


Researcher Skills Workshop

A ResearchOps community project
Hashtag *#researcherskills*



The thumbnail shows a form titled "Research Skills/Career Sheet (part 1)". It includes a header with a link to a GitHub repository. The form is divided into two main sections: "Personal Information" and "Research Skills". The "Personal Information" section includes fields for Name, Email, and Phone. The "Research Skills" section includes a table with columns for "Skill" and "Proficiency". The table has several rows with skills listed, and the "Proficiency" column has a scale from 1 to 5. The form also includes a section for "Research Experience" with a table for "Project", "Role", and "Duration".

While we settle in, you can fill in
← **Research Skills/Career Sheet (part 1)**

re+
ops

Welcome!

ResearchOps?

Active community on Slack
with 1,600+ members
<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. The "+" sign is positioned between "re" and "ops".

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.

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.

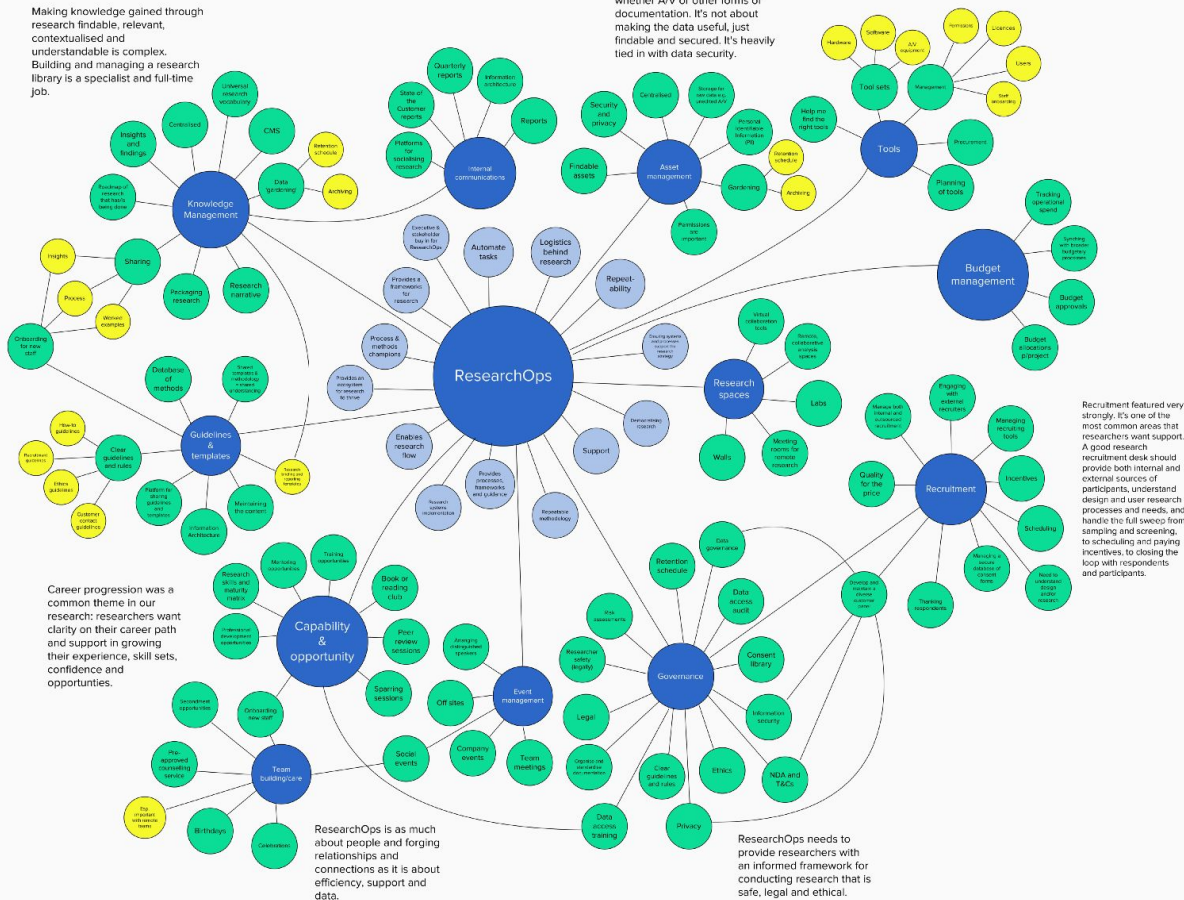
This map is the result of a global initiative by researchers for researchers to give shape to the emerging practice of ResearchOps. It's our V1.

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.

Goals and outcomes

Give you a new frame & perspective for thinking about what it means to work as a researcher, and where your career can go.

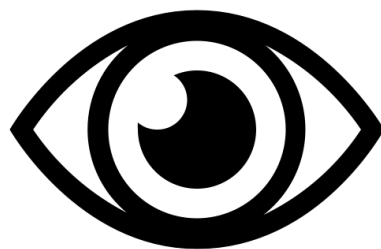
Connect with other researchers, so you can learn from each others' lessons, perspectives, and approaches to the work,

Provide space to reflect on the nature of your work, identify specific areas worth time & attention.

