



EPIC2020 SCALE

[Welcome to EPIC2020 - Introduction video](#)

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Scaling Research in Organisations

Pace Layers Workshop

A ResearchOps community workshop
Hashtag *#PaceLayersMatrix*

EPIC 2020

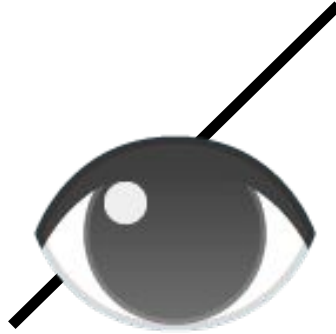
Brigette Metzler @bridgettemetzler | Benson Low @sprae | ResearchOps Community @teamreops

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Welcome!



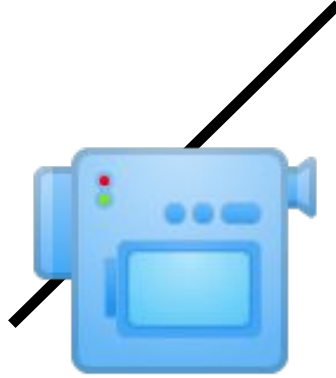
Safe space



“Friend-DA” NDA



Mute your mics



Consent for recordings?

**This workshop is to help you as you
scale your research in your organisation
using the Pace Layers Matrix**

Creating research strategies from an Ops perspective?

There's a growing sense in the ResearchOps Community and beyond, that ReOps is an investment strategy in research. Within the frameworks of Ops lie an ability to see and track the what of research - the concepts and things that need to be in place to make research happen. There's even enough information there to measure a return on investment for research.

But ReOps can do more.



Map and the terrain

The frameworks we've developed in the ReOps Community allow us to see the map for how research happens, but to take a step further, what's required, is knowing the terrain.

The profession of research operations has moved from a list of what is present in the map (the 'what' of research operations), to a 2D map of research (the 8 Pillars here can be viewed as a way of seeing the pathways present in getting us 'down the road').

But in order to create a strategy, we need to understand the terrain. Knowing the terrain of a map tells us whether to pack a kayak or snowshoes? How big is the mountain? How steep is the road?

This matrix is our next iteration - we've been using it on an individual basis for a while, now it is time to test our hypothesis that this works at scale.

Maps? Terrain? Have I come to the wrong workshop?*

To quote Wardley Maps - “Maps help you see what's already there. So what's useful about that?”

- Not many people are doing it; having a map is a competitive advantage.
- It reinforces opportunities that might've previously felt like an instinct.
- It creates a shared understanding with your peers on the state of play of the business or system you are operating in.”

<https://www.workshoptactics.com/blogs/workshop-strategies/how-to-run-a-wardley-map-workshop>

***brought to you by ‘we all are cartographers now’**

Today's workshop aims to give you:

- A more complete picture of the things you think you have - the skills, resources and capacity to manage well **at the moment**.
- The materials to run this workshop with others in your organisation so that you can create a **more complete picture** of your skills, resources and capacity.
- We aim for you to leave with a visual of the perceived **differences between what you think your organisation needs versus what you currently have** the skills, resources and capacity to deliver.
- You will also have identified **some paths** you could take to better **manage the turbulence** between what your organisation needs, what you want, and what you have.

Today's Agenda

1. **Introduction** to the Pace Layers Matrix
2. **Activity 1:** Mapping the 8 Pillars to your current context

Break 5 mins

3. **Activity 2:** Mapping recent project to pace layers
4. **Activity 3:** Focusing on what works well, what isn't

Break 5 mins

5. **Activity 4:** Plan for next steps
6. Group reflection

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Lecture

ResearchOps?

Active community on Slack with 6,000+ members

Website: <http://researchops.community/>

Twitter: <https://twitter.com/teamreops>

#researchops

The logo for ResearchOps, featuring the text "re+" on the top line and "ops" on the bottom line in a bold, blue, sans-serif font.

