NSW Digital Service Toolkit - Activities and templates

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|  | Research PlanUse this template to document your plan for conducting research.  |

## Document snapshot

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| **Use for**: Defining your plan for research |
| **When**: Before you’ve started any research |
| **With**: Your research team |
|  | Time **60 mins +**  |  | Casting**2+ team members**  |  | Tools**Word** |
|  | The time depends on how clear you are on your upcoming research. |  | It’s best to do this as a team to help encourage well-defined and agreed goals that the research will meet. |  | This template is in Word, you can transfer this to another tool if you’d prefer. |

## Document guide

A good research plan helps you plan and define your research goals.

Your team, stakeholders and participants benefit from a clear research plan. It lays out the path ahead, identifies key activities and gaps in your thinking, and aligns teams and stakeholder on the intended outcomes of the research.

This document will guide you through the typical segments of a research plan..

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| --- | --- | --- |
| **What’s it for** | **What you’ll get** | **When to do it** |
| Documenting your plan for research, enabling alignment and visibility for your team and stakeholders.  | A source-of-truth document for your research that can be reviewed and iterated as the project progresses.  | After you have been given an initial project brief, but before you commence any official research activities. |

## How it works

### Before you start

* You should have workshopped or drafted the problem you’re trying to solve or the opportunity space to explore.
* You have a goal for the research.

**Step 1***:* Go through the template filling out the sections of the research plan. Keep it clear and in plain English.

**Step 2:** Present back to your wider team and stakeholders so you can get buy-in for your research and your team’s next steps.

**What’s next?**

* Commence research activities
* Regularly review and update your research plan as the project progresses.

## Additional resources

[Example research plan guide (MS Word)](https://nswgov.sharepoint.com/%3Aw%3A/s/NSWDesignSystem/EWmGykz7VzhAo6lMlxcrt-sBzYKEBAnlNo5sx-5sM6i91Q?e=zTSAxX)

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## ▐ Title of Research Project

|  |  |
| --- | --- |
| **Overview** |  |
| Description: | The name of your research project. A good title will help people understand what the research is about. A bad one just describes the anticipated solutionAdd these to the front page of your document. |

**Project: *[Insert project name]***

[Insert team and agency here]

[Insert date of most recent update to this document]

## ▐ Background

|  |  |
| --- | --- |
| **Overview** |  |
| Description: | The "Background” section is the where you provide context that explains how the project came about. This section is important because it helps the team align on the reasons for the study. Getting this right looks like the team confidently being able to articulate the origin of the project.  |
| Pro-tip: | *One way to write a good background is to imagine someone had to join your team halfway through the project. What context would they need to know to get up to speed quickly?* |

**Project origin**

[Insert an explanation of how this project came to be, including why it was prioritised over other work and why it’s important to work on now.]

**Challenge**

[Insert the problem or opportunity the project is setting out to solve]

**Project team:**

[Insert the names and positions of core team members]

**Stakeholders**

[Insert the key internal stakeholders or decision-makers on this project

**Project sponsor**

[Insert name and position of project sponsor]

**Scope**

|  |  |
| --- | --- |
| **What’s in?** | **What’s out?** |
| [Insert an indicative list of the kind of things that are within the scope of this project] | [Insert an indicative list of the kind of things at are outside the scope of this project] |

## ▐ Research goals and objectives

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| --- | --- |
| **Overview** |  |
| Description: | The “Research goals and objectives” section is where you identify what your team wants to learn, or the ideal research outcome. This section is important because research questions will help your team know what they’re trying to discover through the research. Getting this right looks like the team knowing what they’re trying to learn from users. |
| Pro-tip: | *This is about clarity for the team, so try on land on no more than 3 big questions for your research.* *It’s okay to have a few points under each question to clarify what it means, but avoid the temptation to start writing your discussion guide* |

**Project objective:**

[Insert what you’re trying to achieve with the project as a whole]

**Key research questions**

[Insert 2-3 big questions your research is trying to answer]

## ▐ Participants

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| --- | --- |
| **Overview** |  |
| Description: | The “Participants” section is the place where you outline the people you want to conduct research with. This section is important because it will help you consider who to include and significantly, who to exclude from research.  |
| Pro-tip: | *Ensure that within the types of cohorts you’re researching with, you have a diverse sample.**For example, if you want to speak to university students who work part time, ensure you include people of all genders, people with a disability, Aboriginal and Torres Strait Islander people and people from culturally and linguistically diverse backgrounds.* |

