



Research Repositories

Streamline your Research
& Insight Process

September 14, 2021

Kelly Goto | kelly@gotoresearch.com

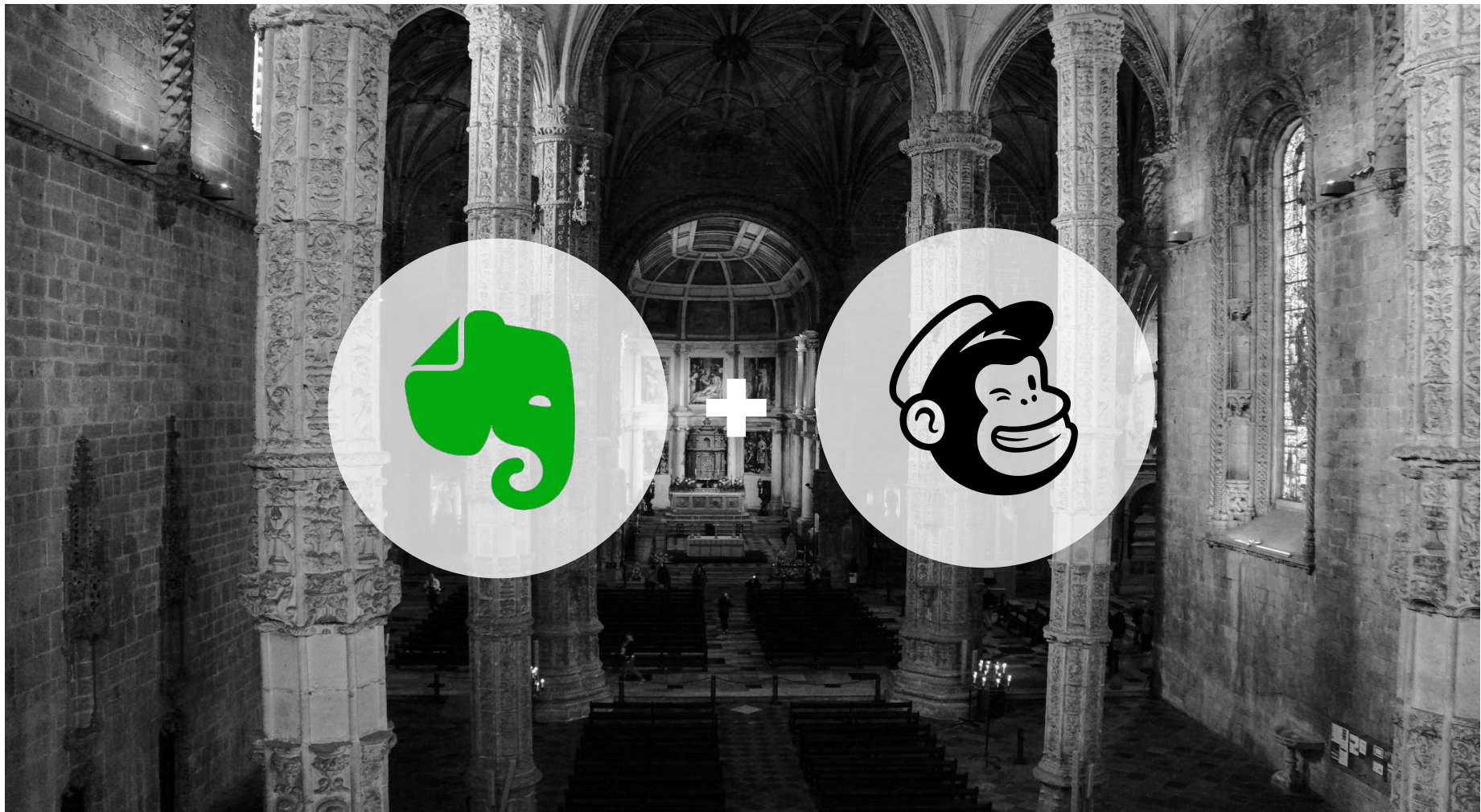


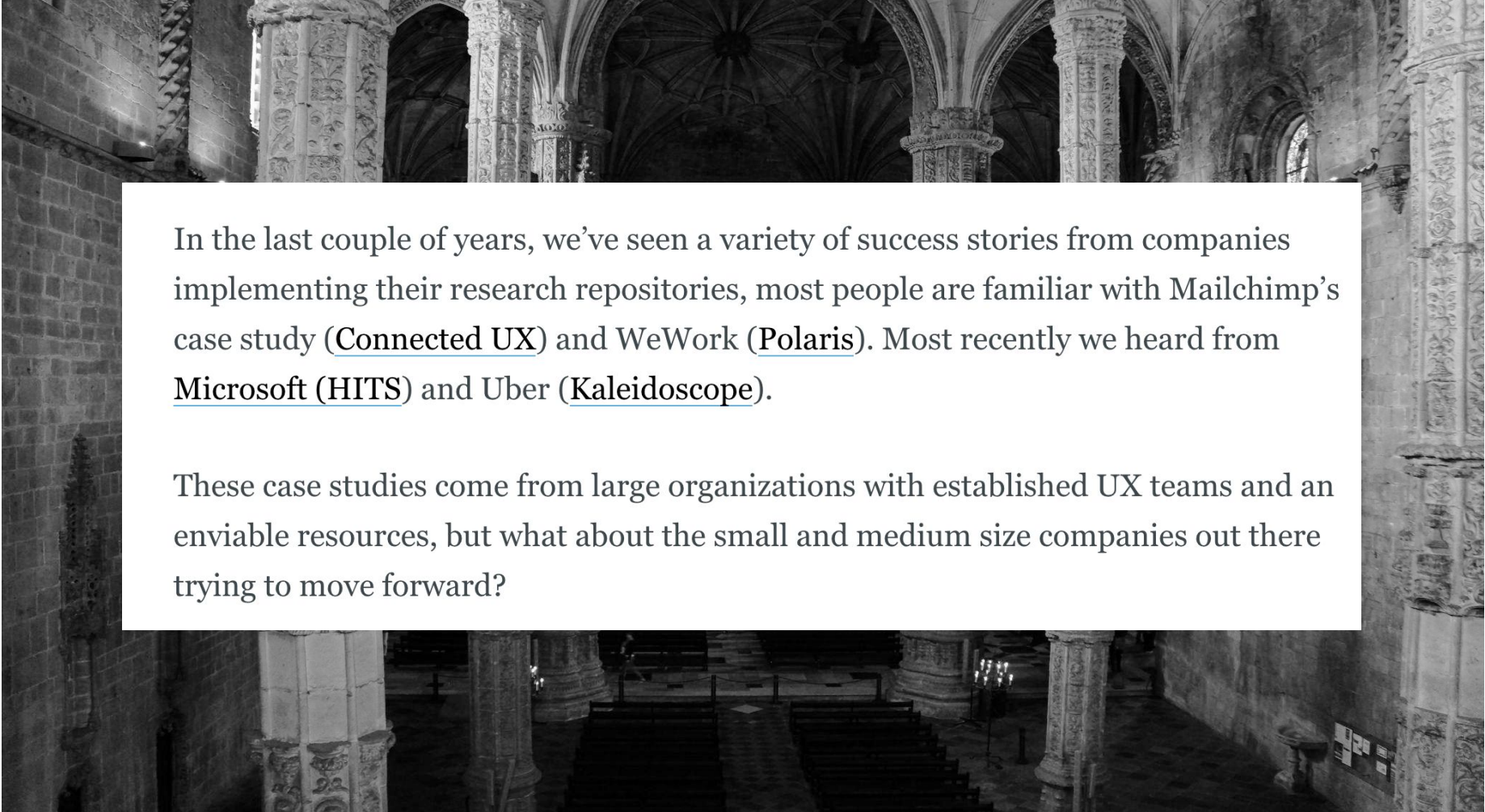


THE VISION

THE REALITY







In the last couple of years, we've seen a variety of success stories from companies implementing their research repositories, most people are familiar with Mailchimp's case study ([Connected UX](#)) and WeWork ([Polaris](#)). Most recently we heard from [Microsoft \(HITS\)](#) and Uber ([Kaleidoscope](#)).

These case studies come from large organizations with established UX teams and an enviable resources, but what about the small and medium size companies out there trying to move forward?

