Research Repos Workshop

A ResearchOps community project
#ResearchRepos

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Today's Agenda

2hrs

(10 mins)   **Welcome!**
Intros and about this workshop

(15 mins)   **About the research cycle**
Talk about the research process and how we each locate ourselves within that process.

(30 mins)   **Experience mapping**
Facilitated group mapping activity

(10 mins)   *Break*

(15 mins)   **Reflection & Discussion**
Voting pains/delights, Sizing and potentially opportunities
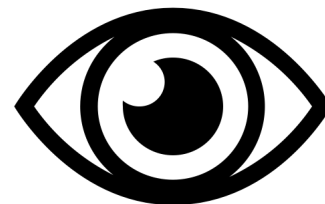
(15 mins)   **Governance**
Reflecting together on governance in the map
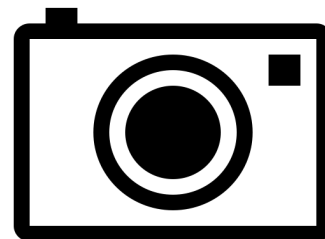
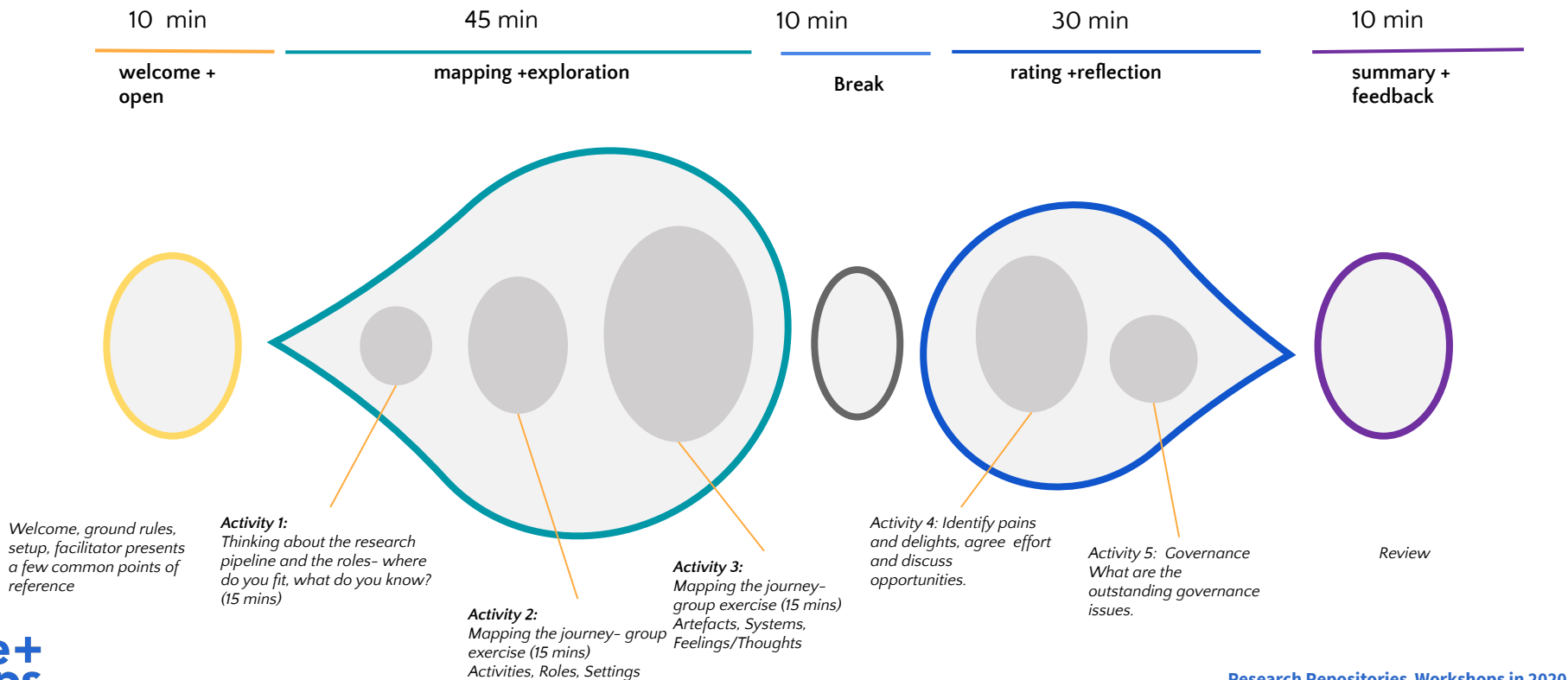**(10 mins)**   **Wrap Up**

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Safe space

"Friend-DA" NDA

**Please step outside
if you need to take a call.**

Consent for photos?

