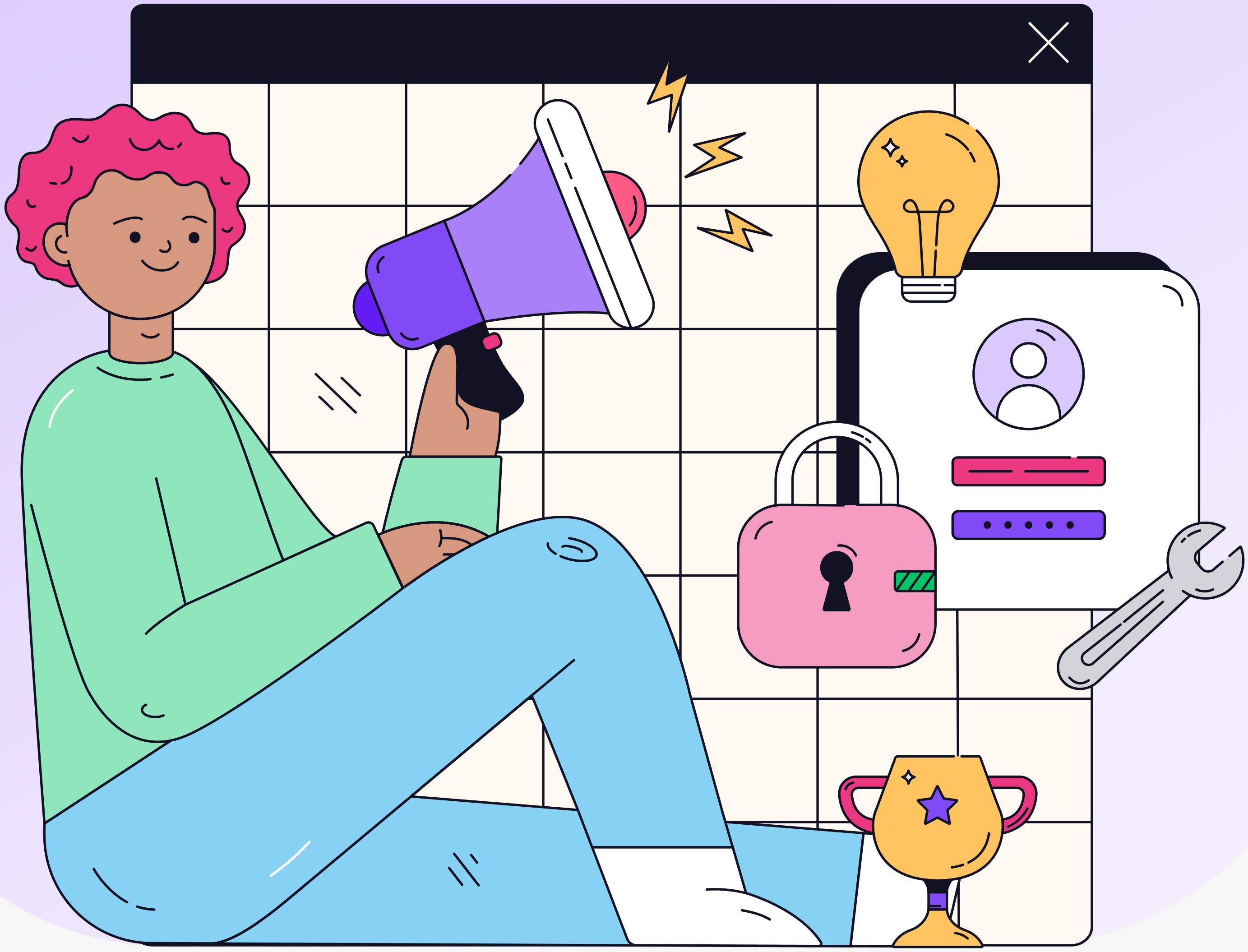
Rally



The 2024 ReOps Playbook

ebook . 2024

A note from the editor

Welcome to *The 2024 ReOps Playbook*! Like many of you, I've ventured deep into the wonderful and fascinating world of Research Operations. Throughout this journey, and in large part thanks to the many wonderful ReOps professionals I've come to know, I've discovered how central ReOps is to crafting products and services that truly resonate with users – a goal that should extend to every corner of an organization.

Research Operations forms the foundation for organizations that genuinely value customer insights and aspire to create user-centered products and services. At Rally, we believe that ReOps isn't just a support function; it's a strategic cornerstone essential for any organization's success.

Our hope with this playbook is to offer you guidance, whether you're new to ReOps or seeking to enrich your existing practice. Through the insights of leading ReOps practitioners featured within these pages, we aim to highlight the critical role ReOps plays, not just in research, but in shaping businesses to be more attentive, responsive, and aligned with their users.

As ReOps continues to grow and evolve, we feel privileged and excited to follow along and hopefully play a role in further amplifying its necessity and value. This journey is not just about the methodologies or the outcomes; it's about the people — the wonderful, impressive humans at the core of ReOps. Connecting with and learning from these individuals has been one of the most rewarding aspects of compiling this playbook.

Thank you for joining us on this exciting exploration. Here's to moving forward, learning together, and making a meaningful impact through our collective dedication to Research Ops.

Rally on,
Lauren & The Rally Team

Chapter 7

Chapter 8

Resources

A special thanks to our contributors

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Understanding ReOps

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What is Research Operations (ReOps)? Kate Towsey, founder of the ResearchOps Community defines it this way: "ResearchOps is the people, mechanisms, and strategies that set User Research in motion. It provides the roles, tools, and processes needed to support researchers in delivering and scaling the impact of the craft across an organization."

Who is Kate Towsey? We like to refer to her as the Queen of ReOps. Kate, who spent nearly 5 years building ReOps at Atlassian as their ReOps Manager, was the instigator of the #WhatisResearchOps global initiative, which brought awareness to ReOps, effectively putting it on the map.

"Kate Towsey has been a constant source of inspiration for me," said Tim Toy, Senior Program Manager, Research Operations at Adobe. "She was one of the first people I met that really wanted to shout from the rooftops about ReOps to the larger tech world."

Kate founded the ReOps Community on Slack in 2018 with a simple tweet. Now, the community has thousands of members from over 150 countries. Recently, Kate also founded The Cha Cha Club, an invite-only club for full-time ReOps professionals. "It's an amazing community that really makes you feel like you are part of a real discipline rather than something you just fell into," added Tim. It's safe to say that Kate has played a pivotal and instrumental role in the success, impact, and growth of ReOps.

What's the role of ReOps?

"It's a common misconception that ReOps' only responsibilities are limited to recruiting, scheduling, and compensating participants," said Heather Ashley, UX Research Coordinator at Webflow. "While it's true these duties are a considerable portion of a ReOps pro's role, we do a lot more than simply finding, scheduling, and paying participants for their feedback and time; ReOps also democratizes research so that anyone and everyone can feel empowered and get involved – even those who've never led a research session before."

Though ReOps is often heavily involved in the individual steps of the research process, Kyle Romain, Senior Manager of UX Research at ezCater, said ReOps' responsibilities within an organization are less about owning certain aspects of the research process and more about making the Research practice as a whole more sustainable, scalable, and consistent.

Accomplishing this, said Crystal Kubitsky, Product UX Ops Lead at MongoDB, requires careful attention to important aspects like:

- Defining policies and processes
- Developing and delivering training
- Establishing and enabling tools
- Building and nurturing panels of participants and recruitment channels
- Ensuring legal and ethical practices are honored and embraced

"A good ReOps will provide peace of mind for the researcher, the participant, and the greater company," said Tim.

For the researcher: "ReOps allows the researcher to focus on their research and stakeholders, not on all the logistical details involved in getting a single participant into a lab or a Zoom session."

For the participant: "ReOps ensures clear communication and expectations regarding the participant's role and experience with research."

For the company: "ReOps ensures that all processes, tools, and systems that researchers use are compliant with the company's policies and processes. Finance, procurement, and legal should all be happier they can talk to one point-of-contact rather than have 75 researchers asking them questions."

It's simple; ReOps' impact goes both deep and wide, not just revolutionizing the practice of Research within an organization but ensuring a more user-centric approach to building products and services.

In this ebook, we explore the world of Research Operations and further expose its immense influence. We understand that your time is valuable, so we've designed this guide to be easily navigable. The following questions will help you swiftly find the information most relevant to your needs:

How to identify your need for ReOps

Kyle Romain
Sr. Manager of UX Research
ezcater

If you're reading this book or have come directly from chapter one, you probably already recognize the need for Research Operations, or you may already have it in place — great! But for those who are still unsure, we'll explore ways to determine your need for ReOps and offer tips for making a compelling business case. This guidance will be useful whether you're just starting to consider ReOps, looking to expand its role in your organization, or seeking to articulate its ongoing value to your team.

There are two key questions to explore. **1) Do you need ReOps?** and **2) When should you introduce ReOps?**

The need for ReOps is universal in every organization, and every research team is likely already performing some form of ReOps, perhaps informally. Ideally, you should introduce a more formalized version of ReOps or ReOps strategies as early as possible.

"Investing in ReOps early on can help you lay a strong foundation and lead a pivotal role in creating streamlined processes, reducing overhead, and emphasizing quality and consistency throughout all research projects and initiatives," said Research Operations Specialist Julian Della Mattia in a recent Rally blog post.

But this isn't always as easy as it sounds. Introducing ReOps into your organization can require significant time, energy, and often a budget you may not have.

In this chapter, we'll share questions to consider when investigating your need for ReOps, and provide tips for building a strong business case for it. First, let's explore how to be sure that you need ReOps.

Do I need ReOps?

Short answer: YES.

Long answer: If you're unsure whether ReOps is necessary, consider these questions:

- **Is my research team large (8+ members)**?
- **Are non-researchers conducting research**?
- **Is the research impactful and utilized effectively**?
- **Are we struggling to find participants**?

Answering 'yes' to any of these questions strongly indicates that your team could really benefit from introducing ReOps.

Is there a right time to invest in ReOps? Julian believes the earlier, the better. "The best time to invest in your research infrastructure was yesterday; the next best time is today." Now, let's explore some strategies for effectively introducing ReOps into your organization.

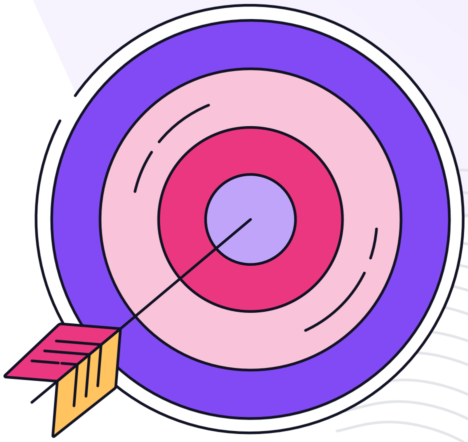
How to introduce ReOps into your org

"It is really important that anyone operating in any sort of research function has the ability and the capacity to manage ReOps to a certain extent," said Kyle Romain, Senior Manager of UX Research at ezCater.

"It is really important that anyone operating in any sort of research function has the ability and the capacity to manage ReOps to a certain extent."

Kyle Romain
Sr. Manager of UX Research at ezCater

One solution does not fit all teams, and the best approach will vary depending on the specific needs of your organization. Although we lean toward hiring a full-time ReOps professional, there are some alternatives that may better fit your needs, budget, or limitations:



Hire a full-time dedicated ReOps professional

Pros:

- Optimizes focus and resources on ReOps.
- Increases research efficiency by freeing up your researchers' time.
- Promotes dedicated and strategic development of ReOps.
- Ensures consistent attention to ReOps tasks.
- Allows researchers to concentrate solely on research.

Cons:

- Time-consuming recruitment process.
- Budget constraints for new hires.
- May not be feasible for very small or solo teams.

What you need to do:

- **Define the role and its responsibilities.**
- **Assemble a diverse hiring team.**
- **Craft a detailed job description.**
- **Implement a thorough hiring, onboarding, and training process.**

Training someone on your team

Pros:

- Utilizes existing resources and knowledge.
- Encourages team growth and skill development.
- May be more budget-friendly.

Cons:

- Divides focus of trained team member.
- Potential lack of specialized ReOps expertise.
- Risks overloading existing staff with dual responsibilities.

What you need to do:

- **Identify potential trainee with organizational and research understanding.**
- **Develop a structured training plan.**
- **Allocate time for training and skill development.**

Building out your tool stack

MORE ON THIS IN CH. 5

Pros:

- Streamlines and automates ReOps processes.
- Enhances efficiency and data management.
- Accessible even to smaller teams.

Cons:

- Requires up-front investment in tools.
- Needs ongoing maintenance and updates.
- Might result in a learning curve for the team.

What you need to do:

- Assess your current tools and identify gaps.
- Research and select appropriate tools.
- Train team on tool usage.

Hire a contractor, freelancer, or consultant

Pros:

- Brings in specialized, experienced expertise.
- Flexible and potentially more cost-effective than full-time hire.
- Quick way to implement ReOps without long-term commitment.

Cons:

- Less integration with the team.
- May not have a long-term commitment to your organization.
- Variability in the quality of external hires.

What you need to do:

- Define the scope and duration of the contract.
- Search for and vet suitable candidates.
- Manage the contractual and the onboarding process.

Implement a few strategies and utilize current team

Pros:

- Cost-effective and utilizes existing team resources.
- Quick to implement with familiar staff.
- Encourages a collaborative team approach to ReOps.

Cons:

- Adds additional workload to researchers.
- May lack the focused expertise of a dedicated ReOps role.
- Could be a temporary or less structured solution.

What you need to do:

- Identify key ReOps tasks to be integrated.
- Allocate these tasks among researchers.
- Provide necessary training or resources.

With an understanding of the different ways to integrate ReOps into your organization, the next critical step is to construct a compelling business case that will support your chosen strategy and highlight the value ReOps brings.

