

A Research Skills Evolution / Advancing Research 2021

A Research Skills Evolution

Dave Hora — @davesresearch

Advancing Research 2021 by Rosenfeld

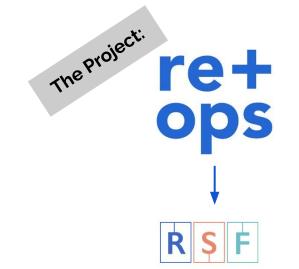


researchskills.net

re+
ops researchops.community



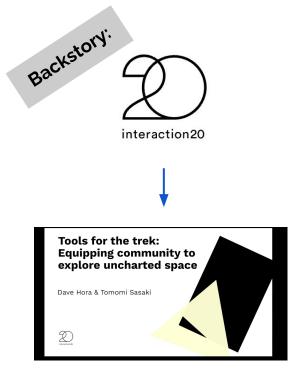
Wardley Mapping is provided courtesy of Simon Wardley and licensed as <u>Creative Commons Attribution-ShareAlike 4.0 International</u>. The Research Skills Framework is provided courtesy of the ReOps Community and licensed as <u>Creative Commons Attribution-ShareAlike 4.0 International</u>



Research Skills Framework

Researchers researching researchers: a project by the ResearchOps Community

https://www.researchskills.net/



https://interaction20.ixda.org/progra m/tools-for-the-trek-equipping-com munity-to-explore-uncharted-space

Index: A Research Skills Evolution

Research Skills 101: The Basics

- Research Skills Framework
- Archetypal path of research growth

Research Skills 201: Two Scenarios of Use

- Strategic profiling for team investment
- Wrangling divergent project processes

<u>Research Skills</u> 401: Challenge, Vision, Invitation
 A living language of practice

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Research Skills Framework

- Available at <u>researchskills.net</u>
- ReOps Community project, > 500 "PWDR" involved
- 47 Craft Skills (Patterns), 13 Human Skills
- 6 tools for individuals & teams; still growing
- Wardley Mapping & Alexandrian Patterns

Which parts help us push the practice forward?

Theme	Skill Patterns							
Strategic Direction	Establish organizational understanding of user needs Develop product or design strategy / approach Participate in product roadmap planning							
Amplify the Practice	Catalog / centralize research insights Train others to conduct evaluative research							
Business Alignment	Collaborate with front-line (sales, support, consulting) Build customer / user group / advisory council							
Integration in Service Delivery	Align research to development cycles Set up beta testing Establish rolling/cadenced user studies Facilitate design sprints							
Broadcasting	Evangelize the value of research Present/share study findings							
Framing the Work	Develop research questions from team needs Run design discovery workshops Run lean/hypothesis mapping workshops Plan research-driven design project		human sl	dlls	Making the work successful			
Structured Modeling	Develop use-centered archetypes (e.g., JTBDs) Develop behavioral archetypes (e.g., personas) Develop service blueprints Develop mental models			7	٦		Theme Collective,	Human Skills
Stakeholder Engagement	Interview stakeholders Run stakeholder kickoff/assumption workshops					\mathbf{i}	Community	Presentation & Storytelling Workshop Facilitation
Synthesis	Create frameworks / concepts to explain insights Develop journey maps Open-ended qualitative data analysis Run sensemaking / synthesis workshops Run longitudinat darg studies / experience sampling	\mathbf{n}					Business Unit, Organization	Organizational Evangelism Business & Strategy Insight Interpersonal Relationships
Basic Quant. Work	Set up quantitative analyses Combine qualitative with product analytics						Product, Service	Service Conceptual Understanding Research Process Management
Surveys & Questionnares	Survey / questionnaire development Run surveys and questionnaires Open-ended quantitative data analysis	Successfully	<i>C</i> 1 111				Team, Project	Cross-Functional Partnership Stakeholder Management & Communication
Interview Planning & Execution	Define participant segments / develop screener Develop study plan from research questions Run user interview session [general]	doing the work	craft skills		J		Self	Project Management & Ownership
Debrief & Analysis	Run field/observation research sessions Analyze / evaluate video recording Run session debriefs Externalize research data (e.g., data walls) Conduct affinity mapping workshops Develop usability study reports						Sell	Mindful Work & Reflection
Evaluative Testing	Conduct product heuristic analyses Track bugs and defects Conduct usability testing Conduct prototype / concept testing Set up card sorting / i A testing							
Coordination & Data Management	Capture raw interview data Recruit, schedule, coordinate participants Manage & organize raw research data							

Research Evangelization

awareness or "Mandard" service delivery like that of design, engineering, or customer support. Effective Reporting of projects and their learnings, as well as a campaign of specific User Needs Inception set the stage for discussing and amplifying awareness of the function of research itself, thus opening new avenues

The challenge

There is always pre search into the needs and rhythms of other teams, harmo your ability to frame research with the appropriate balance of functional quality and team needs. It takes trust for team members to change how they have previously worked to incorporate new ways o working.

operate, see new opportunities for value from research, and believe in your ability to execute. And the best way to build that trust is by providing consistent and well-communicated proof of value and a straightforward approach to the work.

The approach

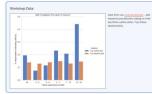
If your or your team are not well-established, start small. Consider the value you've already created in your projects and how these capabilities might be interesting to other teams that were not involved.

Therefore, identify key team members who may be able to leverage or enable useful work and discuss past projects and future applications. Find existing organizational pathways and for interna education and use them to teach the team about how research works and deliver a project casestudy presentation. Build new ways of communicating the work into organizational rituals le.g. "episodes" of short user-focused problem stories at town hall meetings), key touchstones (e.g., put on a "tunch and learn" presentation about becoming a better interview, or novel venues (e.g., a user museum highlighting the reality of work around a specific context.)

The work of evangelization is an ongoing campaign that requires a mix of editorial planning as well as opportunistic education, and above all takes time. It may take 3-5 instances of discrete communication before team members even begin to see and understand what you feel is intuitively obvious.

As more teams understand the value of the work, its rhythm and tempo, they will be able to think about how to better incorporate research into their work. Collaborate on Product & Dearch Strategy with those teams. with new partners.







Product Analytics

est. We need to integrate this type of data-the language that most of our business counterparts are amiliar with-with insights derived from our larger body of qualitative work to build the best picture of

Qualitative data can be mistaken as 'weak' data when it's not gathered at scale. Strong insights may not carry weight without understanding their representativeness across a user population. On the other hand, user "truths" that can be derived from guantitative product data imetrics, analytics) are not atways easy to interpret or understand, especially without sufficient context.

