Researcher Skills Workshop - Madrid

Un proyecto de la comunidad ResearchOps
Hashtag *#researcherskills*

Mientras llegas, porfa rellena **Skills/Career Sheet (part 1)**

re+ops

Bienvenidas!

ResearchOps?

Una comunidad activa en Slack
Con 1,600+ personas
http://researchops.community/

Twitter
https://twitter.com/teamreops
#researchops

re+
ops

ResearchOps is the 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 organisation.

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About this map

This map is the result of a global initiative by researchers for researchers to give shape to the emerging practice of ResearchOps. It's our V1.

It's the result of the analysis of data gathered via a survey and 33 #WhatisResearchOps workshops that ran around the world.

The map's intention is to give a framework for what ResearchOps is. As the practice grows, we expect this map will grow and be refined too.

What about data security, privacy, and procurement?

Data security, privacy, and procurement should be considered in every ResearchOps element you deliver. They're ubiquitous; we've therefore not set them out as discrete elements.

Consider both quantitative and qualitative needs.

The needs of quant and qual are sometimes different; consider this in delivering each ResearchOps element. For simplicity, we've not illustrated this throughout the map; take it as given.

Making knowledge gained through research findable, relevant, contextualised and understandable is complex. Building and managing a research library is a specialist and full-time job.

Asset management is about where you store raw or processed data, whether A/V or other forms of documentation. It's not about making the data useful, just findable and secured. It's heavily tied in with data security.
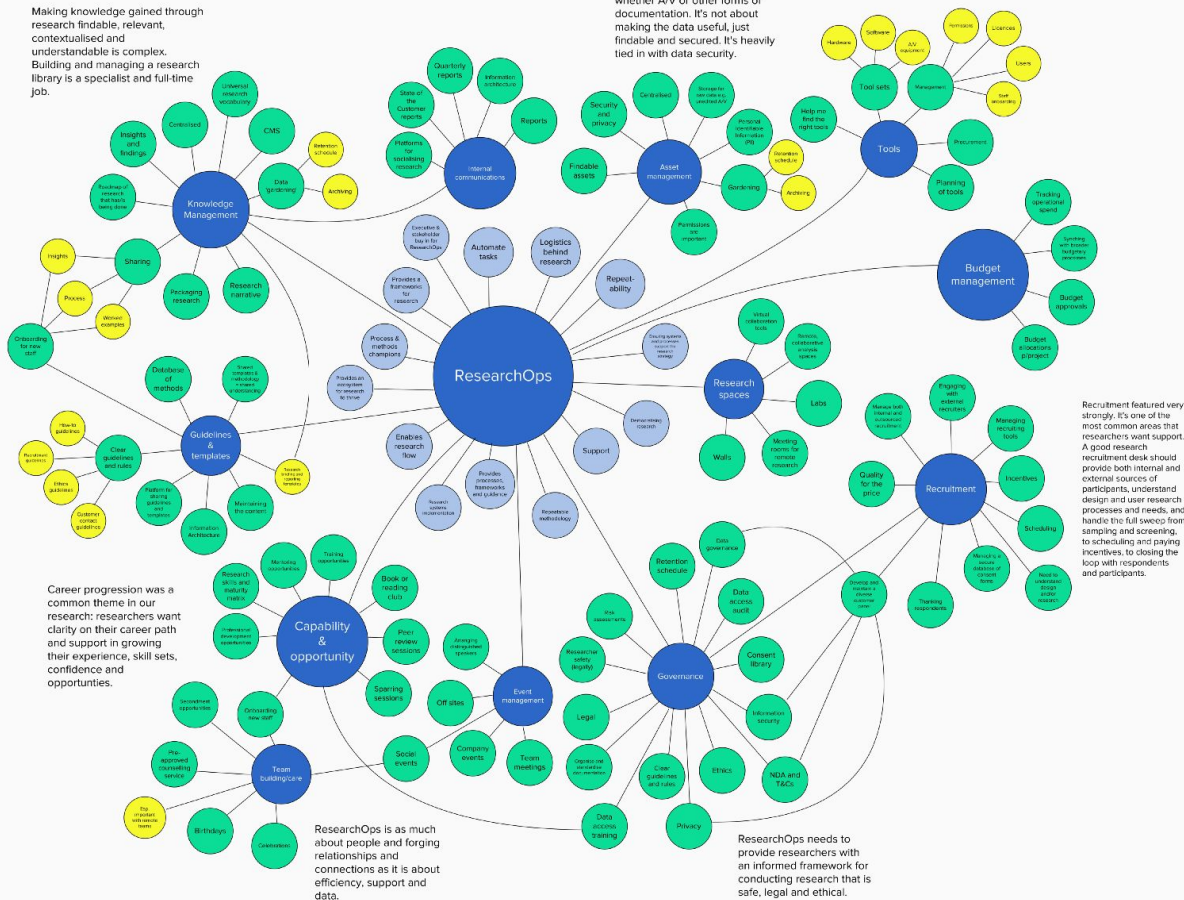
Recruitment featured very strongly. It's one of the most common areas that researchers want support. A good research recruitment desk should provide both internal and external sources of participants, understand design and user research processes and needs, and handle the full sweep from sampling and screening, to scheduling and paying incentives, to closing the loop with respondents and participants.

Career progression was a common theme in our research: researchers want clarity on their career path and support in growing their experience, skill sets, confidence and opportunities.

ResearchOps is as much about people and forging relationships and connections as it is about efficiency, support and data.

ResearchOps needs to provide researchers with an informed framework for conducting research that is safe, legal and ethical.

Central map nodes

ResearchOps

Knowledge Management · Internal communications · Asset management · Tools · Budget management · Research spaces · Recruitment · Governance · Event management · Team building/care · Capability & opportunity · Guidelines & templates

Legend: Element · Terms used to discuss ResearchOps · Attributes · Sub attributes

La comunidad de ResearchOps cumple con un marco de habilidades para los investigadores?

La misión de una persona que hace ResearchOps es ayudar a los investigadores a hacer su mejor trabajo.

Así que, como comunidad, a menudo investigamos a los investigadores.