How to make the case for ReOps

Why build a business case for ReOps? A business case is valuable for many reasons. Introducing ReOps is going to be an investment for you, your team, and your organization. A well-constructed business case justifies this investment, clearly defines the value proposition, aligns with broader organizational goals, assesses risks, outlines resource allocation, sets expectations, provides a framework for measuring success, and, ideally, secures stakeholder buy-in. In short, a business case is a powerful tool before, during, and after the process of introducing ReOps into your organization.

Now, to build a compelling case for ReOps, you need to first do your research.

Use these questions to understand and showcase the current state of Research, identify your pain points, and explore how ReOps can offer solutions:

- How efficiently are research activities currently managed in our organization?
- Do we frequently encounter delays or obstacles in our research process?
- How do we handle research data management and storage?
- Are our researchers spending too much time on administrative or operational tasks instead of core research activities?
- Do researchers have adequate support in terms of tools, resources, and infrastructure?
- As our research needs grow, can our current processes scale effectively?
- Do we have a plan to manage an increase in research activities or data?
- Are we consistently maintaining high quality in our research output?
- How do we ensure compliance with legal and ethical standards in our research?
- Is there effective communication and collaboration among researchers and between researchers and other departments?
- Are research findings easily accessible and utilized by different teams within the organization?

- Are resources, including budget, personnel, and tools, being utilized optimally?
- How quickly can our research processes adapt to new methodologies or changes in research focus?
- Are we able to innovate effectively in our research approaches?
- How are stakeholders engaged in the research process?
- Is there a mechanism for gathering and incorporating feedback from stakeholders?

When building your business case, include these essential elements:

Needs / pain points
Utilize the questions above to identify your pain points. Engage your team to share their experiences and needs.

Definition of ReOps and its value props
Position ReOps as the solution to your identified pain points. Tailor your pitch to resonate with what matters most to your stakeholders.

Desired outcome and impact
Emphasize how ReOps can lead to impactful outcomes like more effective use of research budgets, increased ROI, etc. Focus on outcomes and impacts that matter to your stakeholders and the success of the broader organization.

Potential risk and mitigation strategies
Address any potential risks and detail strategies to mitigate or minimize their effects.

Implementation plan
Outline key steps, timelines, required resources, responsible parties, etc.

Clear metrics for success
Quantify your desired outcomes and impact. Clear, measurable goals are easier to achieve than vague objectives.

ReOps is integral in any organization. Hopefully this chapter has equipped you with the tools to evaluate the importance of ReOps and begin crafting an effective implementation strategy. Continue on to the next chapter to dive into the nuances of creating and nurturing an efficient ReOps and Research team.

Chapter 3

How to build and maintain a Research & ReOps team

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Research Ops Mgr.
Etsy

Andrew Warr
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Tim Toy
Sr. Program Mgr., ReOps
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UX Research Ops Coordinator
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Heather Ashley
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Webflow

Becky Wright
Product UX Researcher
UserTesting

Research Operations is integral to building, maintaining, and scaling a robust research function within an organization. This chapter will explore common ReOps function structures, how to hire for ReOps, structure your hiring team, craft an effective onboarding process, and navigate career progression. By introducing ReOps into your team, you not only enhance your research capabilities but also significantly increase your organization's potential for growth and innovation.

When it comes to ReOps, there's no one-size-fits-all. How ReOps will look and function in your organization depends on a number of factors such as organizational structure and size. For example, whether Research has its own function or lives under a different function like UX/Design or Product will affect where ReOps lives within your org.

To understand how ReOps can look in your organization, it's important to understand two common organizational models for research functions. These models can influence things like your research approach, the topics you research, and the structure and responsibilities of your team.

Centralized: Research is conducted by a dedicated team of researchers.

- *Pros:* consistency, standardization, focused expertise
- *Cons:* potential isolation from other teams, limited perspective

Decentralized: Research is conducted by researchers embedded within different teams, such as product, design, or marketing.

- *Pros:* close alignment with teams research supports, diverse perspectives and representation
- *Cons:* lack of standardization, resource duplication or inefficiency

These two models can be used for Research Operations as well, depending on the needs and structure of your organization. Here are some real-life examples of how ReOps and research teams could be organized:

ORGANIZATION	TEAM COMPOSITION	ADDITIONAL NOTES
GitLab	• UX Director • UXR Manager • 8 User Researchers (staff, senior, & intermediate) • 1 ReOps professional	UX strategically merged with Product within the last year. Team supports 90+ folks from Design, Product, and other teams.
Webflow	• Director of Insights • Product Decision Scientists • 4 User Researchers • 1 ReOps professional	Each researcher is aligned with core company pillars (Manage & Optimize, Design & Build, Grow & Extend, Collaborate & Scale).
Adobe	• 10 Research Managers • 65 User Researchers • 4 ReOps professionals	Designers, PMs, and engineers are regularly conducting research.

ORGANIZATION	TEAM COMPOSITION	ADDITIONAL NOTES
MongoDB	• 15 User Researchers • ReOps team	Each researcher is embedded in a product space, defining and conducting strategic research and consulting with their design partners on evaluative research needs. The research team sits alongside Product Design within the larger Product organization. ReOps sits outside the Product organization with other program management teams. ReOps are true peers and partners to our researchers and designers.

Dropbox	• 3 Research Studios
	• ReOps Team
	  • ReOps Manager
	  • 2 Research Coordinators
	  • Research Program Mgr.
	  • Research Librarian
	  • Contractors
		ReOps supports all research projects across the three studios as well as the entire company.
		
		Each Research studio has a lead and several UX Researchers reporting to them.

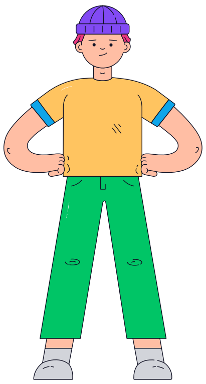
FAIRE	• Head of Research • 4 Researchers • 4 ReOps professionals	There is a large distributed research effort consisting of around 100 individuals conducting their own research to support the product and overall company development process. Research and ReOps sit within the Design org and each researcher is assigned to a product pillar.

Likely some of you reading this will only add one ReOps professional to your research function, or already have one. But for larger organizations, a ReOps team may make sense. As ReOps has grown, it's become clear that there are many specializations within ReOps that can justify a dedicated role such as:

Research Ops Manager

Leads the ReOps team and oversees the operational aspects of research projects, including resource allocation, process optimization, and team management.

Research / Recruiting Coordinator

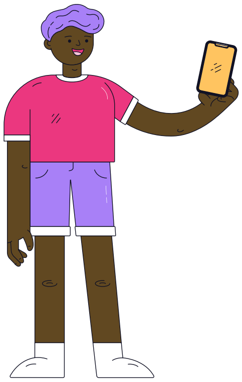


Manages participant recruitment and logistics for all research projects, ensuring a smooth and efficient process for both researchers and participants.

Research Program Manager

Coordinates and oversees research projects, ensuring alignment with organizational goals, efficient execution, and effective resource management.

Research Librarian



Organizes, manages, and stores research data and findings; ensures that data is easily accessible and usable.

ReOps teams typically start by hiring a recruiting coordinator, and later expand to include roles such as a manager or program manager as the team grows and operations become more complex. Ultimately, since ReOps as a function is still young and continuing to grow, the role you add to your organization can and should be tailored and built to your own needs.

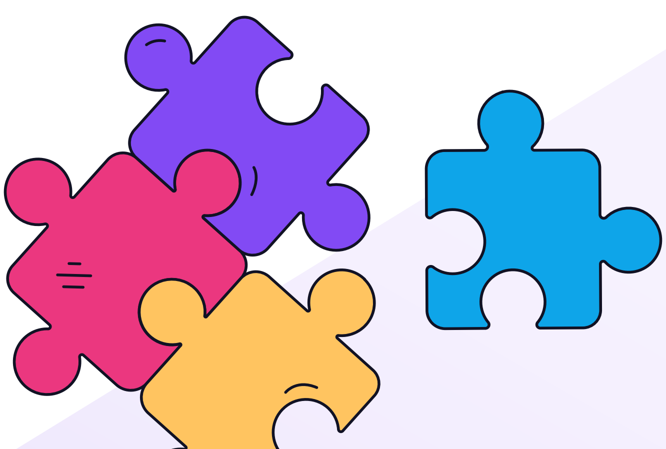
How to build the case for hiring

The first step, Andrew Warr said, is to ask yourself these three questions:

- With the people you currently have, what do you have the scope to cover?
- What do you not have the resources, in terms of headcount or budget, to accomplish?
- Of the things you've prioritized, is what you're not doing more important than what you've said you can do?

When going through this process, "it's so important to be ruthless about what we can and can't do," said Andy, who is the Director of Portfolio Research & Insights at Dropbox. "If you really want to do something, then you need to think about creative solutions in terms of rethinking processes, prioritization, or resource allotment, whether that be budget or headcount towards enabling more to be done. It's not always possible to do more with less."

Keep in mind the priorities of your broader organization and consider involving stakeholders and cross-functional partners early in the process of building the case for hiring. "If it's important to the organization," said Andy. "They will put resources behind it."



Andy & Kaela's insights on headcount projections

Key challenges with headcount:

- Growing appropriately with other functions
- Competing for budget or trying to divide budget among other teams

Key factors to consider with headcount:

- Projected growth and future needs of the research team
- Business objectives, such as entering new markets and launching products
- Trade-offs between investing in tooling and expanding the team
- Proportions of research to be outsourced vs. conducted internally

Consider headcount from a ratio perspective.

- Start here: For 20 engineers, there are 2 PMs, 2 designers, and 1 researcher.
- Typically, Andy has seen a 1:5 ratio when it comes to ReOps & researchers.

Most headcount planning comes down to these 2 questions:

- What do we want to build? How many engineers do we need to build that? Then everything from there is a trickle-down effect.

Utilize growth projections to further provide insight into what you and your team currently can and cannot do. Ask yourself:

- What would I do if we had 30% growth?
- What would I do if we remained flat?
- What would I if we had negative growth?

Keep an eye on the growth of other teams. To ensure you're hiring appropriately, you need to be working with other leaders in your org to understand how they're growing and adapting. Hiring out of pace with other teams can lead to complications down the road.

> "Whatever your approach to headcount, be principled," said Andy. "It's important to not grow for the sake of growing."

Hiring for ReOps

While there isn't a Research Operations degree (yet), or anything similar, there are some common backgrounds you may see among the ReOps community such as research, psychology, UX, library science, operations, academia, and customer support. A beautiful part of ReOps is that since it is still growing as a function, there is no prescriptive background or education needed. This allows for a rich diversity of perspectives and skills that makes ReOps as a function more adaptable and innovative.

"Research and Research Ops bring together really talented and skilled people from a variety of backgrounds and experiences," said Kyle Romain, Senior Manager of UX Research at ezCater. No matter how far your background may feel from ReOps, there are luckily many skills and mindsets that can still help you succeed.

Here are some other skills and qualities that can help someone thrive in ReOps, no matter their background or previous experience:

Organization & Project Management

"This is key for any kind of operations role where you are constantly juggling multiple projects and need a system or approach for keeping track of the important details, data, dates, etc. and being able to communicate to your stakeholders what's going on in a timely and appropriate manner."

Tim Toy
Sr. Program Manager, Research Ops at Adobe

Communication

"You need someone who can provide prompt project updates, be a voice for participants, push back when needed, and be a voice of reason when projects need to be brought back into scope."

Caitlin Faughnan
UX Research Operations Coordinator at GitLab*

Curiosity

"Curiosity is a trait that enables Research Operations professionals to be inquisitive and seek out answers to better understand the context they are addressing and pursue creative solutions."

Crystal Kubitsky
Product UX Operations Lead at MongoDB

Process-oriented / Systematic thinking / Problem-solving

"Can you break down a problem and build a solution that is incremental, clear, and easy to follow?"

Andy Warr
Director, Portfolio Research & Insights at Dropbox

The contents of this chapter are the comments of Caitlin Faughnan and do not necessarily reflect the views of GitLab, Inc.

Collaboration

"Since Research Ops works with a number of folks across an organization. You need a person who is good at connecting across the many cross-functional partners involved in Research."

Andy

Perseverance

"Perseverance is necessary to push through the boundaries and bureaucracies we may face when attempting to do something new or make improvements that better enable research."

Crystal

Compassion & Empathy

"You hate to say it but when you're dealing with a high volume of participants, it can be easy to think of someone as just another number. The goal in hiring compassionate, empathetic, and thoughtful communicators is to make sure you are always treating everyone like a human and not just a lab subject. You want to hire the person that's going to smooth over those rare situations where perhaps there's a dispute over compensation or timing or anything else."

Tim

"It's important to not just have empathy for your users, but also for your teammates and cross-functional partners. You can obviously go out and do the research and try to get into the mindset of the people that you're supporting, but personally I have found it very helpful to already understand their process and experience."

Becky Wright
Product UX Researcher at UserTesting

Attention to detail

"The role ReOps plays in safeguarding the practice of Research requires an attention to detail and thorough approach to minimize complications when it comes to privacy practices, legal compliance, etc."

Crystal

"We are often one of the few parts of a company that are allowed to reach out directly to customers/ users and we need to be very thoughtful, careful, and appropriate in our language and call-to-action. It is often human error when a screener link doesn't work and you lose on a bunch of potential fits because they're not coming back!"

Tim

Timeliness & Follow-through

"Much like you want your overall operations to be reliable, you also want to hire people that are trustworthy and reliable. Do they get things done before or on time? Do they communicate often and regularly with you to make sure nothing is a complete surprise – even if it's something bad? Even if it may be their fault?"

Tim

Efficient & Efficiency-obsessed

"Someone who is really obsessed with efficiency is someone who is going to excel in a ReOps function, because that's really the goal of why this exists."

Kyle Romain
Senior Manager of UX Research at ezCater

Here's an example of a Research Ops Specialist job posting Kyle and his team used at ezCater:

As the Research Ops Specialist, your role will be to orchestrate and optimize processes, tools, and strategies that support efficient, impactful research at scale. As a member of the Product Design & Research team, you'll work closely with product managers, product designers, data analysts, and cross-functional researchers to support the ongoing research needs of our product and marketing organizations. You'll also have the opportunity to assist with and build your skills in conducting qualitative and quantitative research to understand and improve the experience of our customers, caterers, and delivery partners. You'll report directly to the Senior Manager of UX Research.

