

Research Plan

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Context:

What's the business context surrounding this effort?

Ex. Your company is expanding into a new market, growth is slowing and you don't know the root cause, you've started serving a new customer type, you have a hypothesis about a new product direction...

Research Goal:

What's the overarching goal of the research? (This is high level, keep it focused to one or two.)

Example: To gain empathy and understand the mindset of this new customer segment, to identify the top customer problems we could be solving when it comes to a given solution space, to help a newly formed team gain context on the product areas, to come up with new opportunities that shape a given roadmap.

Research Questions:

What are the specific questions you have about customer needs or behavior you are hoping your research will answer? (These are more specific, there might be many.)

Example: What are the biggest barriers to using our product today? How do the needs of customer segment A differ from those of customer segment B? What are customers' current solutions or workarounds to this task or problem?

Audience:

Here is where you outline who you want to do research with.

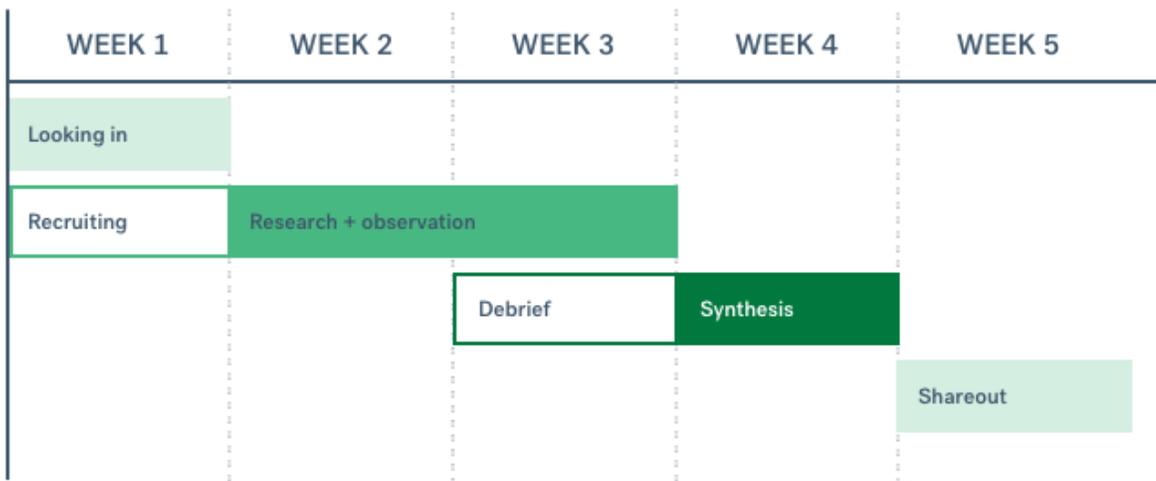
Consider the following criteria:

1. Demographics and firmographics
 - a. Example: developer at a startup vs. CIO at enterprise)
2. The user's context.
 - b. Example: a first time visitor to your website
3. Behaviors they exhibit.
 - c. Example: customers who have taken X,Y,Z actions in your product

Process & Timeline:

Here is where you can outline the steps of your research process! Here are some key steps to consider including:

- a. Kickoff meeting(s) (meeting with teams/stakeholders to go over research goal and questions to make sure everyone is on the same page)
- b. Internal “research” sessions with our own teams to find out what we already know about a certain topic
- c. Customer research (quantitative analysis, customer interviews, survey launch)
- d. Synthesis time (time to actually debrief what you learned and capture insights)



Discussion Guide / Survey Questions

Here is where you can put the actual questions you would use to guide your conversation. Start with the basics to understand their background and build rapport, then let your research questions inform the rest of what you want to ask in the session.

Some pro-tips:

1. Avoid leading questions and assumptions
2. Lean towards open-ended questions
3. Encourage storytelling
4. Adopt the mindset of an apprentice
5. Get to the why