

Research Skills/Career Sheet (part 1)

Please fill this out while you get settled in. Some baseline info—and easy questions to ask the folks nearby.

You'll **leave the top 2 sheets with your facilitator** after the workshop—your organizer will digitize your feedback, and the ResearchOps team will clean up and open source all of our collected data.

Basic info:

Years doing research:	_____
Years in current role:	_____
Official job title:	_____
Org. type (circle one):	Agency / Freelance / In-house–private sector / Public sector
Total # researchers in org:	_____ (0 if no researchers, and you're a designer who does research)
Org. size—total # employees (circle one):	(overall company size over office size) Just me! / 2–10 / 11–20 / 21–50 / 51–100 / 101–500 / 501–1,000 / 1,001+
Org. research maturity (circle one, best-guess OK):	None / Laggard / Early / Progressing / Mature / I'm not sure

A question about your work:

How would you describe the main kind of work you're doing right now? _____

Other, very exciting questions:

Are you a member of the ResearchOps Slack community?	Yes / No / On Waitlist
Does your org have a formal career / skill ladder in place?	Yes / No / Self-employed
Does your org have dedicated support for research operations?	Yes / No / Self-employed
Are you currently working towards a specific goal or next-step as a researcher?	Yes / No / I'm not sure
(if yes) What are you working towards right now? _____	

Research Skills/Career Sheet (part 2)

You'll fill this one out at the end of the workshop, after going through activities & worksheets.

Please **leave these top 2 sheets with your facilitator** after the workshop.

Craft Skills coding—copy over the code (e.g., 101) for your numbered & lettered skills. Note your write-ins that we missed.

Most important Craft Skills to current work:	1. _____	2. _____	3. _____
Most helpful / desirable Craft Skills to gain:	A. _____	B. _____	C. _____
Write-ins: what did we miss? _____			

Human Skills ratings—copy over your ratings from the 1–5 scales; circle the 1 area you'd like to improve the most:

Business & strategy insight:	_____	Research operations prowess:	_____
Adjacent disciplines & delivery:	_____	Technical research prowess:	_____
Organizational diplomacy:	_____	Persuasion & storytelling:	_____
Service conceptual understanding:	_____	Interpersonal relationships:	_____
Stakeholder mgmt / communication:	_____	Professional relationships:	_____
Project management / ownership:	_____	Mindful work & reflection:	_____
Research process management:	_____		

Open-ended reflection

What's the biggest challenge I face in doing the work of a researcher? _____

What do I want to explore next? What am I excited about? _____

What one specific step will I take next to move forward? _____

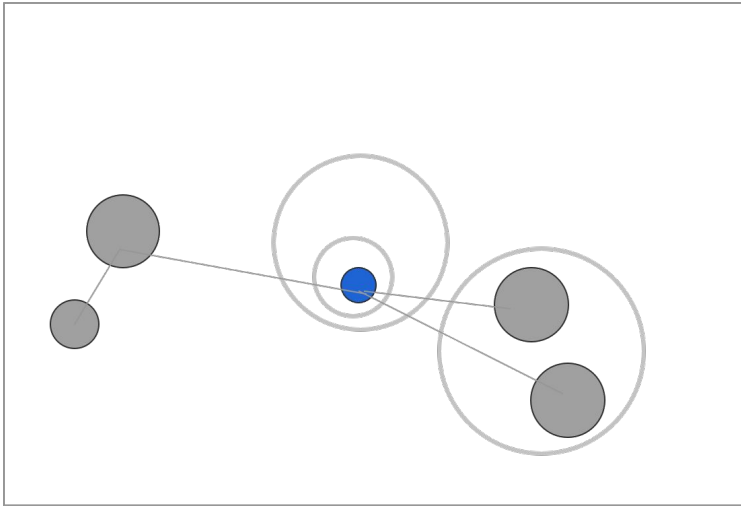
Optional— other thoughts/revelations/concerns to share? _____

Use scratch paper for these activities:

Some tips for approaching the first two activities in the workshop. Your facilitator will prompt you through the details. It's going to be fast—optimize for getting data on the page so you can discuss, rather than building the “perfect” picture.