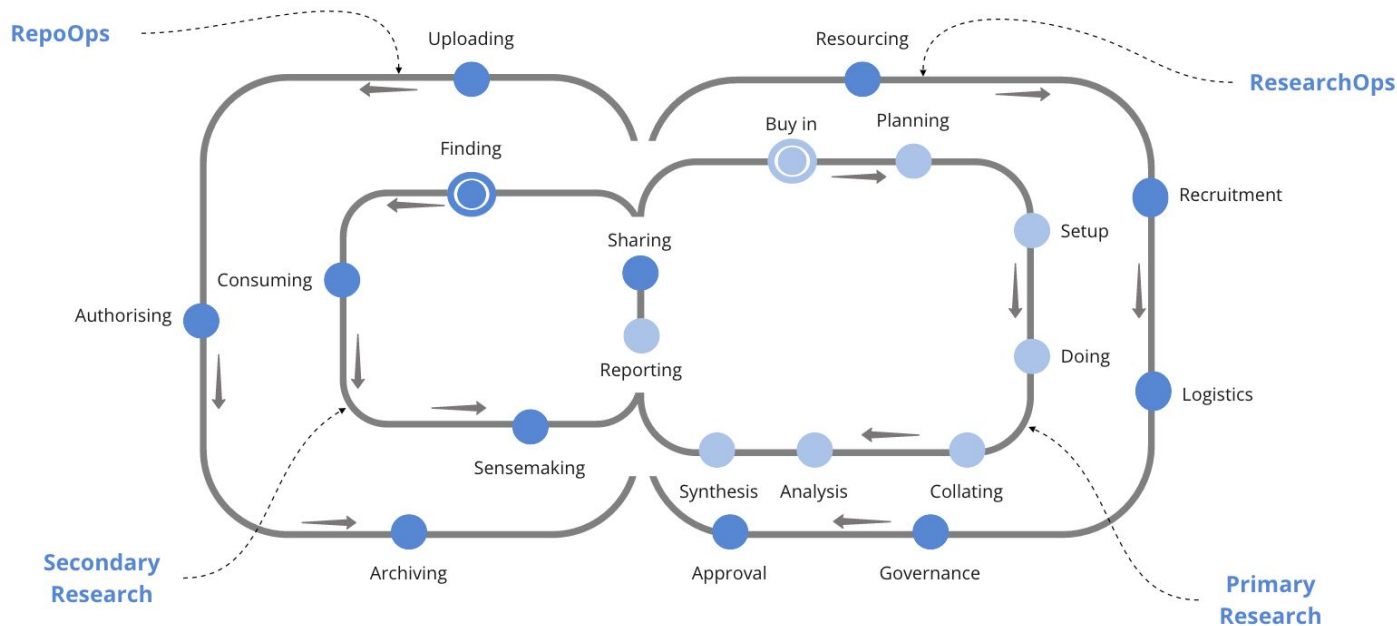
ResearchOps is the mechanisms and strategies that set user research in motion. It provides the roles, tools and processes needed to support researchers in delivering and scaling the impact of the craft across an organisation.

Context before we begin

The story so far:
Frameworks & Maps

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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

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.

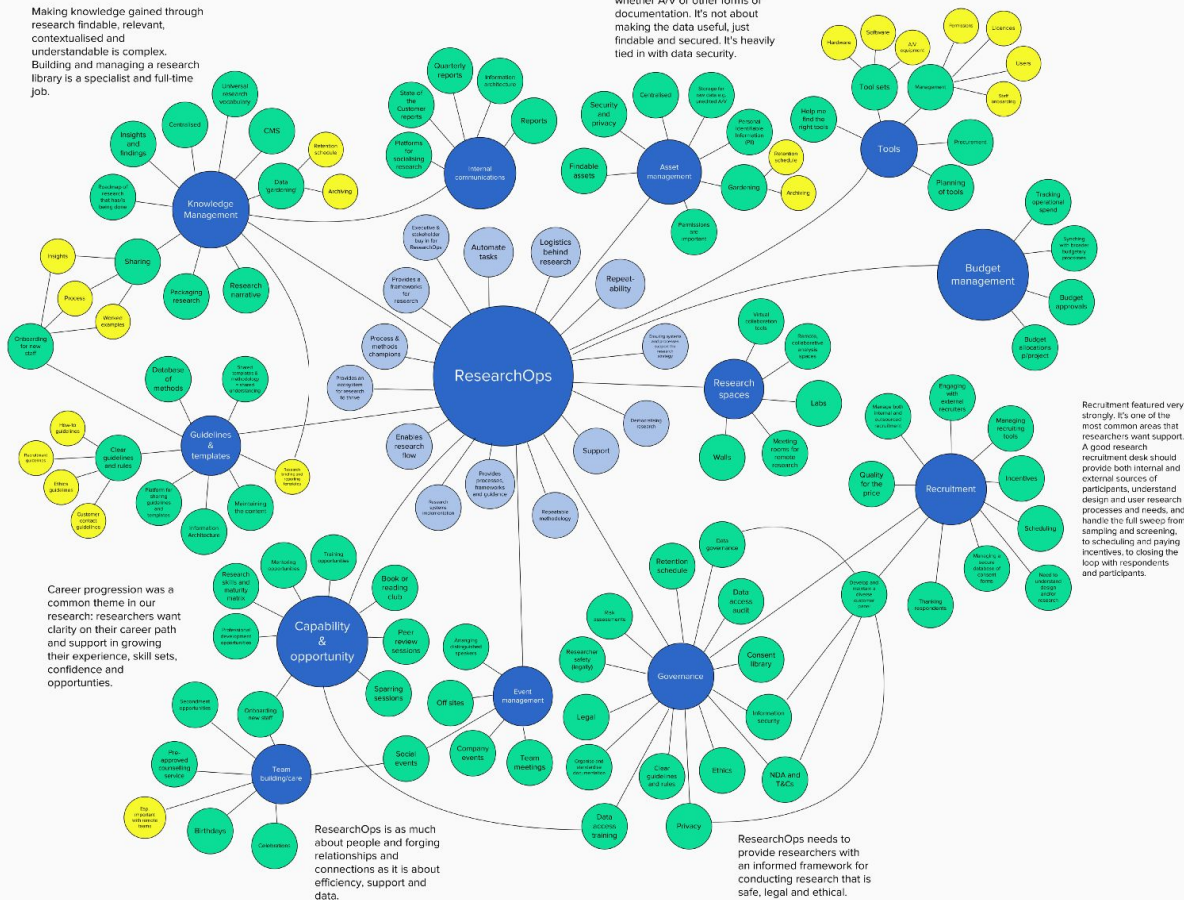
This map is the result of a global initiative by researchers for researchers to give shape to the emerging practice of ResearchOps. It's our V1.