POLARIS

HITS (HUMAN INSIGHTS SYSTEM)



KALEIDOSCOPE

CONNECTED UX

The Power of Insights: A behind-the-scenes look at the new insights platform at Uber



Etienne Fang

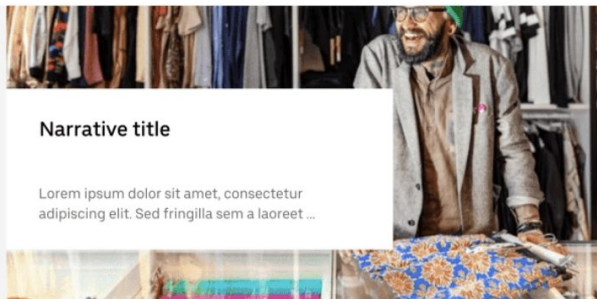
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Aug 27, 2019 · 10 min read



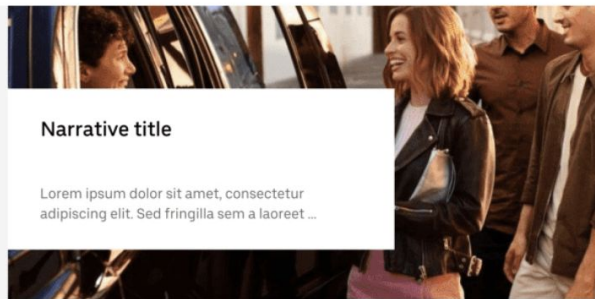
In the late 20th century, the dominant technological question was “How do we learn better?” In the early 21st, that question has been followed by “How do we better use the things we’ve learned?” Uber is powered by information. Chances are good that your company is, too. We’ve all had firsthand experiences of an inconvenient truth: information is only as good as our ability to make use of it. If a roadmap is locked in the glove compartment, no matter how detailed it is, it’s not much use on a road trip. Managing, sharing, and learning from that information is the key to using it successfully.

<https://medium.com/uber-design/the-power-of-insights-a-behind-the-scenes-look-at-the-new-insights-platform-at-uber-26f85becc2e6>



Narrative title

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed fringilla sem a laoreet ...



Narrative title

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed fringilla sem a laoreet ...

Featured Topics



Topic Nine

7 insights

#P1



Topic Ten

152 insights

#P1



Topic Eleven

97 insights

#P1



Topic Twelve

64 insights

#P1



Topic Thirteen



Topic Fourteen



Topic Fifteen



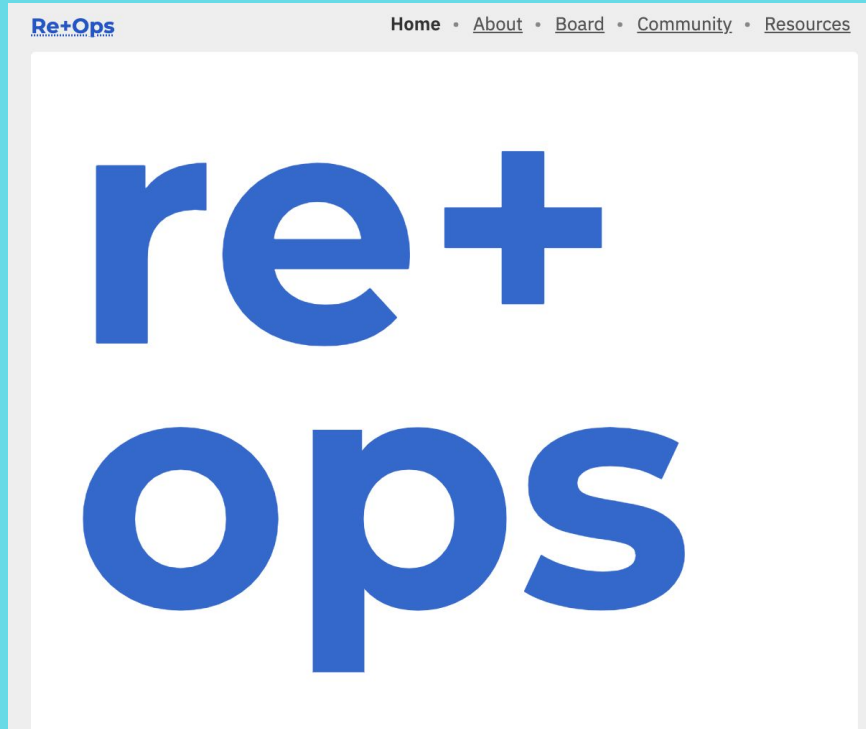
Topic Sixteen

Democratizing UX



Tomer Sharon Jan 12, 2017 · 5 min read ★

<https://tsharon.medium.com/democratizing-ux-670b95fbc07f>



<https://researchops.community/>



About this map

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

It's the result of the analysis of data gathered via a survey and 33 #WhatIsResearchOps workshops that ran around the world.

The map's intention is to give a framework for what ResearchOps is. As the practice grows, we expect this map will grow and be refined too.

What about data security, privacy, and procurement?

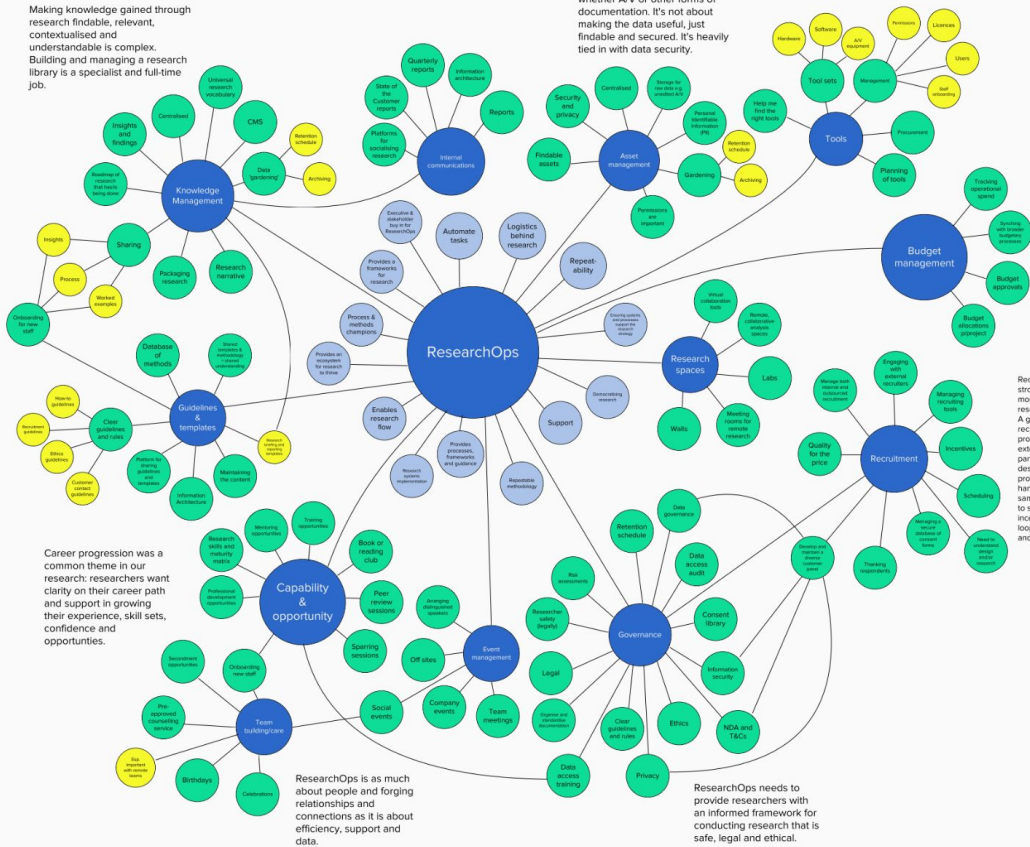
Data security, privacy, and procurement should be considered in every ResearchOps element you deliver. They're ubiquitous; we've therefore not set them out as discrete elements.

Consider both quantitative and qualitative needs.

The needs of quant and qual are sometimes different; consider this in delivering each ResearchOps element. For simplicity, we've not illustrated this throughout the map; take it as given.

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.

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.



