

Building Your Own Research Plan

The Research Plan is the initial component of The Qlarity Confidence Cycle, and it represents the crucial first step towards gaining confidence in your research results and achieving clarity in decision-making.

The Research Plan involves posing key questions to secure clear commitments from all involved parties. Once completed, it serves as a comprehensive roadmap, guiding your project from inception to successful completion. This guide is designed to help you create your own tailored plan and roadmap, ensuring strategic and impactful decisions.



How to Use This Worksheet

This worksheet is a thinking tool designed to help you systematically plan each new research project.

Its value lies in getting you to put careful thought into and commit to a plan which brings clarity to the decisions you are making. There are questions on Page 4 to prompt thoughtful consideration and answer boxes on Page 3 to capture your responses.

Instructions

1. Review the Questions First: Start by carefully reading through the questions on Page 4. These questions are designed to help you think through all the important aspects of your research project.
2. Reflect and Answer: Take your time to reflect on each question. Think about the specific details and objectives of your upcoming research project which will bring clarity to the commitments you are making and highlight areas that may need more attention.
3. Write Your Answers: Once you have thought through a question, write your answer in the corresponding box on Page 3. Each box on Page 3 is labeled to match the question on Page 4, making it easy to organize your responses.
4. Be Outcome and Learning Focused: Specify what you plan to gain from this research, even if it seems ambiguous. The more you consider the end goal in your responses, the closer you will find yourself to it.
5. Review and Revise: After you have completed all the questions, review your answers on Page 3. Make any necessary revisions to ensure your responses are clear, concise, and comprehensive. Note any places that you may be unsure or have inconsistencies.
6. Use as a Reference: Keep this completed guide as a reference throughout your research project and share it with stakeholders, team members, and vendors. It will help keep your whole team focused and aligned with the strategic research objectives.

Tips for Effective Use

- Set An Appointment with Yourself: Set an appointment with yourself for 15 minutes to fill out this worksheet BEFORE meeting with anyone else. Reminder your first attempt is not final.
- Collaborate: Research does not happen in a vacuum. Speak with team members and stakeholders to iterate upon the plan and make decision on the projects scope.
- Revisit Throughout: Schedule three check in's during the project timeline to measure progress vs the plan and adjust as needed. We recommend at the transition from Research Plan to Configure (often the kickoff call), at the end of Configure, and at 80% Access completion.
- Use it on Every Project: Use a clean version of this guide for every new research project to ensure that each project is thoughtfully and uniquely planned. Building the habit of clear expectations with a thorough Research Plan will only improve your research outcomes for better business decisions.

If you are struggling to answer any of these questions OR are ready to get started, but need a little outside help, Qlarity Access is ready to help you!

Please contact us at 573-775-4550 or info@qlarityaccess.com to set up a discussion!

PLAN

The first step in the Xperience Qlarity Formula is to build a Research Plan. An Research Plan cannot be built without a solid foundation - clear and concise research objectives.

PURPOSE

IMPORTANCE

IMPACT

STRATEGIC OBJECTIVES

- 1.
- 2.
- 3.

CONFIGURE

The Configure phase is the technical phase of research design - the who, what, how, how many, of research.

METHODOLOGY

TARGET AUDIENCE

LENGTH OF INTERVIEW

SAMPLE SIZE

ACCESS

The best crafted research project is useless without respondents to participate. But you can't have just anyone engage with your research - you need the exact right people.

ACCESS

CONFIDENCE

Quality research requires alignment and investment from researchers to come true. After a successful research project, you will have the confidence in results you need to make impactful business decisions.

INVESTMENT

DEADLINES

STAKEHOLDERS

DELIVERABLES

CAPABILITIES

RESEARCH PLAN

1. PURPOSE - What do you want to accomplish with this research?
2. IMPORTANCE- What decisions will be made based on this research?
3. IMPACT- What is the business value of this research being completed?
4. STRATEGIC OBJECTIVES - When this project is over, how will you know if it was a success?

CONFIGURE

1. METHODOLOGY- What is the methodology you will use? Quantitative or Qualitative? What kind?
2. TARGET AUDIENCE - Who is your target audience?
3. LENGTH OF INTERVIEW - How much time will the survey/interview/research engagement last?
4. SAMPLE SIZE - How many completes do you need?

ACCESS

1. ACCESS - How will you access research participants?

CONFIDENCE

1. INVESTMENT - What is the range of investment you would consider to obtain research that leads to strategic impactful actions?
2. DEADLINES - When are the decisions this research impacts going to be made?
3. STAKEHOLDERS -
 - a. Who is making the decisions based on this research?
 - b. Who decides on if this research will be included in the process?
 - c. Are they all aligned with details of the project?
4. RESEARCH DELIVERABLES - What format should deliverables be provided in?
5. CAPABILITIES- Does your team have the capabilities required to complete the full scope of the project from start to finish, including audience access? If not, what do you need help with?

REALIGNMENT

After you've finished, please re-review it for any inconsistencies. Are you attempting to collect a large number of niche respondents in an unreasonably short period of time? This may mean that you need to update your plan. Look for any places where your plan doesn't match and adjust.

NEXT STEPS

1. Get stakeholder alignment and approval
2. Enlist the help of a market research firm like Vet Access
3. Design and conduct the research
4. Get results you can be confident in