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.

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.

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.

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.

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

Research Ops

People silos	Research as a team sport	Community of practice	Space	Incentives	Document templates	Infosec	Procurement
Education	Cadence	Professional development	Time	Scheduling	Insights repos	Risk assessments	Software
Value of research	Processes	Staffing	Resources	Logistics			Hardware
Buy in	Methods				Data silos		Systems
	Sharing insights			Paperwork	Data gardening	GDPR	Technology
Push back			Budget	Timesheets		Legal	Labs
Internally focused	Prioritisation	Mature career paths	R.O.I.		Knowledge management		
Stakeholders	Integrating insights	Leadership	Business constraints	Panel management		Consent	
Executives	Protocols	Org Design	Market forces	Participant coordination	Research library	Ethics	
Colleagues			Org Maturity				

Environment

Scope

People

Organisational context

Recruitment and admin

Data and Knowledge Management

Governance

Tools and infrastructure

Perspectives

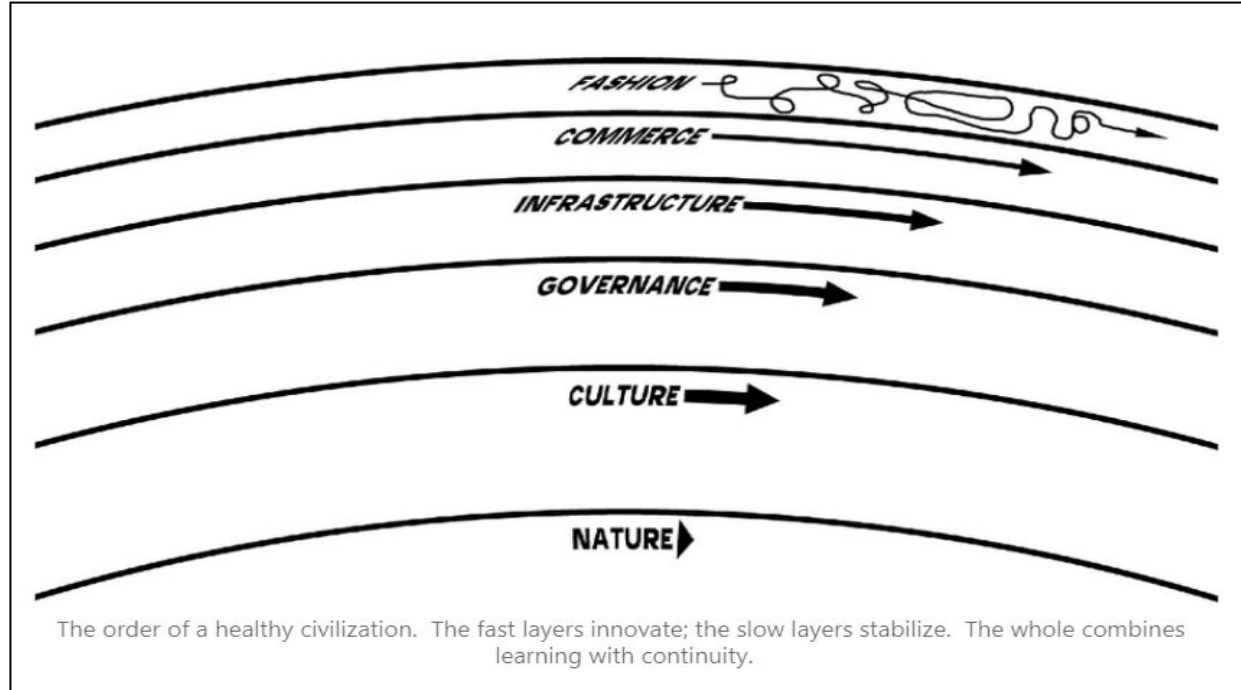
