

UX Research Intake Form

The Team

Leads:

@ Designers, PMs, POs requesting research

Stakeholders:

@ VPS, C-level, External clients (if relevant), VP of Engineering, Product Marketing

Resources & Context:

- Conversation Starter (linked)
- Supporting Documents (linked)
- Relevant Figma Files (linked)
- Slack/Teams/Asana Channel:

Source of ask:

Feature request, brainstorming, etc

Who are we learning about?

Audience:

What user roles/personas are we focusing on? What level of technical capability do they have?

Job Titles / Roles:

e.g., Senior Marketing Manager, Product Analyst, Client Success Manager

Main Workflows & Responsibilities:

Briefly describe how this feature or experience fits into their workday.

Additional Information:

Any other context that helps us understand the users or environment.

What are we trying to learn?

Key Objectives for this Research:

What are the core objectives or outcomes you want to see?

Known Pain Points:

List any known or suspected pain points for users in this context.

Additional Information:

Any relevant data or hypotheses we should consider.

Constraints / Parameters

Constraints:

- Deadlines or critical milestones?
- Recruitment constraints (e.g., user pool, NDA)?
- Available tools / platforms?
- Budget or resource limitations?

Key Research Questions

What questions do you want answered through research? Examples:

- What's confusing about this workflow?
- What's driving frustration or errors?
- How do users understand this feature?

How will we know if it's successful?

Metrics, behaviors, or signals to show research has succeeded:

- e.g., user adoption, task success rate, reduced support tickets

Marigold Value Alignment

Which of Marigold's core pillars does this support?

- Open & Connected
- Insights and Guidance
- Deeper Engagement
- Market Specialization
- Operational Excellence & Trusted Platform

Pillar:

Description

Value to Marigold:

Description of how this research supports strategic goals.