UX
Research
Repositories

**A research repository is an accessible,
searchable, shareable & secure insights
platform. If carefully curated and maintained,
it will grow your research+ops over time.**

May 2021


**The insights platform that emerges
is searchable, extensible & reusable.
Hint: It starts with a single study.**

May 2021

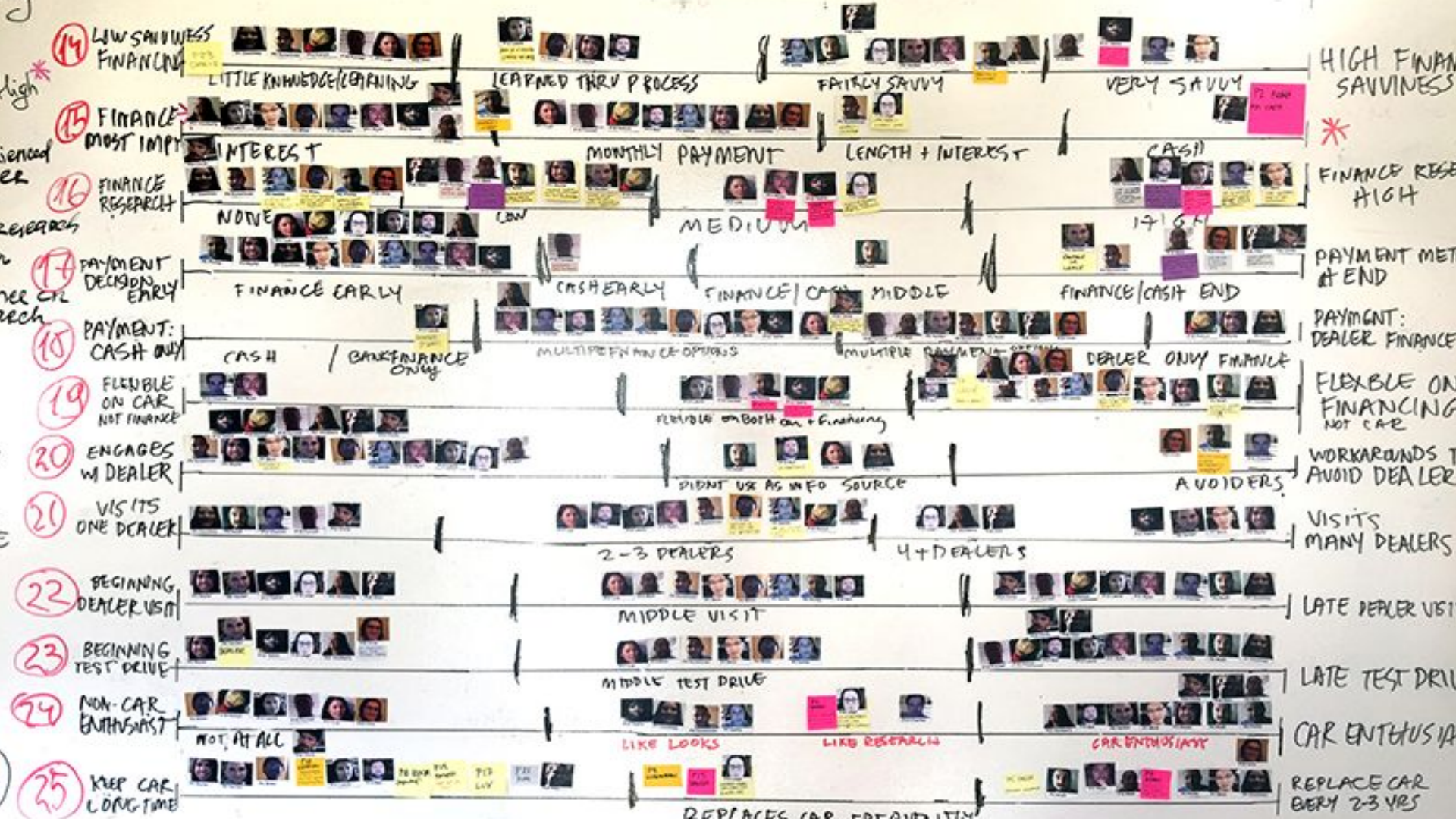
THE REAL QUESTION:

**“Are you finding people using your
research repository to drive designs?
Is the \$7,000 price tag justified?”**

Email received last week.



**The way it
used
to be...**



miro

M U R A L



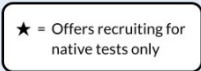
A black and white photograph of a person's hand moving a sticky note on a table. The table is covered with many other sticky notes, some of which have handwritten text. A large teal circle is overlaid in the center of the image, containing the text "Our Real World Journey".

Our Real World Journey

“Ideally it will be a place where we can easily search through past studies, so as not to reinvent the wheel each time and easily see some top level insights and goals of the study.

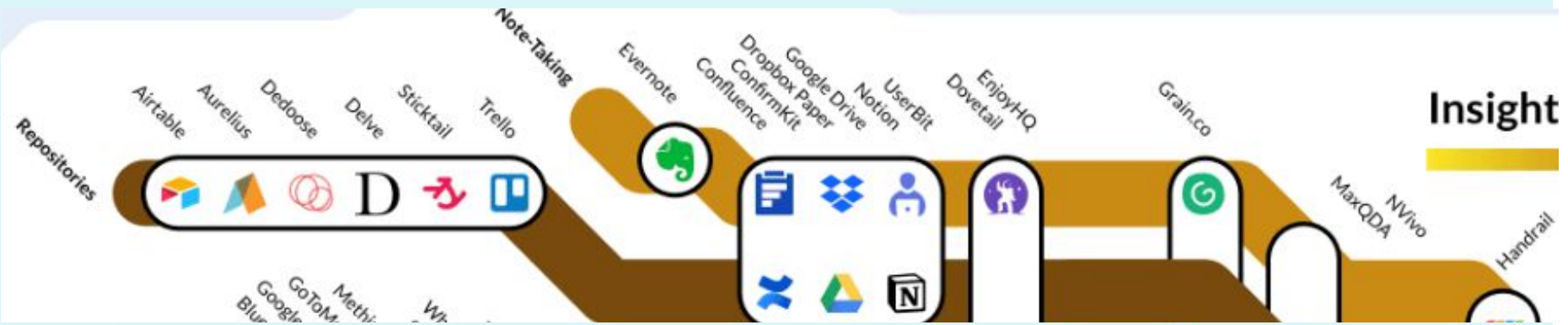
So tagging and organization is important, too — leveled up from what can be done just sifting through Google Drive.”

Slack messaging -
gotoresearch team



userinterviews.com/ux-research-tools-map-2020

Research Repository





Research Repository

We've been looking for a solution for coding, analysis, collaboration and storage for years.

We needed to level up our research approach.

Tools we considered:

DOVETAIL

This tool was promising and we had been using it already with clients.

CONDENS.IO

This looked like a solid contender, but did not have the full set of features.

CONSIDER.LY

This looked like a simple tool with exportable reporting, but when used it was lacking sophistication.

AIRTABLE / NOTION

We were also using Airtable for projects and internal processes.

DEDOOSE

This had a high learning curve and was more outdated / old school than desired.







NVIVO

This tool is an academic standard but has a high learning curve.