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Rough outline for today:

10 min	45 min	10 min	30 min	10 min
welcome + open	mapping +exploration	Break	rating +reflection	summary + feedback

Welcome, ground rules, setup, facilitator presents a few common points of reference

Activity 1:
Thinking about the research pipeline and the roles– where do you fit, what do you know? (15 mins)

Activity 2:
Mapping the journey– group exercise (15 mins)
Activities, Roles, Settings

Activity 3:
Mapping the journey– group exercise (15 mins)
Artefacts, Systems, Feelings/Thoughts

Activity 4: Identify pains and delights, agree effort and discuss opportunities.

Activity 5: Governance
What are the outstanding governance issues.

Review

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Key points from the Workshop Prep doc

What is a repository?

The Research Cycle

ResearchOps Community

Our Values

Workshop Prep for Attendees

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Key points from the Workshop Prep doc

What is a repository?

The Research Cycle

ResearchOps Community

Our Values

A **research repository** is any platform, system, drive, database, content collaboration tool, library, knowledge base, wiki, or file cabinet that stores research data, notes, transcripts, images, videos, recordings, findings, insights, reports, metadata, etc. to support consumption and reuse by the entire team.

And yes, that means that every researcher is interacting with a "repository" already.

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Key points from the Workshop Prep doc

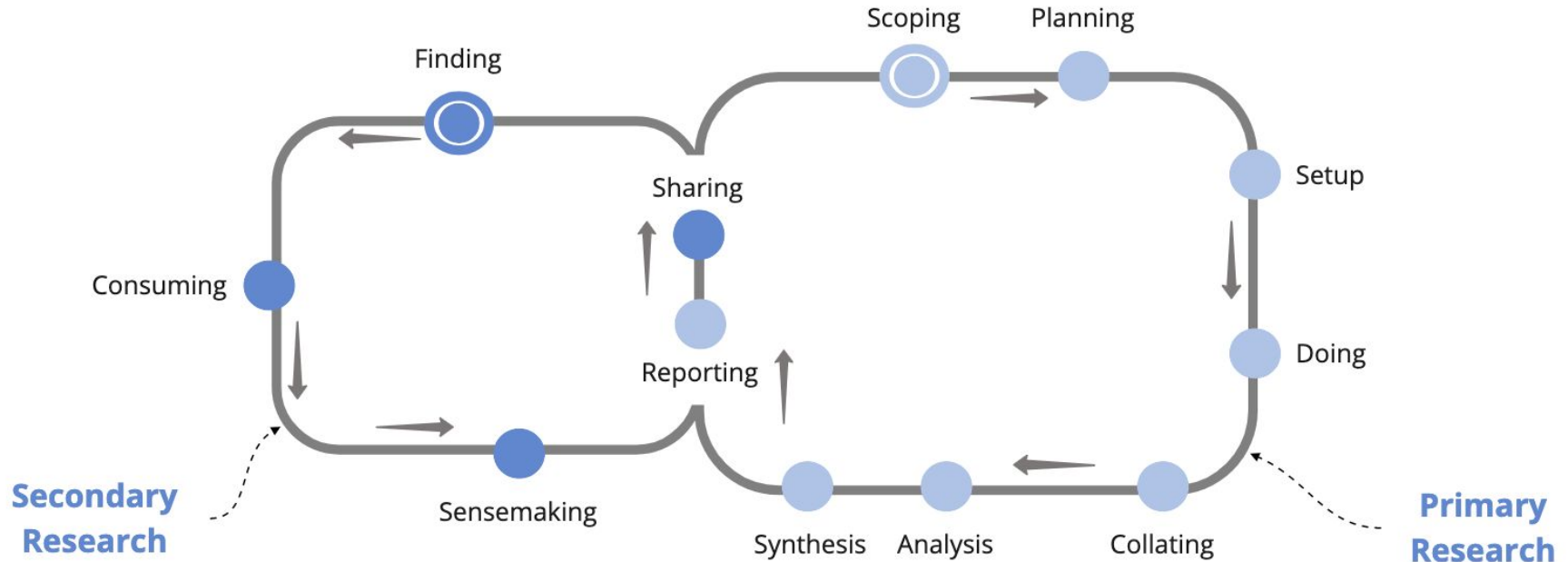What is a repository?

The Research Cycle

ResearchOps Community

Our Values

We needed a way to **illustrate the process** that would **ground us in our similarities** and support workshop conversations on the touchpoints, artifacts, rules, pains, and delights from different industry perspectives. We also wanted to differentiate between primary research, or **fieldwork**, and secondary research, or **sensemaking**. We landed on what we are calling the Tube Map.

See it on the next slide and read more in the appendix.

The Research Cycle (Tube Map version)

Key points from the Workshop Prep doc

What is a repository?

The Research Cycle

ResearchOps Community

Our Values

The ResearchOps community is a **global community on Slack with 3,600+ members in 62 countries** - we are always awake, always online, and always happy to chat about the operations and operationalization of user research and design research.

See Appendix for more about the community.