Create useful data for the ResearchOps team to publish findings representing researchers around the world.



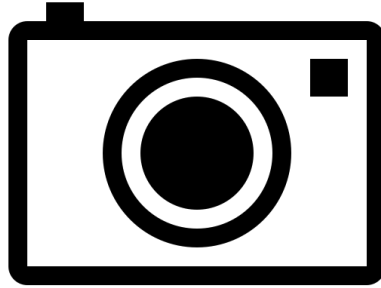
Safe space



“Friend-DA” NDA



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



Consent for photos?

Outline for today:

10-15min

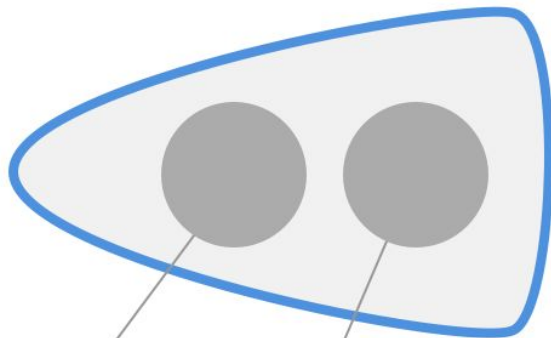
**open +
perspectives**



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

45-50 min

mapping + discussion



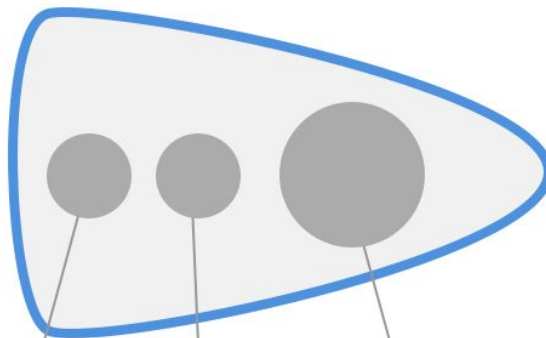
Org / Ecosystem Modeling:
mapping team-in-org, and influence

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

5-10m

45-50 min

rating + reflection



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

10-15min

**summary +
feedback**



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

10-15min

**open +
perspectives**



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45-50 min

mapping + discussion



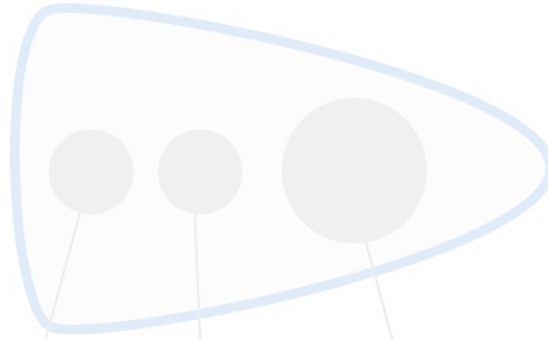
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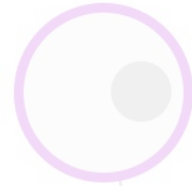
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10-15min

**summary +
feedback**



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

Currently, are you...

1. Working in-house
2. Working in an agency/consultancy
3. Working in-government
4. An independent/freelance

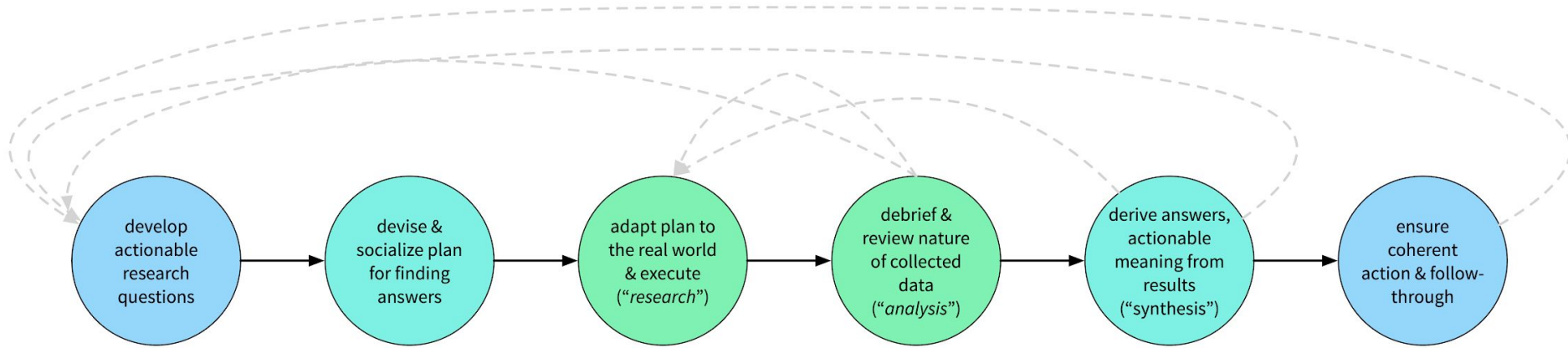
1. New
2. Have been in this field for 2+ years
3. For 4+ years
4. For 6+ years
5. For 8+ years
6. For 10+ years??