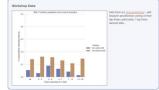
Working with existing products, consider what data is already on hand, or what data can be gathered Both can be a part of ongoing work the meaning of the data changes as you build a better understanding of user behavior.

Therefore, seek existing analytics data when undertaking a project. Review what information will be useful, and evolupte knowledge of existing behavior identify the story is each facet of data, and highlight those interesting areas where the story of the overlap is more interesting than either of its parts. In some cases, with ethical care and consideration for participant privacy, you may be able to develop parallel qualitative and quantitative understanding of specific, individual participants as part

Review related metrics along with each of your Session Debriefs. Bring all relevant quantitative data up from

Precursor skills Follow-up skills Human power-ups Sensemaking Workshop Crass-functional Partnership Service Conceptual Desiness & Strategy Insight

Last updated Apr 26, 2020 39.5



Product Analytics Software Assis guardiative work

Organizations now quantitative data coming in hom multiple sources relation guint grinting in this intercenter for measurement in a metal time functionary. Committies designed, or decrede efforts labeling of grints for even of integrate their type of data—the large part that most of an interact counterport are familiar with -with magnite derived from our larger body of qualitative reveils to build the total perform of entity.

The challenge

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The approach

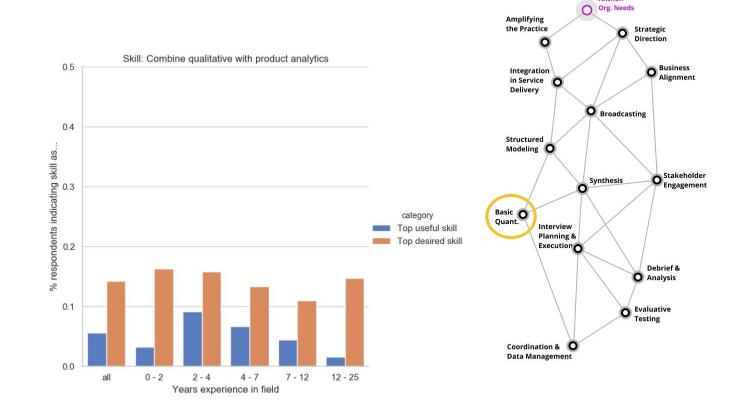
Working with existing products, consider what data is already on hand, or what data can be gathered with new instrumentation. Look is how you can conceilable the data of behavior at scale with experimited insight you wag athreed from the ensight process. each find at data tamoghen the other. Both can be a part of ongoing work the meaning of the data changes as you build a better unionicitating of gue are behavior.

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to you Sensemaking Markshop		
Precursor skills	Follow-up skills	Human power-ups
A/B Test	Sensemaking Workshop	Cross-Dubettens] Tertrarah
Exploratory Quantitative Analysis	Interview Debrief	Bervice Concertsel Modernianilag
		Business & Strategy Train



https://www.researchskills.net/ craft-skills/product-analytics



A Research Skills Evolution / Advancing Research 2021

Anchor:

Research Evangelization



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To gein more lawarage for the way you want to work, the team needs to understand how research will operate, see new opportunities for value from research, and believe in your ability to execute. And the best way to build that built is by providing consistent and well-communicated proof of value and a streightforeard approach to the week.

The approach

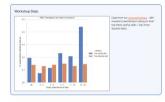
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Trace/cross balentfy key keen members who may be able to leverage or enable useful, and work and discuss pair projects on fulnew explositions. This enables of generations pairways and for terternal education and use them to teach the team about how reasons to works and obleve a project casetary presentation. The advance and advances and the second secon

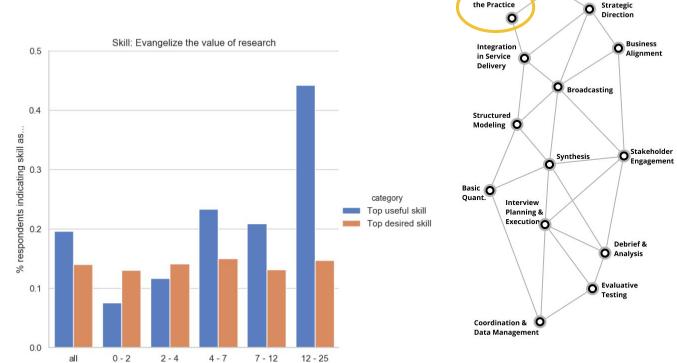
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Are more learns understated the volue of the over 6 dr styfem and lamps. They will be able to their about how to the term incomposite mean of the hier work. Collaborate on <u>Reduct & Dance Comp</u>, with those feature, abuilt more primary and research schedules into <u>Reduct Reducts</u>, and plan <u>Construct. Over Dance Theory</u> with more partners.

Precursor skills	Follow-up skills	Human power-ups
Deer Needs Incention	Product & Design	Grantmational Assession
Effective Reporting	GERALOSY	Internetates1 Aslationstic
	Product Roadsag	Presentation & Atorphelin
	Research-Driven Design	111111111111111111111111111111111111111
	Project	



https://www.researchskills.net/ craft-skills/research-evangelizaiton

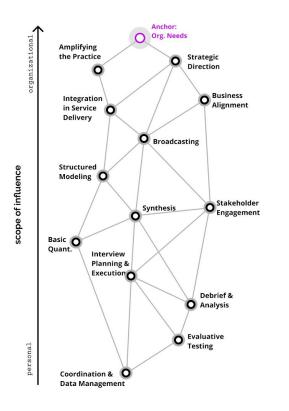


Years experience in field

Anchor: Org. Needs

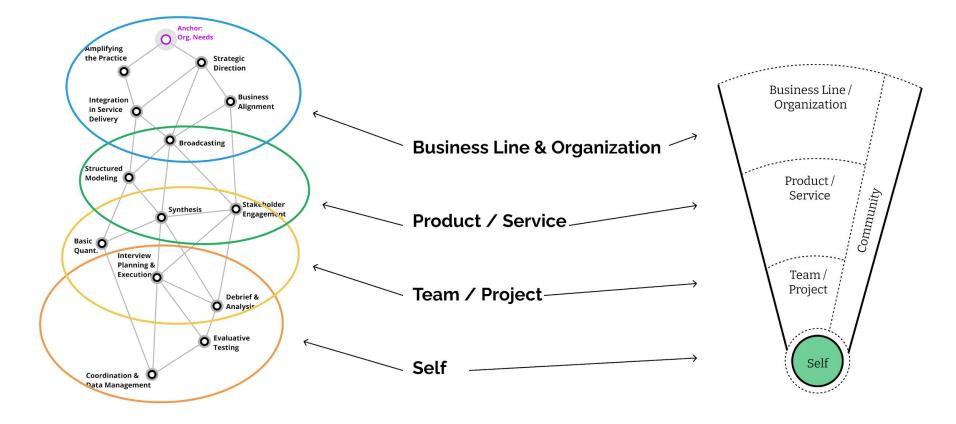
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Amplifying





