



Hands-On Workshop: Draft Your One-Page Plan



Bring a real upcoming study;
draft nine blocks on one page



Write one primary goal and one
decision-ready question first



If the decision line is empty,
rescope before writing more



Define must-have, must-not-have,
and diversity criteria with sample
rationale



Build a five-bullet timeline
anchored to the decision date



Peer-review in pairs using the
ten-point scorecard

One-Page Plan

Decision

Primary Goal

Key Question

Must-Have Criteria

Must-Not-Have
Criteria

Diversity Criteria

Timeline

Plan / Approach

Next Steps

Commitments, Templates, and Next Steps



One artifact per study: a one-to-two-page plan naming decision, questions, method, sample, analysis, checkpoint



Take-back kit: decision statement, question hierarchy, recruitment matrix, screener, consent, tracker, timeline, scorecard



Etiquette: review questions before methods lock, neutral moderators, weekly theme sharing, written stopping rule

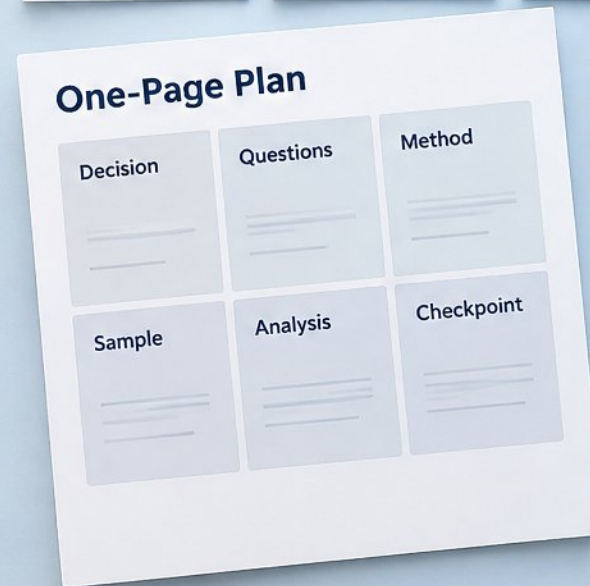


Open a version history in the plan; set the first review date after initial responses arrive



Next step today: fill in the decision line and one research question, then block pilot sessions

From plan
to progress



PersonWise.

PersonWise • AI digital-human course platform



Scan the code or click anywhere to watch this course live, with voice Q&A

personwise.ai/t/d5cf5afb/public