

Formative research planning tool

This planning tool will guide research that will inform the development of your communication effort.

Research questions

What do you need to know about the audience, problem, and approach you might take to solve it?
How can formative research help shape your communication plan and ensure effectiveness?

1.

2.

3.

4.

Methodology

Using a combination of methods is most ideal in helping you learn from existing (secondary) research as well as gaining a better understanding of the lived experience of the audience(s) through your own (primary) research.

METHODS CAN INCLUDE:

- Literature review:** Review of peer-reviewed or grey literature
- Environmental scan:** Less formal review (usually of online material) that provides insight into the audience, the problem, and solutions that have been tried
- Focus groups:** Facilitated discussion among groups of people sharing similar experiences or worldviews (“homogeneous”); groups can be as large as 8 to 12 people, or as small as 3 people (“triads”)
- Key informant interviews:** One-on-one interviews with individuals who have unique insight or serve as gatekeepers to the audience, or with expertise on the problem
- Intercept surveys:** One-on-one surveys self-administered or administered by a surveyor, conducted at a site frequented by the audience (e.g. in a medical or other service provider setting)

SEGMENTATION

How you will break down the audiences you speak with so that you can compare different groups in a meaningful way. Segmentation can be by demographic characteristics (age range, sex, geographic area, etc.) or by psychographic characteristics (such as at what point someone is in adopting a new behavior).

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LOGISTICS

How you will recruit participants, how long groups or interviews will last, or what sources you'll consult for literature review or environmental scan.

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TOOLS AND DELIVERABLES

(E.g. discussion guide, survey instruments, way in which you'll collect and analyze data and report on findings and recommendations):

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4.