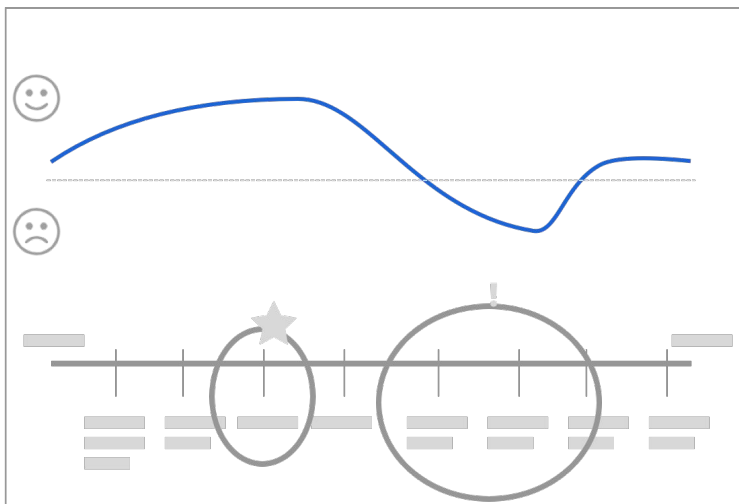
Team / Org Ecosystem: Activity #1

- We'll visualize the structure of our team within the larger org
- Don't worry about how it looks—try to get all the right pieces in place and figure out connections
- If you're in an agency/consultancy, think of a recent or representative project, and include your client's organization as an important constituent
- When you map out “front line” groups (sales, support, etc.), think about the types of user/customer information they have, and how it's used. Is it being leveraged appropriately?



Project Journey Map: Activity #2

- We'll use a basic journey map format: powerful tool for visualizing and reflecting on an experience
- Choose a project that's recently done or almost-complete so you can get a good picture. Detailed specifics of a recent project will be more useful than an old or “ideal” project
- As you map out the emotion line, consider, what factors in the project, your team, your personal life, made you feel that way?



Craft Skills: Worksheet #1

1. Circle each skill you've used in the last ~3 months on real project work; add a star to any skills you could teach & explain to others
2. Add numbers, "1, 2, 3" next to the three skills you think are the most important for your work right now
3. Add letters, "A, B, C" next to three skills you think would be most helpful / desirable for advancing as a researcher

develop actionable research questions

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| 501. develop research questions from team needs | 505. build customer / user group / advisory council |
| 502. interview stakeholders | 506. collaborate with front-line (sales, support, consulting) |
| 503. run design discovery workshops | 507. establish relationships with x-functional counterparts |
| 504. participate in product roadmap planning | 508. run lean/hypothesis mapping workshops |

devise & socialize plan for finding answers

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| 301. plan end-to-end research project | 308. work with outside vendor/providers |
| 302. develop study plan from research questions | 309. set up product beta testing |
| 303. define participant criteria / develop screener | 310. communicate project status/progress outward |
| 304. survey / questionnaire development | 311. train others to conduct evaluative research |
| 305. run stakeholder kickoff/assumption workshops | 312. conduct product heuristic analyses |
| 306. set up live product A/B testing | 313. set up card sorting / IA testing |
| 307. set up quantitative analyses (e.g., NPS) | 314. identify and segment study participants |

adapt plan to real world and execute ("research")

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| 101. coordinate, schedule, recruit participants | 108. conduct IA testing (e.g., card sorts, tree tests) |
| 102. run user interview session [general] | 109. conduct exploratory / unstructured research |
| 103. conduct product usability testing | 110. run field/observation research sessions |
| 104. set up unmoderated user/usability testing | 111. run longitudinal: diary studies / experience sampling |
| 105. take notes, record audio & video | 112. evaluate product accessibility |
| 106. conduct remote usability testing | 113. conduct prototype / concept testing |
| 107. conduct wizard-of-oz testing | |

debrief & review nature of collected data ("analysis")

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| 201. manage & organize raw research data | 205. conduct affinity mapping workshops |
| 202. run session topline debrief meetings | 206. open-ended qualitative data analysis |
| 203. analyze / evaluate usability video | 207. develop usability study reports |
| 204. catalog / centralize research insights | 208. open-ended quantitative data analysis |

derive answers, actionable meaning from results ("synthesis")

