

What is  
Research Strategy?

---

*Christopher Geison*



"Love Life" by Adrian Tomine  
for The New Yorker, 12/7/2020

*You're the reason for this talk*

# *How to do research*

*What research **should** be done*

*This is **NOT** a leadership talk*

*Why me?*

*“So, what is research strategy?”*



*“I don’t know.”*

But I have some ideas...



## Research Strategy:

A set of practices that help ensure an organization's research activities are deliberate, effective, and aligned with the organization's objectives.

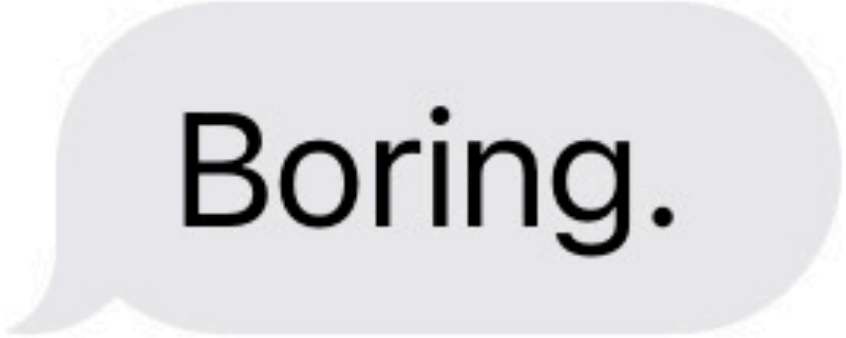




Lin >

Proposed definition for  
"Research Strategy": A set of  
practices that help ensure an  
organization's practices are  
deliberate, effective, and  
aligned with the organization's  
objectives.

Thoughts?



Boring.



## Research Strategy:

How we stop wasting time on bullshit projects that don't drive results.



“

## Research Strategy

How we stop wasting time on bullshit projects that don't drive results.

Work in Progress

”

What is  
strategy?



Goal + Plan

“The essence of strategy is  
choosing what **not** to do.”