What you'll do:

Manage the Research Ops function across product and marketing research teams.

- **Participant management:** Recruit from multiple sources, including outreach, screening, scheduling, and incentives management.
- **Tools:** Organize the procurement and management of tools, which will increase efficiency and scale research.
- **Knowledge management:** Collect and share research insights through the management of multiple research repositories. Create scalable, repeatable practices for sharing, storing, and presenting research.
- **Governance:** Partner with product, design, marketing, and analytics leaders to define and execute on cross-functional research practices. Create processes and guidelines for consent, NDAs, frequency of solicitation, standard compensation, etc.
- **Continuous improvement:** Continuously examine, experiment, and measure improvements to our research operations and processes. Regularly seek feedback to evaluate and re-calibrate on research processes, proper research tooling, and group activities.
- **Communication:** Support the facilitation, synthesis, summarization, and sharing of key research findings in succinct and creative ways to a variety of stakeholders and partners.
- **Advocacy:** Contribute to a growing Product Design and Research practice by promoting a user-centric culture and evangelizing research and its value throughout every level and department within company. Foster a culture of inclusivity and accessibility in our products and also within our organization.
- **Expertise:** Develop and maintain a deep understanding of company products as well as the products of key players in our industry.

What you have:

Experience

- 3+ years working in Research Ops or a related role that involves administration and coordination.
- Experience working with research CRM and recruiting platforms (e.g. Rally, User Interviews, Respondent, etc.)
- In-depth experience scheduling sessions for multiple parallel studies and communicating with internal and external participants/stakeholders.

Research Operations expertise and impact

- An obsession with efficiency and driving research teams to operate better and faster.
- Knowledge of organizing and maintaining accessible research repositories (e.g. Dovetail, Coda, Confluence, etc.)
- Research Ops is your superpower, but you're also passionate about the value of research and have some experience or interest in conducting research.
- An understanding of generative and evaluative research applications.

Communication

- A transparent approach to working that invites others into the process and provides a welcoming venue for feedback.
- A positive attitude and ability to provide clear feedback, as well as regularly seeking feedback on your own performance.
- Excellent written and verbal communication skills.
- Soft skills that are as well developed as your ops skills.
- A self-starter who thrives in a fast paced environment, deals well with ambiguity and focuses on driving impact.
- A sharp mind, a soft heart, and a large funny bone.

"ReOps is a constant juggle of new problems to solve or roadblocks to overcome," said Caitlin. "You need to bring a get-it-done attitude to the table and show initiative in different projects and your day-to-day work."

When determining the skills you want in a potential ReOps hire, Andy recommends first determining the specialization that you're looking for. If you're looking for someone who will specialize in democratization, they may need unique skills that differ from a person who would be entering a resource management or research library role.

What questions should I ask potential hires?

The right question can help you find the right candidate with the skills your team needs. Heather Ashley, User Research Coordinator at Webflow, found scenario-based questions were extremely helpful when she was interviewing for Research Ops roles. "They give candidates the opportunity to be creative and think on their feet," she said. Scenario-based questions can cover topics such as handling conflicting schedules among researchers, late participants or no-shows, collaborating with cross-functional teams, or staying up-to-date on industry standards or trends.

Here's an example of a scenario-based question from Tim:

> *A participant is running 20 minutes late without any communication or notice. Our researcher cancels the session and tells their stakeholders to take a break before the following session. The participant finally shows up and is upset to learn that they will not be able to participate in the research. The front desk asks you to talk to the frustrated participant.*
>
> *What do you do? And why?*

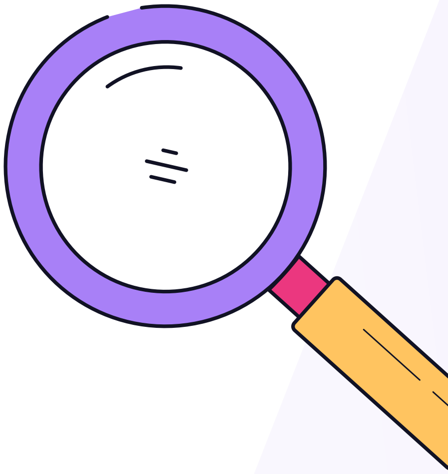
"With this question, I'm looking for someone who is going to approach the situation with compassion and empathy and try to de-escalate the situation," said Tim. "I'm looking for someone to understand that this person still set aside time out of their day to come do a research study, and probably did not want to be late but it just happened."

Tim's answer to this hypothetical scenario? "Reassure the participant, thank them for their time still with the honorarium promised, and try to find another way for them to participate on another day or in another study if appropriate."

Kaela Tuttle-Royer, Research Operations Manager at Etsy, suggests incorporating a tactical scenario. For example, have a researcher from your team pose a specific challenge to the candidate, like devising a strategy for recruiting five users in New York. This approach not only assesses their problem-solving skills but also gauges their grasp of research methodologies.

To further dive into a candidate's skills, Andy recommends asking for examples of processes they've built. "I want them to describe the process to me clearly and concisely. I'm looking for a step-by-step breakdown of that process." This response can be verbal or written, though Andy favors written because it's easier to consume. "Humans are horrible at holding large volumes of information in their head."

By asking this question, you should gain a clear understanding of:



- the process being described
- the problem the process is solving
- how the candidate goes about building a process
- the outcome of the process
- how the candidate views success
- how the candidate aims to improve the process over time
- the candidate's own critiques of the process

Another format you can try is a hypothetical project. Andy shared this example:

> *You want to build a rolling research program to speed up the execution of more evaluative and tactical research. Create an outline of a step-by-step process you would put in place to accomplish this and how you would evaluate success.*

You may also consider adding constraints to the hypothetical such as time or resources available to further test your candidate on things like adaptability, creativity, and innovation.

Tim shared this question that he likes to ask potential candidates:

> *If you could change just one thing about your current role or previous role:*
>
> - *What would it be, and why?*
> - *How would you do it?*
> - *How would you know your change was successful?*

Or phrased differently, can you take one of your own personal pain points and figure out how to improve the process? How would you do it? What does success look like?

“I like this question because it helps me understand whether this person can turn a problem into a measurable solution,” said Tim. "So many of us hear about researchers' pain points, as well as our own. But how do we remedy them in a way that makes sense for all involved?”

Kaela said she likes to ask questions focused on operations. For example, she may ask, what makes a successful operations team? "These questions are insightful as they reveal the candidate's genuine understanding of operations and whether their perspective aligns with our team's approach."

💡Kaela said she’s noticed that candidates who perceive ReOps as collaborative partners, rather than just support roles, tend to significantly enhance team success and research effectiveness.

Stakeholder relationships are important, that’s why Kaela likes to ask this question:

> *Tell me about a time when you had to push back on a stakeholder or tell them no. What happened and how did you do it?*

“As we know, often operations roles are more of a ‘no, but,’ rather than a ‘yes, and,’” she said. “This question will help you to determine if someone is comfortable having these types of conversations and how they may have gone about them in the past.”

What about portfolios?

“For roles that aren't very senior, I recommend against them.” She explained that understanding the impact of the showcased projects requires a deep dive into organizational context, which often results in lengthy, less productive discussions. “It's more fruitful to focus on exploring the candidate's core beliefs and experiences,” said Kaela.

Another alternative? Try a prioritization exercise. Present the candidate with a list of 10 varied tasks and observe how they prioritize and approach these tasks in sequence.

Who should be involved in hiring?

The composition of your hiring team plays a crucial role in determining the quality of candidates you select. The individuals you choose to involve are given significant power and responsibility. This is why you must choose thoughtfully.

Andy shared a simple way to approach building your hiring team. He recommends you include:

- a ReOps or research team member
- a cross-functional partner (program manager, designer, etc.)
- a member of a separate operations function (like Product Ops or Design Ops)

If you already have an existing ReOps team, Tim agreed with Andy on prioritizing those individuals on your hiring panel. This allows for more real-life questions regarding day-to-day scenarios. Whether or not you already have ReOps folks on your team, it's important to include at least one member of your research team.

"We all ask different questions that allow us to get a bigger picture of the interviewee," said Caitlin. "UXRs have a different experience and different expectations when working with ReOps, so their questions will be different compared to a ReOps professional who is getting into the nitty-gritty of process and tooling."

Your hiring panel may change depending on the exact role you are looking to hire. For example, depending on the level of seniority you are looking for, who you include or choose not to include will change. Tim explained it this way: "If you are hiring for a junior ReOps coordinator who will be handling more day-to-day operations, you should have a researcher who is going to be engaging in the work that requires day-to-day operational support. If you are hiring a more senior ReOps professional, then perhaps more senior research team members should be on their hiring panel."

What about if your research team is small and cannot fill a hiring panel on its own? Tim recommends including adjacent functions like Design or Design Ops. Specifically, Tim said, invite designers and cross-functional partners who are most likely to need to leverage research or Research Ops at some point.

Now, even if you have a large research team, including representatives from key teams that will collaborate with research or require support from Research Ops is a good practice. "This will gather a well-rounded perspective on the candidate and allow the candidate an opportunity to connect with who they would be working with," said Crystal. When preparing cross-functional partners for participating in the hiring process, encourage team members to focus on candidate qualifications that are most relevant for them and their respective team.

When it comes to building your hiring panel, build intentionally and with the goal of crafting a well-rounded perspective that accounts for not just the needs of your team, but also the needs of cross-functional partners and your company as a whole.

Onboarding new team members

The onboarding process can have a major impact on your new hire's excitement, preparation, and success in their role. "Onboarding can be intense," said Caitlin. It's likely that your organization has a company-level onboarding, but that doesn't usually cover half of it. You will likely need to craft a team-level and job-level onboarding plan as well. "Your team- and job-level onboarding should be easy for an 'outsider' to understand," she said. "For example, if you use company jargon, explain it, point to where an explanation is, and add necessary context."

Another example of this could be Slack channels. At this point, it's pretty safe to say most companies have Slack channels – lots of them. Even if you've been in your role for many years, seeing a long list of channels can feel overwhelming and confusing. Sharing quick explanations of key channels or providing clear scenarios where one would use certain channels is a small thing that can really make a big difference for your new hire.

"These little things matter because if a person feels more confident in those first few days, it's easier to focus on the job as a whole instead of also trying to navigate those setup stages," said Caitlin.

Your onboarding plan will and should be unique to your team and the person you are hiring, but that doesn't mean you can't utilize some common strategies and ideas. Here are some onboarding best practices to consider when crafting your process:

Use a shadowing system.
At GitLab, Caitlin and her team have new hires go through a shadowing system 2-3 weeks after their first day. This is usually when your new hire will have completed the company-specific onboarding. Caitlin has the new hire shadow different tasks, then the new hire is shadowed while performing those tasks to ensure they are successful and eliminate any confusion or concerns.

Set small goals.
Caitlin also recommends setting small goals to help your new hire feel successful and have clear tasks to work toward. Onboarding, especially remotely, can feel unstructured or isolating. Adding in clear, frequent goals early on can provide a framework for success and help your new hire progress confidently and quickly.

Utilize recorded videos & documentation when introducing tooling.
In addition to shadowing, Caitlin's team provides recorded videos and instructions for specific tools. Many tools provide their own documentation and short videos that you can share with your team, though there may be instances where creating your own videos or documentation makes the most sense.

Follow a typical 30-60-90 day onboarding process.
The 30-60-90 day onboarding plan is popular for a reason. It's a great framework to adopt and make your own. "A 30-60-90 day plan gives new hires the tools necessary to succeed," said Heather. "However, the goals a new hire may initially set out to achieve can change at any time, so it's important to be flexible and think outside the box if the original plans shift." Here's an example of a possible setup from Crystal:

- **30 days:** System setup and key partner introductions and rituals
- **60 days:** Tools, processes, spaces, and teams through shadowing and deep-dive conversations
- **90 days:** Small project ownership and develop initial goals and plans for the year ahead

Adapt your plan and stay involved!
Tim recommends meeting at least weekly with your new hire throughout the onboarding process. When you meet, review and update your onboarding plan to reflect progress and also to make needed changes and adjustments. "This allows for transparency and a platform to drive a dialogue as a new hire or as a new hire's manager."

Have an onboarding buddy – or two.
The more the merrier is true when it comes to onboarding. For at least the first 90

days, Tim recommends assigning your new hire an onboarding buddy. While your new hire will likely have formal meetings with their direct manager, it's nice to keep these onboarding buddy check-ins casual and adaptable. These check-ins can be a great time to introduce your new hire to the work culture at a peer level rather than from a manager/subordinate dynamic, Tim explained. "Research and Research Ops is a team game," he said. Involving more of your team during the onboarding process can build stronger relationships and increase team unity.

Create an onboarding project.
Choose a low-stakes project to let your new hire test the knowledge they've gathered over the past several weeks of onboarding. This project can help your new hire become more familiar with your product, your customers, and your team. It can also give an indication of the success of their onboarding and highlight areas where they can continue to improve and learn more. While there's no set time for introducing an onboarding project, assigning one towards the end of the process tends to yield the greatest success and productivity.

Introduce various Research & ReOps communities.
The Research world has many incredible communities that can be helpful to anyone, especially new hires. Take the time to introduce these communities to your new hire. "Reaching out to these communities to share questions and find support is always helpful," said Heather. "Especially as a new hire going through the excitement and anxiety of being new to the team."

Include cross-functional partners.
"A thorough onboarding can effectively introduce your team, but understanding and interacting with other essential teams is equally important," said Becky. It's crucial for your new Research Ops hire to recognize how research interplays with other departments early on. Facilitating cross-functional partnerships can range from providing a simple list of key contacts to arranging in-depth shadowing sessions with different teams.

Don't forget your other ops teams!
Collaborating with other operations disciplines while developing and fine-tuning your onboarding process is beneficial. Assess any overlaps to determine what needs emphasis or elimination. This approach not only strengthens your working relationships but also enriches the onboarding experience. Remember, working with cross-functional partners, like other ops teams, is an ongoing process, not just something to do only during onboarding, said Becky.