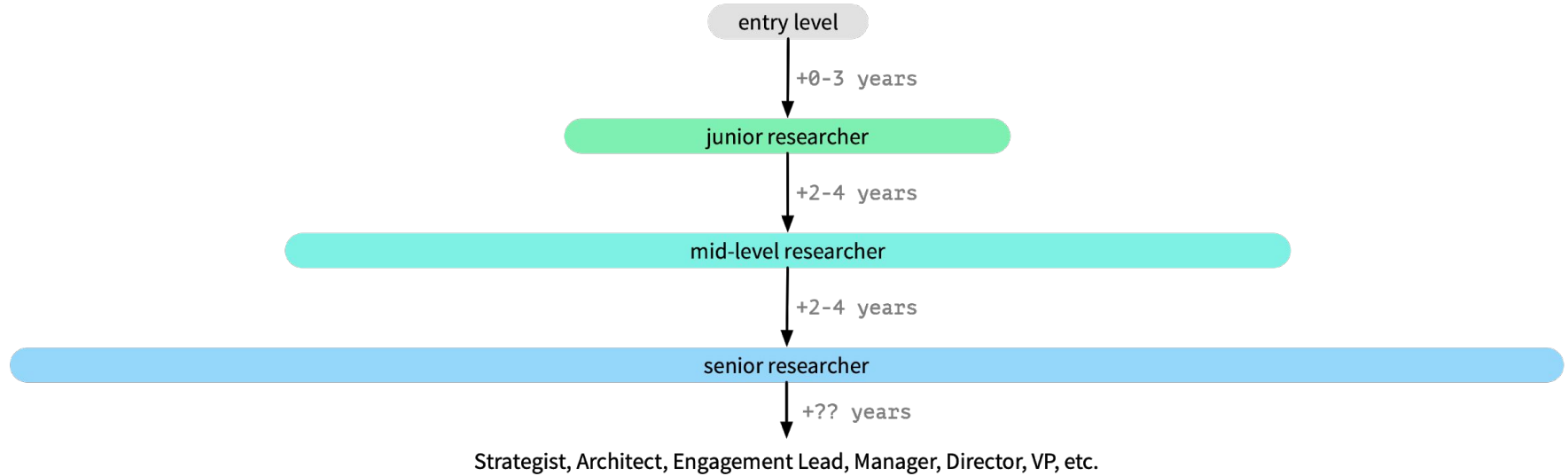
**Raise
your
hand!**

Perspectives

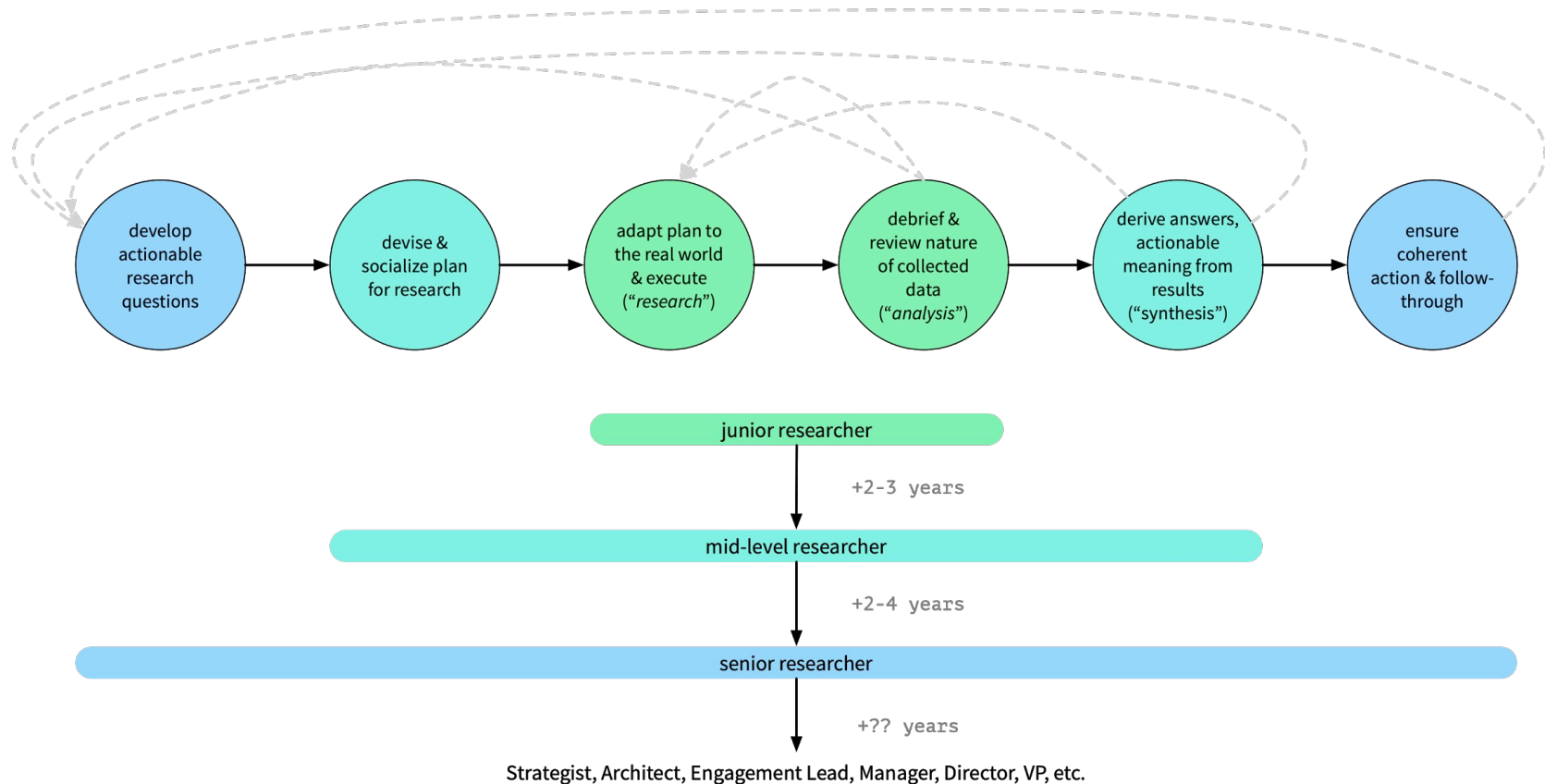
What is research?