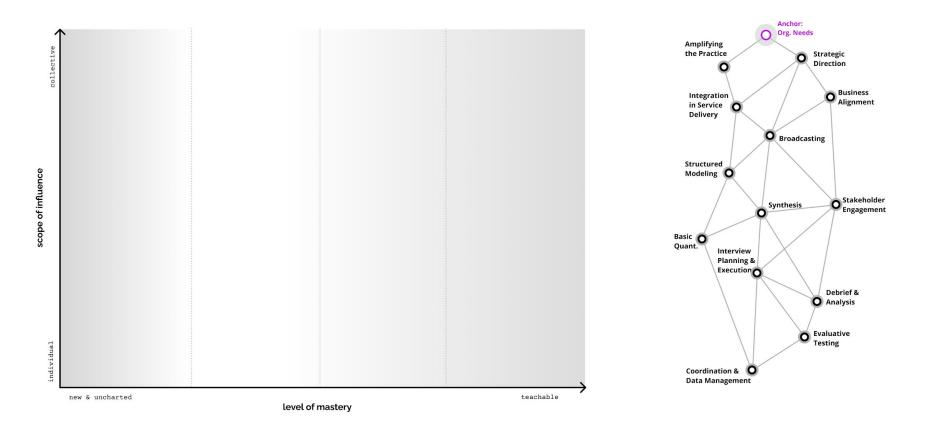
grow upwards from foundational skill themes, move up in complexity of craft and scope of influence

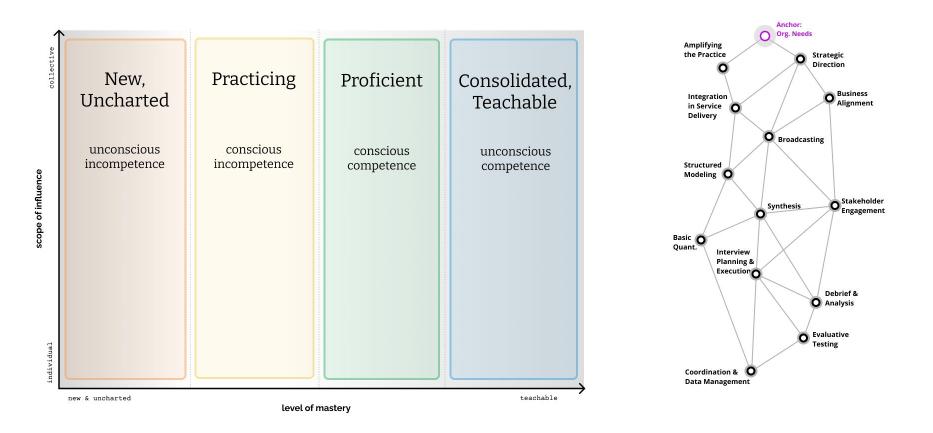


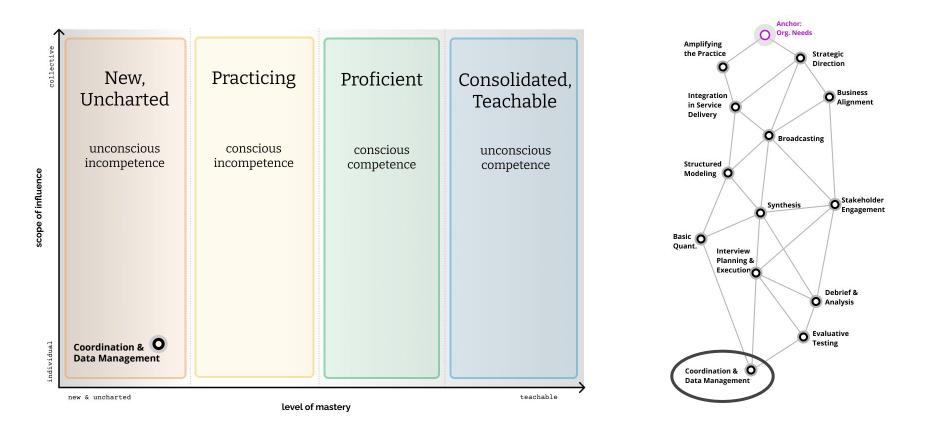
The Archetypal Career Path

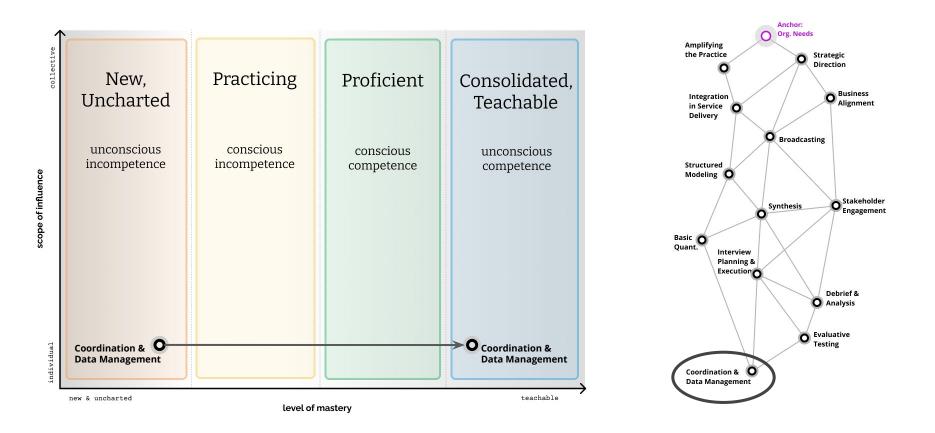
- Available at <u>researchskills.net/insights/report</u>
- Based on value chain hypothesis
- Triangulated with global workshop data
- (There is no "average" researcher)

How can we "see" the researcher's career path?