Be compassionate.
"We've all been the new person," said Caitlin. "A little compassion when creating onboarding tasks and documentation can be helpful." As you build your onboarding process, always consider your new hire as a human first, rather than merely an employee or team member.

4 tips for training ReOps professionals

1. Conduct weekly 1:1s focused on career development and planning, rather than project status.
2. Consider recommending courses on topics such as service design, project management, Scrum training, and other general business areas.
3. Encourage new hires to utilize platforms like LinkedIn and online communities for sharing ideas, discovering new strategies, and staying up-to-date on industry trends and standards.
4. Document everything thoroughly. Ensure any new content and information is always readily available and easily accessible.

After establishing a strong foundation through onboarding and continuous learning, it's equally important to consider the long-term career progression of ReOps professionals.

"At the end of the day, ReOps professionals are often building a service or business within an existing research or design organization. Understanding process mapping, identifying stakeholders, and their interactions with your team and others is crucial."

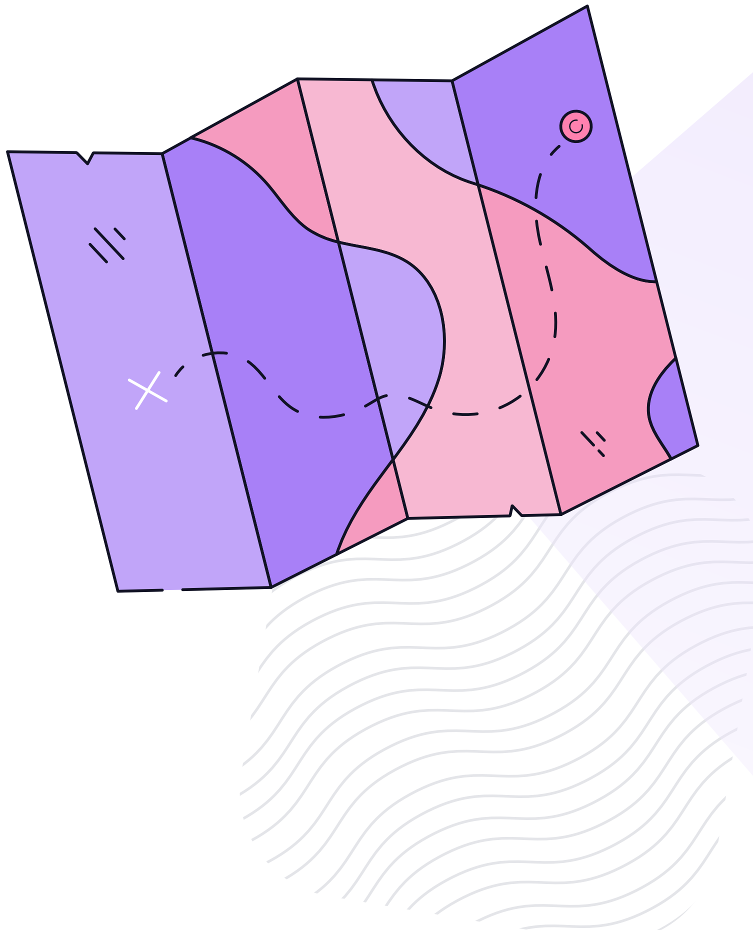
Tim Toy
Sr. Program Manager, ReOps at Adobe

Career progression in ReOps

New and young functions, like ReOps, often have hazy and unclear career progression paths. The lack of a defined career trajectory can significantly impact personal satisfaction and morale, opportunities for growth, direction, focus, and earning potential. "It's important to help people see the potential in their careers," said Andy. He has noticed a trend where ReOps professionals feel their only avenue for career advancement is to return to the research track. "I don't think that should be the case," he said.

"In any operations role, as you progress in your career, there tends to become a blur between functional boundaries," said Andy. "You become someone who doesn't focus solely on Research." He elaborated that your attention shifts to encompass other disciplines such as Design and Product. "You think more about the success of the company and how all of these disciplines operate together."

For Andy, career progression at the most senior levels of operations roles is about unifying all the operations teams – such as strategy, product, and design – and concentrating more on operations as a broader discipline, rather than focusing solely on individual operations functions.



How to foster collaborative research & cross-functional partnerships

Chapter 4

Becky Wright
Product UX Researcher
UserTesting

Kyle Romain
Sr. Mgr. of UX Research
ezcater

Kaela Tuttle-Royer
Research Ops Mgr.
Etsy

"It's important to bring cross-functional partners like design and product along the research journey with you," said Becky Wright, Product UX Researcher at UserTesting. And it's it's the role of Research Operations to facilitate strong collaboration and cross-functional relationships.

In your organization, every individual should focus on the users. Research acts as a bridge between real users and the product being developed. ReOps plays a vital role in enabling cross-functional partners and researchers to conduct safe and effective research. This ensures more meaningful connections with real, human users.

While collaboration across functions is crucial, the most critical partnership is with the research team itself. To enhance this collaboration, understanding basic research principles is invaluable. "A research background isn't a barrier," said Becky. "But to properly help someone, you need to try and get into their mindset. Personally, I've found it very helpful to already understand the research process."

Here's a simplified outline of a typical User Research process:

1. **Define research goals and objectives**
2. **Determine research methodology**
3. **Develop research plan**
4. **Recruit and schedule participants**
5. **Conduct research**
6. **Analyze data**
7. **Synthesize findings**
8. **Report results**
9. **Make recommendations**
10. **Implement changes**
11. **Evaluate impact**

ReOps often assists with many stages of this process. While some tasks may require minimal involvement, others, like participant recruitment and scheduling, could be primarily managed by ReOps. Understanding key research terms and methodologies enhances the effectiveness of a ReOps professional. Below are some common research terms and methodologies that are helpful to know as a ReOps professional:

Qualitative: This type of research gathers detailed information about user behaviors and attitudes, often through discussions or observations. Typical methods include interviews, focus groups, or observational studies.

Quantitative: Research that involves collecting and analyzing numbers and statistics about how users behave or think. Surveys and certain types of analytics tools are common methods.

Evaluative: Research that assesses a product's usability and effectiveness and is typically conducted later in the design process.

Generative: Research that uncovers user needs and motivations and guides early stages of product design.

Mixed-methods: An approach that combines both quantitative (detailed, descriptive data) and qualitative (numerical data) research methods.

Moderated: Research where a researcher interacts with the participant, guiding them and asking questions in real-time.

Unmoderated: Research where participants complete tasks or answer questions on their own, without a researcher guiding them.

Repositories: Databases where all research-related information, like past studies and user feedback, is stored and organized.

Interviews: One-on-one conversations with users to get in-depth understanding about their experiences, needs, and opinions.

Usability testing: Testing how easy a product or service is to use by having real users try to complete tasks while being observed. Unmoderated research is typically done for usability testing.

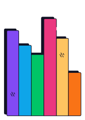
Surveys: A set of questions sent to users to quickly gather information about their opinions, behaviors, or characteristics.

Understanding these principles is a great first step, but the best thing you can do is engage directly with your researchers to understand their workflows, challenges, and what drives them. This lays the foundation for robust and successful collaborations.

Now, let's expand our view to the broader User Research ecosystem. Buckle up, it’s big.

Who collaborates with research?

In a way, everyone does. Every person in your organization is impacted by research – or at least, that’s the ideal scenario! However, there are certain key individuals who commonly collaborate with research. These are the people you're likely to work closely with and support in your role.

Cross-functional partner	Why this relationship matters	What collaboration would provide
Data Scientists 	Data Scientists have access to lists of users.	• Insights into user data organization. • Assistance in developing a process for accessing user lists for outreach. • Linking quantitative data to qualitative user feedback. • A comprehensive balance of both quantitative and qualitative insights.

Cross-functional partner	Why this relationship matters	What collaboration would provide
Customer Success Managers	Customer Success Managers typically own enterprise customer relationships.	• Enhanced access to users for research outreach. • Deeper understanding of user experiences and needs. • Strengthened focus on real user perspectives.
Product Managers	Product Managers interpret and utilize User Research insights to build better products.	• Direct influence on product development with user-centric insights. • Joint efforts in shaping product strategy based on research findings. • Enhanced alignment between user needs and product features.
Designers	Designers utilize User Research insights to inform and refine their design decisions for the product.	• Implementation of research insights into product design. • Aligned product and research roadmaps. • Guidance for creating relevant and impactful research deliverables.
Sales	Sales teams, who are constantly communicating with prospective customers, have a good pulse on the user and often have a long list of potential participants.	• Expanded access to potential research participants. • Exchange of information on user pain points and preferences. • Input for refining sales strategies, including customer journey mapping and persona development.

“Research does not happen in a silo”

That’s what Kaela Tuttle-Royer, a Research Operations Manager at Etsy, shared in a recent AMA with Rally. Silos in an organization typically arise when different disciplines or groups fail to share information or collaborate effectively.

In the context of research, silos can significantly hamper collaboration, efficiency, and the overall impact of research. Here are some common silos encountered in research, along with their implications:

Data Silos

Research data and insights are stored inaccessibly or hidden.

Prevents the organization from leveraging valuable research insights.

Methodology Silos

Researchers use a variety of methods without aligning or sharing best practices.

Leads to inconsistent research quality and understanding.

Organizational Silos

The Research function operates independently of other disciplines, especially cross-functional partners.

Causes a lack of shared insights and diminished collaboration.

Communication Silos

Lack of effective or regular communication channels between researchers and the broader org.

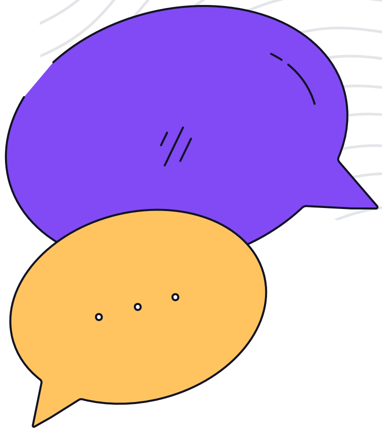
Results in misalignment, reduced visibility, and missed opps to utilize research insights.

Tool or Platform Silos

Utilization of different, non-integrated tools or platforms for research.

Reduces efficiency and consistency, & complicates data compilation & comparison.

The origins of silos can vary – from organizational structure to communication gaps and differing priorities. When silos arise, it's crucial to dismantle them promptly to promote a more integrated and collaborative research environment. For Kyle Romain, Senior Manager of UX Research at ezCater, breaking down silos is about "creating visibility, tearing down walls, and ensuring there are no barriers to research." He emphasized that "all of these strategies are about creating that visibility and ensuring Research is an underlying thread throughout every discipline in the organization."



> **"Breaking down silos is about creating visibility, tearing down walls, and ensuring there are no barriers to research. All of these strategies are about creating that visibility and ensuring Research is an underlying thread throughout every discipline in the organization."**
>
> 
>
> Kyle Romain
> Sr. Manager of UX Research at ezCater

Here are some ways Kyle shared to help you do just that:

- **Create a dedicated research communication channel.**
  Your entire organization should have access to this channel and be able to quickly find a regular feed of user insights and research initiatives. At ezCater, Kyle mentioned their channel actively engages up to 200 people who participate by sharing responses and asking questions.

  What can you share on this channel? Anything, really! The main goal should be to create more visibility and increase the utilization of research insights. Consider sharing things like a quick video highlight reel from a research session, a notable quote from a customer, or a share-out deck summarizing recent findings.

  As you consistently share in this channel, you'll learn to refine and tailor what you share to your audience. You'll hopefully gain insights into what your organization understands and values when it comes to User Research.

- **Conduct a live, company-wide monthly share-out.**
  Use this share-out to spotlight recent research initiatives, give visibility into your backlog, and highlight your pipeline. Kyle suggests formatting this share-out as an

Over the past several months of conducting these share-outs, Kyle noted about 75% attendance. "We've been evolving these share-outs over time to make them more engaging and interactive," Kyle said. In any broader organizational communication, Kyle and his team include links to research resources like their repository and Slack channel. "We try to tie everything together so that if you stumble upon one resource, you're likely to find the rest."

Tip from Kyle: Let your users do the talking!
Kyle and his team place special emphasis on keeping their users at the front and center of all research output and deliverables. "I think we've done a great job letting our users do the talking." Insights directly from your users are often the ones that will resonate the most. You can accomplish this in a number of ways like sharing direct quotes and video highlight reels from research sessions.

Set up regular meetings between your researchers and their cross-functional partners/stakeholders.
Every researcher on your team should have regular meetings with their cross-functional partners. Kyle mentioned that the purpose of these meetings is to review backlogged work, share and refine priorities, and identify any unmet needs or gaps.

"These meetings create a strong forum for open discussions on prioritization between disciplines," Kyle explained. "Research operates as facilitators and enablers of this discussion, and it's been incredibly impactful for us at ezCater."

Research at ezCater is a one-to-many offering, Kyle explained. His team supports numerous teams simultaneously, and establishing this forum has provided vital insights into the allocation of shared resources and increased understanding and awareness of Research and its impact.

Secure a dedicated slot in company- or team-wide all-hands.
At ezCater, the Research function has a dedicated segment in the biweekly product all-hands meeting. This gives Kyle's team the opportunity to share a brief research

rewind, boosting the credibility and visibility of Research. “If we're doing our job well, there shouldn’t be a single person within the company who could say, ‘we don't know who the UX research team is.’”

Make your repository accessible to your entire organization.
Your research repository, rich with customer insights and data, should not only be a tool for researchers, but a resource for the entire company. Kyle advocates for also including comprehensive documentation such as research calendars and project plans. By making these resources easily accessible, you encourage self-guided exploration and broader engagement with research findings. This approach not only demystifies the research process but also showcases its integral role in informing business decisions.

Implement an open-door policy for research sessions.
Sometimes, the best way to learn about something is to experience it firsthand. Allowing people within your organization to observe research sessions can be an effective way to increase research awareness, understanding, and utilization. It empowers individuals to participate in research, connect it more closely to their work, and refine their focus on the user.