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Key points from the Workshop Prep doc

What is a repository?

The Research Cycle

ResearchOps Community

Our Values

Quality: Strive to ensure that the data, insights, method, as well as technical & human resources, are robust, reliable and replicable. Where possible, grade the quality /significance / certainty of your insights.

Accountability: Be responsible for the work you do, including; planning, fieldwork, analysis, storage, administration, and distribution.

Integrity: Consider legal and ethical implications throughout the project. This includes; acknowledging all people and resources that contributed to the work, as well as safeguarding all information and people involved.

Transparency: Promote an honest dialogue with members both within and outside of the project regarding; data, insights, practice, intention, and criticism.
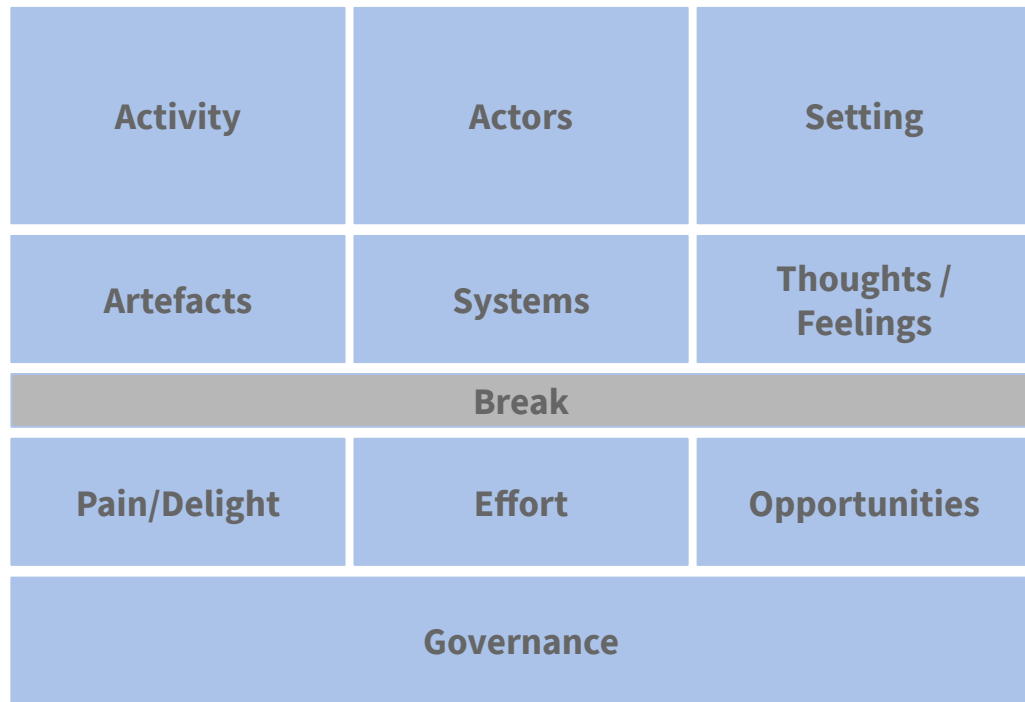
Common Good: Promoting open access and universal design. Put in more than you take out.

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Raise your hand if you:

- Have a **job title** specific to ResearchOps

- Are a research **librarian**

- Spend **most** of your time doing research

- Spend **some** of your time doing research

- Spend most of your time **working as a designer**

- Work in **government**

- **Lead** a research team

- Are an **executive stakeholder** of research

- Are a **product manager**

- Are **something else** not listed here

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Activity #1:
Experience Mapping

Experience Mapping

Activity	**Actors**	**Setting**
Artefacts	**Systems**	**Thoughts / Feelings**
Break		
Pain/Delight	**Effort**	**Opportunities**
Governance		

Experience maps are the tool we are using to capture and articulate the complete set of **touchpoints across research ecosystem** that are relevant in the context of repositories.

What are the **activities**, which **actors or roles** are responsible for them, and in what **settings**? What **artefacts** do they create and on what **systems** and **tools** do they rely? What **emotions** and **thoughts** do they experience? How do those rate as **pain points** or moments of delight? What is the level of effort at that step, and are there **opportunities** make engagement with repositories more **impactful** and **effortless**?

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Round 1: Share your Stories

1. Take 5 mins to **Describe your story** to your pair.

2. The pair **writes notes on stickies**, and place them on the board along the timeline for that persons board.

    ○ For activities, use verb phrases: "doing stakeholder interviews"

3. After 5 mins **swap roles**

4. Total time 10 mins

Experience Mapping

Activity	Role	Setting
Artefacts	Systems	Thoughts / Feelings
Break		
Pain/Delight	Effort	Opportunities
Governance		

Activity: How are people interacting with the repository to meet their needs? What actions do they take and what are their key behaviors?

Roles: what roles are involved in each activity?

Setting: what is the setting for the activities and how might that shape the activity?