- Michael Porter

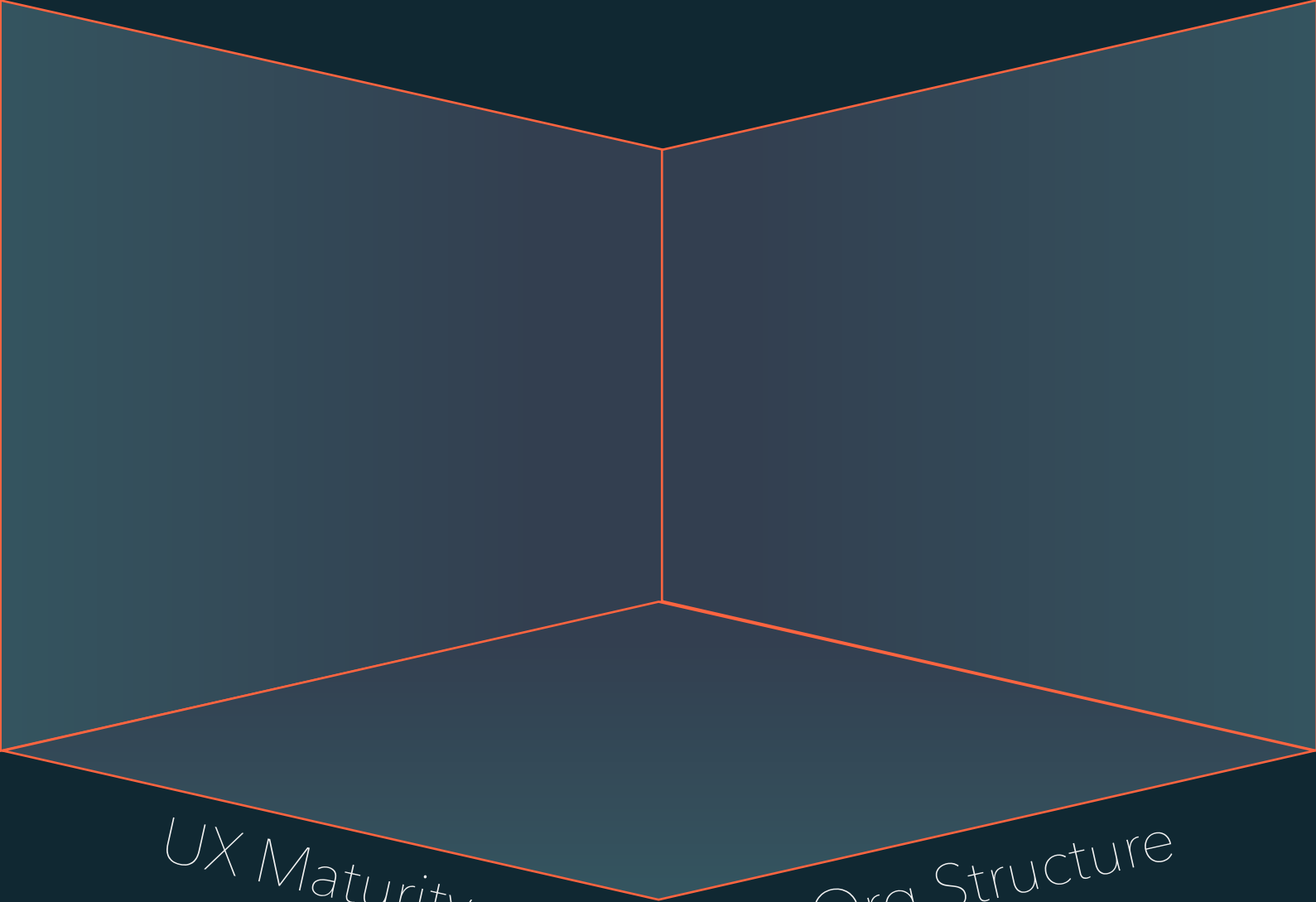
Professor, Harvard Business School

Does your organization have a  
research strategy?

Organization

Team

Individual



UX Maturity

Org Structure



Define



Collect



Prioritize



Measure

Let's talk tools



**Define**

Mission Statement



**Collect**

Questions Workshops



**Prioritize**

Assessment Grid



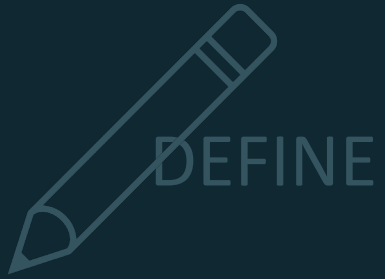
**Measure**

"It depends..."



DEFINE





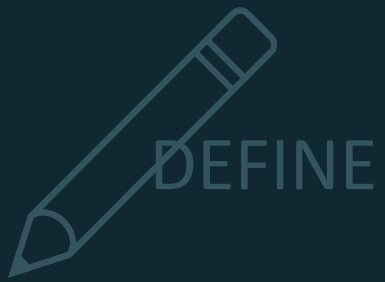
# Mission Statement

An inspiring summary of the  
broader strategy

*We research whatever's most  
politically expedient.*

*We provide insights to support  
product strategy decisions.*

*We focus on the most important  
interactions for the greatest  
number of users.*



# Consider

- What kind of **impact** do you want to have?
- What will it take to **get there**?
- What are your **SWOT**?
- What is your **value proposition**?
- To what will you say, "**no**"?
- How will you **measure success**?



collect



# Questions Workshop

A team workshop for surfacing  
research opportunities



Sinéad Davis Cochrane

UX Manager, Workday





# Questions Workshop

## Purpose

- Identify unknowns
- Turn unknowns into questions
- Align



# Questions Workshop

## When

Whenever.