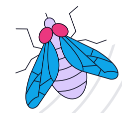
At ezCater, Kyle and his team strive to provide this opportunity to as many people as possible, not just stakeholders and cross-functional partners. “My goal is to increase motivation, direct empathy, and understanding of who is using our products.” Kyle shared an instance where an ezCater engineer, after observing a research session, was amazed to actually see someone use what they had built – something they had never experienced before.

“If we're doing our job well, there shouldn’t be a single person within the company who could say, ‘we don't know who the UX research team is.’”

Kyle Romain
Sr. Manager of UX Research at ezCater

How do you know your strategies are effective?

Kyle sums it up well: "If I were to be a fly on the wall in any random meeting across the company, even if it's with someone who has no direct tie to research or product, and they are discussing a user problem or ways to solve it, that means we've done our job well." Research and ReOps should foster a shared understanding of the user experience and influence how your organization operates.



Another sign of success for Kyle is seeing Research recognized as a strategic partner at the decision-making table, not merely as a support function.

How to involve your stakeholders in research

Engaging stakeholders in research requires distinct strategies, even though there is some overlap with approaches used for cross-functional partners. The range of stakeholders for research and ReOps can vary greatly, from product managers to legal and privacy teams, as well as design and product leadership. While not all stakeholders will hold leadership positions, it's wise to specifically dedicate time to cultivating relationships with leaders of adjacent disciplines.

Proactively building these relationships is particularly important as you aim to increase the presence of Research at the leadership table. Also, expanding your network beyond traditional disciplines like product and design can be highly advantageous.

Unfortunately, building relationships with stakeholders can be tricky. Kyle recommends involving stakeholders directly in the research process. "Doing so naturally transforms them into advocates for research," he said. "They experience research firsthand and gain a clear understanding of its accomplishments and impact."

Inviting stakeholders to participate in research not only gives them direct exposure to the process but also fosters empathy for your users. "It's about more than just showing them research; it's providing them with the chance to step into their users' shoes," he said.

Echoing this sentiment, Kaela highlighted the strategic role of ReOps in this process: "When it comes to stakeholder engagement, ReOps can be a super power partner to researchers by navigating and managing these key relationships."

Chapter 5

How to navigate research tools & software


Crystal Kubitsky
Product UX Ops Lead
MongoDB


Caitlin Faughnan
UX Research Ops Coordinator
GitLab


Wyatt Hayman
Research Ops Manager
FAIRE

The right tool or tools can significantly boost the efficiency and output of your research. On the flip side, the wrong tool can hinder productivity, yield inaccurate data, and waste precious time and resources. "Research Operations takes a lead role in analyzing gaps and effectiveness, defining solution criteria, identifying the right tools to solve those problems, facilitating the onboarding and adoption of those tools, and monitoring their usage and effectiveness," said Crystal Kubitsky, Product UX Operations Lead at MongoDB. In this chapter, we'll explore topics such as evaluating tools, common pricing models, and crafting an effective onboarding.

Before we delve further, let's discuss the different types of research tools. Research tools typically fall into one of these two categories. **Open research, or purpose-built platforms** are flexible and modular systems that integrate with other tools and software. **All-in-one research platforms** are comprehensive solutions that include all the necessary components and features. You might think an all-in-one platform is always the best choice, but that's not always the case. While these platforms offer a long list of features, many of those features often are under-developed.

Here are a few quick reasons to consider each of these tool types:

Choose an *open system* if:

- You want flexibility
- You use a variety of other tools and systems
- Customizing your workflow is important
- Your requirements are complex or specialized

Choose an *all-in-one system* if:

- You prefer a simple solution
- Reducing the number of tools used is a goal
- You're okay with a variety of features that may be less developed
- You have a small team & just need basics

The search for tooling

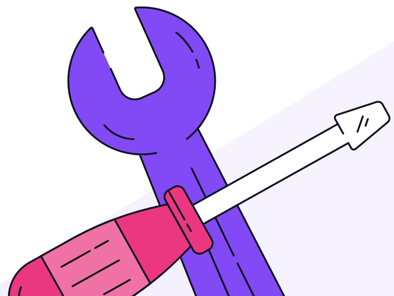
Caitlin Faughnan, UX Research Operations Coordinator at GitLab, recommends you begin by working with your team to compile a list of needs, wants, and nice-to-haves. Wyatt Hayman, Research Operations Manager at Faire, finds features like security, ease of use, and connectivity with other tools and systems essential.

"Data privacy is a non-negotiable. Efficiency and ease of use are next in importance," he continued. This is partly due to Faire's distributed approach, which involves many people doing research infrequently. "They need to become experts within as little time as possible and they'll most likely have to start from scratch when they conduct research the next time."

When searching for tooling, consider the unique elements of your organization. Prioritizing and identifying non-negotiable features will refine your search, saving time and ensuring you find the right fit.

Researching and evaluating research tools

When reviewing tools, first head to various research and ReOps communities. These groups often have dedicated channels for tooling discussions and provide genuine experiences and insights.



Use questions like these to evaluate a tool:

- [ ] Is the user interface intuitive and easy to navigate for both researchers and participants?
- [ ] Does it seamlessly integrate with other software and tools your team uses?
- [ ] Is it customizable to fit specific research needs?
- [ ] Does it comply with data protection regulations and offer robust security features?
- [ ] Can it scale to handle your anticipated data volume and participant numbers?
- [ ] Does it provide strong customer support and training resources?
- [ ] Are comprehensive reporting capabilities and data visualization options available?
- [ ] Is it accessible to participants with disabilities, ensuring inclusive research practices?

After your research, you'll likely have a shortlist of tools you're interested in. Start requesting demos, trials, and discussions with vendors. Wyatt suggests creating an assessment rubric with your team and stakeholders before vendor discussions. Sharing this rubric with the vendor can help ensure a thorough evaluation and successful negotiation process.

The confusing world of tool pricing

It's widely acknowledged that pricing for software tools can often be murky and complex. Wyatt's approach is to ask a lot of questions. While fully demystifying software pricing is challenging, understanding basic models and their pros and cons can help you better determine which model suits your needs.

Pricing Model	How it Works	Pros	Cons
Subscription-based pricing	Users pay a fixed regular fee (monthly or annually).	• Predictable costs with regular payments • Continuous access to updates and support	• Potential for high long-term expenses • Possible feeling of being locked into a service

Pricing Model	How it Works	Pros	Cons
Tiered pricing	Offers different pricing levels, each with its own set of features and services.	• Scalable with options for various business sizes • Pay only for needed features	• Lower tiers may lack essential features • Upgrading to high tiers can be costly
Per-user pricing	Cost is determined by the number of individuals using the software, with each user added increasing total price.	• Cost-effective for smaller teams • Scales with team size	• Costs increase with team growth • Requires careful management of user access
Freemium model	Provides basic features for free, with the option to pay for additional advanced features or capabilities.	• Low barrier to entry with free basic features • Opportunity to try before upgrading	• Basic version often limited for professional use • Frequent upgrade prompts can be intrusive
Usage-based pricing	Charges are based on the actual usage of the service or tool, such as the volume of data used, number of transactions, etc.	• Flexibility and payment proportional to service use • Ideal for fluctuating usage	• Unpredictable costs • Extensive usage can lead to high bills

It's not uncommon to encounter vendors who adopt a hybrid approach, blending multiple pricing models to create more flexible and attractive offerings. For example, a vendor might combine a freemium model with tiered subscriptions, where users start with a free basic version and then have the option to upgrade their subscription for more advanced features.

While this list of pricing models appears straightforward, the reality can be quite intricate, with complexities unique to each tool. Wyatt advises initiating conversations with vendors early. This approach gives you ample time to delve into the specifics of their pricing model, ensuring a thorough understanding and alignment with your needs.

How to secure buy-in and budget for tooling

Securing buy-in and an adequate budget is crucial for adopting the right tools. Wyatt shared a few of his tips:

Foster a deep understanding of Research. "Stakeholders are always more willing to engage in investment conversations if they deeply understand the subject," said Wyatt. When decision-makers grasp the value of ReOps and Research, they are better positioned to appreciate how tooling can enhance that impact.

Highlight savings in time and money. "That's the language that translates to people who can approve investment in research tools," said Wyatt. It's important to craft a narrative that underscores the existing gaps in tooling and the challenges your team faces long before you begin searching for tools.

Keep the ask simple. The request to stakeholders and decision-makers should be straightforward and clear. They need to confidently understand what they are deciding on. A simplified, well-articulated proposal enables decision-makers to easily grasp and support your request.

Make sure everyone is heard. "By giving people a chance to participate in this process, they will feel more comfortable with the decisions you make," he said. Conduct listening sessions to ensure both decision-makers and end-users have their perspectives heard. By doing so, you foster a sense of shared ownership, which leads to tooling decisions that are well-informed and widely accepted.

Align on success metrics early. Understanding and agreeing on success metrics early in the process is key. This alignment not only leads to a smoother evaluation process but also enables you to address concerns more effectively.

How to calculate ROI for research tools

To prove a tool is a worthwhile investment, it's essential to establish ROI and clear metrics for success. Strong success metrics will align with both your research goals and the broader organizational objectives. Involving stakeholders early in the tooling process will ensure this alignment. Here are a few metrics to consider:

- Time savings
- Cost savings
- Increased productivity
- Reduction in errors
- Adoption and usage rates
- Employee satisfaction
- Compliance and risk management

Certain metrics may carry more weight to certain individuals. For instance, when it comes to stakeholders, "saved time and save money are really the only metrics that seem to matter," said Wyatt.

Since tools are usually not one-off purchases, continuously reassessing ROI is essential. "Stay connected to the people doing research to get early indicators of upcoming and evolving research needs," said Wyatt. Regularly discuss with your team their likes, dislikes, and the successes or challenges experienced with the tool.

Onboarding your team onto a new tool

Securing a tool is just the beginning – it's now time to onboard your team! A subpar onboarding can greatly undermine the value of your tool. Here's Wyatt's typical tool onboarding process:

1. Notify the team as early as possible of the upcoming tool change or addition.
2. Develop templates and other assets to facilitate ease of use and ensure proper branding.
3. Enable access for everyone, set up SSO, and implement a provisioning process.
4. Conduct onboarding sessions.
5. Distribute tool documentation, best practices, and guidelines with your team and the broader organization.

Throughout this process, Wyatt emphasizes the importance of frequent feedback and open communication channels. "We do our best to pay attention to how tools are being used so we can better understand pain points and identify ways we can improve efficiency and effectiveness."

No onboarding process is without its challenges. “People don’t reliably attend onboarding sessions,” said Wyatt. Because of this, Wyatt explained, it’s critical to have thorough documentation available and in place long before onboarding begins. “This will require time and early usage to hone best practices and protocols, but you should be cautious not to waste time on your license working this out before rolling out your tool.”

One solution Wyatt recommends is, when possible, to go through a pilot period with a tool. This can allow early adopters at your organization to trial the tool and provide time to build out your procedures and document best practices.

Clear documentation will continue to be critical long after onboarding. “Updated, step-by-step documentation is the most effective way to ensure people are properly using a tool,” said Wyatt. Tools change and it’s important that documentation remains fresh. “Critical updates should be brought up in meetings and on communication channels that provide max visibility.”

Wyatt’s bottom line advice for effective onboarding:

Provide clear documentation and the time and space to troubleshoot.

Selecting a research tool is no small task. It involves understanding your team's needs, evaluating various tools, deciphering complex pricing models, securing buy-in and budget, and effectively onboarding your team. By focusing on these key areas, you can ensure that you choose a tool that not only meets your immediate needs but also supports your long-term research objectives.

Chapter 6

How to enable compliant & ethical research

Becky Wright
Product UX Researcher
UserTesting

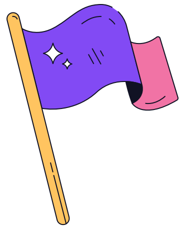
Wyatt Hayman
Research Ops Manager
FAIRE

Kaela Tuttle-Royer
Research Ops Mgr.
Etsy

Disclaimer:
We are not legal professionals, and though we hope this section is helpful to you, we recommend you also consult your legal team or legal counsel when it comes to ethical and compliant research.

As a Research Operations professional, it will be your responsibility to ensure User Research is being conducted in an ethical and compliant way. In this chapter, we'll explore the nuances of this responsibility and strategies for effective governance.

Before exploring topics like consent and data storage, it's important to discuss the laws and regulations that are important to ethical and compliant User Research.



Governance:
The processes and guidelines you'll build for consent, privacy, and information storage. Governance ensures that both researchers and participants are protected and that research is compliant with GDPR and other regulations. Your role when it comes to governance will be to understand GDPR and how it relates to User Research, establish ethical and compliant processes, create templated consent forms, and maintain PII.

Understanding laws & regulations around User Research

Complying with relevant laws and regulations:

- Ensures your research is legally compliant
- Mitigates the risk of legal repercussions and financial losses
- Builds and increases user trust and brand reputation
- Limits breaches and unauthorized access to your users' data
- Proves that your team is committed to ethical data handling practices
- Increases the quality of your research

Here are two key regulations that greatly affect User Research:

GDPR:
The General Data Protection Regulation (GDPR) is a European security and privacy law. Regardless of where your organization is based, if you offer goods or services to or process the personal data of EU citizens or residents, GDPR applies to you. Being GDPR compliant will help you avoid hefty fines (we're talking 4% of your company's revenue or €20 million) and ensure your customers can trust you with their private information and data. GDPR matters especially for User Research since you are gathering and storing PII (Personally Identifying Information).

CCPA:
The California Consumer Privacy Act (CCPA) is a state statute that enhances the rights of California residents by requiring businesses to disclose what personal information they collect and how it's used. In User Research, this means ensuring informed consent about data collection, allowing participants to opt-out or request data deletion, and implementing strict data security measures. While CCPA is specific to California, the ethical practices it requires are valuable for any company and User Research function to strictly follow.