Delivering at scale -

*Managing the tightrope walk between business and research,
democratising research without demoralising it
= scaling impact, not necessarily output.*

The Pace Layers Matrix

“Fast learns, slow remembers. Fast proposes, slow disposes. Fast is discontinuous, slow is continuous. Fast and small instructs slow and big by accrued innovation and by occasional revolution. Slow and big controls small and fast by constraint and constancy. Fast gets all our attention, slow has all the power.”

The Pace Layers Matrix



Brand, Stewart. 1999. *The Clock of the Long Now: Time and Responsibility*. New York: Basic Books.
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The Pace Layers Matrix

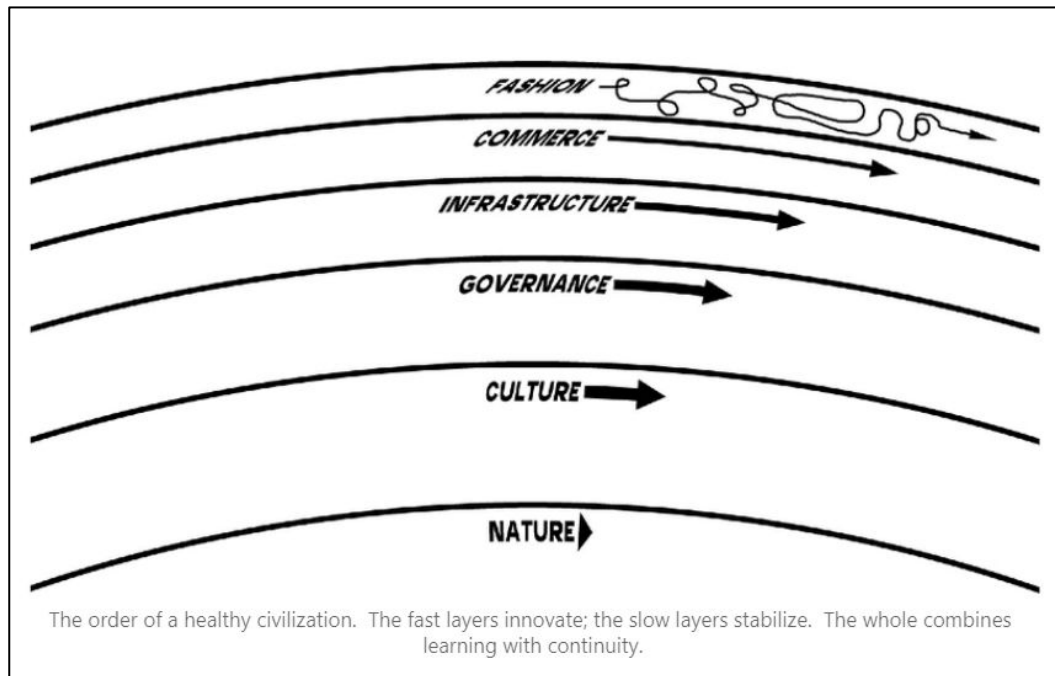
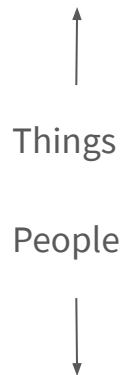
Evaluative

Descriptive

Causal

Generative

Generative longitudinal



Brand, Stewart. 1999. *The Clock of the Long Now: Time and Responsibility*. New York: Basic Books.
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The Pace Layers Matrix

Evaluative:

Tools platforms, body of evidence, communities of practice

Descriptive:

Access to broaden scope, knowledge management

Causal:

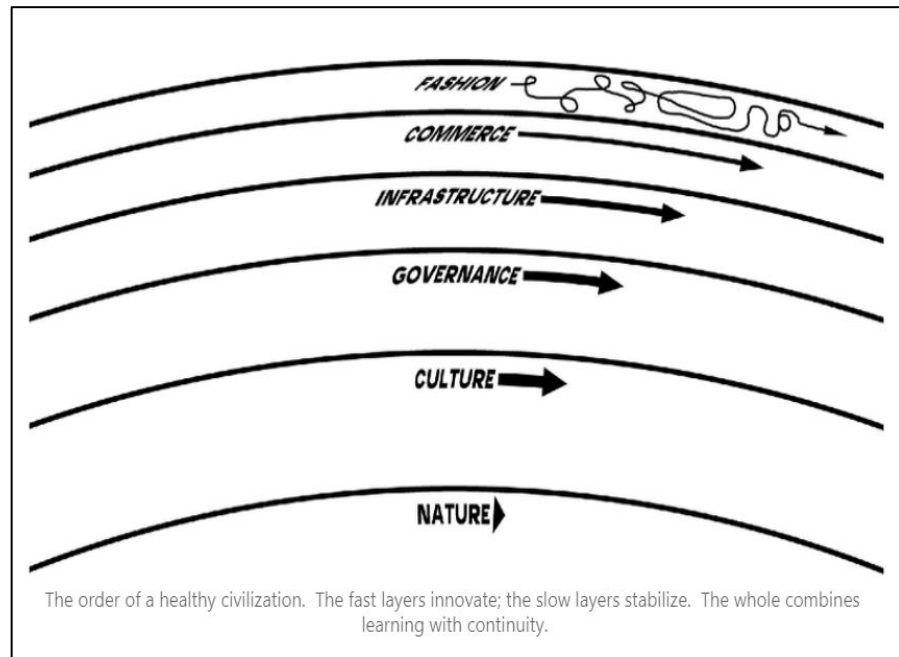
Time, buy in, tools, recruitment, data management

Generative:

Recruitment, consent, ethics

Generative longitudinal:

Participant experience, consent, ethics, research data and knowledge management



Brand, Stewart. 1999. *The Clock of the Long Now: Time and Responsibility*. New York: Basic Books. Reproduced with permission.

Research Ops

People silos	Research as a team sport	Community of practice	Space	Incentives	Document templates	Infosec	Procurement
Education	Cadence	Professional development	Time	Scheduling	Insights repos	Risk assessments	Software
Value of research	Processes	Staffing	Resources	Logistics			Hardware
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	Sharing insights			Paperwork	Data gardening	GDPR	Technology
Push back			Budget	Timesheets		Legal	Labs
Internally focused	Prioritisation	Mature career paths	R.O.I.		Knowledge management		
Stakeholders	Integrating insights	Leadership	Business constraints	Panel management		Consent	
Executives	Protocols	Org Design	Market forces	Participant coordination	Research library	Ethics	
Colleagues			Org Maturity				

Environment

Scope

People

Organisational context

Recruitment and admin

Data and Knowledge Management

Governance

Tools and infrastructure

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Research Ops

People silos Education Value of research Buy in	Research as a team sport Cadence Processes Methods	Community of practice Professional development Staffing	Space Time Resources	Incentives Scheduling Logistics	Document templates Insights repos	Infosec Risk assessments	Procurement Software Hardware Systems Technology Labs
Push back Internally focused Stakeholders Executives Colleagues	Sharing insights Prioritisation Integrating insights Protocols	Mature career paths Leadership Org Design	Budget R.O.I. Business constraints Market forces Org Maturity	Paperwork Timesheets Panel management Participant coordination	Data silos Data gardening Knowledge management Research library	GDPR Legal Consent Ethics	

Environment

Scope

People

Organisational context

Recruitment and admin

Data and Knowledge Management

Governance

Tools and infrastructure

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The Pace Layers Matrix

Research Ops								
Evaluative	People silos Education Value of research Buy in	Research as a team sport Cadence Processes Methods	Community of practice Professional development Staffing	Space Time Resources	Incentives Scheduling Logistics	Document templates Insights repos	Infosec Risk assessments	Procurement Software Hardware Systems Technology Labs
Descriptive		Sharing insights			Paperwork Timesheets	Data silos Data gardening	GDPR	
Causal	Push back Internally focused	Prioritisation		Budget R.O.I. Business constraints	Panel management	Knowledge management	Legal	
Generative	Stakeholders Executives Colleagues	Integrating insights Protocols	Mature career paths Leadership Org Design	Market forces Org Maturity	Participant coordination	Research library	Consent	
Gen. longitudinal							Ethics	
	Environment	Scope	People	Organisational context	Recruitment and admin	Data and Knowledge Management	Governance	Tools and infrastructure