Rough-bucket career level



Combined view: growth & process ownership



Challenges in the work itself

Junior researcher

- Coordination with cross-functional stakeholders
- Understanding each role's part in service delivery
- Limited set of research techniques/tools, tasks
- Honestly assessing / reflecting on work




Mid-level researcher

- Lack of influence on product decisions
- Fuzzy understanding of business strategy
- Project stakeholder management, engagement
- Weaving in / working with quantitative data

Senior researcher

- Higher-order prioritization of research work
- Stretching too thin; always adapting last-minute
- Proving value of research, establishing project ROI
- Getting ahead of the product delivery cycle
- Influencing cross-functional teams for buy-in

Clarity to excel and level-up

		Clarity on the skills & competencies required in role?	Clarity on what's next / how to grow in their career?
Junior researcher		No	No
Mid-level researcher		No	Maybe
Senior researcher		Yes	Yes

Barriers to level up

Junior researcher

- Figuring out what's next and how to get there
- Finding good resources and dependable mentors
- Concerned about not having a specific goal around progress

Mid-level researcher

- Not playing a more influential role in product decisions
- Lack of clarity to advance business acumen

Senior researcher

- Not being able to make time to find mentorship
- Always having to adapt for everyone else / organization
- The need to always be nimble with last minute changes

What does 'better' look like?