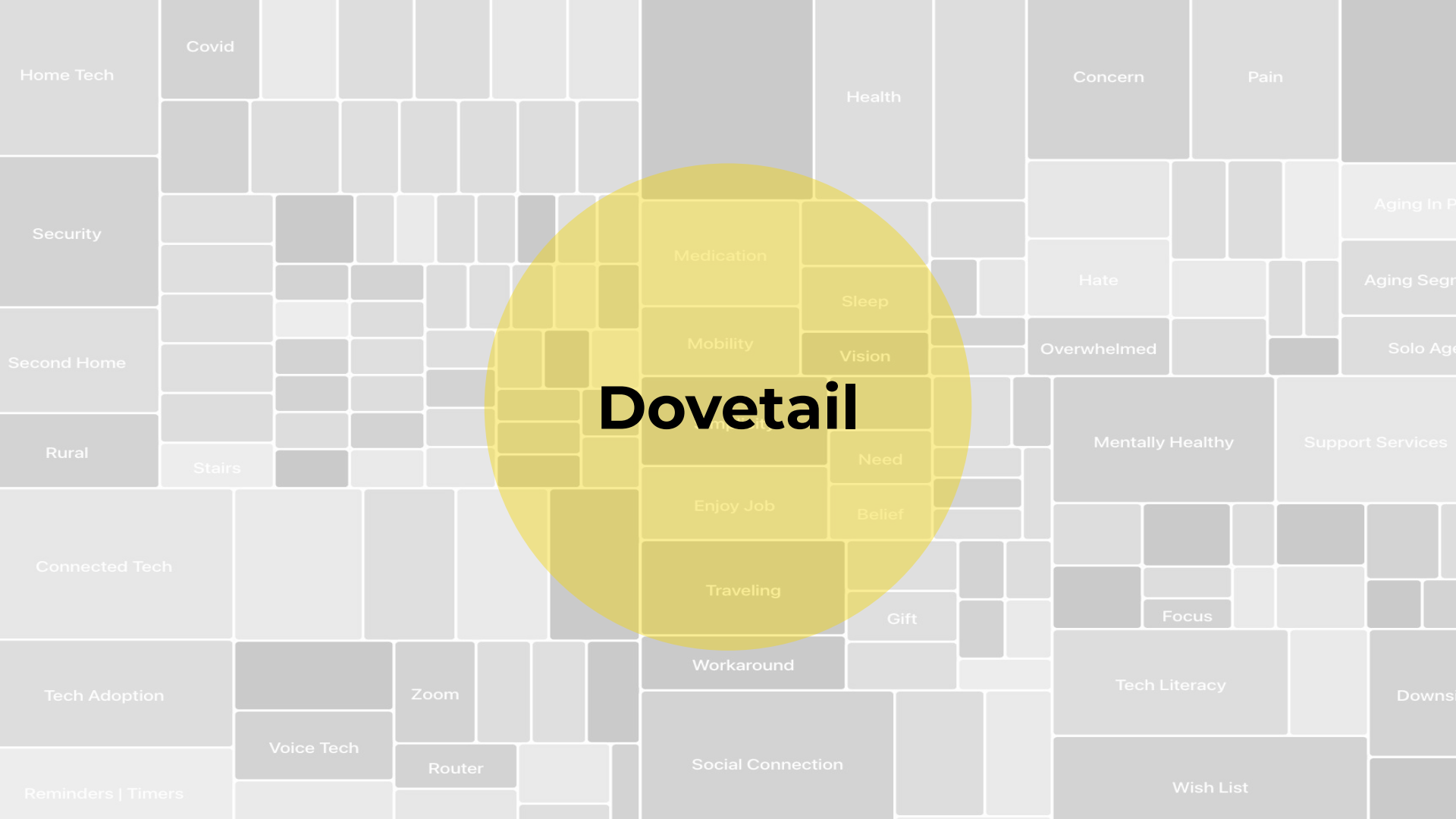
Tools we considered / trialed

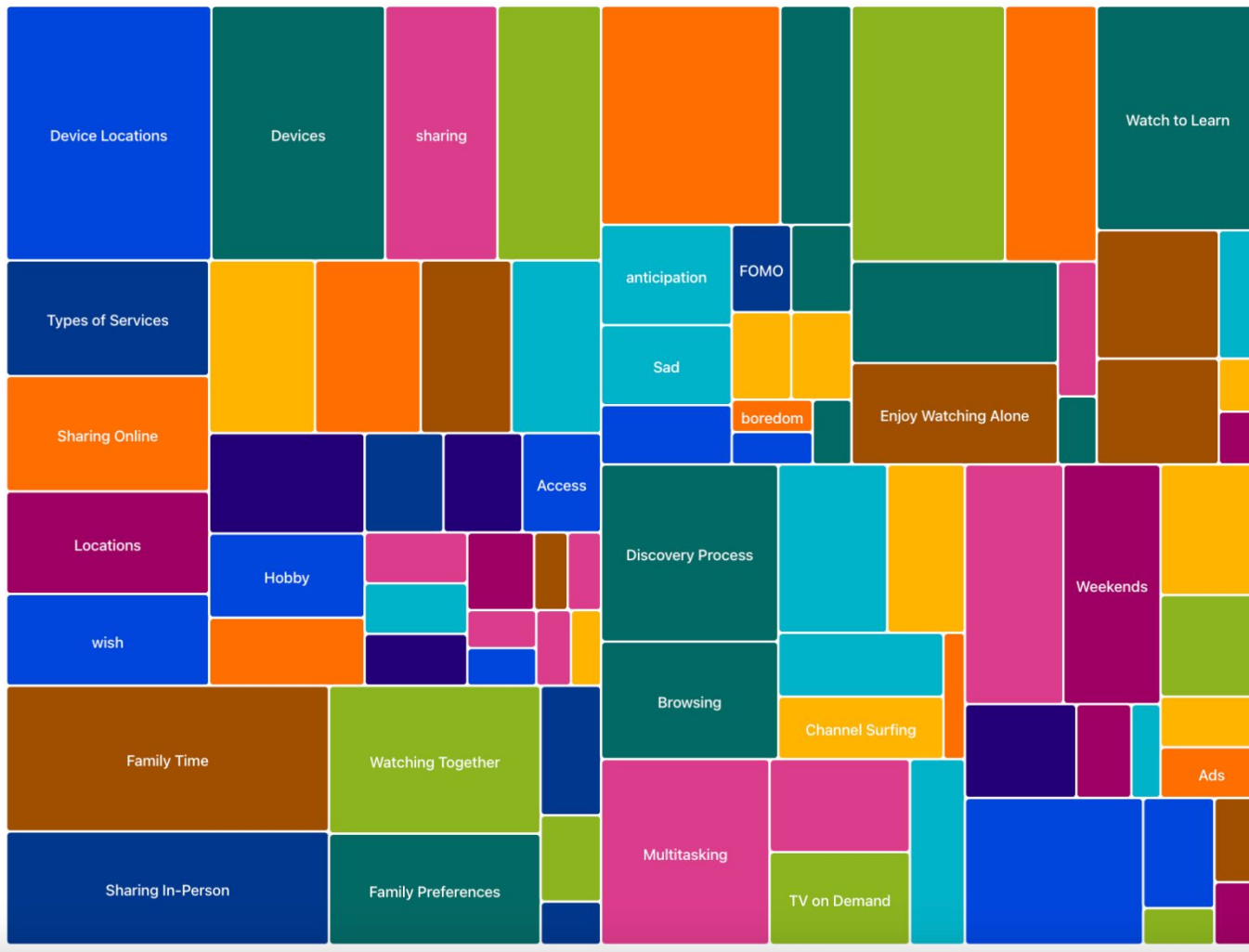
Each of these tools was considered and tested with actual research data. In order to properly test the feature set and flow, we needed to try the tools with actual projects, real-time. Multiple team members were needed to test collaboration features.

Consumer Insights Platforms		Data Tools		Academic Coding Software	
 Dovetail		 consider.ly	 Airtable	 dedoose	
\$15, \$100, \$	\$33 / \$135/mo \$50 per project	\$24, \$124 per seat	\$10, \$20 per seat	\$10.95 / per seat	\$1900 / license
AI powered analysis & easy coding and insights creation	Preset templates & tags, simple coding & report creation	GDPR compliant up front, allows overlapping tags	Endlessly configurable database with multiple views & integrations	Rigorous qualitative analysis tool.	Academic standard for qualitative analysis. Cloud options.

The research team's time is no longer being spent wholly in doing research; they take steps to ensure research is valued company-wide.

They begin to dedicate resources to building systems, processes, templates, and rituals that allow them to conduct and distribute research faster, but still thoroughly.