Consult with your legal team or legal counsel to ensure you are fully aware of relevant laws and regulations. Here are a few others worth exploring:

- Children's Online Privacy Protection Act (COPPA)
- Colorado Privacy Act
- New York Stop Hacks and Improve Electronic Data Security (SHIELD) Act
- Personal Information Protection and Electronic Documents Act (PIPEDA)
- Virginia Consumer Data Protection Act (VCDPA)

Capturing informed consent

Failing to capture informed consent can be disastrous for you, your team, your research, and your company.

Ethical breaches: Not obtaining informed consent is a serious ethical violation that can compromise the autonomy and rights of your participants. It can also expose them to risks or discomfort they didn't agree to.

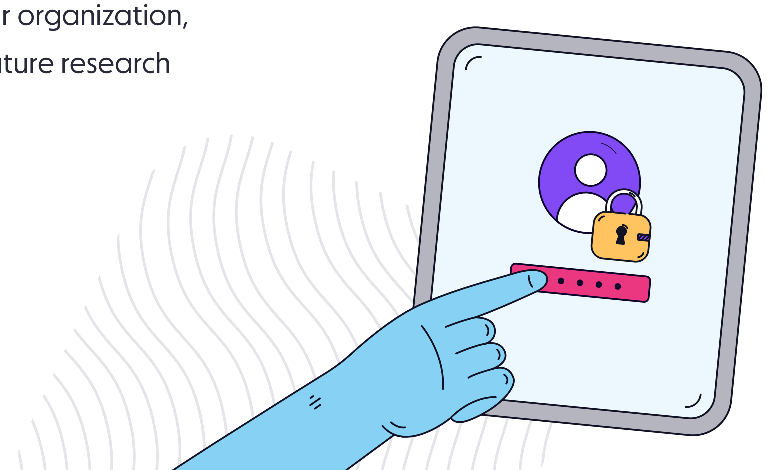
Legal ramifications: There could be legal consequences such as lawsuits, fines, and other penalties, especially if the research involves sensitive personal data.

Loss of trust and reputation damage: Your team and organization could suffer substantial reputational harm. Your participants, and potentially even the public, may lose trust in your organization, impacting credibility and future research efforts.

Participant distress: If your participants are not fully informed, they may experience distress or harm, especially if sensitive or personal issues are involved.

Regulatory and compliance issues: Failing to obtain proper consent can lead to enforcement actions and hefty fines under laws like GDPR and CCPA.

Damage to research credibility and impact: Inadequate consent processes can severely damage the credibility and support of your research, diminishing its overall impact and effectiveness.



Consent vs. informed consent vs. NDA: What's the difference?

NDA (non-disclosure agreement):
A legal document that establishes a confidential relationship between a company and the person signing. Typically an NDA is used to ensure ideas and information are not stolen and shared with competitors or outside parties. In User Research, an NDA may be used if the researcher or participant may learn sensitive or confidential information during the research session that shouldn't be shared.

Consent:
Gaining consent is essential for ethical research. Consent is agreement or permission given by a person to participate in research. Consent forms are also often required by law. When a participant gives consent, they are indicating they understand their rights, privacy, and expectations and are willing to participate.

Informed consent:
Consent and informed consent have two distinct differences that are important to understand, especially in the context of User Research. Informed consent goes a step further than consent – instead of mere agreement to participate, informed consent results in an agreement based on a full understanding of the research and its implications.

Let's explore the concept of informed consent further.

What are the principles of informed consent?

1. **Voluntary participation:** Participation should be completely voluntary and free of coercion or undue influence.
2. **Disclosure:** Participants must receive full disclosure of relevant information, including the purpose, procedures, risks, benefits, and right to withdraw at any time without penalty.
3. **Understanding:** Participants must comprehend the information provided.

4. **Decision:** Participants should be given adequate time to decide to participate without feeling rushed or pressured.
5. **Consent documentation:** Obtaining a written or verbal record of consent, typically through a signed form, is crucial to acknowledge understanding and agreement to participate.

Voluntary participation

Participation in any research study must be entirely voluntary. Participants should have the freedom to decline at any time, for any reason, without coercion or undue influence. Coercion might include incentives, rewards, threats, or pressure. While offering incentives is acceptable and encouraged, be mindful of their potential impact. Excessive incentives could introduce bias or result in recruiting unsuitable participants. In your consent form, consider including language that emphasizes the voluntary nature of participation.

> ***Voluntary participation:*** *You understand that participation in this research is entirely voluntary and that you may at any time choose to stop participating in the research by using the contact information provided in this Agreement.*

Disclosure

Any relevant information must be shared with your participants. This includes:

- The purpose of research (balanced between being neither too vague nor too detailed to introduce bias).
- The format of the study, including activities, tasks, and duration.
- Any foreseeable risks or discomforts the participant may encounter.
- Benefits to participant or others that can be reasonably expected from participating.
- An explanation of proper storage, deletion, and maintenance for records and data.
- Contact information for queries or concerns.
- A statement on the voluntary nature of participation, absence of penalties for refusal, and the right to discontinue at any time.
- Details of any incentive or compensation and conditions around it.
- The participant's right to ask questions, refuse or stop any task, withdraw consent, and access or delete their data.
- A carefully and thoughtfully worded consent statement.

Understanding

It is imperative that participants not only receive the necessary information but also fully comprehend it. When appropriate, use simple, everyday language and avoid technical jargon. The informed consent process should be an active collaboration between the participant and the researcher, designed to empower participants to engage in meaningful dialogue. Clearly outline the process through which participants can ask questions or express concerns.

When participants ask questions or voice concerns, respond respectfully, promptly, and thoroughly. Consider confirming understanding both verbally and in writing. For example, in written form, you might include a statement like:

> *By signing below, you acknowledge that you have read and understood the information in this Research Consent Form.*

The informed consent process is ongoing and doesn’t necessarily stop when the consent form is signed. Participants should always be given ample opportunities to have their questions and concerns addressed.

Decision

Participants should never feel rushed to decide whether to participate in research. We understand research often operates within tight deadlines, but aim to factor in an appropriate amount of time to your research timeline for participants to make a informed decision.

Consent documentation

Consent documentation includes both the consent form used to gather informed consent and the specific language used to ensure consent is truly informed. This consent language is found in your consent form and can also be embedded throughout the research process. Using a consent form ensures consistency and holds both you and your researchers accountable in protecting your participants and practicing ethical research.

Consent forms vary widely in their format and content. While there are some common standards that all consent forms should meet, they are often tailored to fit the specific needs of your research and organization. This customization is crucial to address the particularities of different research types.

For instance, the research team at UserTesting adjusts the informed consent wording based on the type of study being conducted. Not only does this influence the language used in the consent forms, but also the timing of when consent is requested during the recruitment process.

When should you obtain consent?

Informed consent should be secured before an individual begins participating in research. The specific moment can vary. As mentioned above, the UserTesting team adjusts when they request informed consent based on factors like study setup, participant type, and legal compliance. "For unmoderated research, we gather consent at the start of the study, while for moderated, we include consent wording as part of the scheduling flow," said Becky Wright, Product UX Researcher at UserTesting.

In their scheduling process, potential participants receive details about the interview day and the consent requirements. If they agree, they proceed to schedule a session. At the start of the interview, Becky and her team reiterate the need for informed consent, which participants must provide before continuing with the research.

"ReOps, remember the legal team are your friends," said Becky. One of Becky's early projects at UserTesting was to improve the informed consent process. To do so, she worked closely with the legal team to ensure they were covering all their bases. "We were really lucky that our legal team has always been generous with their time and are keen to continually improve our processes," she said.

Becky's consent advice:
Work with legal.

If you have an in-house legal team or outsource legal services, consider their time as valuable. "It's impossible to be too prepared when working with legal," said Becky. She suggests organizing and documenting the following key information before seeking legal assistance:

- Problem being addressing
- Use case
- Goals and objectives
- Existing process
- Solutions already explored

Remember, consent is an ongoing process. Regularly update and revise your consent procedures and documents to reflect new information, potential risks, and other relevant changes.

> **"This approach ensures efficient use of time and establishes you as a competent, collaborative partner. The more detailed and prepared I was, the more trust I built with the team."**
>
> **Becky Wright**
> Product UX Researcher at UserTesting

Privacy & data handling

Ensuring full compliance and ethical standards in your research requires special attention to your participants' privacy and data handling. Among all types of data, particular care should be given to personally identifying information (PII).

PII (personally identifying information):
PII refers to any information that can identify a person, such as a name, address, phone number, email, etc. GDPR defines PII to include: name; physical attributes; location data; online identifiers; an identification number; economic, cultural, or social identity; and health information.

Consider these questions to evaluate your privacy and data handling processes:

- Will data be anonymized? To what extent?
- How will data be used, accessed, and stored? Who will have access?
- Will it ever be published?
- When will the raw, recorded data be deleted (if ever)?
- Can participants request data deletion?

The answers are not only crucial for your team but also need to be transparently shared with your participants, who should be fully informed about what data you are collecting, along with its storage and usage. Additionally, participants should feel empowered to request the deletion of their data at any time.

Anonymization and confidentiality of participant data

Before we dive further in, let's define two key terms often used interchangeably:

Confidentiality: This involves collecting personal information from participants, which is then diligently protected and kept private. Confidentiality measures ensure that any shared data does not reveal participant identities.

Anonymity: This approach ensures that personal information, such as names and contact details, is never linked back to the participants. Anonymity involves complete detachment of identities from the data provided, during, & after the research process.

Protecting the privacy of your participants and properly handling their data is an ongoing process that involves action both before, during, and after data collection. Here are some tips for ensuring effective privacy protection and data storage:

BEFORE DATA COLLECTION BEGINS

Establish a data-management process

Your process should detail how data will be collected, stored, protected, and shared. Make this process accessible to your team and anyone involved in research within your organization. Your process documentation should include:

- Consent forms and any unique consent language
- Guidelines for storing and sharing participant data
- What data to delete when a study is complete
- A plan for responding to data breaches

Develop a data-collection plan

Focus your data-collection plan on preserving your participants' confidentiality. Important aspects to share with participants include:

- What type of data you will collect and any variations
- How the data will be used
- Who the data will be shared with
- Who will have access to the data

When determining what data to collect, ask the following:

- Is this data, especially if it's PII, necessary?
- Will the absence of this data impact my results?

Gather informed consent

Informed consent for data should thoroughly detail:

- What data will be collected
- How the data collected will be used
- Steps taken to secure the data

What should I use to store data safely and securely?

"It's important to find a tool that minimizes how often we are moving data between systems and locations," said Wyatt Hayman, Research Ops Manager at Faire. GDPR mandates responsibility for data collection and handling, both internally and for third-party tools, categorized as "controllers" and "processors."

- **Controllers** determine the use of data and are responsible for properly storing, retaining, and deleting the data. As a controller, you are accountable for upholding your customers' data rights.

- **Processors** process data on behalf of controllers. They ensure data security and privacy through technical and organizational measures and aid controllers in complying with GDPR requirements.

Both roles are critical in protecting participant data. You must choose your processors carefully. For example, Wyatt and his team at Faire, acting as data controllers, use Rally's User Research CRM for participant management and recruitment, serving as the data processor. Rally ensures features like encrypted data, SSO, privacy guarantees, access control, failover processes, data deletion, and more.

Maintain participant anonymity

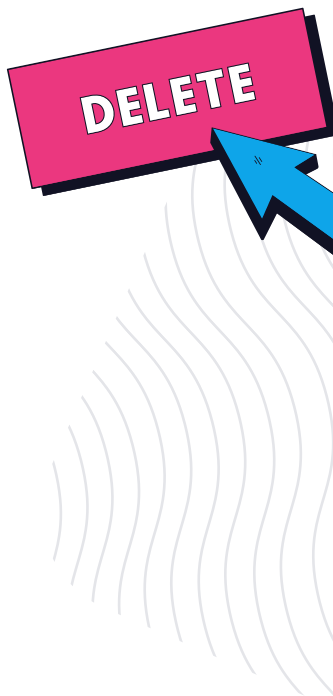
Strive for anonymity throughout the entire research process, whether that's while taking notes, cleaning data, or analyzing results. Here are some quick tips for maintaining anonymity:

- Avoid using PII in notes.
- Use pseudonyms or descriptors instead of names and other PII (e.g. "Participant A").
- Edit out PII from recordings and transcripts.
- Remove metadata from files that could reveal participant identity, location, or device used.

Delete data no longer needed

Avoid keeping data that could risk participant privacy. For easier data deletion:

- Make participant data quickly identifiable and retrievable.
- Reduce data duplication across multiple locations.
- Ensure consistency in data storage and guidelines for deletion.



How long should you keep data? You and your team will need to determine the appropriate length of data retention based on a number of factors. A good rule of thumb is to keep the data long enough to set up, conduct, and report your research.

How to ensure inclusivity and diversity in research

Diversity and inclusion are vital for creating universally accessible products and services and for preventing bias. They also ensure that the needs of all segments of your customer base are understood and addressed. Before starting a research study, discuss with your team what diversity means for your specific project. For instance, you might focus on diversifying participant socioeconomic status or geography.

To recruit a diverse participant pool:

- Utilize multiple recruitment channels such as social media platforms, community groups, and online forums.
- Offer inclusive incentives accessible and appealing to a broad range of users.
- Be flexible in scheduling to accommodate diverse schedules.
- Seek referrals from current participants.

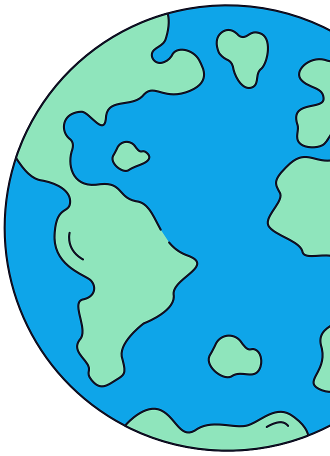
How to promote accessibility in your research process

Your research materials, methods, and processes should be accessible to people with disabilities. Here are 5 tips for promoting accessibility in your research:

1. Provide materials in various formats and choose physically accessible locations for in-person research.
2. Adapt your research methods to accommodate participants with different abilities.
3. Treat every participant with respect.
4. Use multiple communication channels and offer multilingual materials or translation services.
5. Train your team in disability etiquette and cultural sensitivity.