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Challenges in the work

Evaluative and descriptive research

- People silos, Education
- Value of research/Buy in
- Research as a team sport
- Cadence, Processes, Methods
- Community of practice
- Professional development
- Space, Time, Resources
- Incentives
- Scheduling, Logistics
- Document templates
- Infosec, Risk assessments
- Procurement, Software, Hardware
- Insights Repos

Causal research

- Push back
- Internally focused
- Sharing insights
- Paperwork
- Timesheets
- Data gardening
- Legal aspects of running causal research methods (A/B testing etc)
- Labs

Generative research




- Stakeholders, Executives, Colleagues
- Prioritisation
- Integrating insights
- Protocols
- Mature career paths
- Leadership, Org Design
- Budget , R.O.I.
- Business constraints
- Market forces
- Org Maturity
- Knowledge management, Research library
- Consent, Ethics

**All of the challenges will apply across all of the layers, but how important they are to your ability to get research done will vary depending on the research method*

Clarity on the operations of research methods

Clarity on your skills, resources
and capacity to deliver today?

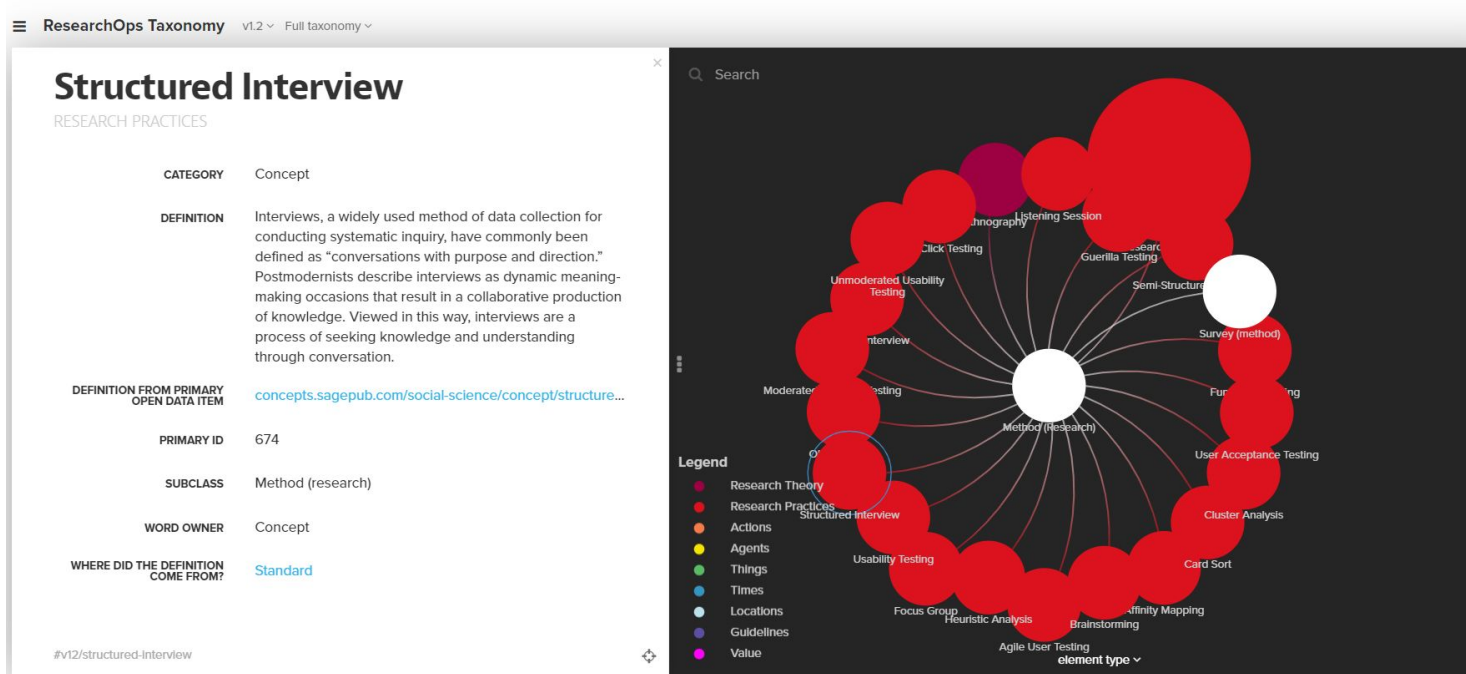
Clarity on what drives
organisations to favour one
method over another

Evaluative & Descriptive		No	Yes
Causal		No	No
Generative/Generative longitudinal		Yes	Maybe

Synthesized from 2.5 years of the ResearchOps Community chats and discussions

What do the layers mean? Which methods fit where?