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Experience Mapping

Activity	Role	Setting
Artefacts	**Systems**	**Thoughts / Feelings**
Break		
Pain/Delight	Effort	Opportunities
Governance		
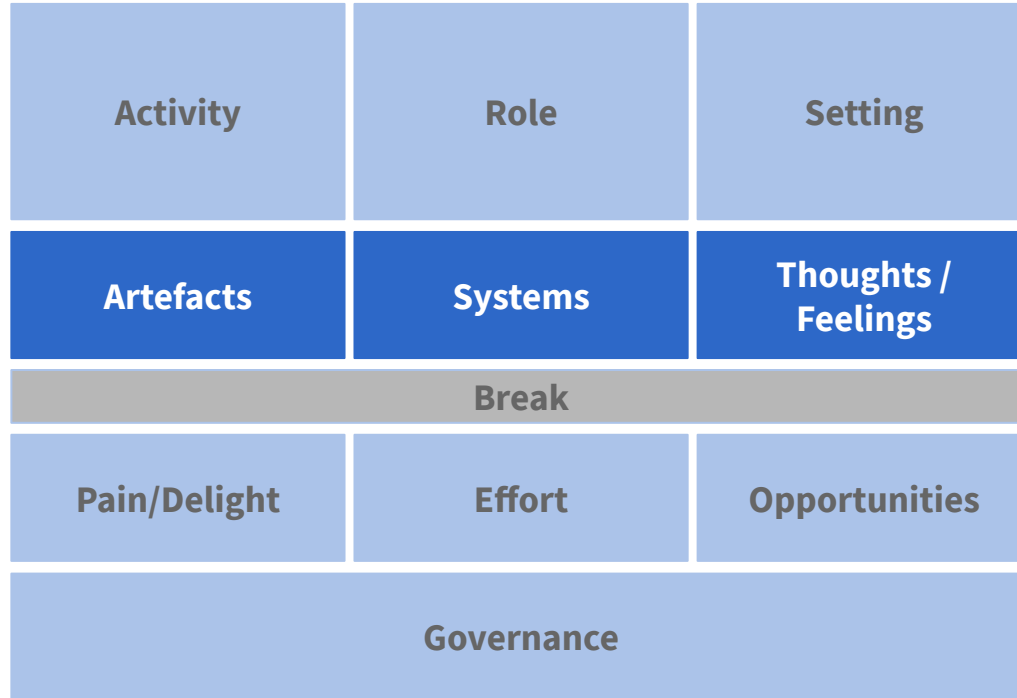
Artefacts: what are the artefacts -- documents, diagrams, data sets, notes, recordings, transcripts, etc. -- that are collected or created along the way at each activity step as evidence or deliverable?
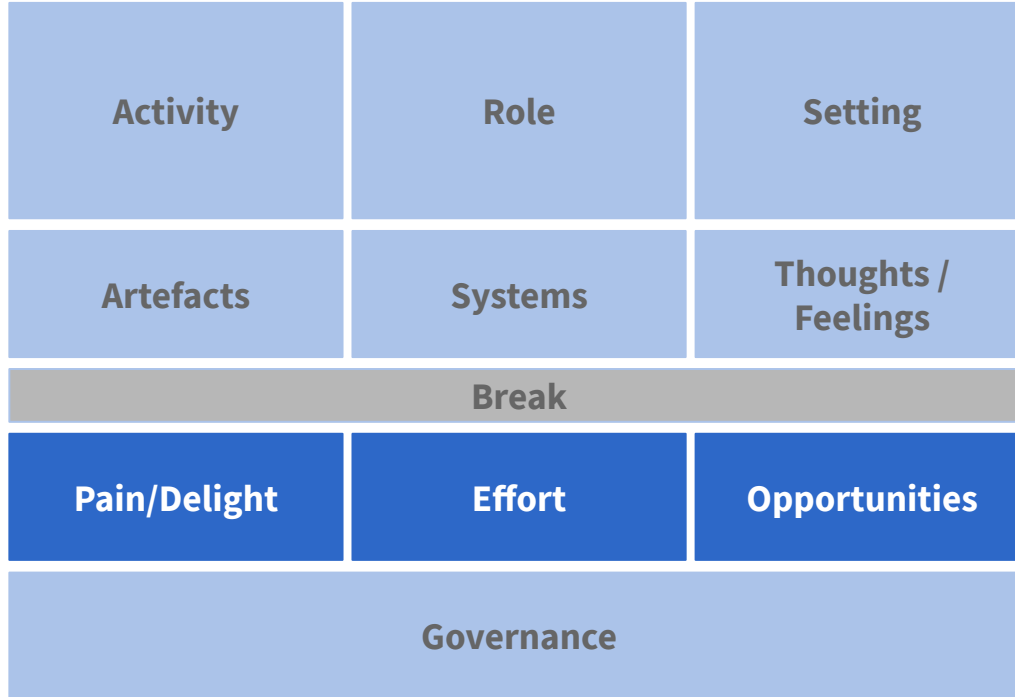
Systems: what systems support the activities? This might be software, or devices, or something else.

