Research Operations in User Research

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TorCHI

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Agenda

- Understanding Research Operations
- Selecting The Right Tools
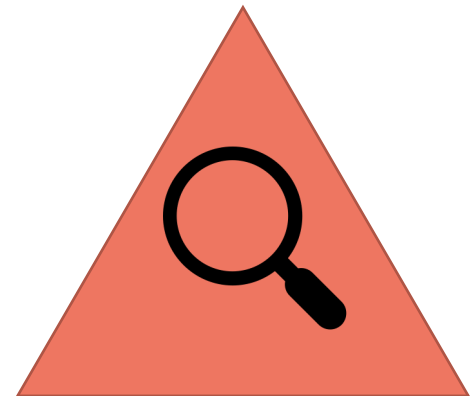- Creating Research Repositories
- Democratizing Research
- Takeaways
- Q&A

Understanding Research Operations
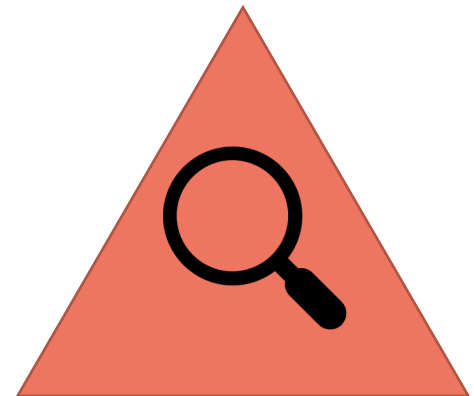
What is ResearchOps?

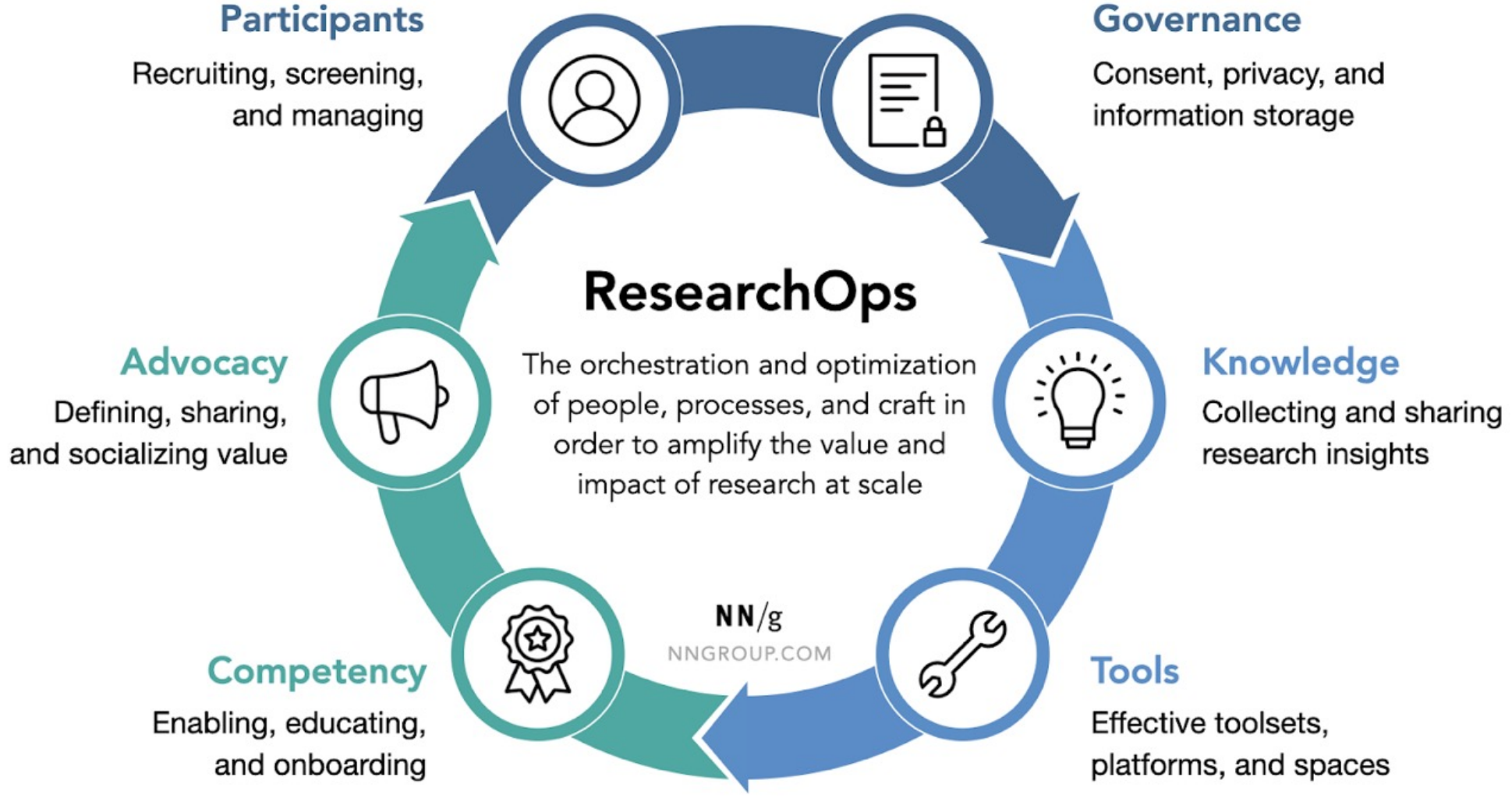Goal is to amplify the **impact** and **value** of **user research**.

