

# Advocate for an Exploratory Research Budget in 6 Steps

Some managers or stakeholders may not see the immediate value in exploratory research—either because it feels too nebulous, or the budget isn't easily set. These steps will help you better define the topic you want to study, map out your process, and secure much-needed buy-in.

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Exploratory research is typically conducted when little is known about a topic, or when a problem needs to be defined more clearly.

Unlike evaluative research, exploratory research aims to explore a topic, issue, or problem to gain a better understanding and identify potential areas for further investigation.

The vastness of exploratory research can be intimidating. But it can also help you...

- Generate hypotheses
- Inform the design of subsequent studies
- Gain a deeper understanding of the topic
- Encourage the exploration of new ideas

With this guide, we'll help you form a specific plan that can aid in getting the budget you need for your research.

## ✓ **Step 1: Identify and define the problem or topic you want to study**

- How does the initiative connect with your company or product?
- How will knowledge about this topic help the company achieve its goals?
- What metrics would be helpful?

It's important to understand what the problem/topic is and what you're solving so that you have a clear path forward. You should be able to draw the path you're hoping to take—from the topic all the way to the company or product.

## ✓ Step 2: Define your goal—and be specific

- What exactly are you looking to accomplish or hoping to find?
- Is this exploratory, quantitative, or qualitative?

Now is the time to be particular about what you want to research. Your goal is something you can always revisit to make sure your study stays on track. Being specific is also helpful when presenting your research idea to others—especially stakeholders.

For example, instead of phrasing your goal like this:

✗ *“To learn how product check-out features impact users.”*

Phrase it like this instead:

✓ *“To learn how non-English speakers use product check-out features.”*

Dig into how the study can better the product roadmap, or give you valuable insights into the user.

## ✓ Step 3: Map out your process

- How are you going to go about reaching your goal?
- Will it be moderated or unmoderated?
- Are you looking for quick data or something more longitudinal?
- Do you plan on mixing methods? If so, what will that look like?
- How much will each step of your study cost?

You know your stakeholders best! So this might mean shooting for the stars and negotiating from there. Or perhaps, keeping it more modest to give them a taste of how valuable this work can be.

For instance, showing stakeholders targeted feedback from users on features or interactions that are top of mind for them can have a huge impact. You might not know what you’re looking for right away, but you will likely find a direction (or many) to take your subsequent research.

Having your study mapped out helps show stakeholders what the plan is, what your timeline might look like, and how much it will cost them. This is key if you want to get stakeholder buy-in.

## ✓ Step 4: Define your criteria for the study

- Who do you need to hear from to achieve your goal?

Be specific about your criteria! Remember to consider your main goal and how it might be beneficial to the company or product. Know where you want to give yourself some wiggle room and know where you want to stay firm.

Are you looking for users 40-75 with high-tech literacy? Or perhaps, you want to hear from 22-25-year-old females looking for jobs? Remember to think about how this particular perspective connects back to your topic and goal. Keep refining that topic and goal.

## ✓ Step 5: Present for impact

Depending on what the process looks like at your company, at some point, you will be presenting your idea to a manager or stakeholder. If you've been able to work through Steps 1 through 4, you will have done enough background research and planning to answer any questions in person.

Put together a slideshow or a document and be sure to include some visuals. Consider the types of data that would be impactful. dscout has a [video playlist builder](#) that you can use to quickly clip together a playlist of participant responses. This video is a great way to show the fruits of your labor with this research style!

## ✓ Step 6: Negotiate and pivot

Company goals and budgets are often shifting depending on the market, so be ready to make adjustments to your plan. You may need to change your topic, adjust your criteria, or decrease the budget.

Be as flexible as you can but remember the goal you set. Advocate for yourself and for your research! You understand how important this work is, so being clear about its importance and connection to company goals will be essential.

Make sure to also consider your bandwidth for the study. If you need to drop down your participant number from 20 to 12 in order to be able to analyze the 60 minutes of video content you'll have, do it. Thorough review of the data is important.

## + Bonus Step 7: Note offshoot topics

Hopefully, you've been able to get stakeholder approval and a budget to run your study. While conducting the study, keep note of any other potential offshoot topics that might be useful for the company or product to delve deeper into.

Keep note, but be sure to stick to the original goal you set for yourself. These offshoot topics can be just as important to continue to get stakeholders interested in more exploratory research!

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