Este proyecto adopta un enfoque participativo para estructurar las habilidades de los investigadores, con el objetivo de liberar un marco que cualquiera pueda adaptar para su uso personal u organizacional. No se trata de operaciones per se, pero creemos que nuestra comunidad está bien posicionada para hacer esta contribución a la disciplina de investigación en general.

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34 workshops y sumando!

Objetivos y outcomes

Darle un nuevo marco y perspectiva para pensar sobre lo que significa trabajar como investigador, y hacia dónde puede ir su carrera.
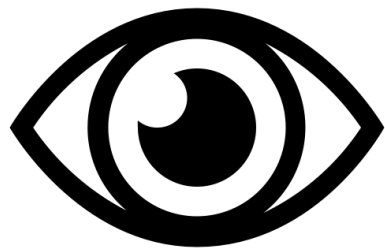
Proporcione espacio para reflexionar sobre la naturaleza de su trabajo, identifique áreas específicas que merecen tiempo y atención.

Conectarse con otros investigadores para que pueda aprender de las lecciones, perspectivas y enfoques del trabajo de cada uno,

Crear datos útiles para que el equipo de ResearchOps publique hallazgos que representen a investigadores de todo el mundo.
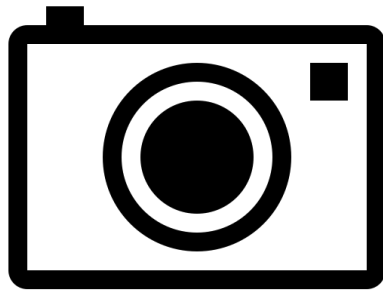
Espacio seguro

"Friend-DA" NDA
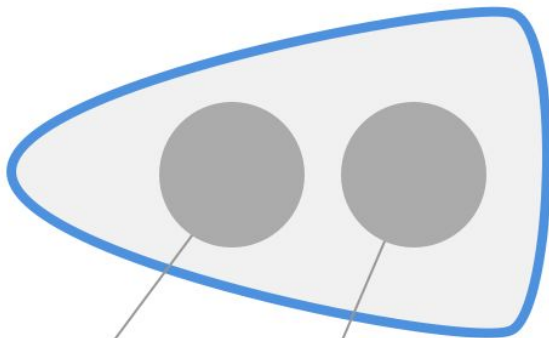
Porfa, pon tu teléfono en silencio.

Fotos?

pocket camera by Guilherme Simoes from the Noun Project

Qué hacemos hoy:

10-15min	45-50 min	5-10m	45-50 min	10-15min
open + perspectives	**mapping + discussion**		**rating + reflection**	**summary + feedback**

Welcome, ground rules, facilitator presents common points of reference. *Summary Form pt. 1*
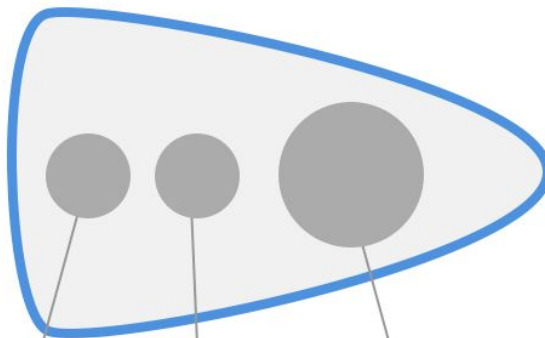
***Org / Ecosystem Modeling**: mapping team-in-org, and influence*

***Recent Project Journey Mapping:** lay out the timeline, highs, lows, and critical moments in a specific-project context*

***Craft Skills:** (individual) sorting out technical research skills*

***Human Skills:** (individual) evaluating a range of skills that make the work work*

***Career Map:** (group) tracing the path on a career map; projecting forward; discussion*

Wind-down, goal focus, reflection circle, high fives all around. *Summary Form pt. 2*

10-15min

**open +
perspectives**

45-50 min

mapping + discussion

5-10m

45-50 min

rating + reflection

10-15min

summary +
feedback

Welcome, ground
rules,facilitator
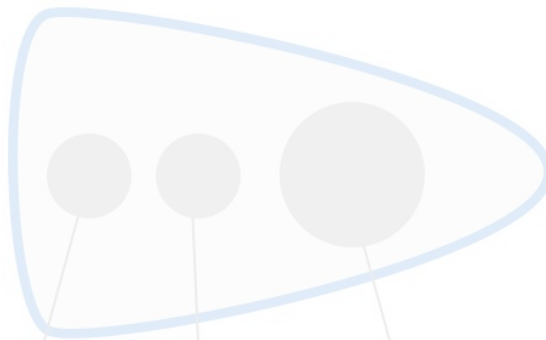presents common
points of reference.
Summary Form pt. 1

*Org / Ecosystem
Modeling*:
mapping team-in-
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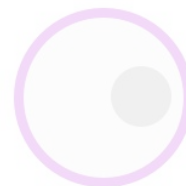moments in a specific-
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forward; discussion

Wind-down, goal
focus, reflection
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around.
Summary Form pt. 2

Actualmente, estás...

1. Trabajo en producto/empresa
2. Trabajo en una agencia/consultoría
3. Trabajo para el gobierno
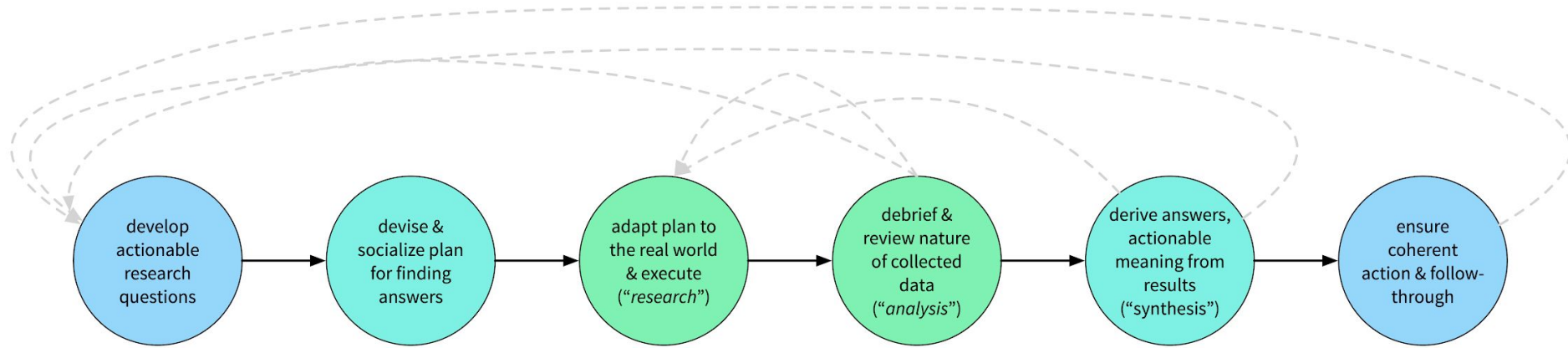4. Soy independiente/freelance