- Backlog
- New priorities
- New team



# Questions Workshop

## Overview

Two parts:

1. Ideation
2. Definition



# Questions Workshop

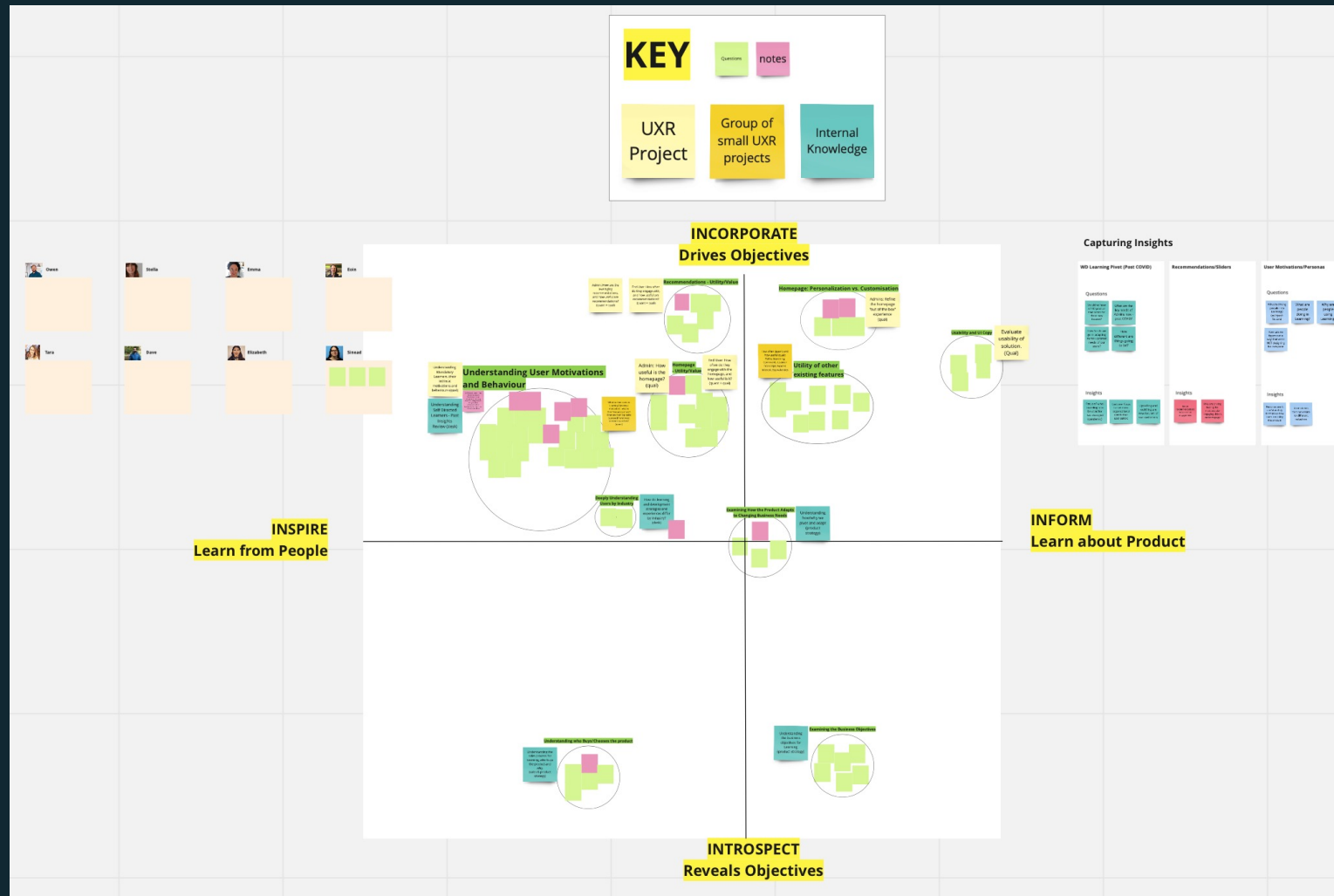
## Workshop 1

*60 minutes*

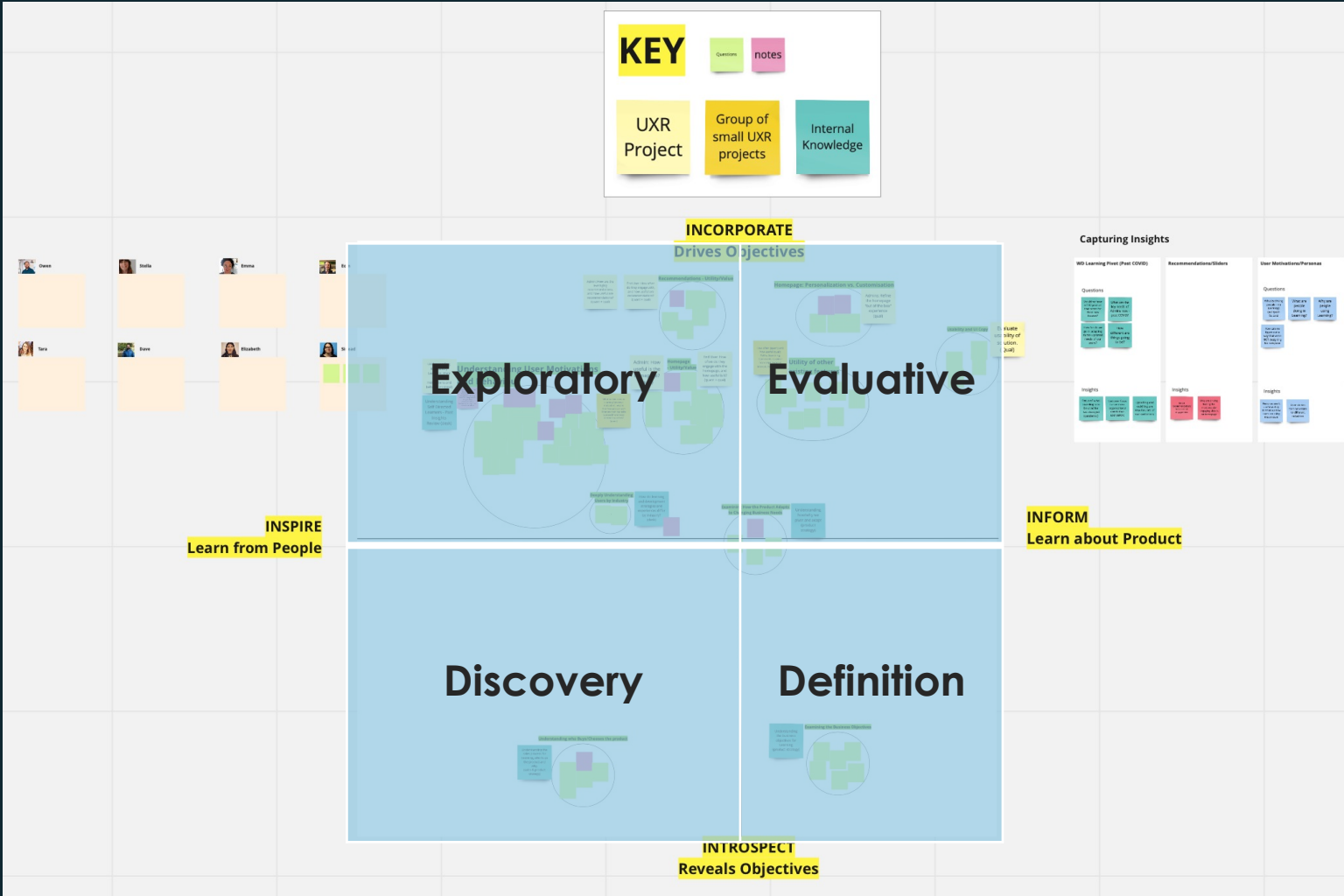
Attendees:

- Manager
- Researchers
- Designers

# Workshop 1



# Workshop 1





# Questions Workshop

## Workshop 2

*90+ minutes*

Attendees:

- Manager
- Researchers



# Questions Workshop

## Workshop 2

1. Turn unknowns into questions
2. Identify methodologies
3. Add to assessment matrix





Prioritize



Prioritize

# Assessment Matrix

A method for assessing research opportunities to support informed decision making



Prioritize

# Assessment Matrix

## Purpose

- Assess opportunities
- Facilitate discussion
- Align



Prioritize

# Assessment Matrix

## Purpose

- Assess opportunities
- Facilitate discussion
- Align



Prioritize

# Assessment Matrix

## When

Whenever.