Thoughts: How do people choose to go about an action and how do they perceive their experience? What are their expectations?

Feelings: What emotions do people carry along with them or experience during particular actions? What are the highs and lows at each step of the experience?

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Experience Mapping

Activity	Role	Setting
Artefacts	Systems	Thoughts / Feelings

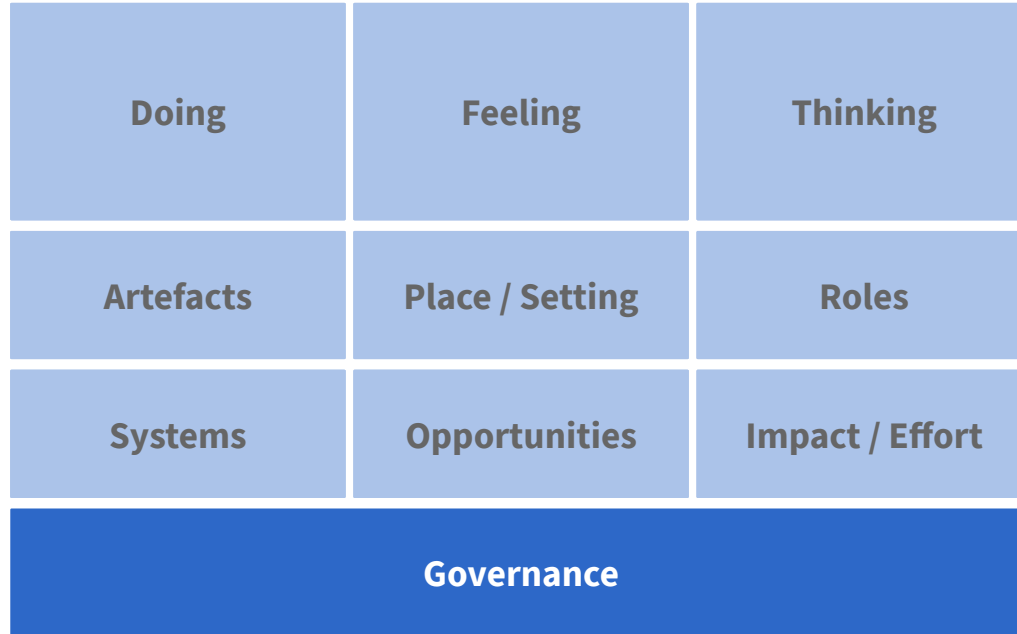| Break		
Pain/Delight	**Effort**	**Opportunities**

Governance

Pain / Delight: how painful or delightful is the experience at each step of the way?

Effort: what size is the effort?

Opportunities: based on the pain points identified, what opportunities exist to make the research repository experience more impactful and effective?

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Experience Mapping

Doing	Feeling	Thinking
Artefacts	Place / Setting	Roles
Systems	Opportunities	Impact / Effort

Governance

Governance:

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	Secondary Research				Primary Research				
Phases	Finding	Consuming	Sensemaking	Reporting	Planning	Researching	Collating	Analysing	Reporting
Activity									
Roles									
Setting									
Artefacts									
Systems									
Feeling & Thinking (Delight / Pain)									
Opportunities									
Governance									

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Round 2: Documenting Artefacts

1. **Brainstorm the artefacts** that are created, refined, or collected throughout the process, and the **systems** in use, and post them on the board below the associated activity

2. One participant can **clean up each section**, removing redundant stickies, clarifying any that are confusing

3. The others can **brainstorm the feelings and thoughts** that arose for each task and post them on the board below the associated activity

   ○ For feelings, use an adjective + context: "frustrated; no way to search prior findings"

   ○ For thoughts, use 1st person statements or questions: "where should i store the transcripts?" "I need to know their availability"

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Take a 10 minute break!

Round 3: Reflecting on Pain & Delight

1. For each task, consider the activities, emotions, and thoughts and **categorize them as pain or delight**, using dot voting. Choose the most extreme activities first if possible

2. Define the effort of each idea
(XL, L, M, S, XS, not sure)

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Round 4: Reflecting on Governance

