**Customer Research Plan**

**Overview**

|  |  |
| --- | --- |
| **Research lead** |  |
| **Background** | What has prompted this research? What other research has been done already? |
| **Purpose** | What needs to be validated or explored? How will those insights be used? How does it tie to your overall strategy? |
| **Success criteria** | What qualitative and quantitative information should be collected? What decisions should be enabled by this information? |

**Focus areas**

Which ideas, features, or other areas will be the focus of this research?

|  |  |
| --- | --- |
| **Area** | **Description** |
| Ideas | Reference any existing ideas that will be researched. |
| Features |  |
| Other |  |

**Customer profiles**

Which types of customers will be involved in this research?

|  |  |
| --- | --- |
| **Type** | **Details** |
| Personas |  |
| Segments |  |
| Organizations |  |
| Other |  |

**Research methods**

How will you go about collecting the information you need to be confident in your insights?

|  |  |
| --- | --- |
| **Type** | **Details** |
| Feedback review |  |
| Focus group sessions |  |
| In-app feedback |  |
| Customer interviews |  |
| Polls |  |
| Other |  |

**Timeline**

When is this research planned?

|  |  |  |
| --- | --- | --- |
| **Activity** | **Description** | **Date** |
| Define plan |  |  |
| Prepare for research |  |  |
| Conduct research |  |  |
| Analyze findings |  |  |
| Share results |  |  |

**Insights**

|  |
| --- |
| **Overview** |
| Summary of what you learned.  |
| **Learnings** | **Action items** |
| •  |  |
| • | • |
| • | • |