- After Questions Workshop
- Quarterly
- Project completion



# Prioritize Assessment Matrix

## Overview

Name	Methodology	Simplicity	Risk	Value	Buy-in	Time	Shelf Life	Timeline/Decision Gates		
		How much work is required? (Consider complexity, # of participants, # of UXRs, etc)	What is the risk to product success of NOT doing this research? Lack of confidence in proposed solution?	Are the outcomes likely to help users? Is the project aligned with OKRs?	Is there exec sponsorship? Will stakeholders collaborate (as opposed to offload)?	Is there enough time to conduct the research (including recruiting)? Is there enough time post-research to implement findings?	Will the insights outlast the next release? Will this provide value in the future?	Go/No Go	Start	Finish
Project 1	Diary Study + IDIs	Low	Medium	High	Medium	Yes	Yes	5/15	Fielding dates are flexible	
Project 2	Usability Sessions	Medium	High	Medium	High	Somewhat	No	6/8	6/29	8/28
Project 3	Survey	High	Low	Medium	Medium	Somewhat	Yes	5/25	6/8	8/14
Project 4	Prototype Explorations	Medium	Medium	Low	[See Notes]	Yes	Somewhat	Waiting to hear back from design team		
Project 5	Usability Sessions	High	High	Low	Medium	No	No	5/25	6/15	7/17
<b>Notes:</b>										
Project 1		Diary: n=24, IDIs: n=6; outside recruiter; complex logistics	No short term risk, but long-term risk is significant if we don't understand end-to-end process	Company OKR: Customers: Reduce sold not implemented // Users: Improve Config experience	Sr. Director & Strategist on board; Likely a low priority for PMs	Plenty of time (2021 R2 release)	Yes			
Project 2		n=9-12, straightforward study, multiple stakeholders	Broken experience	Usability of key product experience	Yes	Only enough time to implement minor changes	Just affects this release			
Project 3		n=1000, responses purchased through surveymonkey	Info gathering/quantifying qual findings; not mission critical but helpful	Org OKR: [xyz] // Better understand user sentiment	Team understands need but unlikely to review docs/attend sessions	Timeline for survey is tight; want results for meeting 8/17	Yes			
Project 4		n=6-9, in-person, 3 prototypes	Problems not uncovered until usability sessions; costly to fix	Team could not identify OKR	Need to assess	Sufficient time (2021 R1)	Could reveal future opportunities			
Project 5		n=6, straightforward study	Broken experience	Usability of product experience affecting some configurations	Team understands need but unlikely to review docs/attend sessions	Not enough time to implement findings unless they involve changes to text	Just affects this release			



Prioritize

Criteria

Simplicity

Name	Simplicity
	How much work is required? (Consider complexity, # of participants, # of UXRs, etc)
Project 1	Low
Project 2	Medium
Project 3	High
Project 4	Medium
Project 5	High
<b>Notes:</b>	
Project 1	Diary: n=24, IDIs: n=6; outside recruiter; complex logistics
Project 2	n=9-12, straightforward study, multiple stakeholders
Project 3	n=1000, responses purchased through surveymonkey
Project 4	n=6-9, in-person, 3 prototypes
Project 5	n=6, straightforward study



Prioritize

Criteria

Risk

Name	Risk
	What is the risk to product success of NOT doing this research? Lack of confidence in proposed solution?
Project 1	Medium
Project 2	High
Project 3	Low
Project 4	Medium
Project 5	High
<b>Notes:</b>	
Project 1	No short term risk, but long-term risk is significant if we don't understand end-to-end process
Project 2	Broken experience
Project 3	Info gathering/quantifying qual findings; not mission critical but helpful
Project 4	Problems not uncovered until usability sessions; costly to fix
Project 5	Broken experience





Prioritize

Criteria

Value

Name	Value
	Are the outcomes likely to help users? Is the project aligned with OKRs?
Project 1	High
Project 2	Medium
Project 3	Medium
Project 4	Low
Project 5	Low
<b>Notes:</b>	
Project 1	Company OKR: Customers: Reduce sold not implemented // Users: Improve Config experience
Project 2	Usability of key product experience
Project 3	Org OKR: [xyz] // Better understand user sentiment
Project 4	Team could not identify OKR
Project 5	Usability of product experience affecting some configurations