The user research taxonomy is under construction in the ReOps Community, but you can find the descriptions and definitions in the workbook and also in the kumu of the taxonomy: <https://kumu.io/TeamReOps/researchops-taxonomy#v12>



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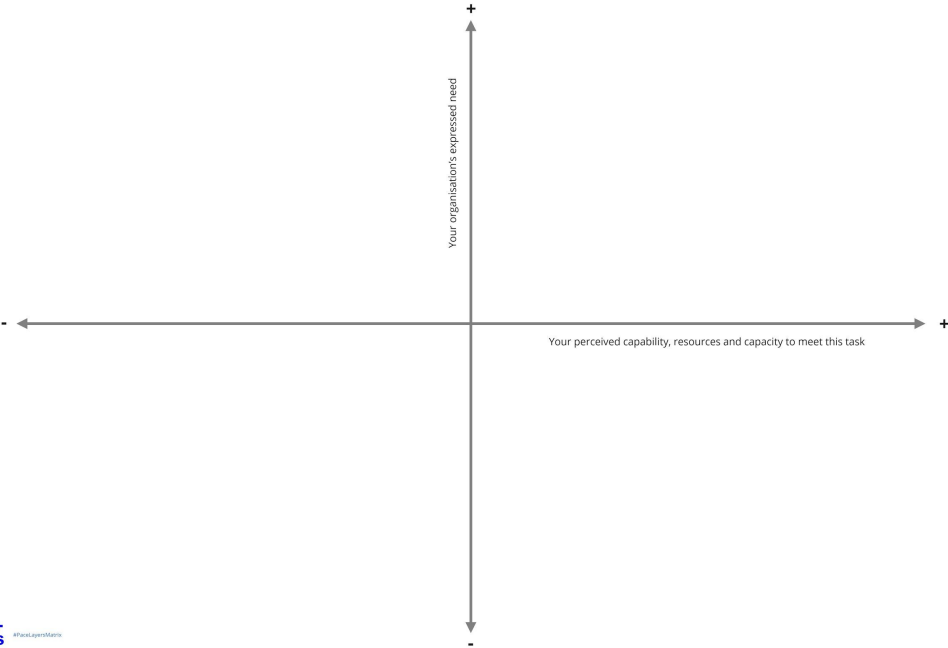
Individual work

Activity #1 – Mapping the 8 Pillars to your current context

Activity 1 - Mapping 8 Pillars to current context

- Think of the 8 pillars as what you think is important to your organisation, and the basis on your (or your team's) current ability to do a task. This might be impacted on by your (or your team's) skills, funding, time, or structures in place.
- Your facilitator will prompt you through filling out your current state.
- Select all applicable sticky notes from the Pace Layer matrix to start of your map, and feel free to add your own as well.

This is a map of perspectives. This one is from your perspective. It won't be accurate, and your perspective will change.



re+ ops What's your story?

- Using the workbook as a guide, work through each of the parts that make up the 8 pillars, mapping your (or your team's) current ability to do a task with a deficit on the left and easily able to respond/fulfil the task/concept on the right. This might be impacted on by your (or your team's) skills, funding, time, or structures in place.
- Think of the Y-axis as what you think is important to your organisation, and the
- Your facilitator will prompt you through filling out your current state.
- Select all applicable sticky notes from the Pace Layer matrix to start of your map, and feel free to add your own as well.

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Break 5 minutes

Mapping and skills

Activity #2 – Mapping recent project to pace layers

Activity 2 - Mapping recent projects to pace layers

Think of the last 6 months and the kinds of research projects you know your organisation has done. You can choose to differentiate your teams from the rest of the org if you like.
Which methods did you use? Looking at this, can you see a dominant one emerging? To think of dominance, perhaps don't think about frequency - think about effort and resources. What are you predominantly spending your time and effort on?