Conducting bilingual or international research

"Bilingual research creates a lot of challenges," said Wyatt. These challenges include the time required for translation along with additional costs and budget constraints. "Ultimately, the largest challenge of all is getting everyone involved to go through an often extended process of translating and interpreting without being dissuaded from conducting or participating in research," said Wyatt.



Wyatt and his team are streamlining this process by:

- Preparing translated communication templates and screeners.
- Establishing a clear translation process for study-related content.
- Selecting a reliable translation service.
- Developing easy-to-follow guidelines for researchers.

While you can handle international research internally, you may also consider outsourcing it to local vendors. "We find that it not only helps ensure a better research experience and more impactful results, it also helps ensure accountability to local regulations and guidelines," said Kaela Tuttle-Royer, Research Operations Manager at Etsy. Local vendors, she explained, will often better understand the customs and nuances.

Crafting ethical guidelines for your research team

As ReOps professionals, you must understand ethical and compliant research and enforce best practices within your team. Becky recommends utilizing templates as much as possible. For example, Becky has created template studies that contain the correct consent wording, which her team can copy and paste into their own study. Becky has also created checks that ensure the correct wording is being used long before recruitment begins.

If you have any kind of internal research guide or handbook, Becky also recommends building out a section specifically for governance. In Becky's case, this section clearly states the importance of informed consent, includes a flowchart for participant consent based on study type, and a guide for choosing the appropriate consent form.

Here are some other tips for ensuring your research team is practicing ethical and compliant research:

- Train and educate through activities like workshops.
- Develop clear guidelines covering consent, data collection, storage, usage, and sharing, and ensure they are accessible and understandable.
- Regularly audit your process.
- Encourage open communication for ethical dilemmas.
- Collaborate with legal and compliance teams.

Continue on to the next chapter to explore how to elevate ReOps and Research at your organization.

Chapter 7

How to elevate and grow your Research & ReOps function

Tim Toy
Sr. Program Mgr., ReOps
Adobe

Kaela Tuttle-Royer
Research Ops Mgr.
Etsy

Andrew Warr
Dir. Portfolio Research & Insights
Dropbox

Kyle Romain
Sr. Mgr. of UX Research
ezcater

Becky Wright
Product UX Researcher
UserTesting

Caitlin Faughnan
UX Research Ops Coordinator
GitLab

Crystal Kubitsky
Product UX Ops Lead
MongoDB

In a research-centric organization, the culture is deeply rooted in understanding and responding to user needs. Decisions across all departments are informed by research, ensuring that strategies align closely with what users genuinely want and need. There's an atmosphere of constant learning and adaptation, where user experiences shape product development. In this environment, User Research is not seen as a task – it's a fundamental principle that guides the organization's direction and innovation.

In this chapter, we'll explore topics like building a research-centric culture, measuring the effectiveness of research and ReOps, and refining your research function based on feedback.

Building a culture where everyone values and supports ReOps & Research

"Justifying your existence is a common theme I've seen over the past fifteen years," said Tim Toy, Senior Program Manager of Research Operations at Adobe. Unfortunately, most companies lack a built-in culture that is aware and supportive of Research.

Creating such a culture is crucial for embedding ReOps and research into your organization's DNA and ensuring cross-functional and stakeholder support and collaboration. Key elements of a culture that supports and values research include:

User-driven decision-making
User insights directly shape decisions from product development to marketing.

Deeply integrated research processes
User Research is not an afterthought, but a ongoing, integral part of the product lifecycle.

Cross-functional collaboration
Teams across departments actively engage with and apply research findings.

Investment in research talent & tools
Significant resources are dedicated to building skilled research teams and acquiring effective tools.

The first step to building this culture is raising awareness. "I like to over-communicate what the team is doing and the presence of research efforts," said Tim. Simple methods, like volunteering to facilitate weekly team standups, sharing documentation and best practices in a Slack channel, or presenting at company all-hands, can effectively communicate research efforts.

It's also important to specifically highlight the impact of ReOps. Kaela Tuttle-Royer, Research Ops Manager at Etsy, and her team mirror their research partners' efforts to build awareness. "We now share monthly ReOps stats and tease any work we may be doing behind the scenes," she said. "This helps keep us top of mind and demonstrates the breadth of our work."

Stakeholders and leadership are pivotal in increasing awareness and support for research and ReOps. They can create a powerful ripple effect that speeds up the development of a supportive culture. Tim regularly provides leadership with weekly or monthly updates focused on productivity and KPIs. "This creates a paper trail documenting the work we've done, the work we are doing, and where we are going." Tim's goal? Never surprise anyone in a bad way and keep leadership in the know.

How you talk matters

"The language you use goes a long way," said Kaela. True support requires genuine understanding. When educating team members, cross-functional partners, and stakeholders, "the way you talk about yourself is the way they'll start to think of you." Control and lead the narrative around research and ReOps within your organization. Kaela recommends avoiding words like support or enable and instead positioning ReOps and research using terms like *partner*, *enhance*, and *subject matter experts*.

Here are some other strategies from Kaela for fostering a supportive culture for research and ReOps:

Build an external presence:
"Gaining visibility among other organizations in our industry can influence how our own organization perceives us," said Kaela.

Focus on empathy:
"We can better influence the work and more often show up in collaborative spaces by speaking the language of those we partner with," said Kaela. Efficient collaboration is built on a foundation of understanding, empathy, and curiosity.

Be experts in your craft:
Research loses its impact if individual contributors lack confidence or a deep understanding of research, the user, and broader business goals.

Tell a story:
While numbers are crucial, so is their presentation. Researchers are storytellers; weaving numbers into compelling stories that detail results from research efforts is vital for building awareness and support.

Building a supportive culture for research and Research Ops is a massive undertaking. "Find your partners and your allies," said Kaela. "They exist within your organization and are key to increasing your influence, especially if you're a small team." Partners often include members of cross-functional teams like security and legal, while allies may be individual research contributors and leadership.

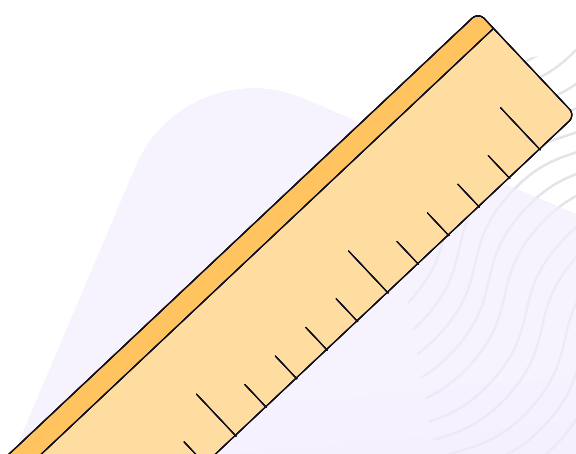
"Bring your partners and allies into the fold and connect with them regularly so they're aware of what you're doing," said Kaela. "This will create natural advocates for research and encourage them to speak about research in their corners of the organization."

How to measure the effectiveness and efficiency of ReOps

One of the fastest ways to grow and scale the ReOps and Research function is to prove impact. Andy Warr, Director of Portfolio Research & Insights at Dropbox, views the impact of ReOps and Research as overlapping but distinct. For researchers, impact means influencing business, product, and design decisions based on research. Tracking these decisions and how research influenced them is an effective method for tracing impact.

For ReOps, Andy considers impact in terms of efficiency – reducing the time it takes to complete various research processes – and scale – increasing the scope of research and its contributions. He suggests exploring questions like:

- How can we increase response rates for participant recruitment?
- How can we decrease no-shows?
- How can we increase the number of employees viewing research share-outs?
- How can we increase the number of non-researchers connecting with customers?
- How can we reduce the time it takes to execute research studies?



Tim's take on metrics

Metrics vary based on company structure and culture. **However, there are some basic metrics any ReOps team can capture on a monthly basis:**

- Number of incoming recruitment requests (studies supported)
- Number of participants requested
- Number of participants recruited
- Total cost of recruitment
- Total cost of incentives
- Time between request and start date
- Time between request and fill date

With these basic metrics, you should be able to answer these questions:

- How many requests were there this month?
- What was the lead time provided?
- How many participants were needed?
- How many participants were recruited?
- How much did it cost you to recruit the participants?
- How much did you spend on incentives?
- What was the total cost of each study?
- How long did it take to fill the study?

Creating a system for researchers & non-researchers to provide feedback

A clear and straightforward feedback system is necessary for the continuous improvement and impact of your research function. "We don't want to be doing anything that's arbitrary or feels like a checked box," said Kyle Romain, Senior Manager of UX Research at ezCater. "Gathering feedback helps us learn, discover new approaches, and ensure our efforts are impactful not just for the Research function but for the broader organization."

At ezCater, Kyle and his team place a strong emphasis on gathering feedback from a variety of individuals within the organization. Empowering both researchers and non-researchers to share their opinions enables them to become active participants in research. An effective feedback system can significantly enhance research awareness, collaboration, and impact.

Encourage open and organic feedback by sharing research updates frequently, making your research repository accessible, and building relationships with teammates and cross-functional partners. This fosters trust, transparency, and more opportunities for feedback sharing.

You may also consider gathering feedback through targeted questions and conversations. These questions can focus on broad research themes or specific processes, systems, or findings:

- How can we make X more useful or impactful?
- What support do you need to perform your job better?
- How can we foster a stronger user-centric perspective?

The challenging part is not just gathering feedback but utilizing it to refine and enhance your research and ReOps efforts.

Refining your operations and research based on feedback

Thoughtful organization of the feedback you gather will help you to prioritize and take action. When implementing changes based on feedback, follow up with the contributors to build trust and demonstrate the real impact of your research. Here are some tips for refining your operations and research based on feedback:

- Categorize feedback (e.g. process improvement, tooling, participant experience, etc.) for efficient analysis.
- Acknowledge all feedback, even if it's not immediately actionable.
- Align actionable feedback with team and organizational goals.
- Record and share utilized feedback, changes made, and its impact.
- Include feedback gathering and implementation as a metric or KPI and embed it into your process to demonstrate continuous improvement.

Empowering both researchers and non-researchers to share their opinions enables them to become active participants in research. An effective feedback system can significantly enhance research awareness, collaboration, and impact.

A quick note on change management

"Understanding change management is crucial for ReOps," said Becky Wright, Product UX Researcher at UserTesting. ReOps often takes on the role of gathering, analyzing, and prioritizing feedback, as well as overseeing and implementing changes. Consider these tips when introducing change:

- Ensure everyone clearly understands the "why" behind the change.
- Engage key stakeholders early in the process.
- Implement changes in phases and start with quick wins to boost motivation and show progress.
- Lead by example to inspire commitment across your team and organization.

Celebrating Research and ReOps successes and learnings within your organization

Effective communication is key to highlighting the value of Research and ReOps. "As researchers, we don't ever want to be gatekeepers," said Kyle. "We aim to create as much visibility and accessibility to our research function as possible." Celebrating successes and learnings not only enhances understanding of research, he continued, but also encourages more people to practice a user-centric and empathetic approach to their work, no matter their role.

It's important to acknowledge that this is sometimes easier said than done. "It's very easy to brush over major successes or milestones especially as a team of one," said Caitlin Faughnan, UX Research Operations Coordinator at GitLab.

Use internal communication channels to promote research activities, best practices, and their impact. "We make a point to share ReOps accomplishments in the same manner and cadence as Design and Research," said Crystal Kubitsky, Product UX Operations Lead at MongoDB. Regularly highlighting these achievements helps further integrate research into the organization.

It's also beneficial to tailor your share-outs to resonate with different members of the organization. A single insight from research can have varied implications depending on your audience. Connecting research efforts to various members and functions within your organization is not only an essential role of ReOps but also requires thoughtful and intentional focus and planning.

Looking into the future of ReOps

Kyle Romain
Sr. Mgr. of UX Research
ezcater

Andrew Warr
Dir. Portfolio Research & Insights
Dropbox

Heather Ashley
UX Research Coordinator
Webflow

Kaela Tuttle-Royer
Research Ops Mgr.
Etsy

Tim Toy
Sr. Program Mgr., ReOps
Adobe

Wyatt Hayman
Research Ops Manager
FAIRE

The evolution and specialization of Research Operations

The field of Research Operations is growing and evolving. Nearly 14 years ago, at the start of Kyle Romain's career, he was an end-to-end UX Researcher. "I was expected to do everything from design to operations to analysis," he said. Over time, this has changed. "People recognize there's more value in having individuals that are very educated and specialized to be dedicated to those areas."

Kyle has also observed a **shift toward leveraging individual skills**. "I recognized early on that I was not the strongest designer, and that there were people better at it than I was." For better or worse, Kyle continued, Research and ReOps have seemingly been the last to adopt this approach.

The separation of Design and Research functions in organizations is now mirrored in Research and ReOps. Further, within ReOps, we're witnessing **increased role specialization**. Andy Warr, Director of Portfolio Research & Insights at Dropbox, predicts companies will start to seek out distinct roles like Research Librarian, Recruiting Coordinator, Democratization Specialist, and more.

As ReOps grows as a distinct and impactful function, there may be increased collaboration and unification of operations disciplines within organizations. **"Will operations functions be consolidated or will they always remain functional-siloed?"** asked Andy. The answer, he believes, depends on what's best for each organization, whether that means separate operations teams for Design and Research, or a single unified team.

Regardless of ReOps' position in an organization, its significance and impact is becoming more widely acknowledged. Heather Ashley, UX Research Coordinator at Webflow, said she's confident ReOps will continue to grow and expand. "ReOps pros are like the Wizard of Oz – working magic behind the curtain. But as the need for UX Research and ReOps grows, that curtain will come down revealing the immense value of ReOps."

As the curtain falls, Kaela Tuttle-Royer, Research Ops Manager at Etsy, believes we will continue to see a pivotal change. "ReOps will increasingly assert its own perspective within organizations, rather than merely following leaders' viewpoints."

"ReOps pros are like the Wizard of Oz – working magic behind the curtain. But as the need for UX Research and ReOps grows, that curtain will come down revealing the immense value of ReOps."