- Impacts management of
  - people,
  - processes
  - tools

- Has always existed in some form

- Became an explicit role for some teams

What is ResearchOps?

- **Need for user research** = **Need for ResearchOps**
- Alleviate strain on management of research teams, process and insights

Participants
Recruiting, screening, and managing

Governance
Consent, privacy, and information storage

Advocacy
Defining, sharing, and socializing value

ResearchOps
The orchestration and optimization of people, processes, and craft in order to amplify the value and impact of research at scale

Knowledge
Collecting and sharing research insights

Competency
Enabling, educating, and onboarding

Tools
Effective toolsets, platforms, and spaces

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My Background

- Started as a researcher of one
  - Had to learn how to engage the whole organization in research as there was no one to support if I couldn't work

- Cofounder in 2 startups
  - Built user research departments from the ground up

Y Combinator

mello

Selecting
The Right Tools

The State of Research Tools

- Significant increase in the last several years of the:
  - Type
  - Quantity
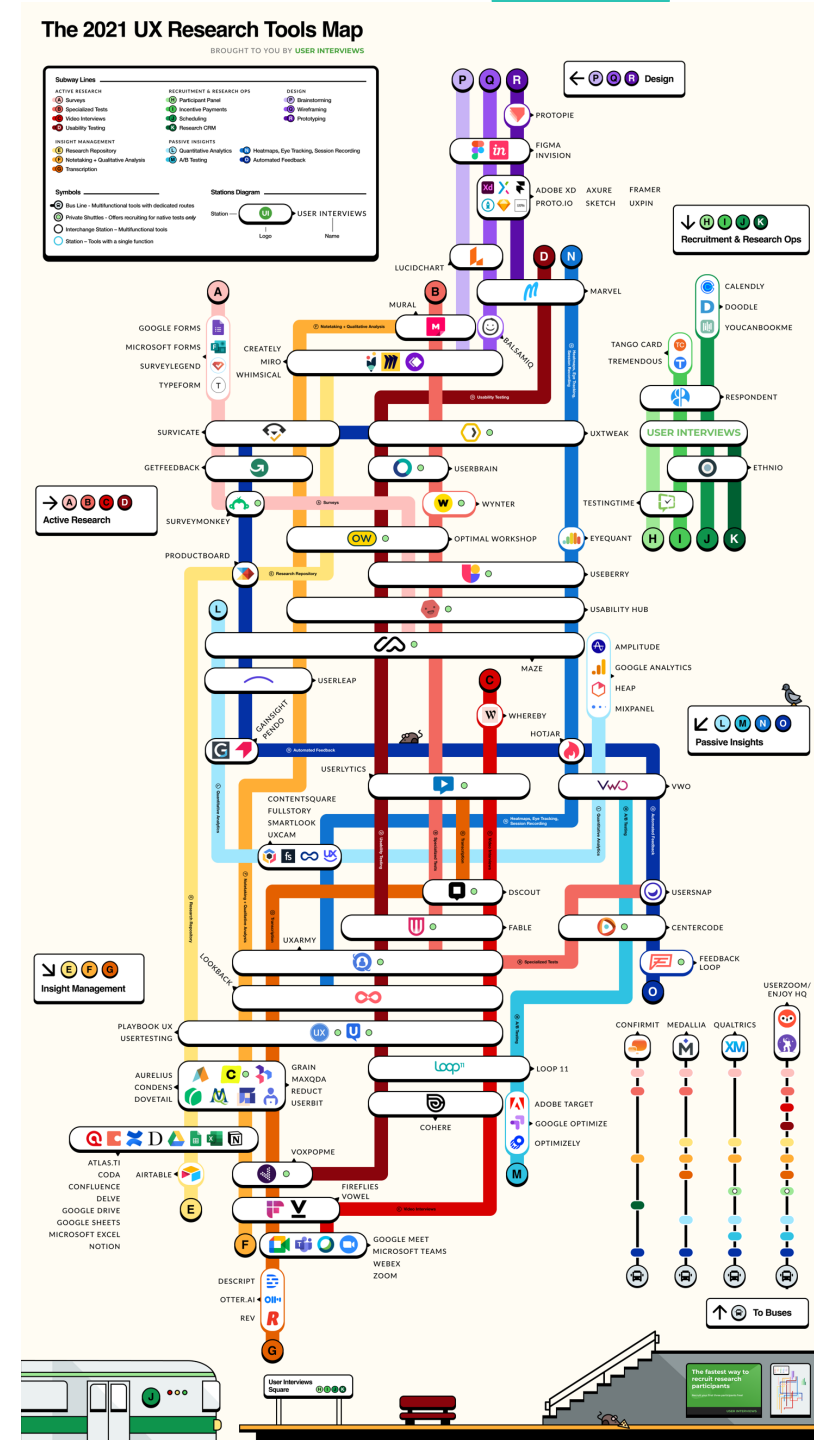- New tools = more decision fatigue

Image Source: User Interviews

Types of User Research Tools

ACTIVE RESEARCH
- (A) Surveys
- (B) Specialized Tests
- (C) Video Interviews
- (D) Usability Testing

RECRUITMENT & RESEARCH OPS
- (H) Participant Panel
- (I) Incentive Payments
- (J) Scheduling
- (K) Research CRM

DESIGN
- (P) Brainstorming
- (Q) Wireframing
- (R) Prototyping

INSIGHT MANAGEMENT
- (E) Research Repository
- (F) Notetaking + Qualitative Analysis
- (G) Transcription

PASSIVE INSIGHTS
- (L) Quantitative Analytics
- (M) A/B Testing
- (N) Heatmaps, Eye Tracking, Session Recording
- (O) Automated Feedback

Tool Considerations

- What are your jobs to be done?