1. Review the experience map for documentation, laws, checklists that would **improve the governance of the research**

2. Post any procedures or documents, laws, or checklists that might be relevant

3. **Discuss any variations** due to participant sample or region

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Effort vs. Impact Matrix
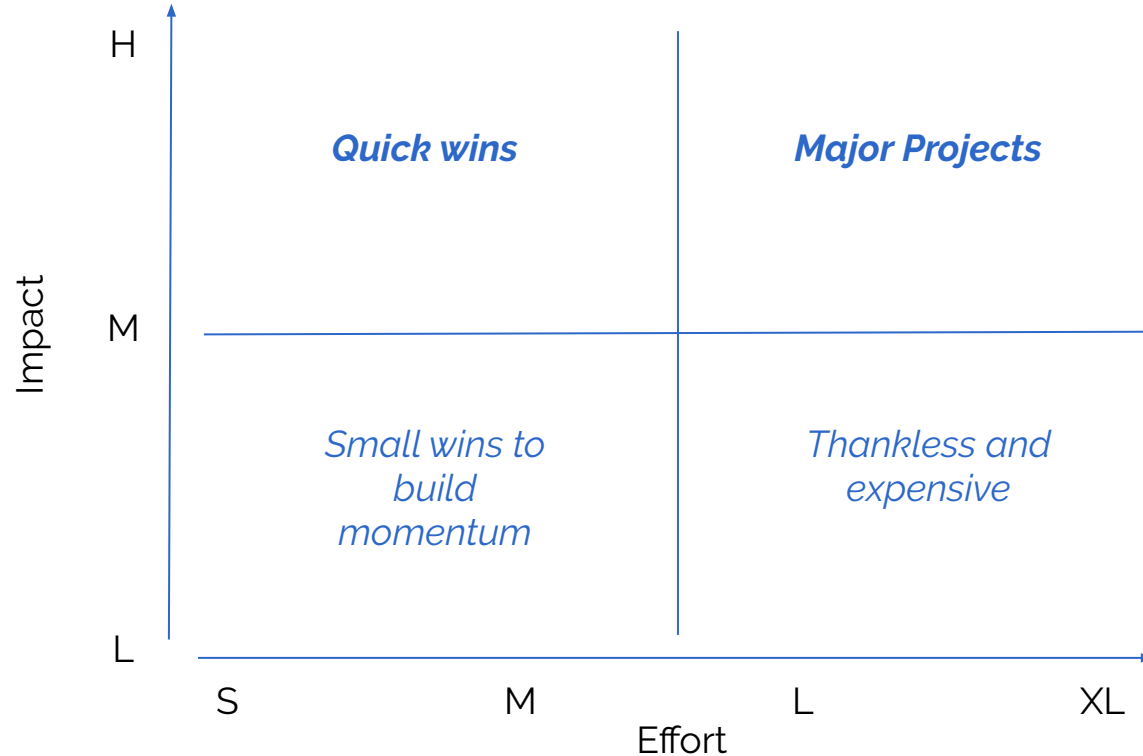
Wrap up

Take 15 seconds to share:

- What was the biggest insight?
- What was the biggest surprise?
- What was the biggest question?

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Thanks!

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@teamreops

Appendix

ResearchOps Community

We're a **global group of people** who've come together to discuss the operations and operationalization of **user research and design research** — also known as ResearchOps.

- Active community on Slack with 3,600+ members
- 62 countries: From Nigeria, Peru, Brasil, Japan to Australia, UK and US - we are **always awake**, **always online** and **always happy to chat Re+Ops**
- Over 143,000 messages sent
- Over 100 active channels
- Our *#tools* channel is more popular than the *#introductions* channel with 3,262 messages posted, with *#research-repositories* and *#recruitment* close behind.