Heather Ashley
UX Research Coordinator at Webflow

Advancing technology and its impact on ReOps

"Automation and AI will play a major role in ReOps," said Tim Toy, Senior Program Manager, Research Operations at Adobe. "I can imagine a world where nearly the entire ReOps process is helmed by an AI or platform." Tim further described his vision this way: You tell the platform the parameters of the study (i.e. types of participants, methodology, schedule, etc.) and the AI will be able to create a screener, deploy it to the right channels, select the most appropriate participants, automatically invite, and thank and log the participant in a CRM.

"As a ReOps professional, I just hope the AI needs someone to help prompt and train it," Tim joked. "But in all seriousness, I think many of the advancements in AI and automation can help ReOps as a discipline strive and become more strategic. Rather than get muddled in the day-to-day firefighting, we can tackle larger topics like improving infrastructure, refining processes, and building out new capabilities."

With the rise of AI and other tooling, Kaela sees ReOps' role in securing proper and effective tooling becoming more essential. "As more tools emerge for ReOps, we must learn how to adapt rather than resist."

When it comes to tooling, Wyatt Hayman, Research Operations Manager at Faire, said he's grateful to have Rally in his toolkit. "I am hopeful that Rally's User Research CRM can be a tool that allows ReOps to focus more on creating complex research enablement programs," he said. "It feels like everyone in ReOps is dealing with the same issues that have required us to create our own solutions – I'm hopeful Rally can continue to solve these challenges, allowing us to focus on more strategic problems."

> **Learn more about the challenges Rally is solving here.**

It's safe to say, the future is bright for ReOps. But that doesn't mean the journey won't be free from bumps and challenges. We trust that the insights from these exceptional ReOps leaders will not only be beneficial but will continue to guide you as you navigate the evolving landscape of Research and ReOps.

"I think many of the advancements in AI and automation can help ReOps as a discipline strive and become more strategic. Rather than get muddled in the day-to-day firefighting, we can tackle larger topics like improving infrastructure, refining processes, and building out new capabilities."

Tim Toy
Senior Program Manager, ReOps at Adobe

The learning doesn't stop!

Did you enjoy this ebook?

Let us know what you think! Share feedback here.

Download and explore our first ebook The Definitive Guide to Participant Management & Recruitment, which features some of *The 2024 ReOps Playbook* contributors.

Want more insights from our amazing contributors?

We've been lucky to have many of our contributors join us as guests in our ongoing virtual AMA series. Explore the written recaps and recordings below:

Andy on guaranteeing research impact

Crystal on building ReOps from the ground up

Kaela on her time at Dropbox, Spotify, and Airtable

Wyatt on elevating ReOps as a strategic partner, NOT an admin

Tim on building ReOps at Airbnb

Join & participate in the growing Research & ReOps community

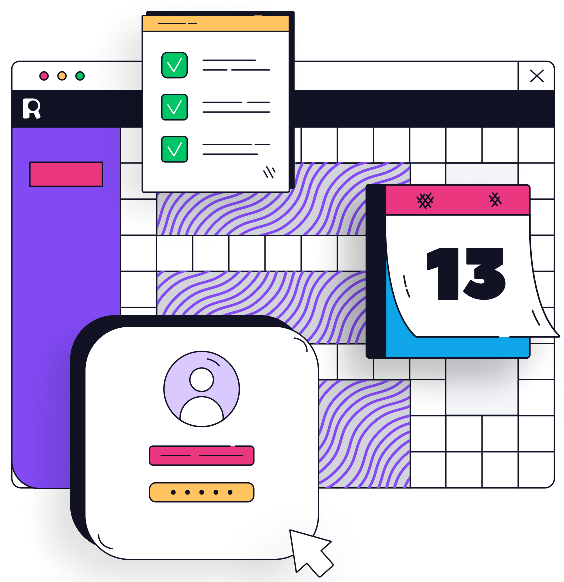
Cha Cha Club: An invite-only club for dedicated Research Ops professionals.

ResearchOps Community: global group of people discussing ReOps. Join their Slack.

Rally Events: Each month, we invite industry professionals to discuss topics like democratization, research impact, continuous discovery, and more!

Elevate your Research Operations with Rally

Rally's User Research CRM empowers ReOps leaders to enable research using the tools they already have, while centralizing the entire research process from invites to incentives in one place.



Why do leading ReOps managers use Rally for user recruitment and management?

Leverage your existing tools
Rally integrates with tools you already know and love. Effortlessly track the end-to-end process from initial invite to incentives in Rally.

Democratize research
Allow Researchers, PMs and Designers to host their own research. Keep an eye on study progress with overview pages.

Automate repetitive tasks

Rally takes scheduling, email reminders, interview links, budget management, incentives, and more off your plate.

Connect with the right participants

Recruit participants by custom attributes, research history, demographic data, survey responses, internal data from Salesforce or Snowflake, and more.

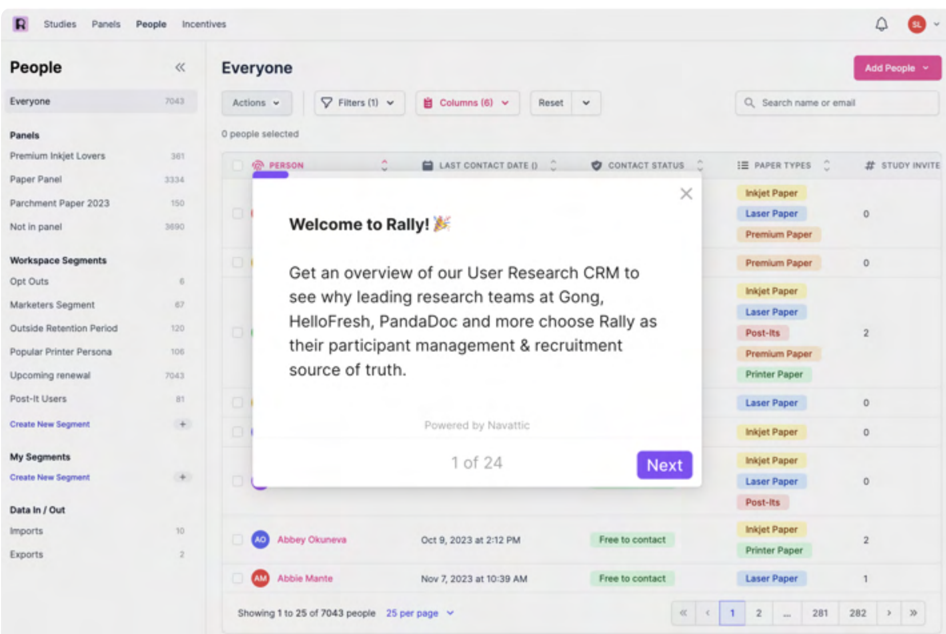
Recruit securely

Rally's platform complies with the highest industry standards for data protection and privacy, ensuring the trust of both researchers and participants.

Eliminate uncertainty & inconsistency

Lead your team in adhering to industry-standard procedures by creating custom consent forms and email templates even when you're OOO.

Explore our [interactive demo center](#) to discover Rally for yourself.



A few reflections on ReOps

We are immensely grateful to the numerous individuals who generously dedicated their time and expertise to bring this ebook to life. Without their invaluable contributions, this project would not have been possible. We are humbled by their support and delighted to have had the chance to collaborate with such talented and committed individuals. We are excited to see where the future leads them and are confident in their continued success. We encourage you to take a moment to learn more about each of our contributors and read a few of their reflections on their careers in ReOps.

"Research Operations has been my entire career, which I never anticipated. It has enabled me to work at some amazing companies and work on projects I never dreamed of in my wildest dreams. I hope it continues to afford me all of those opportunities – I hope I didn't just jinx it."

Tim Toy
Sr. Program Mgr., Research Ops at Adobe

"I've truly been able to 'grow up' in ReOps, but it has come with certain challenges. Being part of an emerging, often undervalued, industry has meant that much of my career has required me to sell myself or what I do. While it has taught me invaluable lessons, it has made my career a bit trickier than going into an industry that's more tried and true. ReOps has felt like my calling. I've had a few moments in my career where I wasn't sure I could stick it out, but there is truly no other industry I can see myself in. ReOps allows me to marry my research mind with my operational skills and I thoroughly enjoy what I do."

Kaela Tuttle-Royer
Research Operations Manager at Etsy

"I felt incredibly fortunate to have found the world of UX Research when I left the field of psychology – I was happy to find a role where I could apply my research skills while also learning an entirely new set of skills. As cheesy as it sounds, I felt like this all over again when I discovered ReOps. I will always love the art of running research, but the next stage for me is to help researchers conduct quality research and help participants be happy and successful. Plus, the research doesn't stop! I still am able to conduct research to discover and understand what my team and organization need. It is now a level even more meta than what I was doing before!"

Becky Wright
Product UX Researcher at UserTesting

"Some people know exactly what they want to be when they grow up from a very young age. When I was growing up, there was no such thing as Research Ops and if there was, it was probably under a different name. When I made my career switch, I initially focused on breaking into UX research. But along the way, I discovered Research Ops and found it to be even more compatible with my previous career as an archivist (something else I didn't plan on, but fell into and really enjoyed). Research Ops pros are very much like librarians – they tend to work independently, but are simultaneously well-connected to their community and cross-functional partners. It's given me great pleasure to join the Research Ops field, and I can see myself continuing to grow with it."

Heather Ashley
User Research Coordinator at Webflow

Acknowledgements

Crystal Kubitsky
Product UX Operations Lead
MongoDB

Crystal is a seasoned research and design leader who loves helping people conduct better research and make better decisions through process, frameworks, and experimentation. She has nearly 20 years experience in a variety of industries including entertainment, education, healthcare, law, finance, and technology. She's currently the Lead for Product UX Operations at MongoDB.

Kyle Romain
Senior Manager of UX Research
ezcater

Kyle has spent his career over the last 14 years as an end-to-end UX leader, practitioner, and professor working in tech startups, enterprise software, and design consulting. He's spent the more recent years of his career building, scaling, and leading impactful UX research teams, which has made him increasingly passionate about the importance of visible, accessible, and meaningful research throughout an organization.

Becky Wright
Product UX Researcher
UserTesting

Becky is a passionate UX researcher who strives to simplify and improve the research process. She holds a PhD. in Psychology and moved into UX after working in academia. Currently, she supports Research Operations for the product team at UserTesting, a SaaS leader in experience research and insights. When she's not working, she likes to solve cryptic crosswords with her family while enjoying a cup of tea.

Heather Ashley
User Research Coordinator
Webflow

Heather S. Ashley, MLIS (she/they) is a bit of a professional unicorn. In Heather's past life, she worked as a film & television archivist at Paramount (formerly Viacom) for over a decade. Heather's previous background helped shape their current experience by leveraging knowledge management, communication & advocacy to get people excited about doing research. Having supported UX research teams at companies such as RR Donnelley and HelloFresh, Heather believes that Research Ops is ever-evolving, and that there is immense value in empowering both formally-trained & novice researchers to contribute their ideas in order to reach desired outcomes. Heather currently serves as UX Research Coordinator at Webflow, a no-code website building and hosting platform.

Tim Toy
Sr. Program Manager, Research Ops
Adobe

Tim unexpectedly fell into the User Research Operations world 17 years ago and has not left! After getting his start in Research Operations at

Adobe, Tim went on to build and run Research Operations teams at Electronic Arts and Airbnb, and has recently returned to Adobe! Tim currently lives in San Francisco with his wife, two daughters, and two guinea pigs. They can often be found biking around the west side of the city looking for the perfect playground and perfect burrito.

Wyatt Hayman
Research Operations Manager
FAIRE

Wyatt likes building systems that enable organizations to better serve their customers. He has seen most phases of the startup process from starting a company with college friends, being on the pre-launch team of a venture funded startup, to Airbnb's hypergrowth and IPO, and now another rocketship startup with Faire. Research mechanisms and operations that enable customer feedback to guide an organization have been at the core of his work. He currently serves as Research Operations Manager at Faire, a marketplace that independent retailers use to discover, source, and sell unique products from around the corner, and around the world.

Kaela Tuttle-Royer
Research Operations Manager
Etsy

Kaela has grown up in Research Ops with her first role being a dedicated recruiter at Dropbox. She found a passion for her users and the practice of Research Ops and had the chance to test, own, and grow a global research and insights ops practice at Spotify, Airtable, and later Etsy. Kaela loves mentoring people in ReOps (and general operations), finding ways to use my role to benefit the users, connecting people across organizations, and using metrics to prove how ReOps and Research makes an impact.

Andrew Warr
Dir. Portfolio Research & Insights
Dropbox

Andy is on a mission to build the world's best products based on best-in-class user-centered design practices and teams. He has worked at most of the big tech companies throughout his career and is a prolific writer intent on sharing as much hard-won knowledge as he can with researchers about research and leadership. He says it like it is, and makes sure that the work he and his team are doing is deeply meaningful to the business and its users. Andy's current mission is at Dropbox where he is the Director of Portfolio Research & Insights.

Caitlin Faughnan
UX Research Ops Coordinator
GitLab

Cait is a problem-solver at heart and resourceful in her approach. She fell into the ReOps space in 2019 and it was the perfect match for her skill set. She has mostly worked in the tech industry but has collaborated with others across several industries to improve their ReOps programs. Currently she's the only Research Operations Coordinator at GitLab, a DevSecOps platform, where she keeps the values of transparency, collaboration, and accountability at the forefront of her work.

Oren Friedman
Co-founder & CEO at Rally

Oren is one of Rally's Co-Founders and our CEO. He lives and breathes all things Research Ops, having spent the last 8 years of his career in different research organizations. He's passionate about enabling Research teams and their stakeholders to do their best work.

Lauren Gibson
Content Marketing Manager

Lauren leads marketing and content at Rally, where she is dedicated to connecting and amplifying the voices of the User Research and Research Ops community. With her experience in building marketing functions for startups, Lauren is passionate about creating powerful content that resonates with people. When she's not working, Lauren enjoys reading, traveling, and staying active through exercise. She currently resides in Boston with her husband.