

FREE INTAKE FORM

Research Roadmap Intake Form

Get a custom research plan built around the decision you actually need to make. Fill in the minimum inputs below and we'll turn them into a sequenced, high-value research roadmap — no wasted studies, no guesswork.

- 1 Capture product context, the decision, and the stakes in one place
- 2 Inventory the evidence you already have before commissioning anything new
- 3 Surface budget, recruiting, and compliance constraints up front
- 4 Submit it and receive a draft roadmap within 3 business days

A roadmap starts with the decision

Most research goes wrong before a single question is written — because it begins with a method ("let's run a survey") instead of a decision ("should we ship this feature, and to whom?"). This form flips that order. Tell us the decision, the deadline, and the stakes, and the right research follows.

The goal of this intake is to gather the minimum inputs needed to design a high-value research roadmap: what you're deciding, what you already know, and what limits the work. Spend twenty minutes here and you'll save weeks of misdirected studies later.

The core principle

Scope research backwards from the decision — never forwards from a method.

Every study should change an action you'd otherwise take. If a finding wouldn't move the decision, it doesn't belong on the roadmap. Anchor everything to the call you have to make, the date you have to make it by, and the cost of getting it wrong. That trio determines how much research is worth doing — and which questions come first.

How to use this form

- Work through **Parts 1-4** in order — each section feeds the next.
- Answer in specifics: real numbers, real dates, real constraints beat vague intentions.
- If a field doesn't apply, write "n/a" rather than leaving us to guess.
- Submit when complete (**Part 5**) and we'll return a draft roadmap in 3 business days.

Who should fill this in

Ideally the person who owns the decision — the product, growth, or research lead who will act on the answer. The clearer you are about the call you face, the sharper the roadmap we can build.

Product context

Set the scene. Who is this product for, and where is it in its life? This grounds every recommendation that follows in your actual situation rather than a generic playbook.

FIELD	YOUR ANSWER
Product name	
Primary user segment	
Current stage (MVP, growth, enterprise)	

Stage at a glance

Tick the description that best matches where the product is today — it shapes how much evidence already exists and how fast you need to move.

- ☐ **MVP** — early, validating the core value proposition and first users
- ☐ **Growth** — proven core, now optimising adoption, retention, and expansion
- ☐ **Enterprise / scale** — mature, defending share and serving complex buyers

Name the segment narrowly

"Everyone" is not a segment. The tighter you define the primary user — by behaviour, context, or job-to-be-done — the more targeted and trustworthy the resulting research will be.

ANYTHING ELSE WE SHOULD KNOW ABOUT THE PRODUCT

The decision you need to make

This is the heart of the form. A roadmap is only as valuable as the decision it serves — so be precise about the call, when it lands, and what's riding on it.

FIELD	YOUR ANSWER
What is the decision you need to make?	
Deadline for the decision	
What happens if we get it wrong?	

Make it a real decision

"Should we...?" — not "We'd like to learn about..."

A good decision statement names two or more concrete options and an owner who will choose between them. "Should we launch variant A or B?" is researchable. "We want to understand our customers better" is a wish, not a decision — and it produces a study with no off-ramp and no end.

Sharpen the decision — answer in detail

THE OPTIONS ON THE TABLE (WHAT COULD WE DECIDE?)

WHY THIS DECISION MATTERS NOW (THE STAKES / COST OF GETTING IT WRONG)

Current evidence

Before we recommend new research, we map what you already know. Existing evidence shortens the roadmap, sharpens the open questions, and stops you from paying to learn the same thing twice.

FIELD	YOUR ANSWER
Prior research (studies, interviews, tests already run)	
Existing data sources (analytics, CRM, support, sales)	
Known hypotheses (what you currently believe is true)	

What you already have — tick all that apply

- ☐ Past user interviews or surveys relevant to this decision
- ☐ Product or behavioural analytics (usage, funnels, retention)
- ☐ Sales, support, or success conversations and tickets
- ☐ Competitor or market data / benchmarks
- ☐ An internal point of view or hypothesis we want to test

Write down your hypotheses — even the shaky ones

Stating what you currently believe lets the roadmap target the beliefs that, if wrong, would most change the decision. Untested assumptions are exactly what good research is for.

WHERE YOUR CURRENT EVIDENCE FEELS WEAKEST OR LEAST TRUSTWORTHY

Constraints

A roadmap that ignores reality never ships. Tell us what bounds the work — budget, recruiting, and compliance — so every recommendation is something you can actually do.

FIELD	YOUR ANSWER
Budget range	
Recruiting limits (audience access, panel, incentives)	
Legal / compliance constraints (privacy, regulated market, NDAs)	

Common constraints — tick any that apply

☐ Fixed or limited research budget for this decision

☐ Hard-to-reach or niche audience to recruit

☐ Tight timeline that limits study type or sample size

☐ Privacy / data-protection rules (e.g. GDPR) on participant data

☐ Regulated industry or claims requiring legal review

☐ Confidentiality — unreleased product, NDA-only participants

Constraints are inputs, not obstacles

A tight budget or timeline changes the method — not whether you should research.

Knowing the real limits up front lets us right-size the work: a lean, decision-focused study beats an ambitious one you can't finish. The more honest you are about constraints, the more usable the roadmap.

Next steps

You've gathered everything we need to design your roadmap. Here's what happens once you submit.

1. **Submit the form.** Send your completed intake to Portifer — make sure Parts 1–4 are filled in as specifically as possible.
2. **We review and design.** Our team maps your decision against your existing evidence and constraints to scope the right sequence of research.
3. **Receive a draft roadmap in 3 business days.** You'll get a sequenced plan — what to research, in what order, with what method — built around the decision you need to make.

Before you send — quick check

- ☐ Product context is complete (name, segment, stage)
- ☐ The decision is stated as a real choice with a deadline and clear stakes
- ☐ Existing evidence and hypotheses are listed
- ☐ Budget, recruiting, and compliance constraints are noted

BEST CONTACT FOR THE DRAFT ROADMAP (NAME & EMAIL)

Get a custom research roadmap

Portifer turns your decision, evidence, and constraints into a sequenced research plan — so every study earns its place and moves the call you actually need to make.

[Submit your intake & start free →](#)