1. Nuevo
2. He estado en este campo por más de 2 años
3. Por más de 4 años
4. Más de 6 años
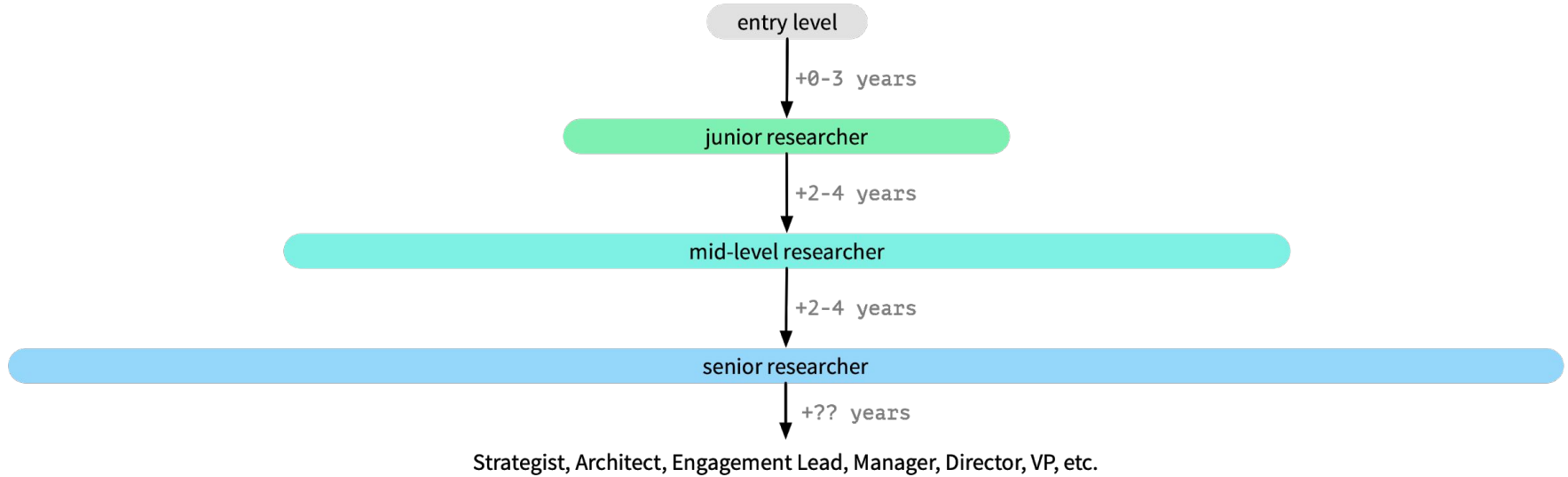5. Más de 8 años
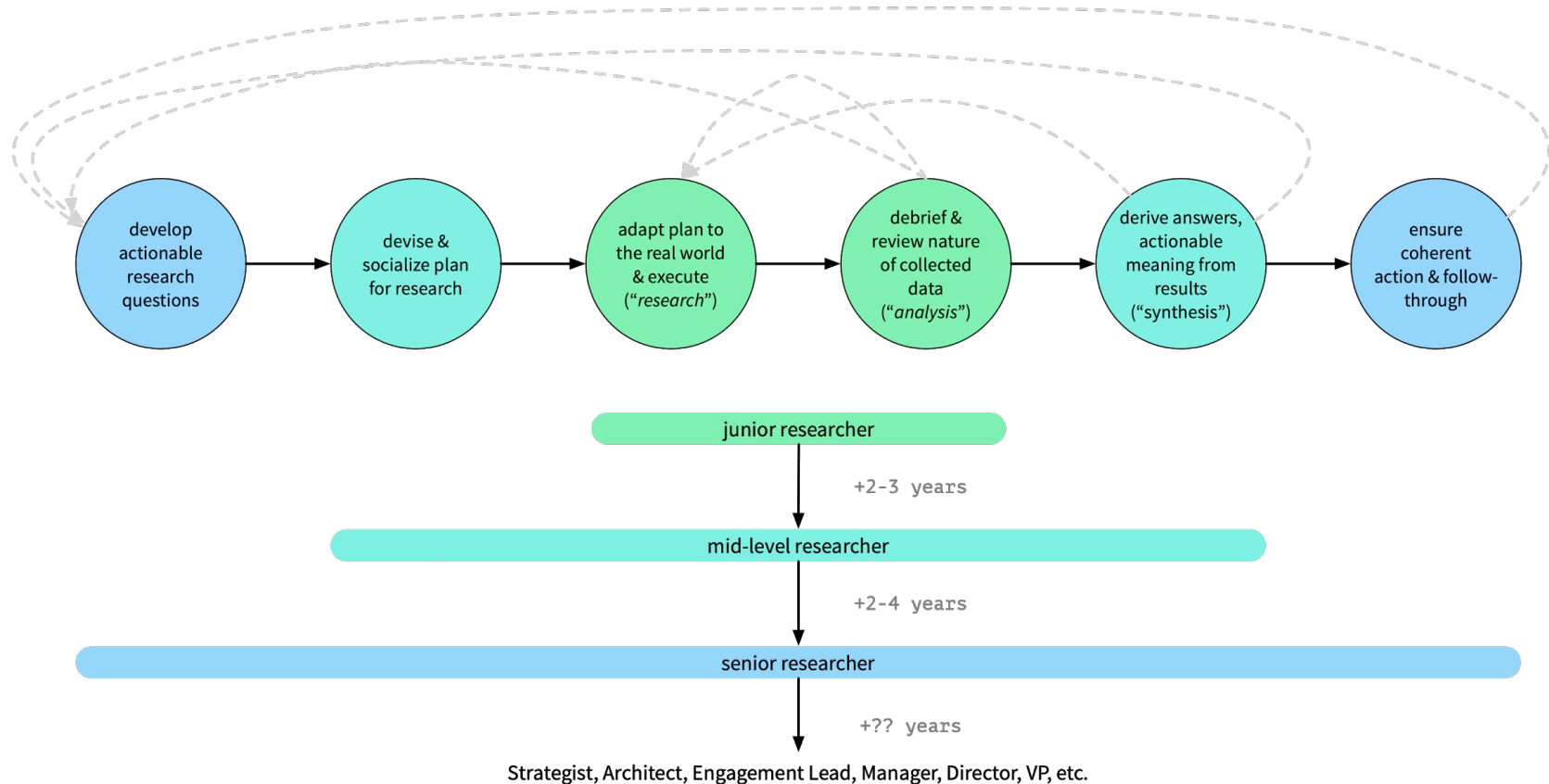6. Más de 10 años?