Junior researcher

- Not clear

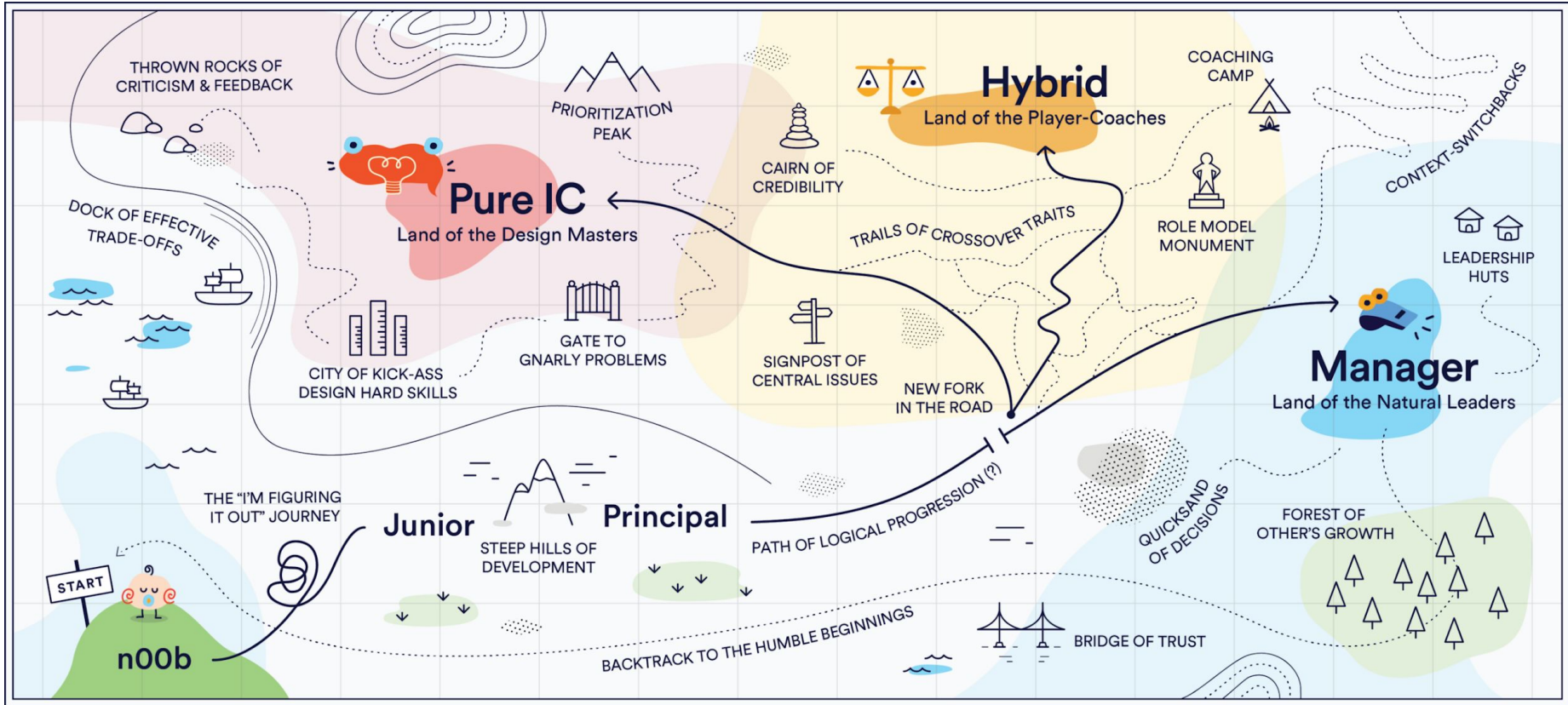
Mid-level researcher

- Yearn to do more purposeful and impactful work
- Crave to learn how their work connects to what the business envisions

Senior researcher

- Growing deeper into qualitative skills
- Proficiency in mixed methods
- Good at answering what 'minimum viable research' will lead to progress

Multi-track view of what's beyond Senior



Another interesting look at future-paths:

Contributor			Driver		Leader	
Associate	Key	Senior	Lead		Principal	
<i>A supporting-level player who is honing their craft and working to understand organizational context</i>	<i>An established performer with strong communication skills who proactively builds relationships</i>	<i>A high-level performer with strong relationships and the ability to lead projects</i>	<i>A leading performer who prefers to manage projects over managing people.</i>		<i>Indispensable individual contributor.</i>	
<i>Professionalism, craft, focused effort</i>	<i>Communication, craft</i>	<i>Expertise, process, explain rationale, cross-functional</i>	<i>Depth, expertise, innovation, persuasion, strategic, confidence; programs not projects</i>		<i>Breadth, mentorship, evangelism, thought leadership, visionary, storytelling</i>	
Right out of school, quality portfolio, but little to no shipped work	Contributed to a couple of shipped projects	Contributed to multiple shipped products	Leads the delivery of shipped products; Delivered successful work at the scope of 'product areas'		Leads teams in framing and solving hard problems; has driven innovative efforts that uncovered new value with new kinds of experiences; presents company as an industry leader in design	
Strong in 1, capable in 2 other	Strong in 2, capable in 2 others	Killer in 1, strong in 2, capable in 2 others	Killer in 2, strong in 2, capable in 1-2 others		Killer in 2, strong in 2, capable in 1-2 others	
Strong and capable engagement in standard design processes	Strong and capable engagement in standard design processes	Develops the process/approach for tackling a design problem, using known methods; anticipates problems	Develops and uses facilitation skills to engage cross-functional teams; Explores new patterns and practices, enhancing methodological toolkit; shifts from project planning to program planning		Completed shift to 'program,' working across multiple workstreams; develops new practices that drive increased value and appreciation of design both internally and externally.	
					</	

Public file: "Design Team Levels Framework (Originally for Snagajob Design)" – Peter Merholz / @peterme

Source: <https://docs.google.com/spreadsheets/d/1m-Cso3848CgEz0eng5spL0LDppnwOgt726ij01pVwO8/edit?usp=sharing>

Mapping and discussion

10-15min

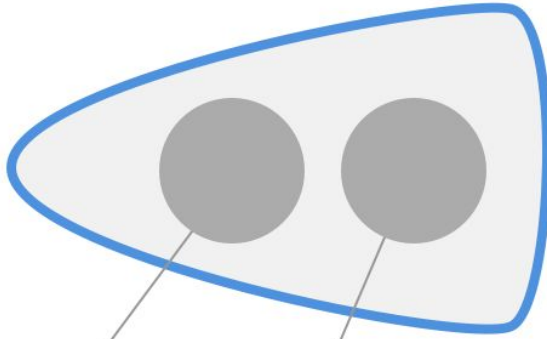
**open +
perspectives**



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

45-50 min

mapping + discussion



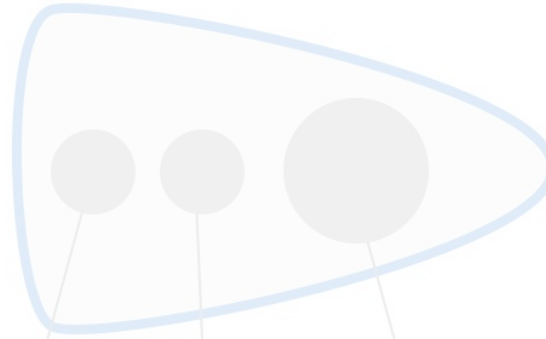
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5-10m

