

Research project workflow

A compact student workflow for moving from an initial finance idea to data, analysis, writing, and feedback.

PHASE 1 - FRAME THE QUESTION

01 Spark the idea

Notice a puzzle, contradiction, or why-does-this-work question.

Examples: WSJ, Financial Times, Bloomberg, Odd Lots podcast

02 Quick literature scan

Check whether this has already been answered and what is already known.

Examples: Google Scholar, SSRN, NBER, Consensus.app

03 Refine the question

Narrow it until the question is specific, answerable, and connected to evidence.

PHASE 2 - PLAN THE STUDY

04 Form a hypothesis

Predict what you expect to find and explain why that pattern should appear.

05 Choose data and method

Match the question to accessible data and beginner-friendly tools.

Examples: FRED, SEC EDGAR, yfinance, Python, Excel

PHASE 3 - DO THE WORK AND SHARE

06 Run your analysis

Apply the method, keep a record of choices, and document the results.

Examples: GitHub, Jupyter Notebook, Google Colab

07 Interpret findings

Ask what the numbers mean, what they do not prove, and whether they are robust.

08 Write up and get feedback

Share a draft, revise, and repeat. Good projects improve through review.

Example: EMU Writing Center

Findings often send you back to step 03. That is the work, not failure.