

Research briefing template



Introduction

A research brief is your documented plan for conducting user research activities. It outlines the objectives and goals of your research project, helping to ensure alignment different stakeholders. By creating a research brief document, you have a reference point for the project, ensuring that anyone involved understands its scope and purpose.

The brief includes information on the target audience, the specific research questions, or topics to be addressed, and the methods to be used. It also specifies the timeline, expected deliverables, and potential risks or constraints, providing a clear roadmap for the project.

It's a great starting point for driving efficient and effective user research.

Instructions

This research brief template and the helpful text in red will guide you through creating your own document. Keep your stakeholders involved throughout, and ensure they agree with its content before the project begins.

The key elements to consider as you complete the template are:

- Defining the problem statement
- Identifying your stakeholders (and getting their buy-in!)
- Defining your research's scope and the project objectives
- Choosing the right research method
- Deciding how you'll recruit participants
- Outlining the timeline and key limestones
- Proposing how you'll present your findings
- Assessing potential risks to the project

Research brief

Research details:

Project summary	
Project summary	e.g. Moderated user testing
Recruitment methods	e.g. Using our own network
Focus of research	e.g. Donation journey, starting from the homepage
Desired outcome	e.g. Understand people's expectations when donating online, what works well and what doesn't to inform a new design

Roles and responsibilities

Who is involved in this project, along with their roles and what they're responsible for.

Client stakeholders

Who has a vested interest in the project from your charity or any other partner organisations?

What is their role and where will they be involved?

Name	Contact	Role / responsibility
Jane Smith	jane.smith@charity.com	Compliance, ensuring that the new donation journey meets data protection standards
Jane Smith	jane.smith@charity.com	Compliance, ensuring that the new donation journey meets data protection standards
Jane Smith	jane.smith@charity.com	Compliance, ensuring that the new donation journey meets data protection standards

Research team

Who is involved in doing the research? What is their role and where will they be involved.

Name	Contact	Role / responsibility
Jane Smith	jane.smith@charity.com	Leading the research – speaking to participants and writing up the notes
Jane Smith	jane.smith@charity.com	Leading the research – speaking to participants and writing up the notes
Jane Smith	jane.smith@charity.com	Leading the research – speaking to participants and writing up the notes

Research background

Background of what product the research is being undertaken on, and what the research aims to achieve.

Service, area or journey

What area of the charity is the research being run on? E.g. the donation journey.
What is the purpose of this service and what are its overall goals?

Features

What feature/features are being tested? E.g. the one-off donation form.
What part do they play in the user journey?

Organisational goal

What are the benefits of the research to your charity? E.g. increased donations.
What are the risks of not running research? E.g. miss out on some donations because...

Research objectives

What are the goals of the research? E.g. make the process of donating easier and more trustworthy? What questions are we trying to answer? What hypothesis will be tested?

Research details

Information about the type of research, who will be involved, and its key milestones and outputs.

Types of research

Is it user testing, surveys, tree testing etc? What format will it take; in-person, remote etc?

Research dates and milestones

When will the research take place? What other milestones need to be considered?

Participant information

Who are they - what are their key characteristics? How many participants will be involved?

Participant recruitment

How will they be recruited? E.g., through your mailing list, through a recruitment agency.
What incentive is on offer?

Deliverables

How will the results be used? E.g., they will help to inform the communications calendar?
How should the results be delivered? E.g., PowerPoint report with video clips.

Project considerations

Identify what risks there are to the project, or what risks there are to the charity from undertaking the project. Provide ways that these will be avoided or accounted for.

Risk and challenges

What challenges may be faced during the research? What risks come along with performing this research? What needs to be put in place to avoid these?

Constraints

What barriers may be in place? What is out of scope?

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