Todas de pié

Perspectivas

¿Qué es research?

Diferentes niveles

entry level

+0-3 years

junior researcher

+2-4 years

mid-level researcher

+2-4 years

senior researcher

+?? years

Strategist, Architect, Engagement Lead, Manager, Director, VP, etc.

Visión combinada: crecimiento y procesos

Desafíos del trabajo como researcher

Junior researcher

- Coordinación con las partes interesadas multifuncionales
- Entender la parte de cada rol en la prestación de servicios
- Conjunto limitado de técnicas/herramientas de investigación, tareas
- Evaluar honestamente / Reflexionar sobre el trabajo

Mid-level researcher

- Falta de influencia en las decisiones sobre los productos
- Comprensión difusa de la estrategia empresarial
- Gestión de los grupos de interés del proyecto, compromiso
- Tejiendo / trabajando con datos cuantitativos

Senior researcher

- Priorización de los trabajos de investigación por orden superior
- Estiramientos demasiado finos; siempre adaptándose a los cambios de última hora
- Demostrando el valor de la investigación, estableciendo el retorno de la inversión del proyecto
- Adelantándose al ciclo de entrega del producto
- Influencia en los equipos multifuncionales para la participación

Synthesized from 14 discovery interviews conducted by the ResearchOps project team

Claridad para destacar y subir de nivel

	¿Claridad sobre las habilidades y competencias requeridas en el rol?	¿Claridad sobre lo que viene / cómo crecer en su carrera?
Junior researcher	No	No
Mid-level researcher	No	A lo mejor
Senior researcher	Sí	Sí

Synthesized from 14 discovery interviews conducted by the ResearchOps project team

Barreras para subir de nivel

Junior researcher

- Averiguar qué sigue y cómo llegar hasta allí
- Encontrar buenos recursos y mentores confiables
- Preocupado por no tener una meta específica en torno al progreso

Mid-level researcher

- No jugar un papel más influyente en las decisiones de productos
- Falta de claridad para hacer avanzar la visión de negocio

Senior researcher

- No ser capaz de encontrar tiempo para encontrar un mentor
- Siempre teniendo que adaptarse a todos los demás / organización
- La necesidad de ser siempre ágiles con los cambios de última hora

Synthesized from 14 discovery interviews conducted by the ResearchOps project team

¿Cómo es "mejorar"?