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| --- | --- |
| **User groups** | **Quantity of users** |
| [Insert list all the different cohorts or groups of people you want to conduct research with. This may be based on demographics, behaviours, experiences or other attributes.] | [Insert how many people per user group you want to conduct research with] |
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## ▐ Recruitment

|  |  |
| --- | --- |
| **Overview** |  |
| Description: | The “Recruitment” section is the place where you how you’ll source participants. This is important because it will help you decide on whether you’ll recruit yourself, bring in outside help or somewhere in between. |
| Pro-tip: | *When recruiting for usability testing, you may only need five users to get the information you need. Check out this* [*famous Nielsen Norman article*](https://www.nngroup.com/articles/why-you-only-need-to-test-with-5-users/) *to learn why.* |

**Recruitment approach:**

[Insert a description of how you will recruit, and the agency, team or people responsible for recruiting participants]

**Team recruitment lead:**

[Insert team representative who will take ultimate responsibility for recruitment]

**Participant communications:**

[Insert your plans for communicating with participants before, during and after research. Use the [User research communications](https://digital.nsw.gov.au/digital-service-toolkit/activities-and-templates/user-research-communications) template to help]

**Participant tracking:**

[Insert your plan for tracking the status of participants, from contacted to booked in]

**Participant privacy**

[Insert your plan for ensuring the privacy and confidentiality of participants]

## ▐ Method of research

|  |  |
| --- | --- |
| **Overview** |  |
| Description: | The “Method of research” section is where you outline how research will be conducted. Getting this right looks like knowing what research methods will be best to answer each research question.  |
| Pro-tip: | *It’s always a good idea to start with data and information that your team or agency may already collect. Desktop research – looking at available resources (both internally and externally)- can help you start to answer your questions and refine your more involved research efforts.*  |

|  |  |
| --- | --- |
| **Research question** | **Method(s) of research** |
| [Insert research question from Research goals and objectives] | [Insert the methods that will be most effective for answering them] |
|  |  |
|  |  |

## ▐ Research synthesis

|  |  |
| --- | --- |
| **Overview** |  |
| Description: | The “Research synthesis” section is where you outline where and how you will analyse your findings, and how the results of your research will be presented to your team and stakeholders. Remember to maintain privacy of your participants, de-identify data, and store information securely.  |
| Pro-tip: | *Check out the* [*Synthesising research findings*](https://www.digital.nsw.gov.au/digital-service-toolkit/activities-and-templates/synthesising-research-interviews) *activity for a structured approach to this activity.* |

**Research capture:**

[Insert how your team will capture research outputs (notes, datasets, recordings and transcripts)]

**Research storage:**

[Insert how and where your team will store research outputs (notes, datasets, recordings and transcripts) in a way that retains security and privacy of participants]

**Research synthesis**

[Insert how and when your team will bring together and make sense of research outputs]

**Research outputs**

[Insert the outputs (showcase, report etc.) your research will produce]

## ▐ Timeline

|  |  |
| --- | --- |
| **Overview** |  |
| Description: | The “Timeline” section is for how long the research will take. This helps your team stay on track and sets expectations for your stakeholders about when the outputs of your research can be expected.  |
| Pro-tip: | *If you have a deadline to meet, start with that and work backwards. This will help you understand the depth and breadth of research to plan for. But remember, don’t scrimp on the analysis because this takes time to do it properly.*  |

|  |  |
| --- | --- |
| **Milestone/ Activity** | **Timeline** |
| [Insert key milestone, e.g. **Recruitment commences**] | [Insert indicative date, week or sprint #] |
| [Insert key milestone, e.g. **Research commences**] | [Insert indicative date, week or sprint #] |
| [Insert key milestone, e.g. **Synthesis commences**] | [Insert indicative date, week or sprint #] |
| [Insert key milestone, e.g. **Team review of research**] | [Insert indicative date, week or sprint #] |
| [Insert key milestone, e.g. **Research showcase**] | [Insert indicative date, week or sprint #] |

## ▐ Costs

|  |  |
| --- | --- |
| **Overview** |  |
| Description: | The “Costs” section is the place where you outline the expenses that your research will incur. This section is important so you can visibly show a breakdown of how your spending funds.  |
| Pro-tip: | *If you’re having difficulty getting a budget signed off for your whole research efforts, consider breaking it up into smaller rounds with very clear objectives for each round. An agile approach to research helps to minimise risk.*  |

**Participant considerations:**

* [Insert approach to remunerating participants]
* [Insert additional participant costs that need to be considered, such as travel and meals]
* [Insert method of participant payment e.g., gift card or bank transfer]

**Project considerations**

* [Insert any technology or software requirements that you will need for research e.g. testing platforms, collaborative software for synthesis]
* [Insert any supports or adjustments do you need to factor in for participants, e.g. translation services for non-English speaking participants, additional recruitment if participants don’t show up]

**Research budget**

|  |  |  |
| --- | --- | --- |
| **Item** | **Description / Notes** | **Cost** |
| [Insert item] | [Insert description or notes] | [Insert cost] |
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Document end.