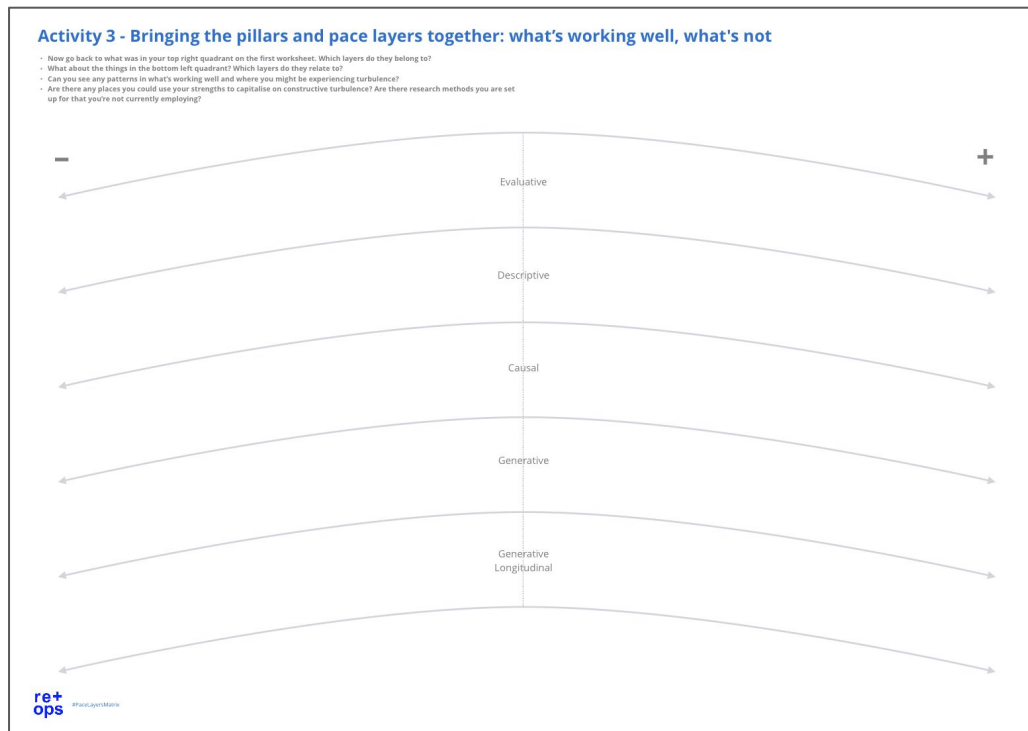
In a little bit, we are going to look at what went right for these pieces of research and what went wrong. We're also going to look at what you would have liked to have done in a perfect world so that we can look at the distance between your current state and your future state.

re+ ops #PaceLayerMaps

- Go to the Miro board to map this.
- Consider the last 6 months and the kinds of research projects you know your team or organisation has done.
- Which methods did you use? Map them here along the layers. Can you see a dominant one emerging? To think of dominance, think about effort and resources. What are you predominantly spending your time and effort on?

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Activity #3 – focusing on what works well, what isn't



- Go to the Miro board to map this.
- Top 2 quadrants
- Now go back to what was in your top right quadrant on the first worksheet. Which layers do they belong to?
- What about the things in the bottom left quadrant? Which layers do they relate to?
- Can you see any patterns in what's working well and where you might be experiencing turbulence?
- Are there any places you could use your strengths to capitalise on constructive turbulence? Are there research methods you are set up for that you're not currently employing?

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Group discussion

Break 5 minutes

First thoughts on planning for the future

Activity #4 – Plan for next steps



- Go to the Miro board to map this.
- Start with what are the top 3 things you want to work on next? What is missing from a layer you're doing well? (low hanging fruit), alternatively, what does the org need that you can 'nearly' do?
- What do you plan on investing in next? You may have identified that there is a part of the pillars that the need priority and value it will bring.
- Mapping those key priorities starting with the Y-axis of value for you and your organisation, then slide across the X-axis for the estimated effort required.

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Questions — Discussion

1. What are you observing in the inventory? Is there a disparity between what you can do and what you think your org wants you to do?
2. What are the top 3 things you want to work on next?
3. What do you plan on investing in next?
4. From your perspective, who has the most impact on your work?



**Group
20 min**

Next steps

How to take this back to your organisation

Reflect & Discuss

Self-reflection

- What did you discover today?
- What challenge areas can you meaningfully work on?
- What are the questions you want to explore?
- What next steps do you want to take tomorrow?



**Solo
3 min**

Reflection circle: —go around the room

- And share whatever you're comfortable sharing about what you've found



**1 min
Per
person**

Thank you

- + **Follow @teamreops**
- + **Join the Slack invite list**
- + **Take this workshop / the framework and modify it to suit your needs**
- + **Join the conversation: #ResearchOps and #PaceLayersMatrix**

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