Junior researcher
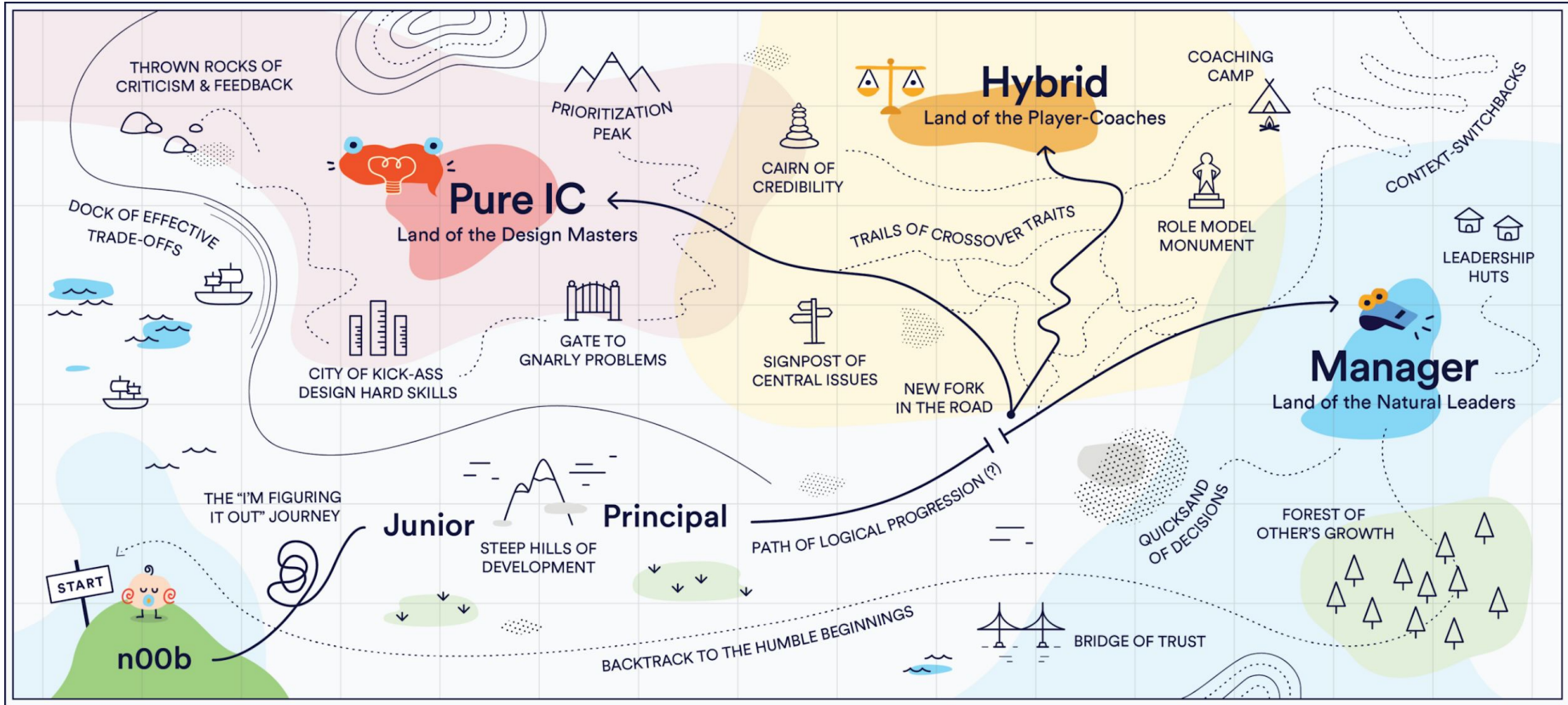
- No está claro

Mid-level researcher

- Quisieran hacer un trabajo más útil e impactante
- Quisieran aprender cómo su trabajo se conecta con lo que el negocio prevé.

Senior researcher

- Profundizar en las habilidades cualitativas
- Dominio de métodos mixtos
- Responde a lo que "la investigación mínima viable" llevará al progreso

Synthesized from 14 discovery interviews conducted by the ResearchOps project team

Vista de que hay más allá del senior

Mapeo y debate

open +
perspectives

45-50 min

mapping + discussion

5-10min

45-50 min

rating + reflection

summary +
feedback

Welcome, ground
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presents common
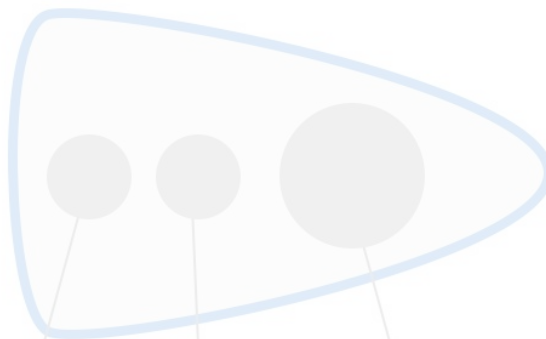points of reference.
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***Org / Ecosystem
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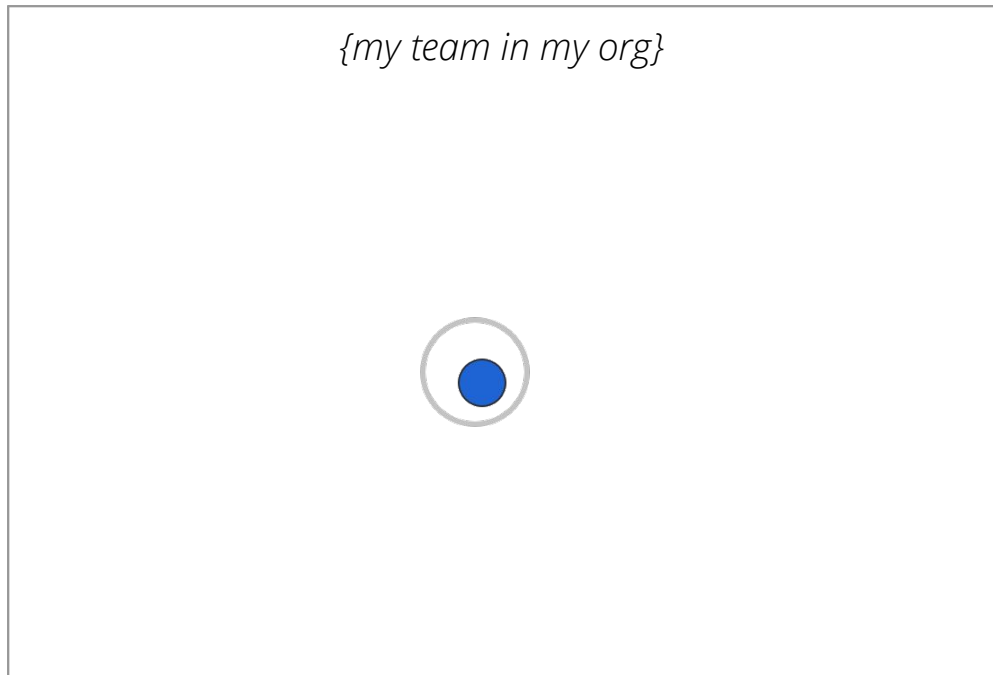path on a career
map; projecting
forward; discussion*

*Wind-down, goal
focus, reflection
circle, high fives all
around.
Summary Form pt. 2*

Modelar el Ecosistema en tu org. — Actividad #1

{my team in my org}

- Coja una hoja de papel y bolígrafos

- Empieza con un punto sombreado para ti, y añade un círculo alrededor para tu equipo....

Modelar el Ecosistema en tu org. — Actividad #1

1. Dibuje un círculo más grande alrededor de tu equipo: ¿de qué grupo o unidad de negocio más grande forma parte tu equipo? Etiqueta a ese grupo.

