EL
Passion

RESEARCH PLAN

Example plan of the research phase for B2B software

TO DOs

Week 1 [dates]

- [ ] Share product planning input regarding features with high priority [PM @Owner's Name]
- [ ] Set feature priorities to research [PM @Owner's Name; UX @Owner's Name]
- [ ] Set feature priorities to research [PM @Owner's Name; UX @Owner's Name]
- [ ] Draft research plan [UX @Owner's Name]
- [ ] [Task] [Owner's Role @Owner's Name]
- [ ] etc.

Week 2 [dates]

- [ ] Approve the research plan [PM @Owner's Name; UX @Owner's Name]
- [ ] Draft interview guides [UX @Owner's Name]
- [ ] Send an email to customer specialists to explain the research [UX @Owner's Name]
- [ ] [Task] [Owner's Role @Owner's Name]
- [ ] etc.

Week 3 [dates]

- [ ] Approve the interview guides [PM @Owner's Name]
- [ ] Schedule sessions with customer specialists [PM @Owner's Name]
- [ ] Organize space for notes and other needed documents [UX @Owner's Name]
- [ ] [Task] [Owner's Role @Owner's Name]
- [ ] etc.

Week 4 [dates]

- [ ] Conduct research sessions with customer specialists [UX @Owner's Name]
- [ ] [Task] [Owner's Role @Owner's Name]
- [ ] etc.

Week 5 [dates]

- [ ] Finish conducting research sessions with customer specialists [UX @Owner's Name]
- [ ] Meet to review the results from interviews and adjust the plan [PM @Owner's Name; UX @Owner's Name]
- [ ] Write summary after interviews with customers specialists [UX @Owner's Name]
- [ ] [Task] [Owner's Role @Owner's Name]
- [ ] etc.

Week 6 [dates]

- [ ] Meet to review the results from interviews and adjust the plan [PM @Owner's Name; UX @Owner's Name]
- [ ] Draft an email for customer specialists to use in their contact with customers to introduce the research and solicit involvement [UX @Owner's Name]
- [ ] [Task] [Owner's Role @Owner's Name]
- [ ] etc.

Week 7 [dates]

- [ ] Select possible customers based on usage [PM @Owner's Name; CS @Owner's Name]
- [ ] Schedule and set meetings with users [CS @Owner's Name]
- [ ] [Task] [Owner's Role @Owner's Name]
- [ ] etc.

Week 8 [dates]

- [ ] Conduct research sessions with users [UX @Owner's Name]
- [ ] Meet to review the results from interviews [PM @Owner's Name; UX @Owner's Name]
- [ ] Write summary after interviews with users [UX @Owner's Name]
- [ ] Share and present the results after the research phase to the Board/Managers [PM @Owner's Name; UX @Owner's Name]
- [ ] [Task] [Owner's Role @Owner's Name]
- [ ] etc.

[STEP'S NAME]

Example: INTERNAL INTERVIEWS WITH CUSTOMER SUCCESS TEAM

GOAL

[Your goal]

Example: Understand the tactical goals. Deepen the understanding of each analytics feature.

KEY TEAM PLAYERS

[People taking part in tasks at this step]

Example: Product Manager, UX Researches [@Name, @Name], Customer Success Team Manager [@Name]

METHOD

[Name of the method you plan to use at this step]

Example: Contextual Interviews. Ideally, have the interviewees present and show key areas.

SCHEDULE

[How much time may be needed to complete this step]

Example: 2 weeks

EXPECTED OUTPUT

[What type of documents will you create after completing this step + link to those documents]

Example: Table with all the crucial analytical features. Description of each feature consisting of key metrics, list of use cases/usage context, real/confirmed users' problems, and requests for improvement.