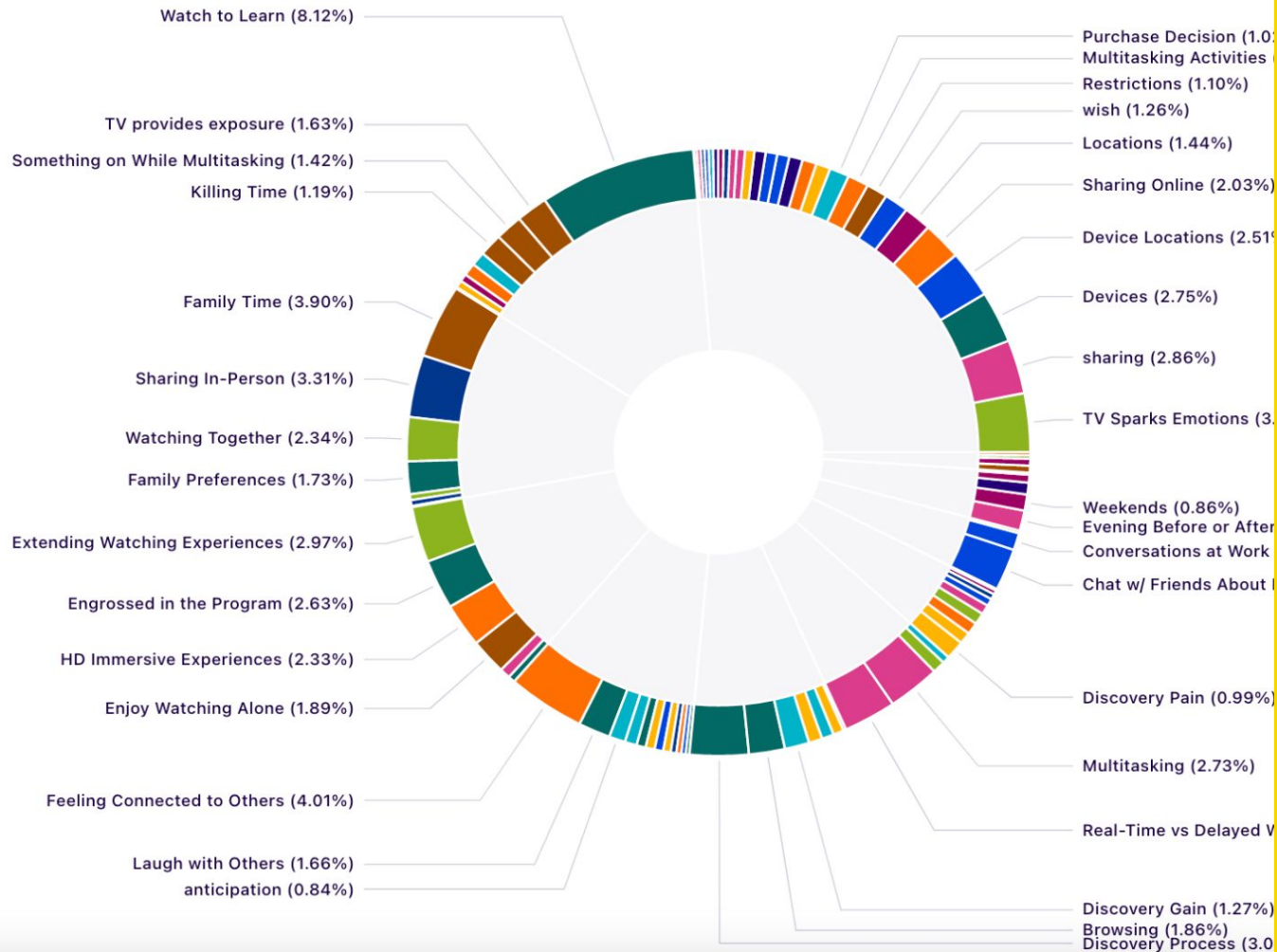




AI-Assisted Themes

All interview transcripts were open coded into themes. Groups were further clustered into areas of need and concern.

This is a representational graphic of some of the themes that naturally emerged through the conversations:



AI-Assisted Themes

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This is a representational graphic of some of the themes that naturally emerged through the conversations:

Themes in Context

Emerging themes or insights are easily extracted from the data. The display is like Pinterest.
When expanded, the context and associated video clips and text are displayed.



I love to engage in conversation with others about what I watch

Draft 5 Aug 2021



Some programs are so interesting I really enjoy digging deeper into the program or topic

Draft 5 Aug 2021



Certain programs bring companionship together creating an event

Draft 5 Aug 2021



Watching give me exposure to things that can help me stay connected and grow

Draft 6 Aug 2021



I like having the TV on in the background while doing other things during less engaging programs

Draft 6 Aug 2021



I love watching HD quality output it makes me feel like I'm part of the program

Draft 20 Aug 2021



Watching TV with my family gives us something to bond over

Draft 20 Aug 2021



I prefer having the ability to decide when I watch programs, so they fit into my schedule

Draft 20 Aug 2021



When I watch with others I tend to laugh more and that makes it a better experience

Draft 20 Aug 2021

We watch mostly in the evenings on week nights and on weekends

Draft 20 Aug 2021

People want more access on multiple devices. input is no longer about restrictions,



Leslie (54)

SEGMENT 1

Average Tech

Mark (48)

SEGMENT 1

High Tech

Sandy (45)

SEGMENT 1

High Tech

Roger (40)

SEGMENT 1

Average Tech Moderate Activity

Monica (54)

SEGMENT 1

Low Tech Moderate Activity

Frederick (56)

SEGMENT 1

High Activity High Tech

Shannon (45)

SEGMENT 1

Caregiver

Ben (42)

SEGMENT 1

Moderate Activity Average Tech

Jody (66)

SEGMENT 1

High Tech

Ray (59)

SEGMENT 1

Average Tech

Laurie (66)

SEGMENT 1

Average Tech Low Tech High Activity

David T (75)

SEGMENT 1

Low Tech High Activity

Don (66)

SEGMENT 1

Low Tech Extreme Activity / Attr

Joanne (68) (Care Director)

SEGMENT 1

Expert

Candice (61)

SEGMENT 1

Low Activity / Sedentary Average Tech

Barry (74) (Blogger)

SEGMENT 1

Expert

Kim (59)

SEGMENT 1

Caregiver

Jo (71) (Dyad)

SEGMENT 1

Caregiver

Mike (71) (Dyad)

SEGMENT 1

Proactive Downsizer

Kathleen (59)

SEGMENT 1

Expert

Lori (71)

SEGMENT 1

Older Adult



Participants

Airtable allows participant data to be used in a flexible, ongoing manner.

 Leslie (54) SEGMENT 1 Average Tech	 Mark (48) SEGMENT 1 High Tech	 Sandy (45) SEGMENT 1 High Tech	 Roger (~40) SEGMENT 1 Average Tech Moderate Activity	 Monica (54) SEGMENT 1 Low Tech Moderate Activity	 Frederick (56) SEGMENT 1 High Activity High Tech	 Shannon (45) SEGMENT 1 Caregiver
 Ben (42) SEGMENT 1 Moderate Activity Average Tech	 Jody (66) SEGMENT 1 High Tech	 Ray (59) SEGMENT 1 Average Tech	 Laurie (66) SEGMENT 1 Average Tech	 David T (75) SEGMENT 1 Low Tech High Activity	 Don (66) SEGMENT 1 Low Tech Extreme Activity / At	 Joanne (68) (Care Director) SEGMENT 1 Expert
 Candice (61) SEGMENT 1 Low Activity / Sedentary Average	 Barry (74) (Blogger) SEGMENT 1 Expert	 Kim (59) SEGMENT 1 Caregiver	 Jo (71) (Dyad) SEGMENT 1 Caregiver	 Mike (71) (Dyad) SEGMENT 1 Proactive Downsizer	 Kathleen (59) SEGMENT 1 Expert	 Lori (71) SEGMENT 1 Older Adult
 Judith (71) SEGMENT 1 Older Adult	 John (75) SEGMENT 1 Older Adult	 Jean (72) SEGMENT 1 Older Adult	 Carol (72) SEGMENT 1 Moderate Activity	 Sharon (64) SEGMENT 1 Caregiver	 Mandy (65) SEGMENT 1 Expert	 Joanna (73) SEGMENT 1 Low Tech Low Activity / Sedentary
 Charles (86) (Dyad) SEGMENT 1 Average Tech	 Renee (81) (Dyad) SEGMENT 1 Low Tech	 David B (79) SEGMENT 1 High Tech	 Fred (92) SEGMENT 1 Low Activity / Sedentary Low Tech	 David S (83) (Dyad) SEGMENT 1 Owns 2 Homes	 Janet (79) (Dyad) SEGMENT 1 Owns 2 Homes	 Elaine (79) (Dyad) SEGMENT 1 Moderate Activity Low Tech

