

## Kick-off template

### Project description

2-3 sentences describing the project. Start with researcher assumptions but validate during the meeting.

### Objectives

2-4 objectives is the most that can be reasonably covered in a one hour session depending on complexity. These are completed during the kick-off meeting and will be used to create the discussion guide for the sessions.

### Participant criteria

These are completed during the kick-off meeting and will be used to create the recruiting screener. Be mindful of any legal compliance issues regarding discrimination.

### Team

Start with researcher assumptions but validate during the kick-off meeting. These are completed during the kick-off meeting.

- **Product owner:** Looking for decision makers on the product side to be accountable during the research process.
- **Project manager:** if any
- **Design lead:** Looking for the person responsible for providing testing materials (mock ups, prototypes, etc...), if any.
- **Research lead:** Me!
- **Recruiters:** could be an outside vendor

## Research Templates: Qualitative Interviews

**Timeline:** Actual dates set during the meeting. From kick-off to presentation is usually between 4-6 weeks. Researcher will send out invites after the kick-off to get on everyone's calendars. Participant is mandatory for responsible parties and strongly recommended for everyone else.

Touchpoints	Responsible	Due date
Kick off meeting	All	today
Review design testing materials	Researcher/ Design team	within 3 business days of kick-off
Review screener	All	email within 3 business days of kick-off
Coordinate with recruiting vendor	Researcher/ Recruiting	after screener approved
Review first draft of discussion guide	All	within 5 business days of reviewing test materials
Review final draft of discussion guide	All	within 5 business days of reviewing first draft
Final design testing materials due	Researcher/ Design team	3-5 business days before sessions
Finalize participants	Researcher/ Recruiting	2 business days before sessions
Research sessions	All	set during the kick-off meeting
Research findings presentation	All	1-2 weeks after sessions

*This sample template is a recreation from memory. Due to strict NDAs, I don't have any of the original work that I did.*