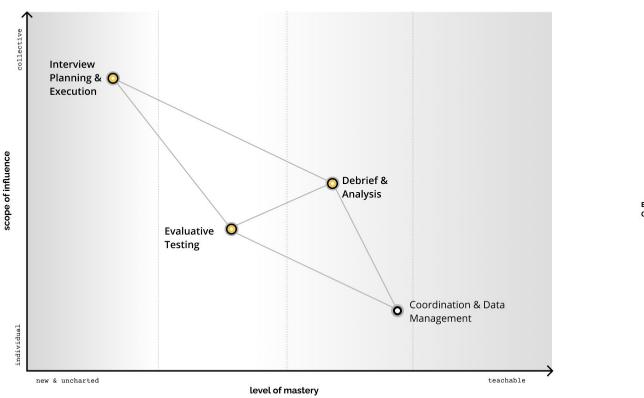


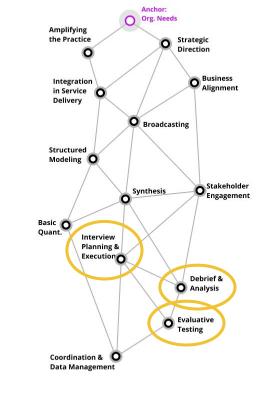




Sample profile: ~1 year experience, centralized in-house researcher

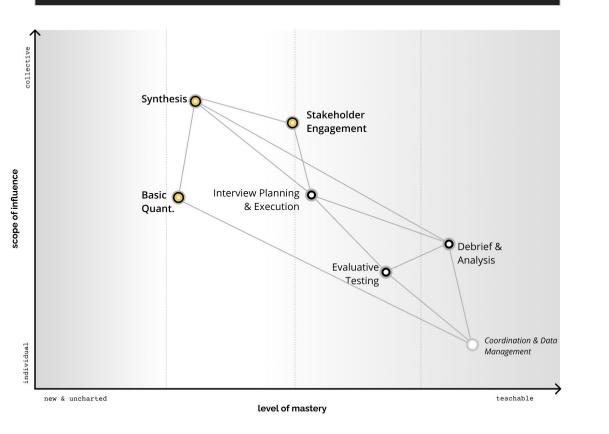
• Started as coordinator, now learning live usability testing

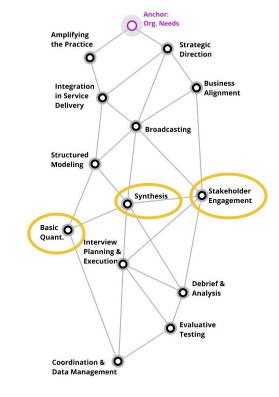




Sample profile: ~2 year experience, embedded in-house researcher

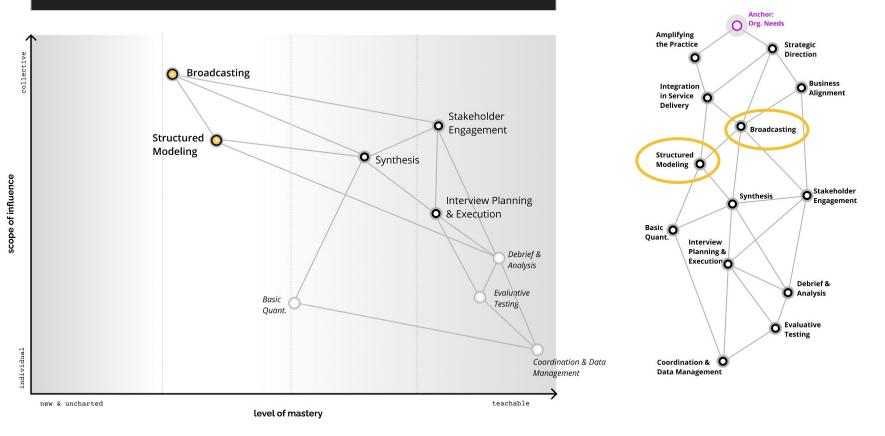
• Now embedded; Learning to own full projects within team





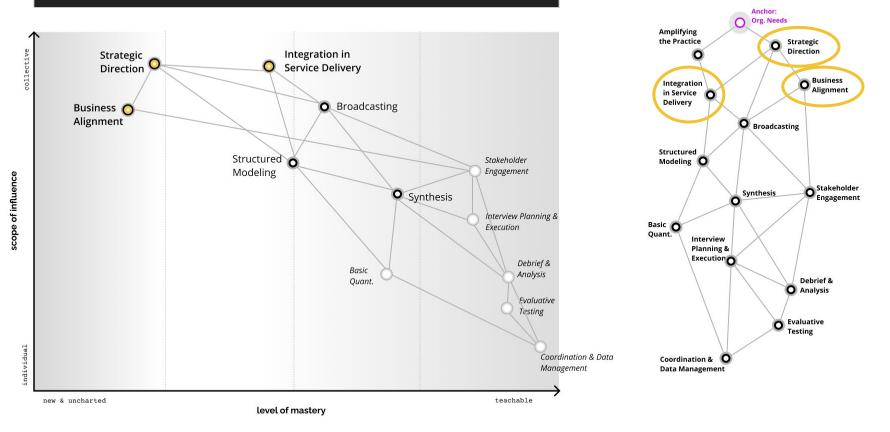
Sample profile: ~4 year experience, embedded in-house researcher

• Too much work! Storytelling & persuasion. Learning 'strategy'



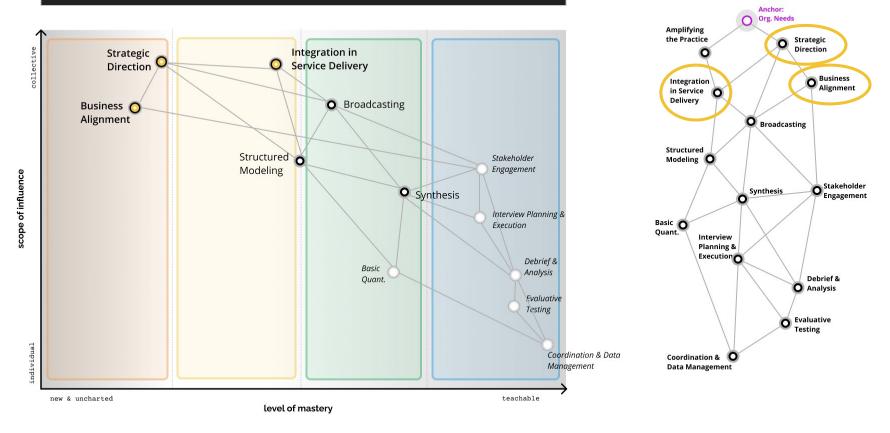
Sample profile: ~6-7 year experience, embedded in-house research lead