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| 401. develop conceptual models | 405. develop behavioral archetypes (e.g., personas) |
| 402. develop service blueprints | 406. develop use-centered archetypes (e.g., JTBDs) |
| 403. develop journey maps | 407. run sensemaking / synthesis workshops |
| 404. develop mental models | 408. combine qualitative with product analytics |
| | 409. develop quantitative models / clustering |

ensure coherent action & follow-through

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| 601. present/share study findings | 606. establish rolling/cadenced user studies |
| 602. align research to development cycles | 607. set up rapid-iterative-testing cycles |
| 603. present findings organization-wide | 608. track issues/defects in bug tracking system |
| 604. evangelize the value of research | 609. model user needs for wider org. |
| 605. facilitate design sprints | 610. develop product/design strategy/approach |

Other / write-ins: _____

Human Skills: Worksheet #2

These speak to a broad range of avenues you can pursue for growth and advancement. Do your best to rate each 1–5.

Business & strategy insight—what is our organization trying to do? How do we go about that?

1: it's not clear to me	2: it's a bit fuzzy	3: I'm roughly aware	4: I have a solid picture	5: I understand deeply
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Adjacent disciplines & delivery—how do our delivery disciplines all fit together? Where does research fit?

1: it's not clear to me	2: it's a bit fuzzy	3: I'm roughly aware	4: I have a solid picture	5: I understand deeply
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Organizational diplomacy—how do we evangelize value of research? With whom & where is the influence?

1: it's not clear to me	2: it's a bit fuzzy	3: I'm roughly aware	4: I have a solid picture	5: I understand deeply
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Service conceptual understanding—what is the underlying scope & structure of our service / product?

1: it's not clear to me	2: it's a bit fuzzy	3: I'm roughly aware	4: I have a solid picture	5: I understand deeply
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Stakeholder management / communication—how do we keep all parties informed, at the right level?

1: I don't do this at all	2: I can do this in a pinch	3: I'm fairly capable here	4: I'm well-versed in this	5: I'm basically an expert
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Project management / ownership—how do we work together to make [outcomes] happen? Why?

1: I don't do this at all	2: I can do this in a pinch	3: I'm fairly capable here	4: I'm well-versed in this	5: I'm basically an expert
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Research process management—how do we design/adapt research to fit our project/situational needs?

1: I don't do this at all	2: I can do this in a pinch	3: I'm fairly capable here	4: I'm well-versed in this	5: I'm basically an expert
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Research operations prowess—how do we prepare, enable, sustain, evolve our research program?

1: I don't do this at all	2: I can do this in a pinch	3: I'm fairly capable here	4: I'm well-versed in this	5: I'm basically an expert
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Technical research prowess—how do we actually plan, execute, understand, and package our research?

1: I don't do this at all	2: I can do this in a pinch	3: I'm fairly capable here	4: I'm well-versed in this	5: I'm basically an expert
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Persuasion & storytelling—how do we translate research output into product/service outcomes?

1: I don't do this at all	2: I can do this in a pinch	3: I'm fairly capable here	4: I'm well-versed in this	5: I'm basically an expert
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Interpersonal relationships—how well-connected am I to cross-functional team members in the org.?

1: I know nobody	2: I have a few connects	3: I've some good allies	4: I feel well-engaged	5: I know&trust <i>everyone</i>
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Professional relationships—how well-connected am I to our larger professional community?

1: I know nobody	2: I have a few connects	3: I've some good allies	4: I feel well-engaged	5: I know&trust <i>everyone</i>
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Mindful work & reflection—how well do I separate my work & my worth? How honestly do I assess myself?

1: I don't do this at all	2: I can do this in a pinch	3: I'm fairly capable here	4: I'm well-versed in this	5: I'm basically an expert
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Career Map: Worksheet #3

- Think of the Y-axis as your growth in “doing the work” (Craft), and the X-axis as your growth in working together with other people (Human)
- Your facilitator will prompt you through filling out your past-to-current state of the map
- Don't worry if you feel stuck in the lower left for now—which way will you move forward? Why?

You'll chart your journey along this map. Don't worry if it's only on the lower left for now: project your path forward.

