

Who Are You Researching?

Users, executives, customers, subject matter experts. What type of person are you researching? How do they relate to your project?

Plan Research

What assumptions are you trying to verify with your research? What are you interested in learning from these people?

Define Methods

You may not know what information you want, but what methods can you use to discover what you want to learn? A few interviews are generally a good place to start.

Initial Research Plan		Project	
Stakeholder Type Abstractly, who do you want to research and why do they matter?			
Areas of Interest What do you hope to learn more about by researching this stakeholder?			
Research Map What methods are you going to use? What do you want to ask them or observe them doing?			
Version Control		Iteration #:	Date:
			Author:

Why

Doing this for each stakeholder group will let you build a cohesive plan for research that will allow you to check the validity of many of your assumptions. The more research you do, the better you will understand the problem you are trying to solve.

What came before?

Project Definition
Assumption Map

What's next?

Observation
Contextual Inquiry
Interview
Domain Research

Tips

Use this to explore groups of people, rather than seek specific knowledge.

Fill out one of these for each distinct type of stakeholder you may have. Generally, six subjects per group will give you a good sense of that group.

If you have multiple types of users, you should do one for each of those as well.

Update this as you continually iterate upon your research.

After your research, try turning each of these groups into a persona. If they are too broad or too narrow to fit a persona, try iterating upon this worksheet till they fit.

Stakeholder Type

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Areas of Interest

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Research Map

What methods are you going to use? What do you want to ask them or observe them doing?