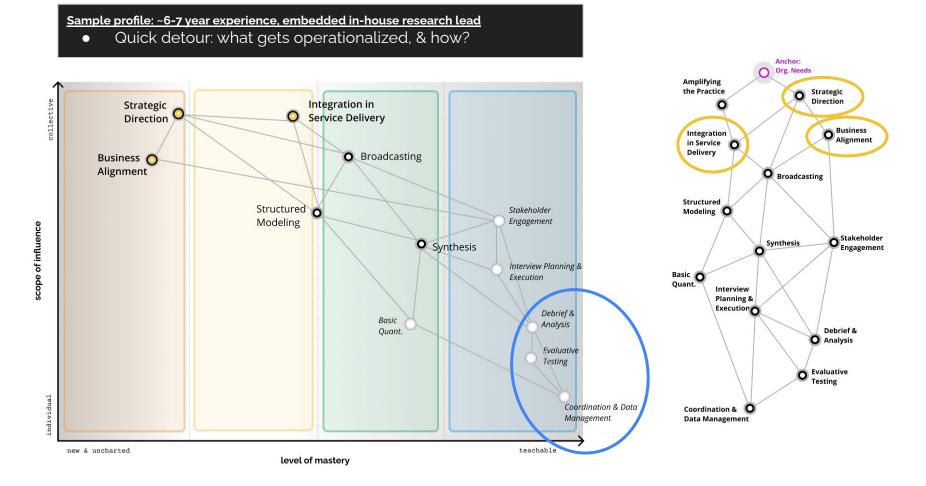
• Reshaping product process. Influential & always evangelizing.





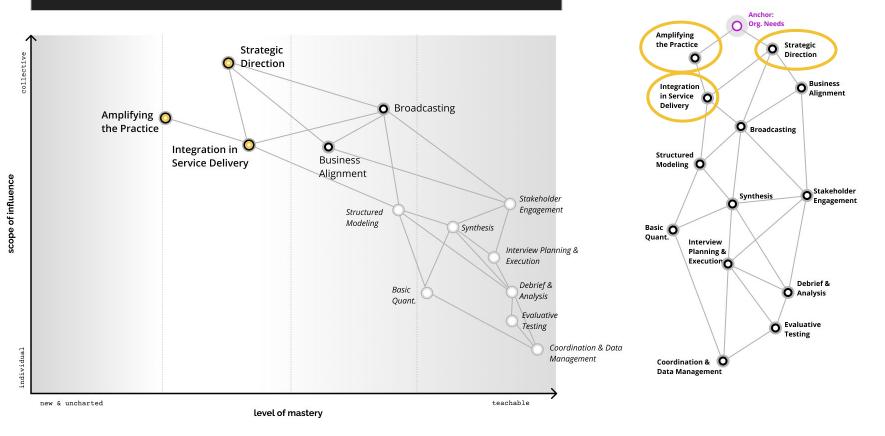
• Quick detour: what gets operationalized, & how?





Sample profile: ~7-12 years experience, in house senior lead or manager

• Practice positioning. Leadership tension.; What the hell is next?



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 A living language of practice

Scenario 1: Strategic Planning for Team Investment

- You are a newer research manager
- Working with a team of 4
- Your quarterly retro is coming up
- And you need to plan hiring, L&D for H2 2021...

What activities will help you get there, involve the team, bring them along with you? https://www.researchskills.net/tool/skills-and-themes-inventory

Skills and Themes Inventory

Assess your current level of mastery for 47 research skills.

Quick pre-work for each teammate

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Description Descripti		Α.			0.		.0	¢	F
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	2	Strategic Direction	Product Roadmap	1		î-			
Arey for Princips Are Arey for Princips Arey for Printer Print Arey for Princips Arey for Princips Arey fo		Strategic Direction	User Needs Inception			1			
	4	Strategic Direction	Product & Design Strategy			1		R	Ratings Cheatsheet: Use 0-4 at left
	5	Amplify the Practice	Public Project Index			1		1	I am not aware of this (or) Not applicable for me
International Control Co	4	Amplify the Practice	Research Training			E		1	I don't understand this yet
	7	Business Alignment	Front-Line Collaboration			1		12	I need more practice
III Inspection Reveal Contextor Description (Control Control		Business Alignment	Customer Advisory Council			L		3	I understand and can do this by myself
11. Integration & Berker Delanger Constanted Cycle Coupling 22. Integration & Berker Delanger Delanger Delanger Berker Delanger Berker 23. Integration & Berker Delanger Berkerth Chaits Delanger Berkert 24. Integration & Berker Delanger Berkerth Chaits Delanger Berkerth 25. Delanger Berkerth Chaits Delanger 25. Berkerth Delanger	9	Integration in Service Delivery	Cadenced User Studies			L		4	I can do this and explain it to someone else
12 Insequencia in Service Delivary Betz Est 1 Insequencia in Service Delivary Bessetch Charlon Design Prised 14 Insequencia in Service Delivary Bessetch Charlon Design Prised 19 Devolcation III On Control Delivary Bessetch Charlon Delivary Prised 19 Devolcation	10	Integration in Service Delivery	Design Sprint			L			
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	14	Integration in Service Delivery	Research-Driven Design Project			L			
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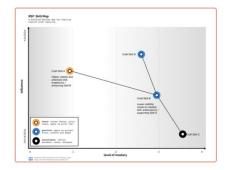
Theme Rating Table:	Score
Coordination & Data Management	
Evaluative Testing	
Debrief & Analysis	
Interview Planning & Execution	
Basic Quantitative Work	
Synthesis	
Stakeholder Engagement	
Structured Modeling	
Integration in Service Delivery	
Broadcasting	
Business Alignment	
Amplify the Practice	
Strategic Direction	

