



RESEARCH SUMMARY

**Example summary after the research
phase for B2B software**

Links

Research plan: [\[link\]](#)

Notes and recordings from the interviews: [\[link\]](#)

Support documents: [\[link\]](#)

[\[Other type of documentation\]](#) [\[link\]](#)

etc.

Key Points

- [\[your most important observation from the research\]](#)
- [\[your most important observation from the research\]](#)
- [\[your most important observation from the research\]](#)
- [\[your most important observation from the research\]](#)
- Etc.

PERSONAS/TYPES OF USERS

ROLE IN THE ORGANIZATION

[\[User's role in the organization he/she works in\]](#)

Example: HR Manager

THE MOST OFTEN USED FEATURE

[\[Name of the feature user is using the most often in your tool\]](#)

Example: Reporting module

WHY THEY USE THIS FEATURE

[\[The purpose, why users need to use mentioned features or modules\]](#)

Example: To share reports about employees' activity in the tool with the HR Director

OBSERVATIONS

NAME OF THE FEATURE/MODULE

[Name of the feature analyzed during the interview]

Example: Reporting module

OBSERVATION

[What did users say about this feature or module?]

Example: It works pretty fine to me, I always find important information here, I can generate reports I need with ease

RATING

[Was the experience good or bad? How good or bad was it]

Example: ★★★★★☆ users are pretty satisfied with this module

SUGGESTIONS FOR IMPROVEMENTS

[What did they suggest to do to improve the experience?]

Example: Reporting module works fine but we could think of changing the copy on the button from "Export" to "Generate" since this is more related to the action that users do.