When _____	I want to _____	So I can _____
↑	↑	↑
Situation	Motivation	Expected outcome
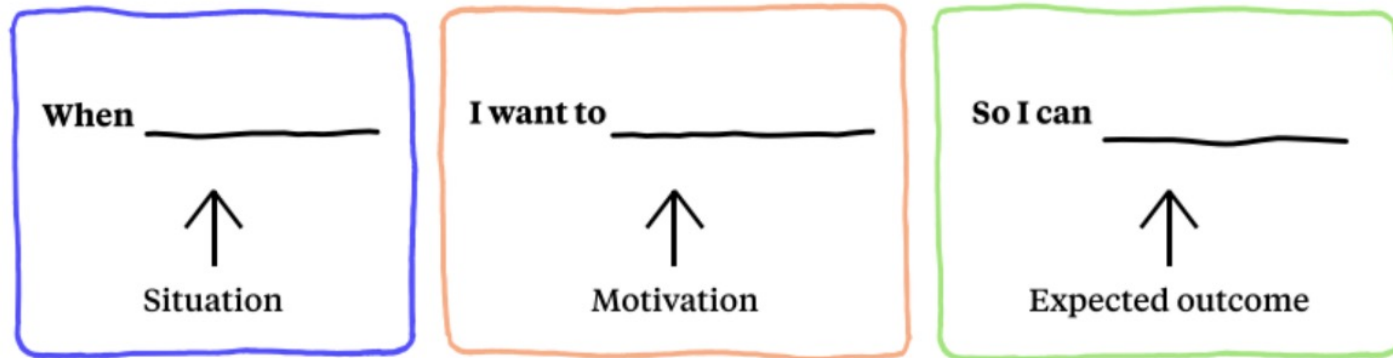
Tool Considerations

- Minimal viable research requirements
- Time horizon
- Purpose
- Other Researchers/ Designers?
- Costs
  - Are you able to compare costs between tools easily?

Vendor Considerations

- I developed a b2b SaaS tool through YCombinator, which has led me to apply some unique insights:
    - Researching the company – go to Capterra and G2 for customer and prospect reviews.
    - Crunchbase to look up their funding structure and try to examine the cash flow and trade-offs.
    - Look at LinkedIn in to see if they have engaged in layoffs recently.

Creating
Research Repositories

User Research Repositories

A database that collects and organizes user data, insights to help research teams and the overall organization to **collaborate** and **address user feedback**.

Example Research Repository

Search:

Select:	Filter:	List of Findings:			
Reports	Product ✕	**Product**	**Topic**	**Severity**	**Finding**
Findings	Topic ✕	GoFreeBo.com	Login	High	Don't see the login button
Recordings	Severity ✕	GoFreeBo.com	Login	High	Hard to tap on phone screen
Transcriptions	Contact ☐	GoFreeBo.com	Login	Medium	A little hard to read on phone
Plans	Status ☐	GoFreeBo.com	Login	Good	Noticed the "remember user name" checkbox
Schedules	Research Method ☐	LiveUpBo.com	Login	High	Don't know login benefits
Requests	Date ☐				
Methods					
Resources					

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User Research Repositories

- Can be **in-house** or a **purchased solution** facing
- Can be hosted on a third-party or internal platform


Example Research Repository

Search: [🔍]

Select:	Filter:	List of Findings:			
Reports	Product ✕	**Product**	**Topic**	**Severity**	**Finding**
Findings	Topic ✕	GoFreeBo.com	Login	High	Don't see the login button
Recordings	Severity ✕	GoFreeBo.com	Login	High	Hard to tap on phone screen
Transcriptions	Contact ☐	GoFreeBo.com	Login	Medium	A little hard to read on phone
Plans	Status ☐	GoFreeBo.com	Login	Good	Noticed the "remember user name" checkbox
Schedules	Research Method ☐	LiveUpBo.com	Login	High	Don't know login benefits
Requests	Date ☐				
Methods					
Resources					