Coordination & Data Managem	Data Capture
Coordination & Data Managem	Well-Managed Data
Evaluative Testing	Heuristic Analysis
Evaluative Testing	Usability Test
Evaluative Testing	Information Architecture Study
Evaluative Testing	Concept Test
Evaluative Testing	Bug & Defect Tracking
Debrief & Analysis	Interview Debrief
Debrief & Analysis	Video Analysis
Debrief & Analysis	Affinity Map
Debrief & Analysis	Data Wall
Interview Planning & Execution	Study Plan
	Participant Segments & Screening
Interview Planning & Execution	User Interview
Interview Planning & Execution	Field Interview
Interview Planning & Execution	Experience Sample / Diary Study
Interview Planning & Execution	Interview Protocol
Basic Quantitative Work	Surveys & Questionnaires
Basic Quantitative Work	Exploratory Quantitative Analysis
Basic Quantitative Work	Product Analytics
Synthesis	Exploratory Research
Synthesis	Exploratory Qualitative Analysis
Synthesis	Journey Map
Synthesis	Sensemaking Workshop
Synthesis	Conceptual Model
Stakeholder Engagement	Stakeholder Interview
Stakeholder Engagement	Stakeholder Assumption Workshop
Structured Modeling	Service Blueprint
Structured Modeling	User Personas
Structured Modeling	Jobs to be Done
Interview Planning & Execution	Actionable Research Question
Integration in Service Delivery	Research-Driven Design Project
Broadcasting	Effective Reporting
Broadcasting	Research Evangelization
Integration in Service Delivery	A/B Test
Integration in Service Delivery	Beta Test
Integration in Service Delivery	Development Cycle Coupling
Integration in Service Delivery	Design Sprint
Integration in Service Delivery	Cadenced User Studies
Business Alignment	Customer Advisory Council
Business Alignment	Front-Line Collaboration
Amplify the Practice	Research Training
Amplify the Practice	Public Project Index
Strategic Direction	Product Roadmap
Strategic Direction	User Needs Inception
Strategic Direction	Product & Design Strategy

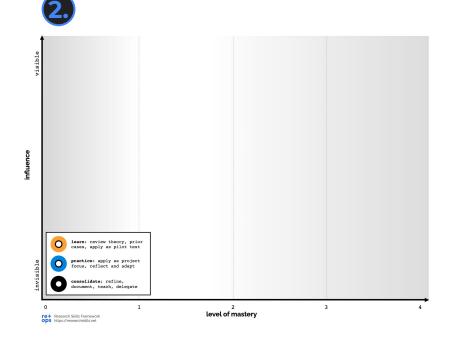
https://www.researchskills.net/tool/skill-map

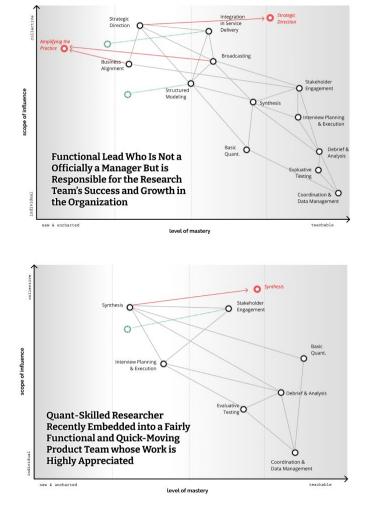
Skill Progression Map

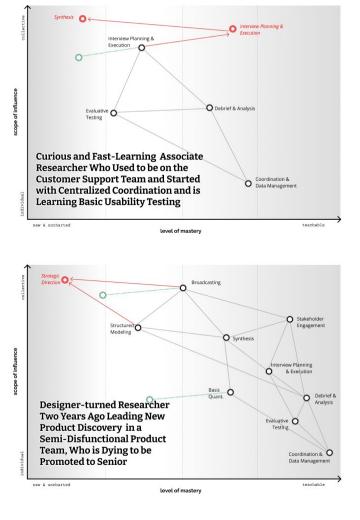
Chart the landscape of your skills. Decide where to invest, or divest.



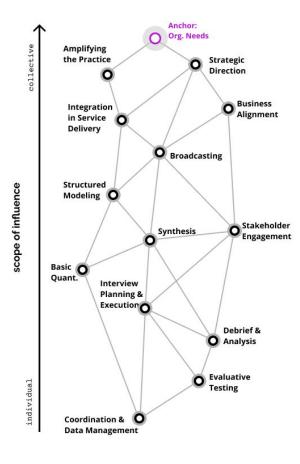
First activity in workshop



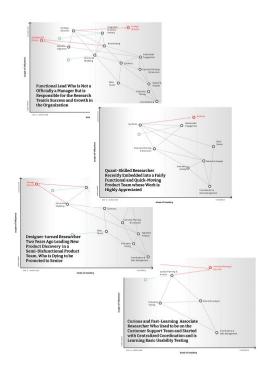


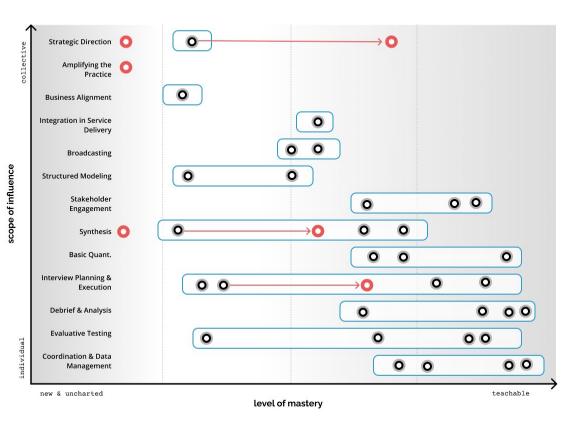


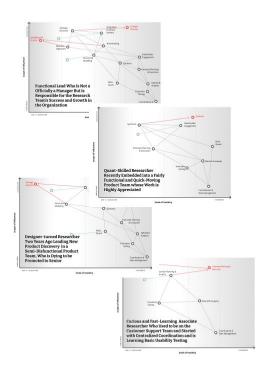
The path for individual growth, the singular...

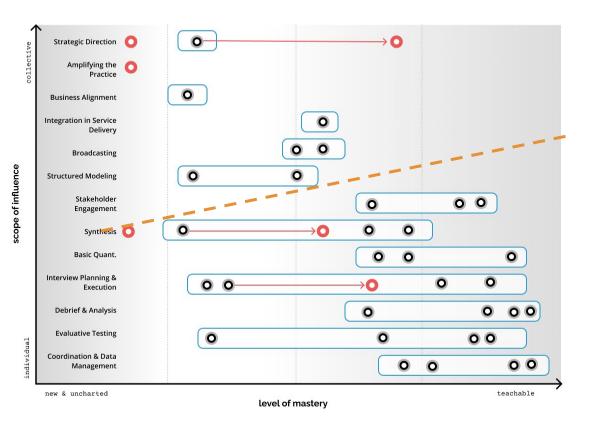


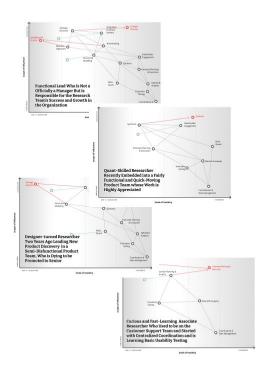
...also reflects how a team contributes to the organization, in the aggregate.