<div> <div>Grid view</div> <div>1 hidden field</div> <div>Filter</div> <div>Group</div> <div>Sort</div> <div>Color</div> <div>Share view</div> </div>							
<input type="checkbox"/>	Participant Name	Segment 1	Segment 2	Generation	Ident...	Age	Ethnicity
1	Leslie (54)	Average Tech	Solo Ager	Generation X: Born 1...	Female	54	African American
2	Renee (81) (Dyad)	Low Tech	Forced Retirement	Traditionalists or Sil...	Female	81	African American
3	Charles (86) (Dyad)	Average Tech	Retired	Traditionalists or Sil...	Male	86	African American
4	Jody (66)	High Tech		Baby Boomers: Born...	Male	66	Caucasian
5	Ray (59)	Average Tech		Baby Boomers: Born...	Male	61	Caucasian
6	Laurie (66)	Average Tech	Owns 2 Homes	Baby Boomers: Born...	Female	66	Caucasian
7	David T (75)	Low Tech High	Retired	Baby Boomers: Born...	Male	75	Caucasian
8	Don (66)	Low Tech Extre	Privacy-Oriented Exper	Baby Boomers: Born...	Male	66	Caucasian
9	Joanne (68) (Care Director)	Expert	Solo Ager	Baby Boomers: Born...	Female	68	Caucasian
10	Mark (48)	High Tech	Sandwich Generation	Generation X: Born 1...	Male	48	Caucasian
11	Sandy (45)	High Tech	Recently Retired Sandw	Generation X: Born 1...	Female	45	Indian American
12	David B (79)	High Tech	Recently Retired	Traditionalists or Sil...	Male	79	Caucasian
13	Roger (~40)	Average Tech M	Solo Ager	Generation X: Born 1...	Male	44	Caucasian
14	Candice (61)	Low Activity / ...	Recently Retired	Baby Boomers: Born...	Female	60	White
15	Monica (54)	Low Tech Mode	Downsizer Sandwich Ge	Generation X: Born 1...	Female	54	Japanese Amer...
16	Barry (74) (Blogger)	Expert	Retired	Baby Boomers: Born...	Male	74	Caucasian
17	Kim (59)	Caregiver		Baby Boomers: Born...	Female	59	Caucasian
18	Jo (71) (Dyad)	Caregiver	Forced Retirement	Baby Boomers: Born...	Female	71	Japanese Amer...
19	Mike (71) (Dyad)	Proactive Do...	Recently Retired	Baby Boomers: Born...	Male	71	Caucasian
20	Kathleen (59)	Expert	Older Adult	Baby Boomers: Born...	Female		Caucasian
21	Lori (71)	Older Adult	Forced Retirement	Baby Boomers: Born...	Female	71	Caucasian
22	Judith (71)	Older Adult	Recently Retired Rural /	Baby Boomers: Born...	Female	71	Caucasian
23	Frederick (56)	High Activity H		Generation X: Born 1...	Male	56	Caucasian
24	Fred (92)	Low Activity / ...	Retired	Traditionalists or Sil...	Male	92	Japanese Amer...
25	John (75)	Older Adult	Rural / No Broadband	Baby Boomers: Born...	Male	75	White
26	Jean (72)	Older Adult	Recentlv Retired	Baby Boomers: Born...	Female	72	Caucasian



Participants

Airtable allows participant data to be used in a flexible, ongoing manner.

Customized views and fields allows it to be used as an ongoing database for multiple studies.



Participants

Airtable allows participant data to be used in a flexible, ongoing manner.

Customized views and fields allows it to be used as an ongoing database for multiple studies.

Hidden fields such as participant payments, location and medical conditions can also be kept private.

Generation X: Born 1965 -...	Baby Boomers: Born 1946 ...	Traditionalists or Silent Ge...
<div>Monica (54) SEGMENT 1 Low Tech Moderate Activity</div>	<div>Don (66) SEGMENT 1 Low Tech Extreme Activity /</div>	<div>Renee (81) (Dyad) SEGMENT 1 Low Tech</div>
<div>Roger (~40) SEGMENT 1 Average Tech Moderate Acti</div>	<div>Lori (71) SEGMENT 1 Older Adult</div>	<div>David B (79) SEGMENT 1 High Tech</div>
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<div>Frederick (56) SEGMENT 1 High Activity High Tech</div>	<div>Judith (71) SEGMENT 1 Older Adult</div>	<div>David S (83) (Dyad) SEGMENT 1 Owns 2 Homes</div>
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<div>Shannon (45) SEGMENT 1 Caregiver</div>	<div>Kim (59) SEGMENT 1 Caregiver</div>	<div>Elaine (79) (Dyad) SEGMENT 1 Moderate Activity Low Tech</div>
<div>Ben (42) SEGMENT 1</div>	<div>Kathleen (59) SEGMENT 1</div>	<div>Henry (81) (Dyad) SEGMENT 1</div>
8 records	20 records	9 records



Exporting from Dovetail to Airtable

The goal: Have a way to save data from all the various coding repositories used.

Coding & taxonomy is very important – pre-thinking of the searchable tags and ways the columns would appear in Airtable.

Coding / taxonomy is an iterative / ongoing process.

Memories of Watching	When we Watch	Pains	Emotions
As a child it was pure en... TAG Fun Activities	was a big Saturday morn... TAG Weekends	I don't watch it through ... TAG Data Plan Pain	I can't wait to watch TAG anticipation
I really like Netflix's stre... TAG Purchase Decision	boxing event on Saturda... TAG Weekends	I wouldn't be satisfied w... TAG Discovery Pain	I feel like if you can pref... TAG Feeling Connected to Others
I remember looking at a ... TAG Sharing Online	I could not watch until af... TAG After Homework	If it is one they have to ... TAG Search Pain	I'm pretty sure I did cry ... TAG Sad
I remember looking at a ... TAG Commenting Online	I feel like I probably wat... TAG Evening Before or After Din...	In the past, i remember ... TAG No Remote	The next morning at bre... TAG anticipation
I remember we were one... TAG Access	I feel like I probably wat... TAG After School	(Amy: Something in-bet... TAG Coordinating Times	(Amy: Do you think ther... TAG Laugh with Others
I say "oh man, did you w... TAG sharing	I had to make sure I did ... TAG After Homework	I am not going to be pro... TAG Discovery Pain	(Amy: Have you ever yell... TAG Frustrated
i wanted to watch a movi... TAG Device Locations	i watch weeknights and ... TAG Weekends	I have a 200MB data pla... TAG Data Plan Pain	(Amy: You know how the... TAG Feeling Connected to Others
i wanted to watch a movi...	i watch weeknights and ...	I prefer content that is fr...	Also doing something wi...
155 records	25 records	24 records	44 records