2. Añade a tu equipo de diseño y/o producto si aún no forman parte de la imagen.

3. Finalmente, piensa en cada equipo/grupo con acceso directo a los clientes: ventas, soporte, consultoría, etc.-añade al mapa y sombreada. Averigüe cómo se conectan contigo.
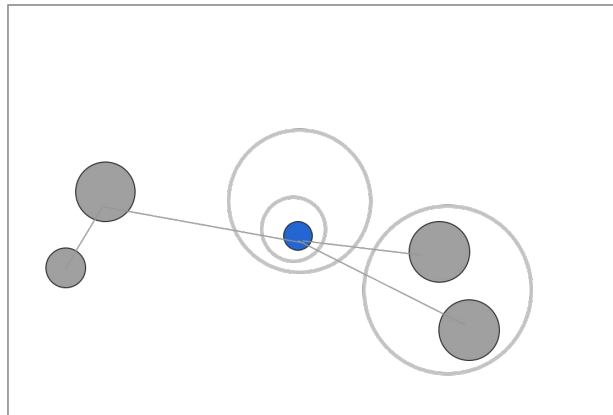
Sola
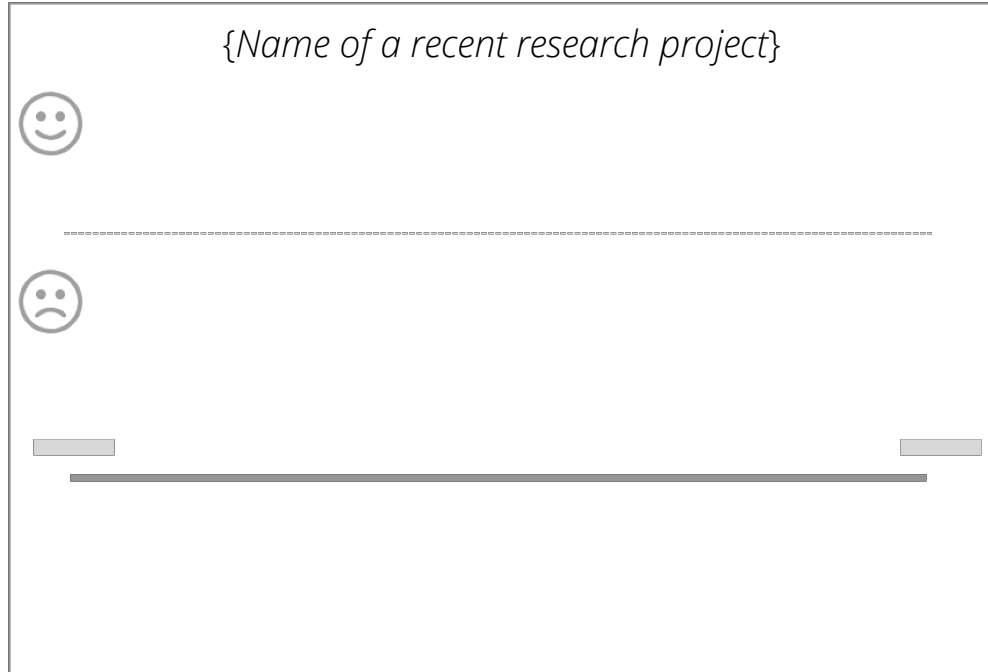3 min

Modelar el Ecosistema en tu org. — Debate

1. ¿Dónde encaja tu equipo en la organización?

2. ¿Cómo afecta al trabajo que realizas?

3. ¿Qué otro equipo tiene la mayor conexión con los clientes/usuarios? Por qué? ¿Qué pasa con tu conocimiento y experiencia?

4. Desde tu punto de vista, ¿quién tiene el mayor impacto en su trabajo?

En parejas 10 min

Journey Map de un Proyecto — Actividad #2

{*Name of a recent research project*}

- Coje una hoja de papel y bolígrafos

- Traza dos líneas: una línea de emoción en la parte superior (agregue sus caritas felices/tristes favoritas) y una línea de tiempo del proyecto en la parte inferior.

Journey Map de un Proyecto — Actividad #2

1. Comienza por llenar un cronograma de eventos importantes del proyecto, cualquier cosa que haya cambiado el estado o el curso del proyecto.

2. Ahora piensa y rellena la línea del mapa de viaje del "estado emocional": ¿cómo te sentiste a lo largo de este proyecto?

3. ¿Dónde sentiste la mayor frustración? Circule esa área y dibuja un signo de exclamación en tu línea de tiempo aquí

4. Finalmente, ¿dónde sentiste que tuvo el gran impacto? Circule su línea de tiempo y dibuje una estrella en su línea de tiempo aquí
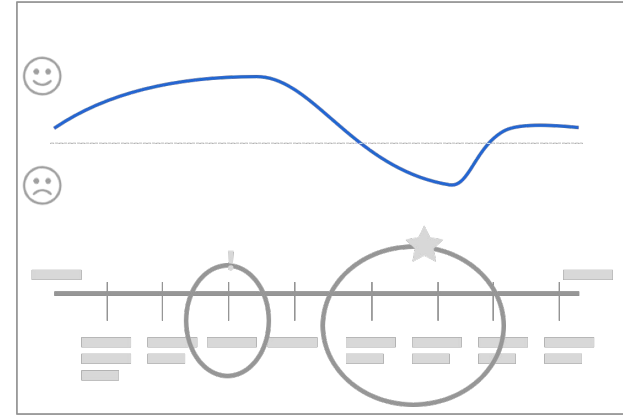
Sola
3 min

Journey Map de un Proyecto — Debate

1. ¿Cómo comenzó tu participación en el proyecto? ¿Cuánta influencia tuviste sobre cómo lo hiciste?

2. ¿Qué tipo de evento, acción o resultado lo hizo sentir más impactante?

3. ¿Qué condiciones llevaron al estrés o a la dificultad en el proyecto? Por qué?

4. ¿Cómo se cerró su participación? ¿Cuáles fueron los resultados finales?

En Pareja 10 min

Hacemos un coffee break

Clasificación y reflexión

10-15min
open + perspectives

45-50 min
mapping + discussion

5-10m

45-50 min
rating + reflection

10-15min
summary + feedback

Welcome, ground rules, facilitator presents common points of reference. Summary Form pt. 1

Org / Ecosystem Modeling: mapping team-in-org, and influence

Recent Project Journey Mapping: lay out the timeline, highs, lows, and critical moments in a specific-project context
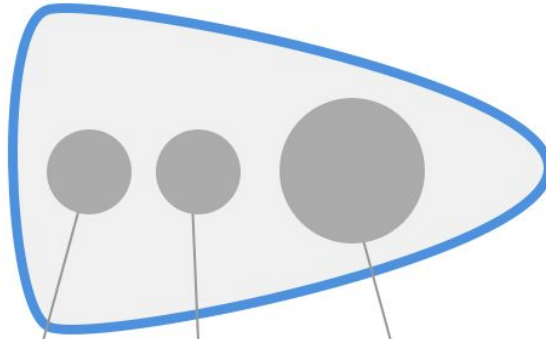
Craft Skills: (individual) sorting out technical research skills

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Career Map: (group) tracing the path on a career map; projecting forward; discussion

Wind-down, goal focus, reflection circle, high fives all around. Summary Form pt. 2