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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 is the result of the analysis of data gathered via a survey and 32 #WhatisResearchOps workshops that were run 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.
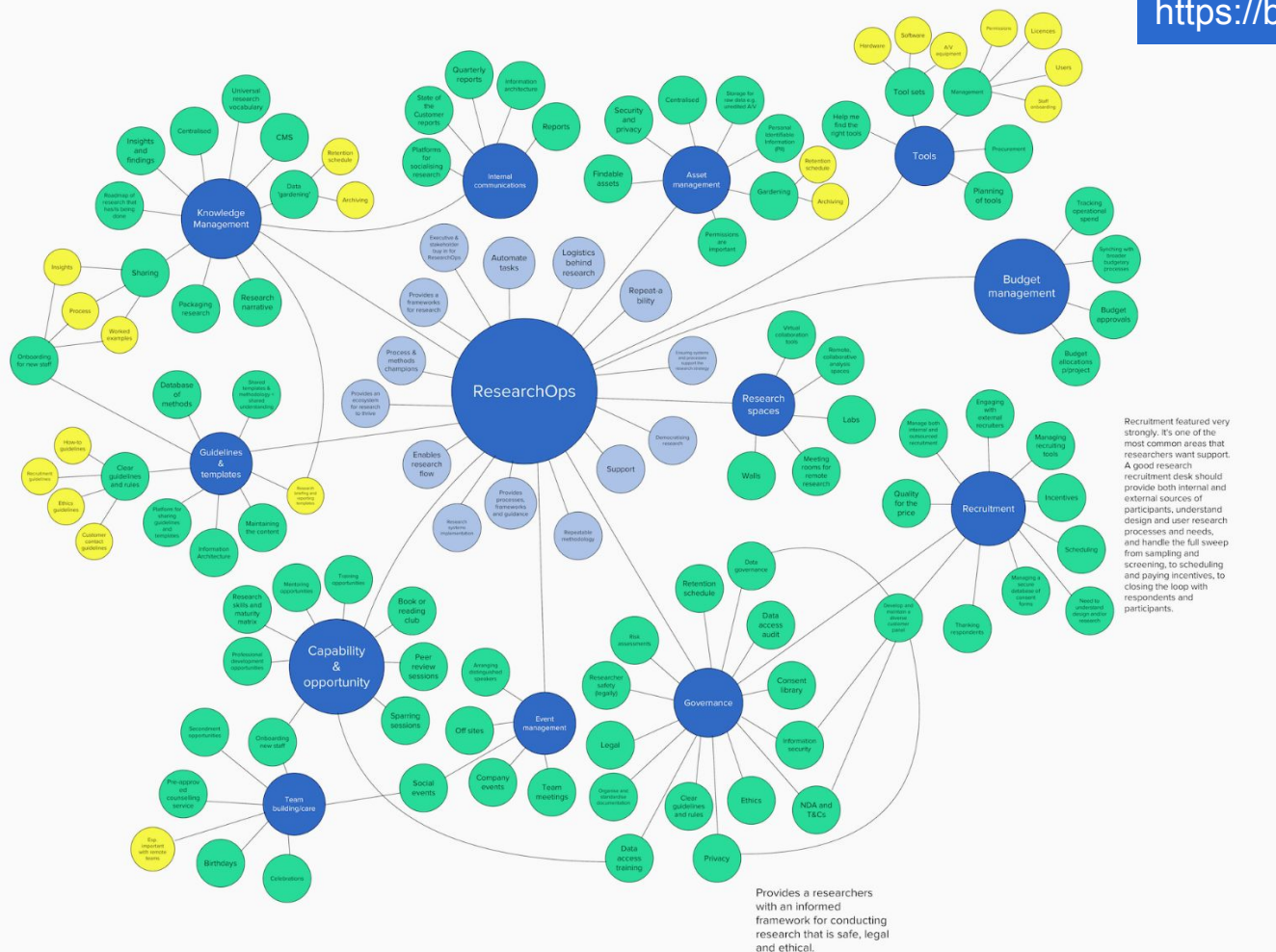
ResearchOps is the mechanisms and strategies that set user research in motion.

Research Ops 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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Community Initiatives

What Is ResearchOps?

In a global series of workshops in 2018, we defined ResearchOps as the people, mechanisms, and strategies that set user research in motion and support researchers in delivering and scaling the impact of the craft across an organisation.
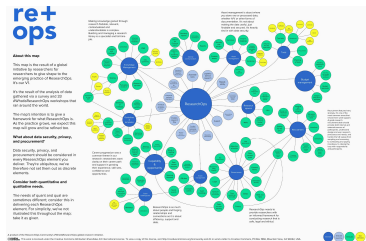
Researcher Skills Framework

Taking a look at what it is that we, as researchers, really do, where the big challenges are, and how researchers would like to push their practice forward.
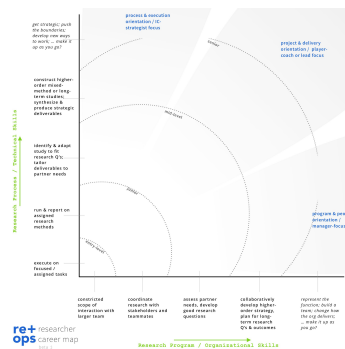
Research Repositories

Defining the nature of the problem space, the user needs, patterns of reasoning, and guiding principles, understanding the types of artifacts that people have or plan to store, and the processes, interactions, and decisions involved in creating and ethically use research repos, solved by research repositories.

How to find us

slack https://researchops.slack.com/

re+ops http://researchops.community/

https://twitter.com/teamreops #researchops

https://www.linkedin.com/groups/13738330/

https://vimeo.com/teamreops

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The Research Cycle

The Research Cycle (Tube Map version)

