UX Research Plan

Study Goals & Research Questions **(Research requestor fills section out)**
The overarching goals and research questions you need answered in the study. For concept validation, what is the primary use case and business objective being explored. For design validation, review the user stories, workflows, and wireframes to inform research questions.

Test Script Section	Method Used	High Level Research Goals
Introduction & Overview	Moderator guided interview (10 minutes)	• Gather participant concept • Overview of what a think-out-loud session is • Introductory questions (overall role at company X, involvement with redaction activities)
Usability of single / bulk redaction flow	Think-out-loud usability / first impression testing (10 minutes)	• Validate flow created during design sprint (how documents are selected for redaction, how easy is the tool to use for basic redacting • Start with documents already in the redaction screen. • Review preview and redact flow • How important is it for the user to use list/report of entities found in a set of documents? • Will the users sort the documents based on the entity groups type? • Possible entities /prediction • Expectations around handling bulk redaction filtering
Entity Analysis	Interview and survey (15 minutes)	• **(Interview)** What type of content is most important to redact • **(screenshare interview)** How can we re-name entity to a term that is more user friendly • **(Survey Question)** prioritize types of content that is most critical to redact (versus nice to have) • **(Survey Question)** Group entities that you would expect to be automatically redacted versus would require manual intervention versus train the system)

Workflow Overview	Interview & Journey Mapping (15 minutes)	• Who are the key players in the process? How many people are redacting? Approving on a deal? • Is there a need to save multiple versions of documents during the approval process? After deal has gone live? Once the deal has closed? • Willingness to manipulate 1 version but mark changes made from one version to another. • User expectations around version control and reverting back to the original
Closing	(3 minutes)	• Thank you for your time, next steps etc.

Methodology (Researcher selects method based on Goals section)
The method used to conduct research. Method selection is dependent on the following factors. Study goals, recruitment method, data collection size, and data collection timeframe. See Neilsen Norman's UX research methods for guidance on what method best fits your needs.

- **60 minute interview / first impression click test (depending on mock-up fidelity it could become a task based test**

Study Assets
Please include any prototype links, working documentation around study scripts, goals etc.

Participant Recruitment *(If required)*
Who do you need to include in this study? How many participants are needed (method dependent). Internal versus external. What personas are needed?

10-12 M&A power users, global recruit.

Schedule & Logistics

For each study, please fill out the grid . Please use the space here to note additional dependencies and notes that are specific to this study.

For customer confidentiality, this is left blank.

Name	Company	Date	Region	Source	Notes
P1			APAC (Sydney)	Sales Rep	
P2			APAC (Sydney)	Survey	

Overall Responsibility Matrix

Research Activity	Assigned To	Notes & Dependencies
Creating Research Questions & Goals	Team	
Method Selection	Jeanne	
Participant Recruitment *(if required)*	Jeanne	
Participant Consent & Scheduling *(if required)*	Jeanne & Vishal	
Create Test Protocol / Script	Jeanne	
Tool setup (depending on method) *(if required)*	Jeanne	
Test Moderation (depending on method) *(if required)*	Jeanne	
Note Taking	Team	
Data Analysis	Team	
Reporting Results to Team	Jeanne	
Preparing Prototype *(if required)*	Lia & Lahens	