45-50 min

rating + reflection



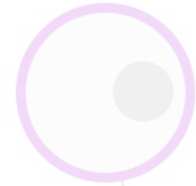
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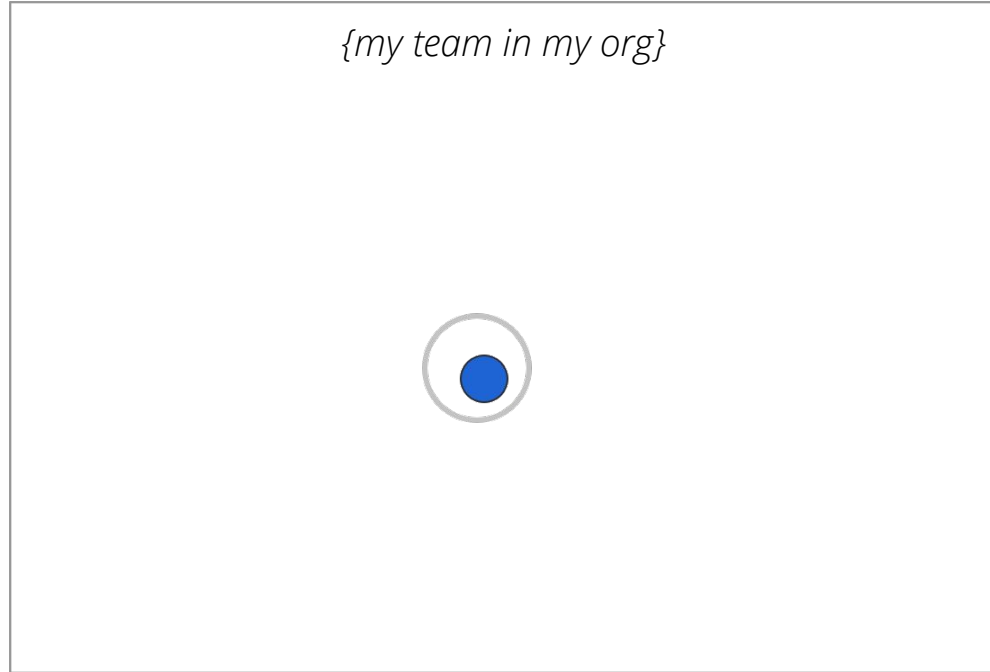
10-15min

**summary +
feedback**



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

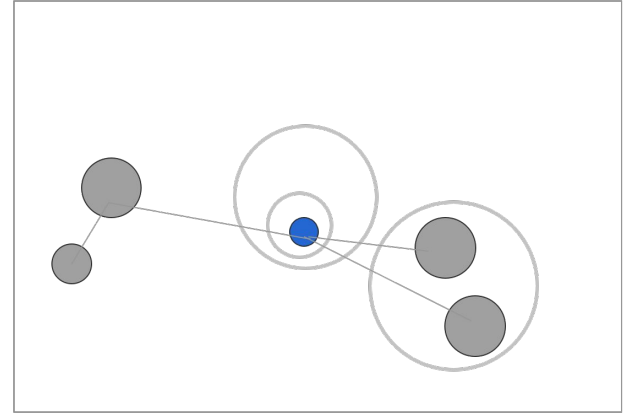
Org. Ecosystem Model — Activity #1



- Get a sheet of scratch paper and pens
- Start with a shaded dot for yourself, and add a circle around that for your team...

Org. Ecosystem Model — Activity #1

1. Draw a bigger circle around your team—what larger group / business unit is your team a part of? Label that group.
2. Add in your Design and/or Product team if they aren't already a part of the picture.
3. Finally, think of each team/group with direct access to customers: sales, support, consulting, etc.—add them to the map and shade them in. Draw out how they're connected to you.



Solo
3 min

Org. Ecosystem Model — Discussion

1. Where does your team fit into the org?
How does that arrangement affect the work that you take on?
2. Which other team has the strongest connection to customers/users?
Why? What happens to their knowledge & experience?
3. From your perspective, who has the most impact on your work?