Prioritize

Criteria

Buy-in

Name	Buy-in
	Is there exec sponsorship? Will stakeholders collaborate (as opposed to offload)?
Project 1	Medium
Project 2	High
Project 3	Medium
Project 4	[See Notes]
Project 5	Medium
<b>Notes:</b>	
Project 1	Sr. Director & Strategist on board; Likely a low priority for PMs
Project 2	Yes
Project 3	Team understands need but unlikely to review docs/attend sessions
Project 4	Need to assess
Project 5	Team understands need but unlikely to review docs/attend sessions



Prioritize

Criteria

Time

Name	Time
	Is there enough time to conduct the research ( <i>including recruiting</i> )? Is there enough time post-research to implement findings?
Project 1	Yes
Project 2	Somewhat
Project 3	Somewhat
Project 4	Yes
Project 5	No
<b>Notes:</b>	
Project 1	Plenty of time (2021 R2 release)
Project 2	Only enough time to implement minor changes
Project 3	Timeline for survey is tight; want results for meeting 8/17
Project 4	Sufficient time (2021 R1)
Project 5	Not enough time to implement findings unless they involve changes to text



Prioritize

Criteria

Shelf Life

Name	Shelf Life
	Will the insights outlast the next release? Will this provide value in the future?
Project 1	Yes
Project 2	No
Project 3	Yes
Project 4	Somewhat
Project 5	No
<b>Notes:</b>	
Project 1	Yes
Project 2	Just affects this release
Project 3	Yes
Project 4	Could reveal future opportunities
Project 5	Just affects this release



Prioritize

# Assessment Matrix

## Overview

Name	Methodology	Simplicity	Risk	Value	Buy-in	Time	Shelf Life	Timeline/Decision Gates		
		How much work is required? (Consider complexity, # of participants, # of UXRs, etc)	What is the risk to product success of NOT doing this research? Lack of confidence in proposed solution?	Are the outcomes likely to help users? Is the project aligned with OKRs?	Is there exec sponsorship? Will stakeholders collaborate (as opposed to offload)?	Is there enough time to conduct the research (including recruiting)? Is there enough time post-research to implement findings?	Will the insights outlast the next release? Will this provide value in the future?	Go/No Go	Start	Finish
Project 1	Diary Study + IDIs	Low	Medium	High	Medium	Yes	Yes	5/15	Fielding dates are flexible	
Project 2	Usability Sessions	Medium	High	Medium	High	Somewhat	No	6/8	6/29	8/28
Project 3	Survey	High	Low	Medium	Medium	Somewhat	Yes	5/25	6/8	8/14
Project 4	Prototype Explorations	Medium	Medium	Low	[See Notes]	Yes	Somewhat	Waiting to hear back from design team		
Project 5	Usability Sessions	High	High	Low	Medium	No	No	5/25	6/15	7/17
<b>Notes:</b>										
Project 1		Diary: n=24, IDIs: n=6; outside recruiter; complex logistics	No short term risk, but long-term risk is significant if we don't understand end-to-end process	Company OKR: Customers: Reduce sold not implemented // Users: Improve Config experience	Sr. Director & Strategist on board; Likely a low priority for PMs	Plenty of time (2021 R2 release)	Yes			
Project 2		n=9-12, straightforward study, multiple stakeholders	Broken experience	Usability of key product experience	Yes	Only enough time to implement minor changes	Just affects this release			
Project 3		n=1000, responses purchased through surveymonkey	Info gathering/quantifying qual findings; not mission critical but helpful	Org OKR: [xyz] // Better understand user sentiment	Team understands need but unlikely to review docs/attend sessions	Timeline for survey is tight; want results for meeting 8/17	Yes			
Project 4		n=6-9, in-person, 3 prototypes	Problems not uncovered until usability sessions; costly to fix	Team could not identify OKR	Need to assess	Sufficient time (2021 R1)	Could reveal future opportunities			
Project 5		n=6, straightforward study	Broken experience	Usability of product experience affecting some configurations	Team understands need but unlikely to review docs/attend sessions	Not enough time to implement findings unless they involve changes to text	Just affects this release			



measure



measure

“It depends...”

There's no single measurement  
of research success.

Or is there?



## Two key questions

1. Did the project achieve its aims?
2. Was the research used?





measure

Did the project achieve its aims?



measure

Was the research used?

*Let's work together.*

*ResearchStrategy.info*

*ResearchStrategy.info*



@ChrisGeison