PLANNING YOUR RESEARCH: CHECKLIST

DESCRIPTION

This job aid offers a checklist made up of questions that need to be answered before performing design research.

WHEN TO USE

Use this job aid at the planning stage of your design research.

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PAIRS WELL WITH

- Choice of research methods
- Best practices for protecting participants' data in design research

PURPOSE

The checklist can be used to include all the necessary component into the research plan.

DESIRED OUTCOME

The structured, well-organised research plan.

HOW TO USE

As you develop your research plan, refer to this checklist to determine whether you completed the question specific components/tasks to answer the following questions:

Adapted from Project Management for User Research: The Plan and Building a research plan with five simple questions – Canadian Digital Service

Canada School of Public Service

École de la fonction publique du Canada

Canada

CHECKLIST

What is the goal of your research?

Purpose and goals of the research

What is the value of this work?

Purpose of the plan

Rationale

What is the value of this work?

User tasks, metrics, and usability goals, such as maximum time on task and other success criteria (if applicable)

User profiles (characteristics of target participants for the research)

Recruitment plan

Stakeholder engagement

What methods will be used?

Choice and rationale for each research method

Questionnaires

Note-taking and question-asking guidelines for observers, including how to collaborate in effective data gathering without biasing the sessions

Facilitator script with questions for participants, including consent forms

Methods of data analysis and synthesis

Research ethics documents:
- Data management plan
- Privacy, confidentiality and anonymity

What resources are needed?

Budget

Expectations about deliverables and timing

Team:
- Expectations and roles
- To-do lists

Schedule

Equipment and supplies

Location information and contact details

Checklists, documents and forms