Craft Skills: Hoja de trabajo 1 #1

Craft Skills: Worksheet #1

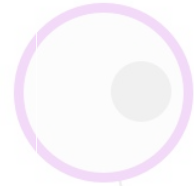1. Circle each skill you've used in the last ~3 months on real project work; add a star to any skills you could teach & explain to others
2. Add numbers, "1, 2, 3" next to the three skills you think are *the most important* for your work right now
3. Add letters, "A, B, C" next to three skills you think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

develop actionable research questions

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		

devise & socialize plan for finding answers

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

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

101.	interview users	107.	conduct prototype / concept testing
102.	conduct product usability testing	108.	conduct IA testing (e.g., card sorts, tree tests)
103.	set up unmoderated usability testing	109.	conduct exploratory / unstructured research
104.	take notes, record audio & video	110.	run field/ethnographic research
105.	conduct remote usability testing	111.	run longitudinal: diary studies / experience sampling
106.	conduct wizard-of-oz testing	112.	evaluate product accessibility

debrief & review 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		

derive answers, 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

ensure coherent 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		

Other / write-ins: _____

re+ ops #researcherskills workshop
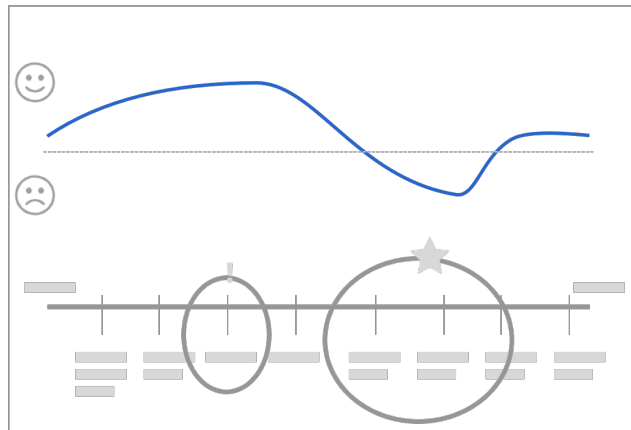
Craft Skills: Hoja de trabajo #1

1. **Rodea con una línea** cada habilidad que has usado en los últimos ~3 meses en un proyecto real; **añade una estrella** a cualquier habilidad que puedas enseñar y explicar a otros.

2. Añade los **números "1, 2, 3"** junto a las tres habilidades que creas que son las más importantes para tu trabajo en este momento

3. Añade **las letras "A, B, C"** junto a las tres habilidades que consideres más útiles para avanzar como investigador.

Sola
7 min

Human Skills: Hoja de trabajo #2

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

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?

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

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

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

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

**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

re+ ops #researcherskills workshop
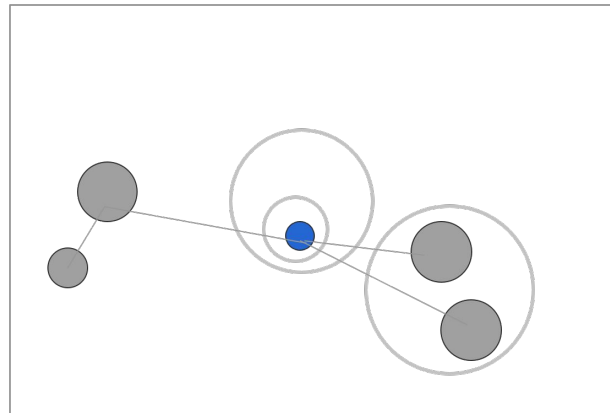
Human Skills: Hoja de trabajo #2

1. Echa un vistazo al mapa de tu organización/ecosistema y piensa en tus relaciones con el equipo que te rodea.
2. Lee cada una de las Habilidades Humanas en esta hoja de trabajo
3. **Rodea con una línea** tu auto-evaluación del estado actual-la sensación de que está bien

Solo
7 min

Career Map: Hoja de trabajo #3
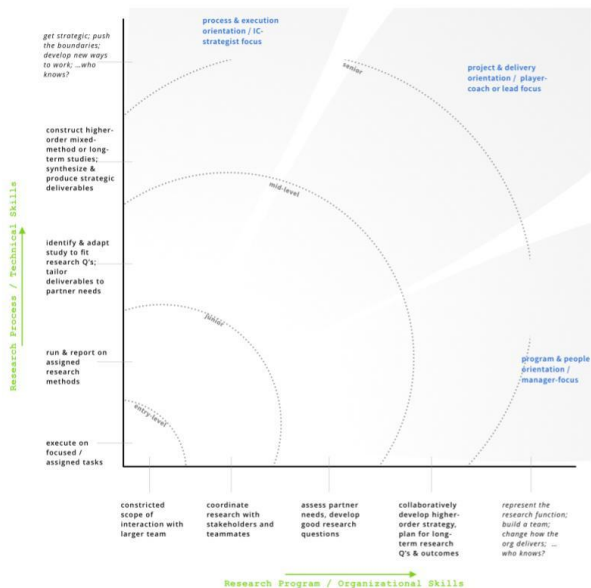
Career Map: Hoja de trabajo #3

1. ¿Cuándo empezaste como investigador? Pon un punto, añade una fecha. En ese primer papel, ¿dónde crees que te metiste? Coloca un punto y rastrea la progresión.
2. Pasa al siguiente año o al siguiente trabajo, lo que sea primero: piensa en cómo estabas trabajando, coloca un punto.
3. Ahora continúa haciendo un seguimiento de tu progreso para cada año y evento profesional, hasta que llegue el día de hoy.

