

UX Research Plan Template

A planning framework for UX researchers. Use this template to define goals, align stakeholders, and set your study up for success before the first session.

TIP

You can either run this template session-by-session and bring recordings within Looppanel OR paste this as a discussion guide within your study on Looppanel directly, which will be automatically used to auto-transcribe, tag themes with AI, and find patterns across participants.

This PDF is editable. Click any shaded field to type into it — the highlighted placeholders are yours to rewrite. Prefer pen and paper? Print it and write on the lines.

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SECTION 1 — STUDY OVERVIEW

Fill this in before sharing with stakeholders.

Study Name

e.g. Onboarding Discovery Q3

Researcher

Stakeholders

List everyone who needs to be aligned

Date Created

Fieldwork Dates

e.g. 12 Aug — 20 Aug 2025

Report Due

SECTION 2 — RESEARCH GOALS

What are you trying to learn, and why does it matter now?

Background (what prompted this research):

Primary research goal:

e.g. Understand why users abandon the onboarding flow before completing setup.

Research questions:

Q1:

Q2:

Q3:

SECTION 3 — METHOD & APPROACH

Which method best fits the question and the timeline?

Research Method

e.g. Moderated user interviews

Session Format

e.g. Remote via Zoom / In-person

Session Length

e.g. 45 to 60 minutes

Number of Sessions

e.g. 8 participants across 2 segments

Recording

Yes

No

Why this method:

04

SECTION 4 — PARTICIPANT CRITERIA

Who are you recruiting, and how will you qualify them?

Target participant profile:

e.g. B2B SaaS users in a project management role, 1+ year of experience with the product

Qualifying criteria:

Disqualifying criteria:

e.g. Employees of competitor companies, internal team members

Recruitment Channel

e.g. Customer list, Respondent.io, internal panel

Screener Required?

Yes

No

Incentive

e.g. \$75 Amazon gift card

Screener live by

Recruiting complete by

Pilot session

Fieldwork window

Synthesis complete by

Report shared by

Team roles:

Interviewer:

Note-taker / Observer:

Recruiting lead:

Stakeholder reviewer:

SECTION 6 — SUCCESS CRITERIA

What does a successful outcome look like for this study?

The study will be successful if:

e.g. We can answer all three research questions with evidence from at least 5 participants per segment.

How findings will be shared:

e.g. Research report + 30-min readout with product and design team

Decision this research will inform:



 Looppanel

The plan is set. Now skip the grunt work.

Bring your sessions into Looppanel to auto-transcribe them, tag themes with AI, and find patterns across participants — in minutes, not weekends.

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