Our illustration of the research cycle in the context of a repository continues to evolve. With a broad definition of repositories, we needed a way to illustrate the process that will ground us in our similarities and support workshop conversations on the touchpoints, artifacts, rules, pains, and delights from different industry perspectives.
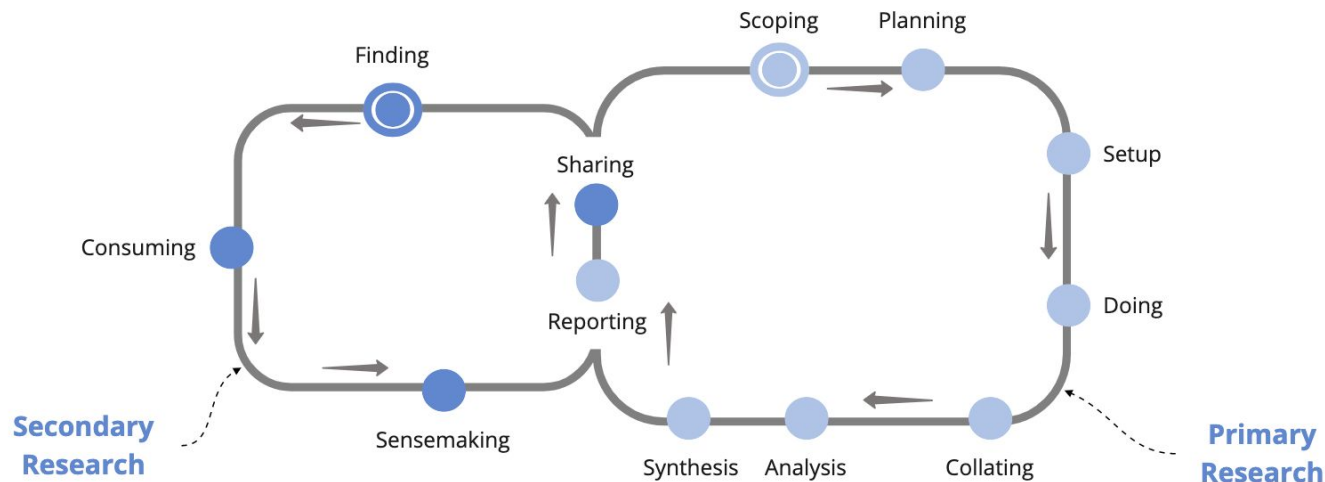
For the workshops, we landed on what we are calling the Tube Map as that is what it (sort of) looks like. It differentiates between primary (fieldwork) and secondary (sensemaking) research.

The Research & Operations Cycle
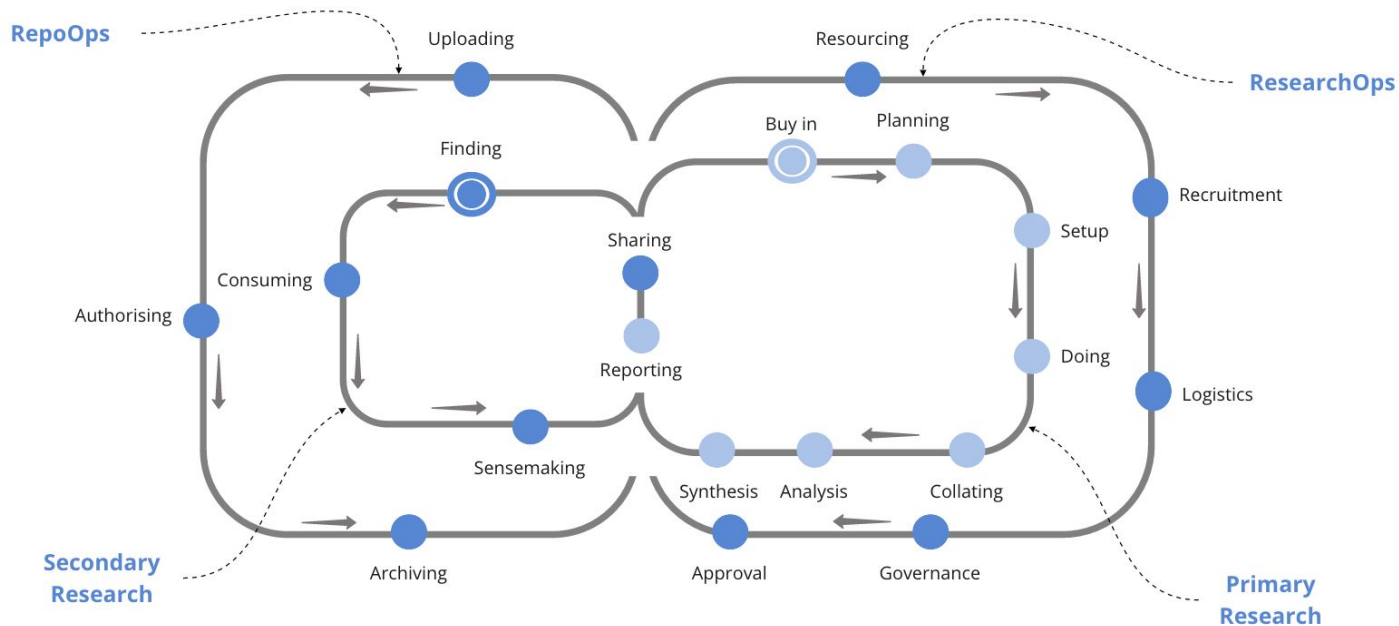
Primary research involves the collection of data first-hand, in the course of a research project. **Secondary research** involves making sense of data & insights from primary research in a new context. **ResearchOps** ensures all the mechanisms and services are in place to conduct research. **RepoOps** administers the data and insights on the repo

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