In pairs
10 min

Project Journey Map — Activity #2

{Name of a recent research project}

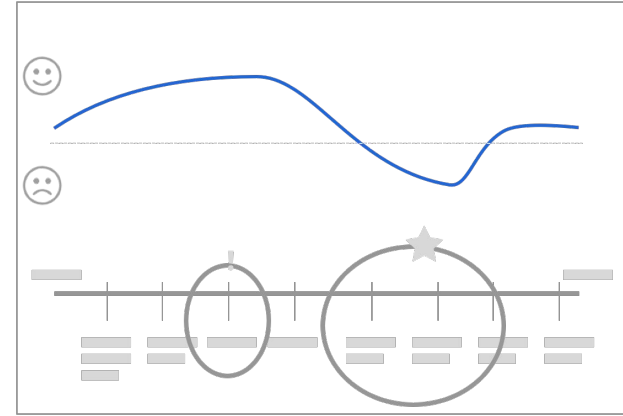
😊

☹️

- Get a sheet of scratch paper and pens
- Start with two lines: an emotion line on top (add your favorite happy/sad faces), and a project timeline line on the bottom

Project Journey Map — Activity #2

1. Start by filling out a timeline of major project events, anything that changed the state/course of the project.
2. Now think through and fill in the “emotional state” journey map line—how were you feeling throughout the course of this project?
3. Where did you feel the most frustration? Circle that area and draw an exclamation mark on your timeline here
4. Finally, where did you feel you had the great impact? Circle your timeline & draw a “!” on your timeline here



Solo
3 min

#2 Project Journey Map — Discussion

1. How did your involvement in the project get started?
How much influence did you have over how that?
2. What type of event, action, or outcome made you feel the most impactful?
3. What conditions led to stress or difficulty in the project? Why?
4. How did your involvement close? What were the ultimate outcomes?

A solid blue circle containing the text "Pairs" and "10 min" in white.

Pairs
10 min

*Optional—need a
short break?*

Reflection and rating

10-15min

**open +
perspectives**



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

45-50 min

mapping + discussion



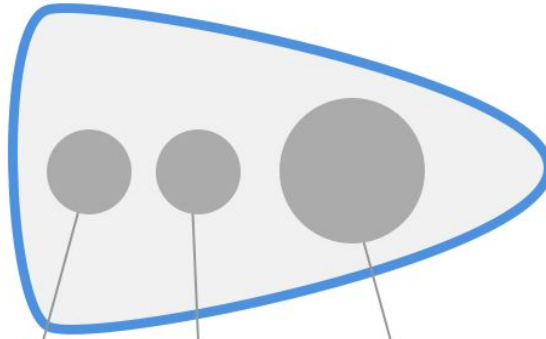
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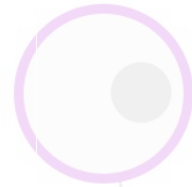
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10-15min

**summary +
feedback**



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

Craft Skills: Worksheet #1

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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 | |

define & 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 | |

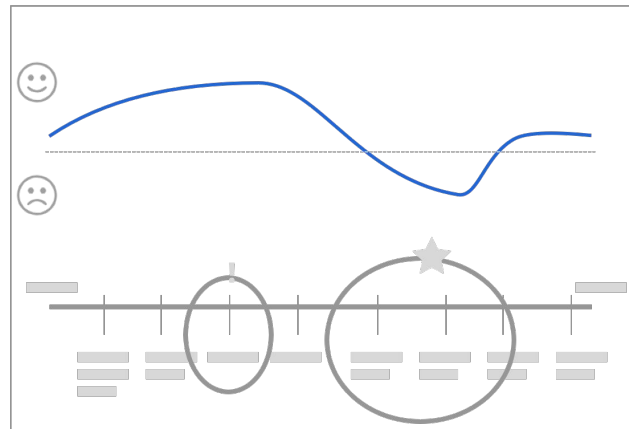
derive answers, actionable meaning from results ("synthesis")

- | | |
|---------------------------------|---|
| 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: _____



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Solo
7 min

Human Skills: Worksheet #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
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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
-------------------------	---------------------	----------------------	---------------------------	------------------------

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.?

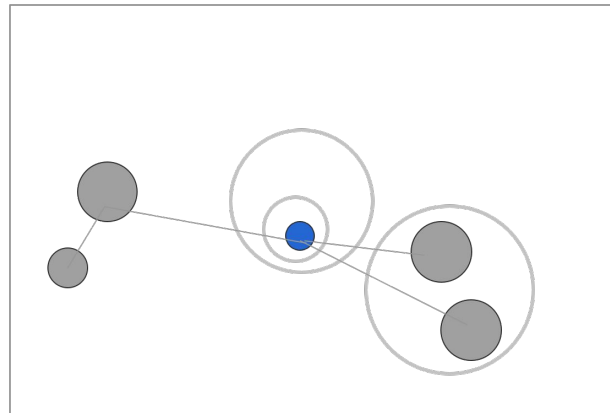
1: I know nobody	2: I have a few connects	3: I've some good allies	4: I feel well-engaged	5: I know&trust everyone
------------------	--------------------------	--------------------------	------------------------	--------------------------

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?