4. Por último, avanzar algunos años....

Sola 7 min
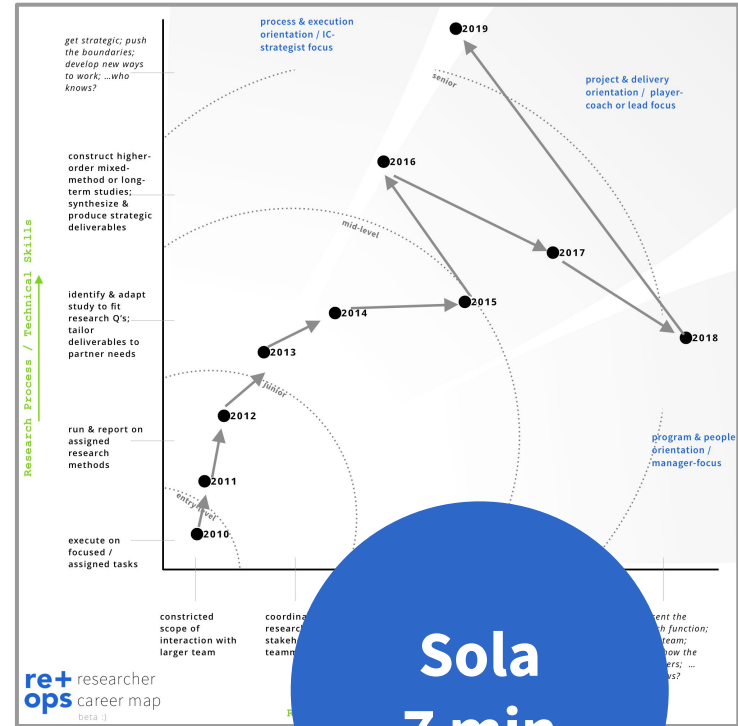
Career Map: Hoja de trabajo #3

1. ¿Dónde estás ahora y cómo llegaste allí?
2. ¿Cuál es la parte más interesante (la mejor, la peor, la más difícil, la más inusual) de tu viaje hasta ahora?
3. ¿Hacia dónde crees que te gustaría empujar? ¿Cómo llegarás allí?

En grupo 20 min

Reflexión

10-15min

**open +
perspectives**

45-50 min

mapping + discussion

5-10m

45-50 min

rating + reflection

10-15min

**summary +
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moments in a specific-
project context*
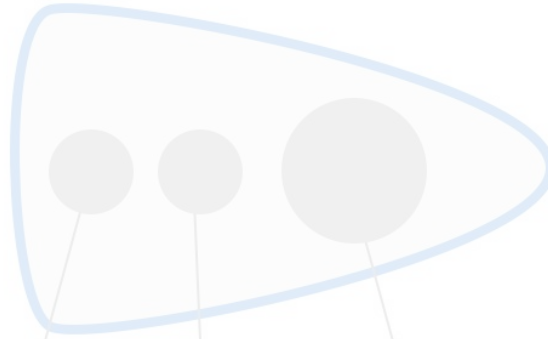
Craft Skills:
*(individual)
sorting out
technical
research skills*

Human Skills:
*(individual)
evaluating a
range of skills
that make the
work work*

Career Map:
*(group) tracing the
path on a career
map; projecting
forward; discussion*

*Wind-down, goal
focus, reflection
circle, high fives all
around.*
Summary Form pt. 2

Auto-reflexión

- ¿Qué aprendiste hoy?
- ¿Cuáles serán tus próximos pasos?
- ¿Cuáles son las preguntas que quieres explorar?

Sola 3 min

Compartir reflexión: alrededor de la sala

- Comparte tus reflexiones si te sientes cómoda

1 min Para cada uno

¡El último paso!

Rellena la pág 2. Entrégalo a las facilitadoras

Toma fotos para ti, y puedes quedarte con todos los demás materiales de la hoja de trabajo.

Las organizadoras también te enviarán mañana un formulario online de comentarios sobre el taller.

Research Skills/Career Sheet (part 1)

Please fill this out while you get settled in. 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): Independent / Consultancy / Startup / Enterprise / Government / Other
Team size—total # researchers: ____ *(0 if no researchers, and you're a designer who does research)*
Org. size—total # people (circle one):

self-employed / 1–10 / 11–50 / 51–200 / 201–500 / 501–1000 / 1001–5000 / 5001–10,000 / 10,001+

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
(if yes) What are you working towards right now? _____

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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 : 1.____ 2.____ 3.____
Most desired Craft Skills: 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 & 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? _____

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Ref: UX Research Maturity Model

	LAGGARD	EARLY	PROGRESSING	MATURE
Exec Attitude	• Unconvinced	• Cautious	• Enabling	• Expecting
Scope What does research cover? What are some of the methods that are being used? How far does research reach in the organization?	• Limited to user feedback • Market research	• Ad-hoc • Late-stage testing existing products w/ clients • User/advisory groups • Log analysis • Limited to one business or product	• Discovery research w/ client base • Consistent, iterative usability testing • Monitored Beta & Pilot programs • Comprehensive analytics & data collection • Participatory design w/ clients, users, etc	• Discovery research w/ clients, non-clients • Consistent evaluation of current products • Explores new markets, audiences • Multi-channel touchpoints • Spans across organization • Not limited to functionality: includes customer experience, recruiting & onboarding, etc
Purpose Why is the organization investing in design research?	• Find what customers don't like	• Usability test to predict the future (CYA)	• Confirm current product decisions are sound • Establish shared understanding of customers and markets by product team	• Prioritize where to focus new innovations • Inform customer/market segmentation • Learn where to adjust product strategy • Identify unmet needs
Staffing Who makes up the research team in the organization?	• No dedicated research team • Product management or marketing interacts with clients • May hire perception/market research firm	• Designers lead guerrilla usability tests • May outsource research to agency	• Dedicated research person or team within organization • Product management & design support the research team	• Management level position to lead alongside product, marketing, commercial etc • Resources available for non-research teams to conduct research, report findings
Audience Who uses the findings that come from design research?	• Individual product team	• Product management • Marketing	• Product management • Marketing • Design • Engineering	• C-suite (CEO, CMO, etc) • Commercial leaders • Corporate Strategy • External partners
Governance What are the policies to how research will be conducted and consistently applied across teams, projects, and the organization?	• none	• Little pre-research planning • Reports are emailed to stakeholders • Little awareness of best practices	• Research processes are managed, consistent • Follow best-practices • Findings are available for wider teams	• Decisions are made consulting existing design research or create need for more research • Strategy, tactics, findings are consistently applied across projects, orgs, businesses

https://uxdesign.cc/the-organizations-design-research-maturity-model-b631471c007c

¡Gracias!

+ **Sigue a @teamreops** hacían[1]
+ **Únete a la lista de espera en Slack**
+ **Participa en los town halls**
+ **Echa un vistazo a los videos en Vimeo**
+ **Únete a la conversación: #ResearchOps y #researcherskills**

https://researchops.community

https://twitter.com/teamreops

https://vimeo.com/user89807865

teamreops@gmail.com

re+ops