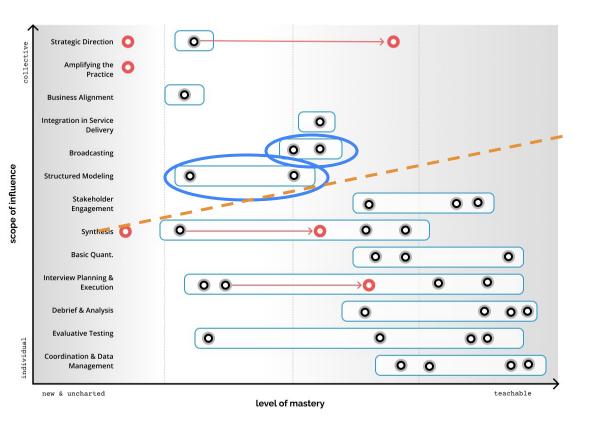












Scenario 2: Wrangling Divergent Project Processes

- You are managing many embedded researchers
- Who all run similar projects in different ways
- You want to improve their workflows & effectiveness,
- Without setting restrictive constraints

What activities will help you understand the work, identify key areas for intervention, set standard practices that are healthy & helpful?

Moderate amount of pre-work for the team

https://www.researchskills.net/tool/project-builder

1.

Understand your personal conditions for success by visualizing highs and lows in a project timeline.

Project Journey Map

::	
-	

https://www.researchskills.net/tool/project-journey-map

Project Builder

Plan successful research projects: visualize the end-to-end flow and make up-front decisions that lead to greater downstream impact.

<pre><pre>cproject name>;</pre></pre>	pattern planning			R	S F Hight
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Prampt overview; -2 mins	<pre>cproject name>: Entry contain mage-max, date Paint of context, oper context index</pre>	pattern sequence	planning			ŔŞF	See aloc: Concepts and grounding ideas behind these patterns.
Scenario Tool Prompt - RSF Project Builder	Project Context: 1. Question		3. Execute	4. Analyze			
buddar	Question What do we have what we do offerently after that? What we do offerently after that? What would happen if we don't do this?	2. Approach • Who do see redistroation fronts? • What itemic of information do we need? • How do see inford to get 17? • How will see bring the least along?	3. Execute • What type of data do we gather? • In what contexts are we researching? • What methods, techniques do we use? • How do we collect and store?	A. Analyze How do we evaluate our data reliability? How do we manage and work with data? How do we masure trace-able incipites? What forms of synthesis will we enable?	5. Synthesize • What is our approach to sensemating? • How do we create shared understanding? • What artifact outputs will see report with? • How do we model data, create insights?	6. Impact • What projects will this work anable? • What decisions are more important? • Who needs to learn from this project? • How do we package and communicate the work?	
Pattern selection discussion - 10 mins	Project Pattern Selection	pn:					
	Question 0	Approach 0	Execute 0	4. Analyze 0	5. Synthesize 0	6. Impact 0	
		+	+	÷	+	+	
Thinking through a user research project, initial pal Nonline	Research Skills - Card Listing 1. Question 5	2.Approach 8	3. Execute 12	4. Analyze 7	5.Synthesize 8	6.lmpact 8	
	Actionable	Study Plan	User Interview	Interview Debrief	Report	Bug & Defect	
	Stakeholder	Participant	Participant	Video Analysis	Sensemaking	Effective	
	Product Roadmap	Interview Protocol	Usability Test	Affinity Map	User Personas	Public Project	
	Front-Line	Stakeholder	Data Capture	Well-Managed	Conceptual Model	User Needs	
	Customer	Cadenced User	Heuristic Analysis	Data Wall	Journey Map	Research	
	•	A/B Test	Experience	Exploratory	Product Analytics	Design Sprint	
		Research Training	Field Interview	Exploratory	Jobs to be Done	Product & Design	
		Research-Driven	Concept Test	+	Service Blueprint	Development	
		+	Surveys &		+	+	
A Research Skills Evolution / Advancing Res	earch 2021		Information				Dave Hora / @davesresearch



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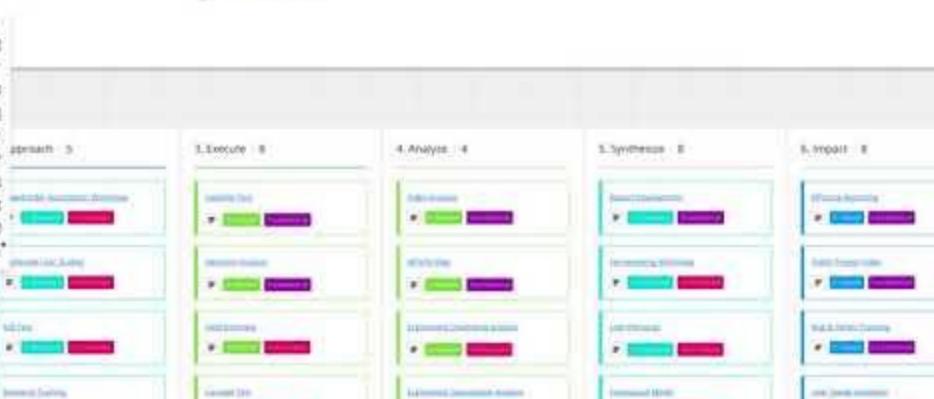
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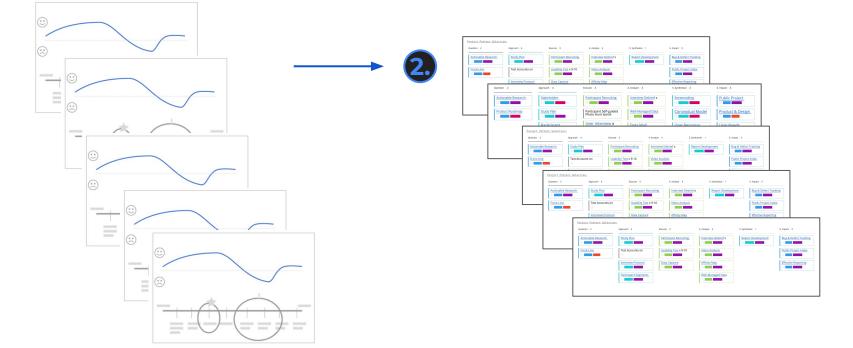