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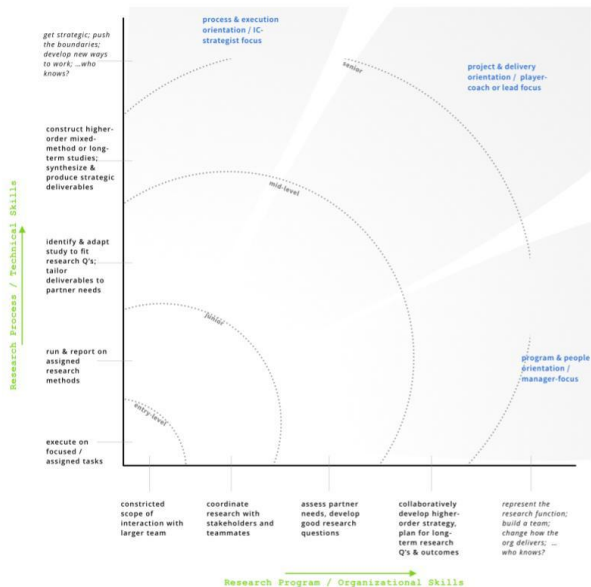


Solo
7 min

Career Map: Worksheet #3

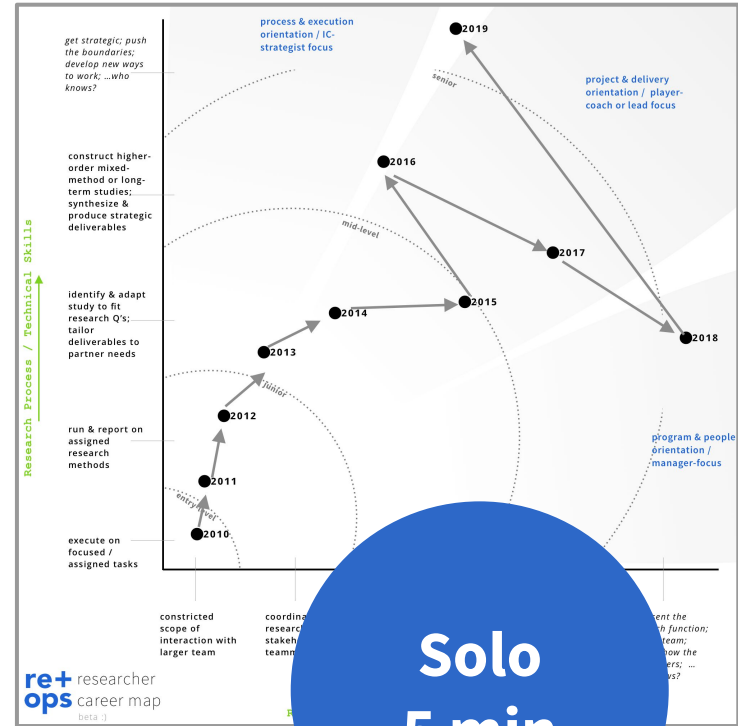
Worksheet #3: Career Map

You'll chart your journey along this map—and don't worry if it's only on the lower left for now.



Career Map: Worksheet #3

1. When did you start as a researcher?
—place a dot, add a date. In that first role, where do you think you got to?
Place a dot and trace the progression.
2. Move on to your next year or next job, whichever first: think about how you were working—place a dot.
3. Now continue dot-ing and tracing your progress for each year & career event, until you reach today
4. Finally, draw forward a few years...



Solo
5 min

#3 Career Map: Worksheet #3

1. Where are you now, and how did you get there?
2. What's the most interesting (best, worst, hardest, unusual) part about your journey so far?
3. Where do you think you'd like to push towards? How will you get there?



**Pair
15 min**

4. Reflection

10-15min

**open +
perspectives**



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45-50 min

mapping + discussion



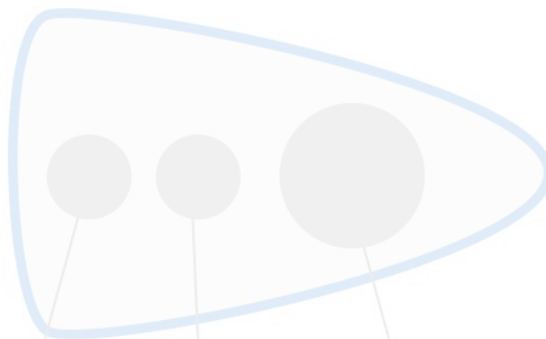
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10-15min

**summary +
feedback**



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

Self-reflection

- What did you learn today?
- What next steps do you want to take tomorrow?
- What are the questions you want to explore?



Solo
3 min

Reflection circle: —go around the room

- And share whatever you're comfortable sharing

*if your workshop is
greater than 10-12
in size; consider
breaking out into
two or three groups*



**1 min
Per
person**

The final step!

Fill out page 2; leave both with facilitator

Take photos for yourself, and you can keep all the other worksheet materials

Your organizer will also send you a workshop feedback form (digital) tomorrow

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? _____

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. _____
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? _____

Thank you

- + Follow @teamreops
- + Join the Slack waitlist
- + Come to one of our town halls
- + Watch town hall videos on Vimeo
- + Join the conversation: #ResearchOps and #researcherskills

<https://researchops.community>

<https://twitter.com/teamreops>

<https://vimeo.com/user89807865>

teamreops@gmail.com

re+
ops