5

RESEARCH REPOSITORY BENEFITS



#1 REPEATABLE PROCESS



#4 SHAREABLE INSIGHTS



#2 COLLABORATIVE CODING



#5 DATA GOVERNANCE
/ FRAMEWORK



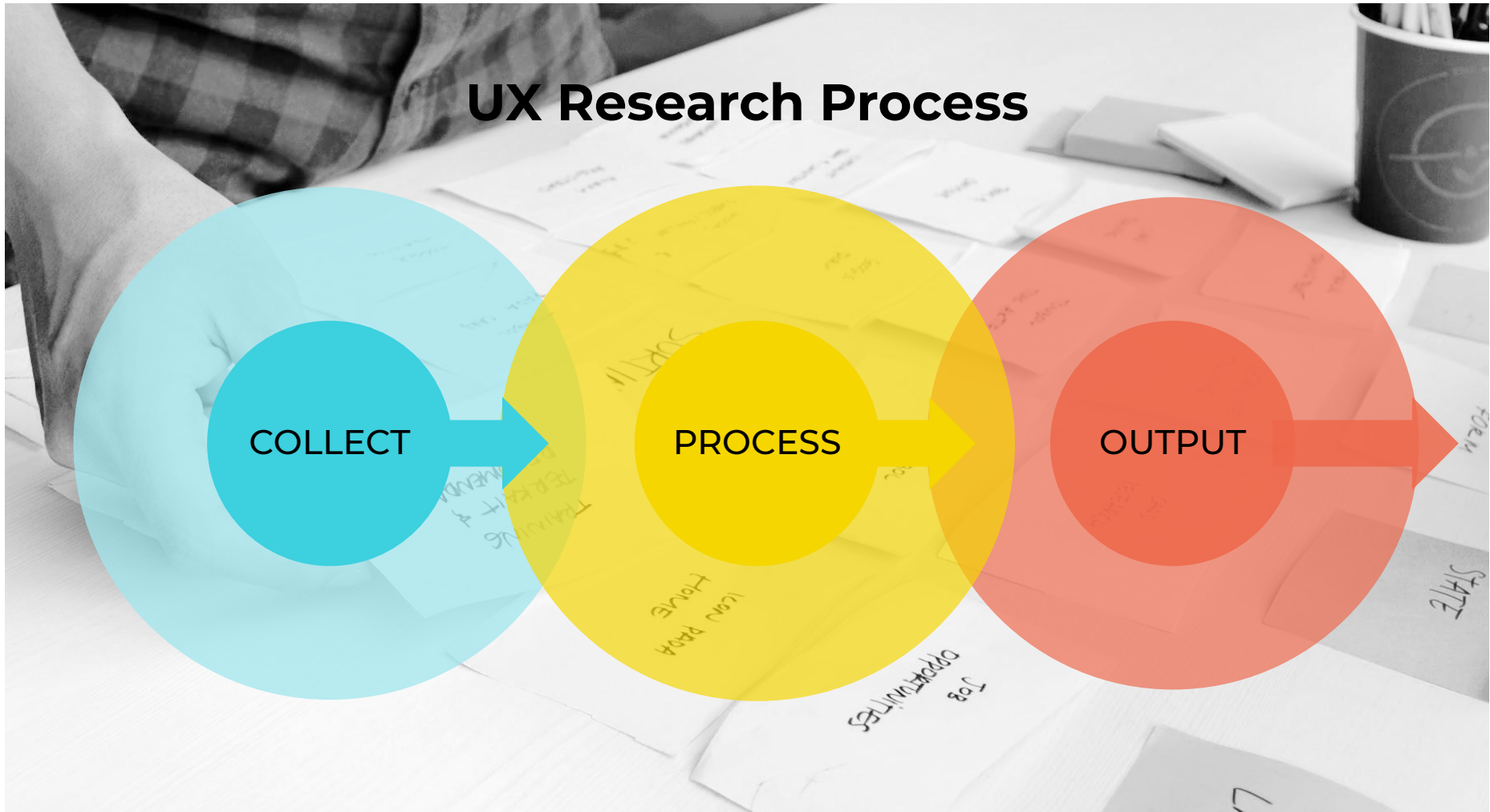
#3 REPURPOSE RESEARCH

UX Research Process

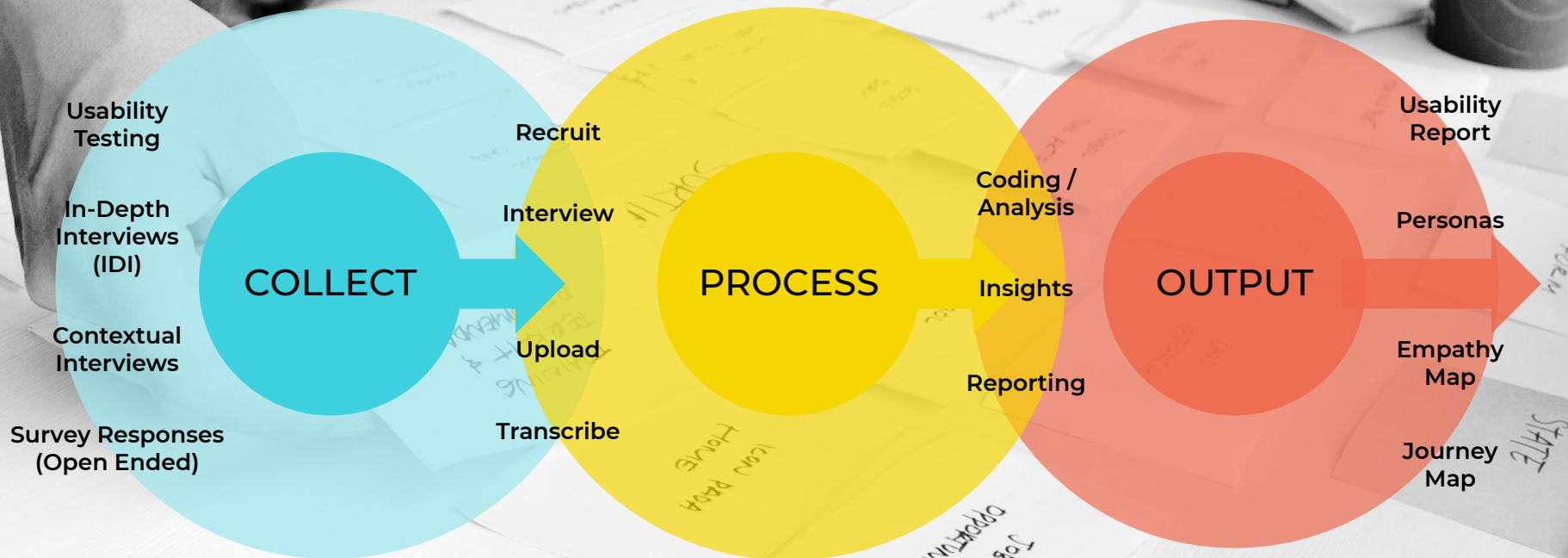
COLLECT

PROCESS

OUTPUT



UX Research Process



UX Research Process

COLLECT

Usability Testing
In-Depth Interviews (IDI)
Contextual Interviews
Survey Responses (Open Ended)

