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.

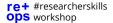
You'll **leave the top 2 sheets with your facilitator** after the workshop—your organizer will digitize your feedback, and the ResearchOps team will clean up and open source all of our collected data.

| Does your org have a formal car Does your org have dedicated so Are you currently working towa | reer / skill ladder in place? upport for research operations? ords a specific goal or next-step as a r owards right now? | esearcher? Yes / No / I'm not sure |
|--|---|------------------------------------|
| Does your org have a formal car | upport for research operations? | Yes / No / Self-employed |
| Does your org have a formal car | - | |
| - | eer / skill ladder in place? | Yes / No / Self-employed |
| Does your org have a formal career / skill ladder in place? | | |
| Are you a member of the Resear | rchOps Slack community? | Yes / No / On Waitlist |
| Other, very exciting questions: | | |
| | | |
| | | |
| | | |
| | nin kind of work you're doing right no | w? |
| A question about your work: | | |
| | None / Laggard / Early / Progressing / | Mature / I'm not sure |
| Org. research maturity (circle or | ne, best-guess OK): | |
| | Just me! / 2–10 / 11–20 / 21–50 / 51–10 | 0 / 101–500 / 501–1,000 / 1,001+ |
| Org. size—total # employees (cir | rcle one): (overall company size over | office size) |
| Total # researchers in org: | (0 if no researchers, and you | u're a designer who does research) |
| Org. type (circle one): | Agency / Freelance / In-house-private | sector / Public sector |
| Official job title: | | |
| Years in current role: | | |
| | | |
| Years doing research: | | |

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:** C. ____ **Most desired Craft Skills:** 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 & articulation: 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?

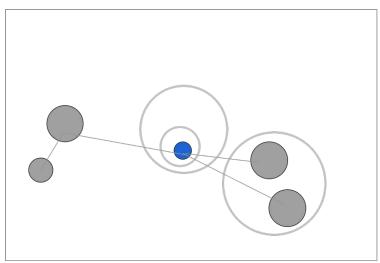


Use scratch paper for these activities:

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.

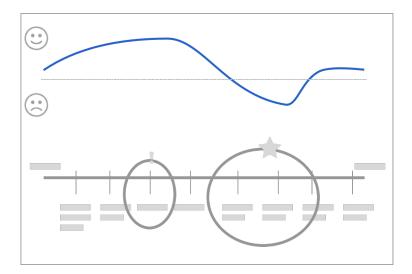
Team / Org Ecosystem: Activity #1

- 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 for advancing as a researcher

| 501. | develop research questions from team needs | 505. | build customer / user group / advisory council |
|------------|--|------|--|
| 502. | interview stakeholders | 506. | collaborate with front-line (sales, support, consultin |
| 503. | run design discovery workshops | 507. | establish relationships with x-functional counterpar |
| 504. | participate in product roadmap planning | 508. | run lean/hypothesis mapping workshops |
| vise & soc | ialize plan for finding answers | | |
| 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 |
| apt plan t | o real world and execute ("research") | | |
| 101. | coordinate, schedule, recruit participants | 107. | conduct prototype / concept testing |
| 102. | run user interview session [general] | 108. | conduct IA testing (e.g., card sorts, tree tests) |
| 103. | conduct product usability testing | 109. | conduct exploratory / unstructured research |
| 104. | set up unmoderated user/usability testing | 110. | run field/observation research sessions |
| 105. | take notes, record audio & video | 111. | run longitudinal: diary studies / experience samplir |
| 106. | conduct remote usability testing | 112. | evaluate product accessibility |
| 107. | conduct wizard-of-oz testing | | , , |
| brief & re | view nature of collected data ("analysis") | | |
| 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 |
| | ers, actionable meaning from results ("synthesis") | | |
| 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 |
| sure cohe | rent action & follow-through | | |
| 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.

| Durationage O street agent in a label | | | |
|---|----------------------|---------------------|-------------------|
| Business & strategy insight—what is our | r organization tryii | ing to do? How do v | ve 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 |
|----------------------------|--------------------|----------------------|---------------------------|------------------------|
|----------------------------|--------------------|----------------------|---------------------------|------------------------|

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 |
|-------------------------|---------------------|----------------------|---------------------------|------------------------|
| | | | | |

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 |
|-------------------------|---------------------|----------------------|---------------------------|------------------------|
| | | | | |

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 |
|-------------------------|---------------------|----------------------|---------------------------|------------------------|
| | | | | |

Stakeholder management / communication—how do we keep all parties informed, at the right level?

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 |
|--|
|--|

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 | |
|--|---------------------------|-----------------------------|----------------------------|----------------------------|----------------------------|--|
|--|---------------------------|-----------------------------|----------------------------|----------------------------|----------------------------|--|

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 |
|-----|---------------------------|-----------------------------|----------------------------|----------------------------|----------------------------|
| - 1 | | | | | |

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 |
|---------------------------|----------------------------------|------------------------------|-----------------------------|----------------------------|
| 1. I doirt do this at all | 2. I carr do triis irr a piricri | 3. Till failiy capable fiere | 4. THI Well-versed III this | 5. Till basically all expe |

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 |
|---------------------------|-----------------------------|----------------------------|----------------------------|----------------------------|
| | ' | , , | | , ' |

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 everyone | |
|-----|------------------|--------------------------|--------------------------|------------------------|--------------------------|---|
| - 1 | | | | | | 1 |

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 everyone |
|------------------|--------------------------|--------------------------|------------------------|--------------------------|
| | | | | |

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 | |

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.