Constructing Research Repositories

- The steps of building Research Repos are similar to a digital product:
  - Brainstorm
  - Define
  - Design
  - Test
  - Launch
  - Iterate
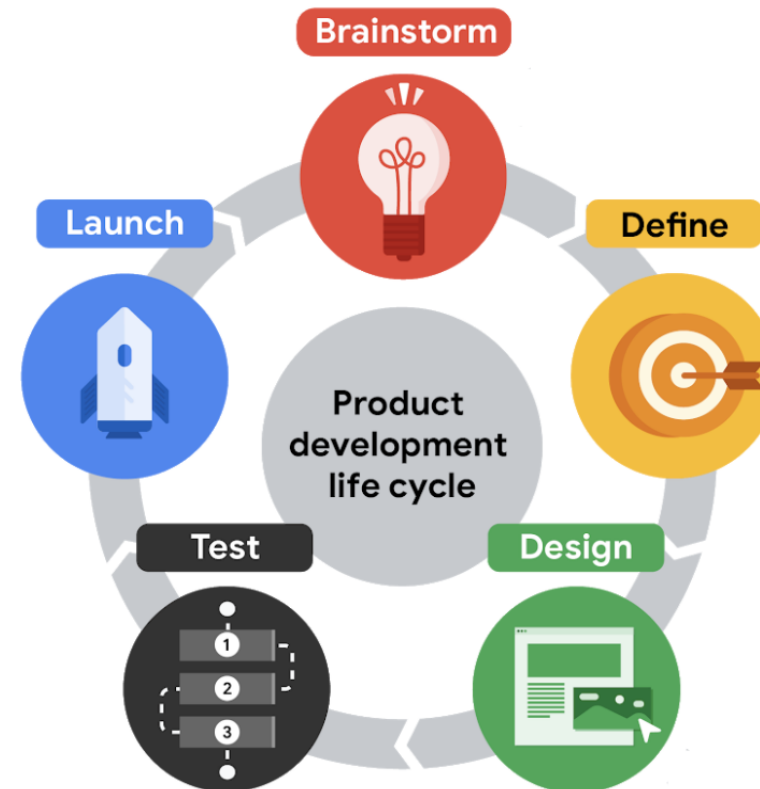
Data Considerations

- Type of data being stored
  - Presentations?
  - Videos of Participants?
  - Recordings?
- How will access be monitored?
- Repo IT security policies
- How to export repo data?
- Who will have access?

Legal Considerations

- What are the legal implications for storing the repo data?

- How long should the raw data be kept before being destroyed?

- How will research information that has been placed with an NDA be handled?

Organizational Considerations

- Who is your intended audience?

- Sustainable training process

- How to Ensure Material
  - Relevance
  - Longevity

- Unhappy Paths – What could go wrong?

Repo Considerations

- Training
- Longevity
  - 1 year's worth of data?
  - 5 years of data?
- Current Company Size
  - 2x larger
  - 3x larger

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Democratizing Research

Democratizing Research

"The definition of democratization is murky at best. At a very high level, it means engaging stakeholders in the research process. This could be through observation, collaboration, or training."

~Lucy Denton (Dovetail's Product Design Lead)

Democratization of Research

Pros

- Increased capacity for research
- Equips more people in the organization for research
- Work-life balance for researchers
- Increases spread of research – esp. in low impact, tactical work
- Fosters cross functional collaboration leading to a more innovation

Cons

- Critics see it as diluting the craft of research
- Possibility for misinformation
- Increased need for quality control supervision
- Increased tooling i.e. users for licenses

Researcher Considerations

- What is the state of the research projects required by the organization?

- What is the research maturity level of the organization?

- How many researchers are on the team?

- What are the risks to the research projects in the case that the researcher is incapacitated?

- What does scaling of research for the organization look like in the future (e.g. more researchers)?

Non-Researcher Considerations

- What is their knowledge on research?

- What is the willingness for non-researchers to be trained in research?

- What sort of activities can non-researchers do?

- What other tools are they already using? How accessible will this new tool be in their work stream?

- How will they be trained and what will they be trained on? Tools or working with participants?

- What activities will non-researchers be working independently? What activities will be supervised by a researcher?

- Will you need to budget more for tools licensing?

Takeaways

- ResearchOps responsible for the orchestration and optimization of people, processes, and craft in order to amplify the value and impact of research at scale.

- Over the past several years the number and type of tools that can be used for user research has grown considerably.

- Consider the jobs to be done of your research tools and the financial sustainability of your vendors.

Takeaways

- View building your Research Repos like building and maintaining a product.

- There is not set model for research democratization.

- Research democratization comes with both opportunities and challenges based how your organization is structured.

Questions? Comments?

Thank You

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Resources

Bruce, Sean and Denton, Lucy. What is the democratization of user research? Dovetail. https://dovetailapp.com/blog/what-is-the-democratization-of-user-research/

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Pernice, Kara. Research Repositories for Tracking UX Research and Growing Your ResearchOps. Nielsen Norman Group. https://www.nngroup.com/articles/research-repositories/