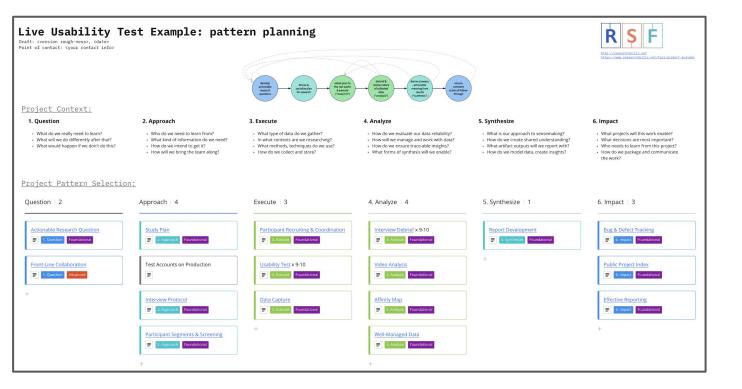


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First bit of workshop draws out common pressures & successes

Next identifies core practices & outcome drivers





- Project archetype with core patterns
- Create a playbook that speaks to recurring challenges, flexible enough to adapt to all study contexts
- Pin tools, resources, techniques to this study playbook
- Train new team members on ways of working from custom set of patterns of practice
- Understand project challenges & recurring needs as basis for targeting operations work

Index: A Research Skills Evolution

Research Skills 101: The Basics

- Research Skills Framework
- Archetypal path of research growth

Research Skills 201: Two Scenarios of Use

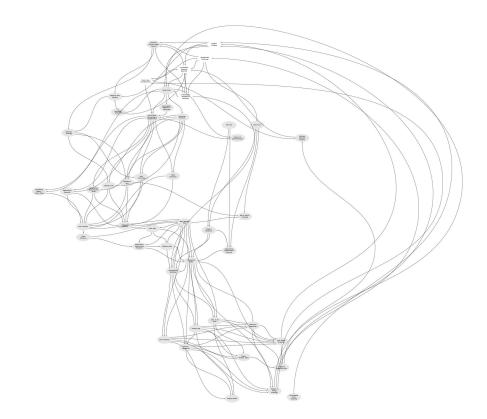
- Strategic profiling for team investment
- Wrangling divergent project processes

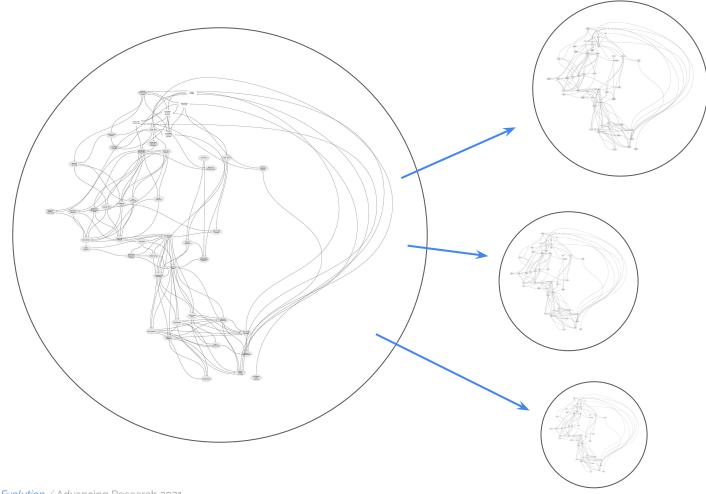
Research Skills 401: Vision, Challenge, Invitation

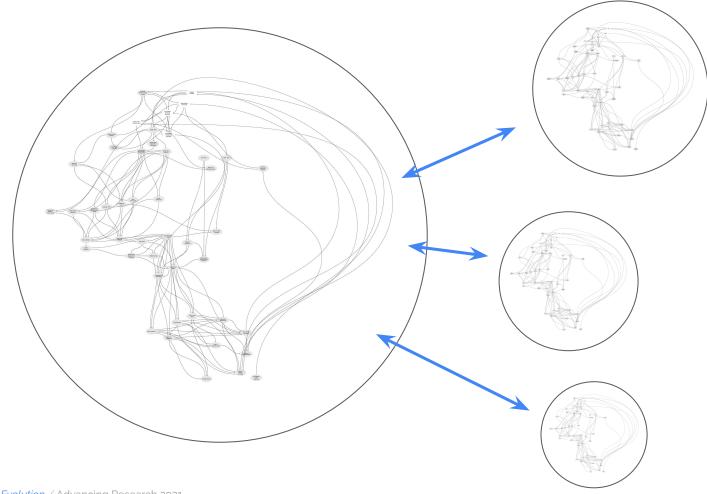
• A living language of practice

The power and flexibility of this approach comes—as with any good research—from a nuanced look at the real work, the day to day practices we employ on the ground.

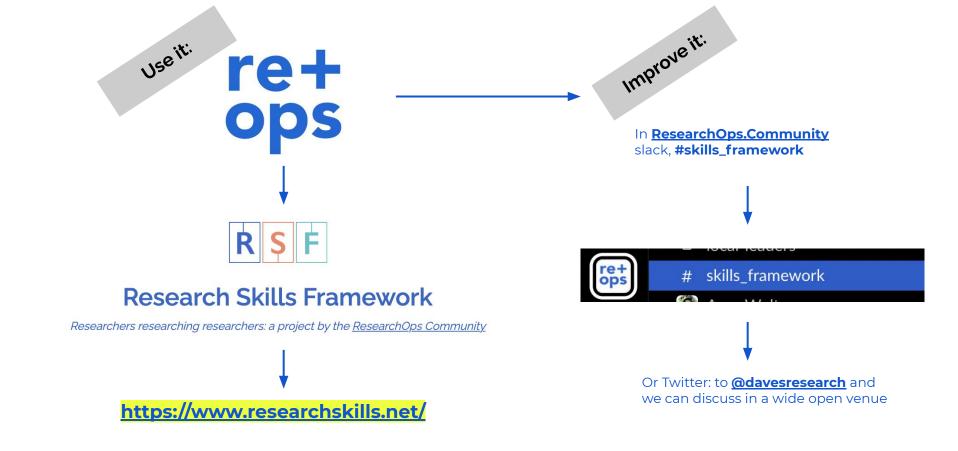
We abstract and manipulate these discrete patterns of practice into higher order meaning and more useful tools.







To make a living language of practice, we need to build tools for adoption, tools for use, and pathways for teams to contribute new developments...



The parting invitation:

- **1**. Test & try these existing tools!
- 2. Adopt and adapt the skills for your team
- 3. Find what works for you and why
- 4. Share to the community at large; contribute back to the framework
- 5. Enough activity points the way—shows the pathways we must build to bring it to life

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A Research Skills Evolution

Dave Hora — @davesresearch

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