Recruit
Interview
Upload
Transcribe

PROCESS

Coding / Analysis
Insights
Reporting

BENEFITS



Repeatable Process



Collaborative Coding



Repurpose Research



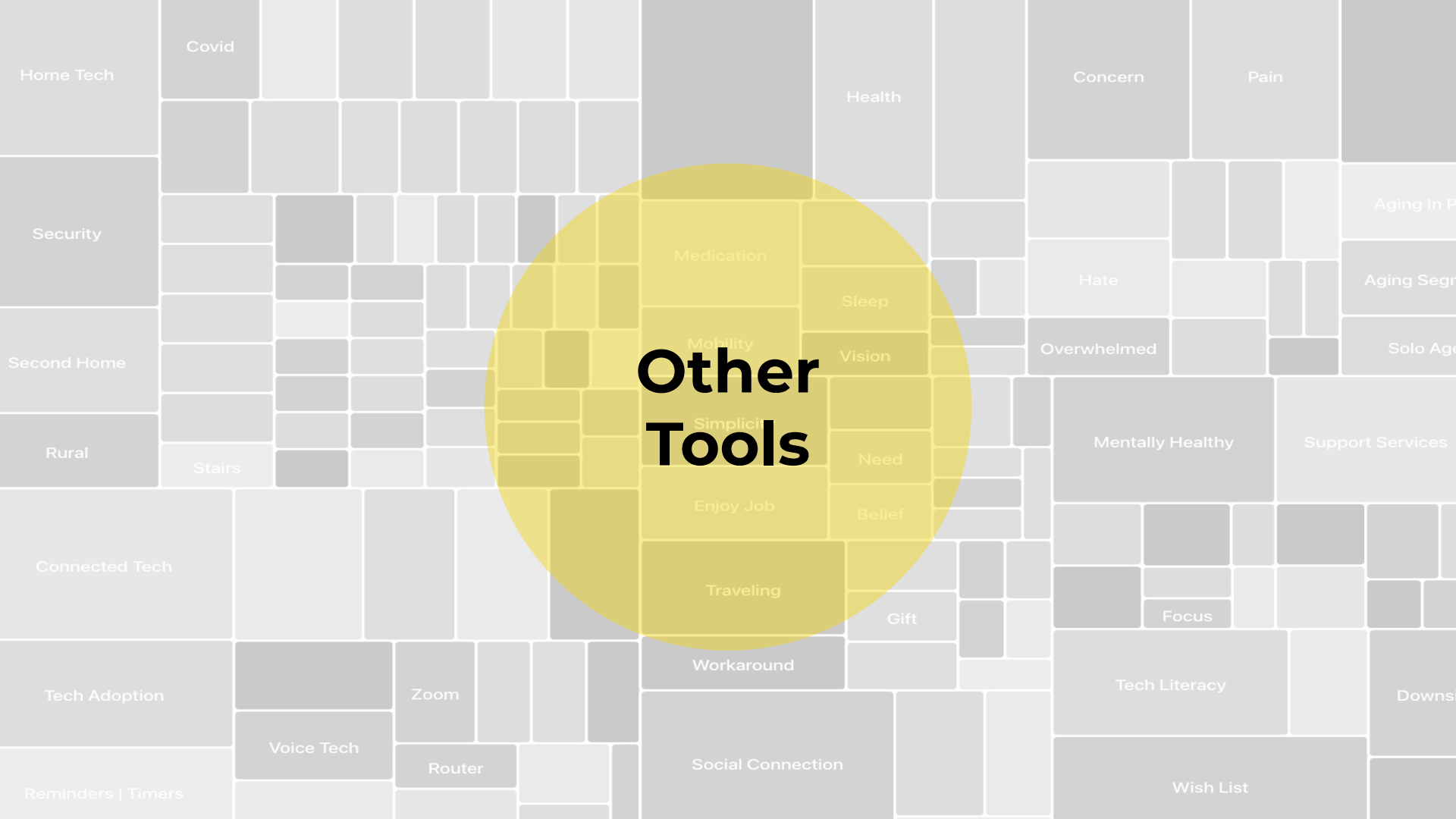
Shareable Insights



Data Governance / Framework

Taxonomy and coding will not be perfect from the get-go. It is an ongoing, iterative proces.

Sept 2021





Kyle Marshall

Share Link

Actions



Segment tags

Age: 26-35 3

Non technical 8

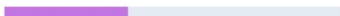


DEMOGRAPHICS

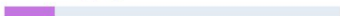
Age	31
Work	Teacher
Location	Suburban

TECH

Social Media



Online Shopping



Gaming



Internet



TAGLINE

I have spent too much time and money on professional help. I want to take charge of my health

BIO

Kyle has been a teacher for 7 years now. He wanted to be a teacher ever since he was 11. He teaches kids of ages 11-17. On the weekends Kyle likes to volunteer for the local Red Cross.

Kyle has spent a considerable amount of money and time on getting professional help with nutrition because of health problems in his 20s. His experiences have rendered him with a bias against getting professional help. He is more prone to researching self-help methods rather than going to an expert.

Kyle is proud of his ability to figure things out for himself. He likes to discover new apps and resources that can help him be more efficient and organized.

ATTRIBUTES

introvert

quick-learner

rule-follower

self-reliant

Add New Section

GOALS

- maintain health without professional help
- Get feedback on healthy/non-healthy diet from people he trusts
- Ability to share diet history with professionals if need be
- Save money
- Track food and beverage in one place

FRUSTRATIONS

- Professional help is too expensive
- Manual entry of nutritional value
- Inaccurate calorie/macro counts in apps
- Apps sharing his data without explicit content



Kyle Marshall

Research Phase

On-boarding Phase

✓ Actions

Put a post on facebook to ask for recommendation

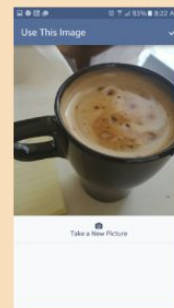
Friends suggest various apps

Kyle searches each recommendation on google for reviews

Most apps seem complex. Kyle wants something relatively easy to use.

Kyle comes across Calorious. Takes pictures to track what you eat. Simple enough

Storyboard



Emotional Graph



Opportunities

Growth

Explore [facebook](#) and [instagram](#) as potential channels for growth.

Word of mouth is the best channel for growth?

- affiliate programs?
- rewards program?

Add Description

Add Description

Add Description

Investing in any tool (Dovetail, Consider.ly or Airtable) takes **continuous culling and curation**.

Also, you will need to try it out on multiple projects and with various team members to see what works for you / your company.

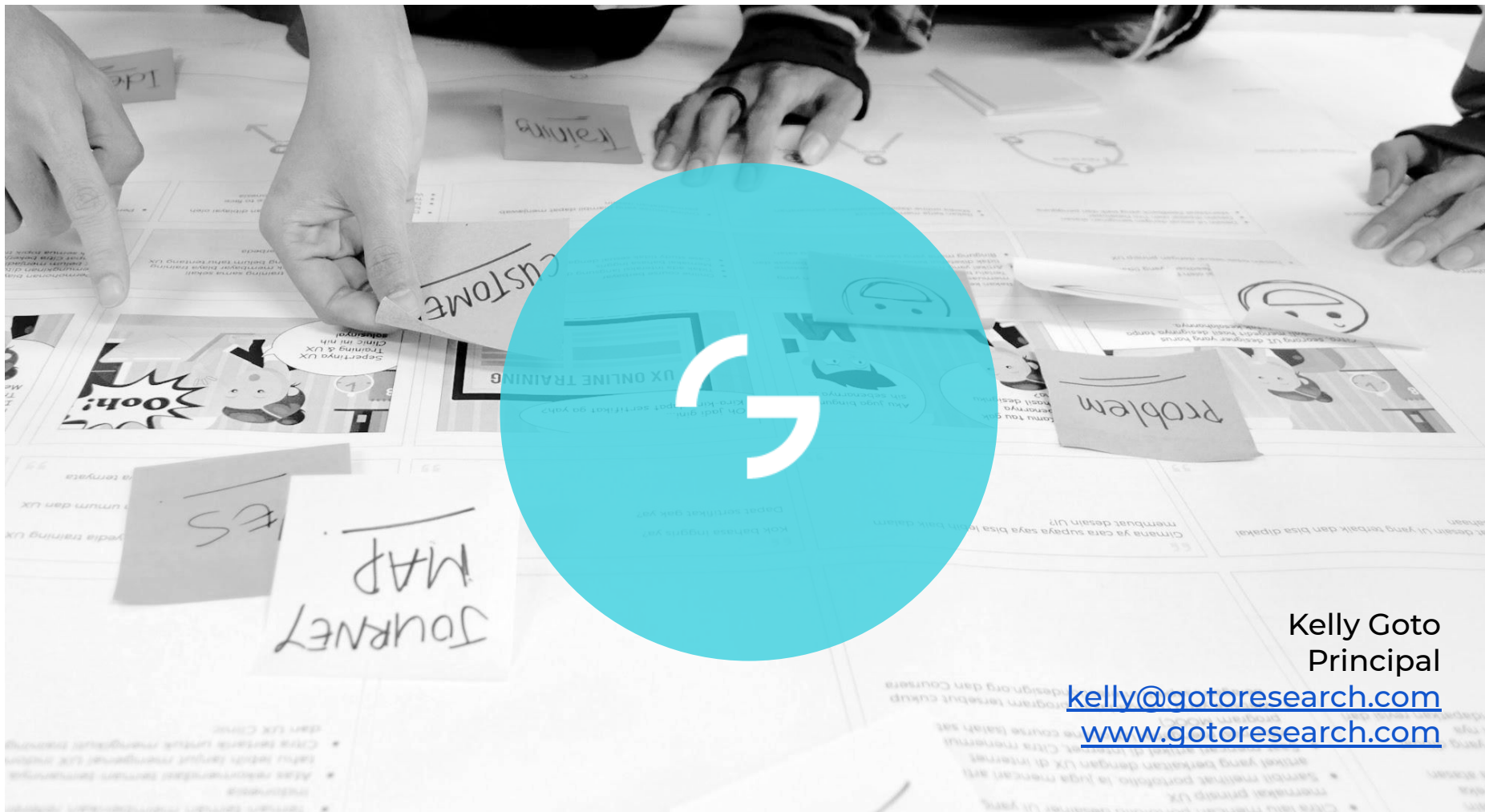


**We remember stories best.
Use narrative to share learnings and
insights. Your data is only as valuable
as the stories you tell with it.**

Aaron Walters - Acting Dir of Product,
COVID response, Resolve to Save Lives



QUESTIONS?



Kelly Goto
Principal

kelly@gotoresearch.com
www.gotoresearch.com