APPENDIX

STAKEHOLDERS AS RESEARCHERS

Empowering non-researchers to interact directly with consumers

Marta Ponte Fissgus

Master thesis

Stakeholders as Researchers: empowering non-researchers to interact directly with consumers

Master of Science in Strategic Design

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STAKEHOLDERS AS RESEARCHERS

Empowering non-researchers to interact directly with consumers

Master thesis by
Marta Ponte Fissgus

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1 INTERNAL SURVEY TO RESEARCHERS

This survey is referred to on section 4.1 - Internal training initiatives.

Training non-researchers to do their own research

Hey there! Thank you for taking a few minutes to fill up this form :) The purpose is to map-out the different internal initiatives to train/help non-researchers conduct their own research and identify best practices that can be shared across the team.

Your email address ░░░░░░░░░░░░░░ will be recorded when you submit this form.
Not ░░░░░░░░ ? Sign out

* Required

1. **Have you ever trained / helped a non-researcher do their own research?** *
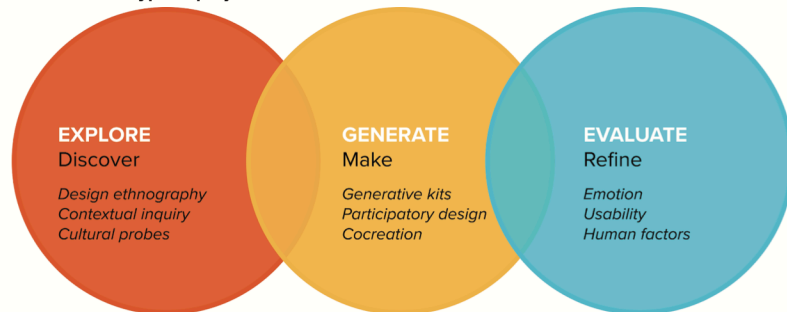   *Mark only one oval.*

   ◯ Yes

   ◯ No   *Skip to question 15.*

Training details

Tell me a bit more what the training / help consisted of so I can learn from you :) Please keep the answers to this section limited to just one training initiative.

2. **What was the type of project?** *

Mark only one oval.

   ◯ Foundational / exploratory

   ◯ Generative

   ◯ Evaluative

   ◯ Other: _____

3. **Who did you support? (select all that apply)** *
   Check all that apply.

   ☐ Designer

   ☐ Engineer

   ☐ PM

   ☐ Marketing

   ☐ Other: _____

Check all that apply.

☐ Research plan

☐ Recruitment

☐ Research design (i.e.interview guide)

☐ Moderation

☐ Analysis

☐ Other: _____

5. **What motivated you to train the other person vs doing the research yourself?** *

_____

_____

_____

_____

_____

6. **Were you able to fulfill that motivation?** *

_____

_____

_____

_____

_____

7. **Did you save any time compared to having done the research yourself?** *
Mark only one oval.

◯ Yes

◯ No

◯ Other: _____

8. **Why / why not?** *

_____

_____

_____

_____

_____

9. **How did you deliver the training?** *

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

11. **If you were to do this again, what would you do differently?** *

_____

_____

_____

_____

_____

12. **Additional comments**

_____

_____

_____

_____

_____

13. **Docs that you can share**

_____

_____

_____

_____

_____

14. **Is this the only training that you've done?** *
   Mark only one oval.

   ( ) Yes   *Skip to question 18.*

   ( ) No - add another project

Consideration

15. **Have you ever considered training others?** *
   Mark only one oval.

   ( ) Yes

   ( ) No

   ( ) Other: _____

considered doing so before)?

_____

_____

_____

_____

_____

17. **What could have motivated you to do it?**

_____

_____

_____

_____

_____

Your thoughts on training

These questions are optional. But nonetheless if you have some thoughts on points to consider when thinking about training, feel free to add these here!

18. **Which functions could benefit the most from training in user research?** *
    Check all that apply.

    ☐ Designer

    ☐ Engineer

    ☐ PM

    ☐ Marketing

    ☐ Other: _____

19. **Which types of projects do you think are most suitable for non-researchers to do on their own (with the support from a researcher)?**
    Mark only one oval.

    ⬭ Foundational

    ⬭ Generative

    ⬭ Evaluative

    ⬭ Other: _____

20. **How could the training / support for non-researchers be delivered?**

    _____

    _____

    _____

    _____

    _____

21. **Additional comments**

_____

_____

_____

_____

_____

☐ Send me a copy of my responses.

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2 INTERVIEW GUIDE FOR RESEARCHERS

This interview guide is referred to on section 4.2 - Interviews with practitioners.

Interview guide

Who: Researchers who have participated in trainings

TIMELINE: Project emerges ➜ Prioritization ➜ Assign researcher ➜ Scope research ➜ Plan research/methods ➜ Recruiting/logistics ➜ Moderate sessions ➜ Synthesis ➜ Write/present deliverables

1. Interview goals

- Understand the experiences of other researchers with training
  - When, where, and why to train non-researchers?
  - What is the decision making process/decision tree of training vs hiring a vendor?
- Suitable stakeholders
  - How do you select, identify suitable stakeholders?
  - What are the essential soft skills / hard skills?
    - How do you gauge this skills?
- Methodology
  - What kind of methodologies can be taught vs not?
- Tools
  - How did you deliver the training?
- Training set up
  - Planning: Tips and tricks to helping scope and plan research
  - Moderating: How to train non-researchers to effectively collect valid data from humans
  - Analysis: Teaching non-researchers how to synthesize & tell stories with qual data
- Role of the researcher
  - What is your role? Hand-holding vs freedom? What is the other person doing vs what are they doing?
- Lessons learnt/recommendations
  - What things became obvious only after the training was done?
  - What would you have done differently?

2. Interview structure

Section	Goal	Time
Intro	Warm-up	5 min
Trainee selection	Identifying soft and hard skills of trainees	5
Tools	Tools used to deliver the training	5
Methodology	Methods most suitable for training and research stages	5
Practical tips: Training set up	Tips and tricks per research stage	5
Role of the researcher	Collaborator, advisor, mentor	5
Lessons learnt/recommendations	What should I know	5

3. Interview questions

Intro
1. In a few sentences can you describe one or two of your experiences with training others.
2. What motivated your decision of training the other person instead of hiring a vendor?
   a. To what extent were you able to fulfill your motivation?

Trainee selection
3. How do you select, identify suitable stakeholders to be trained?
4. What are the essential soft skills? Can you list them for me?
   a. And the hard skills?
   b. How do you gauge this skills?
5. Has there been an instance in which you didn't follow through with the training because the person didn't have the right skillset?
6. How do you help them leave their biases behind or minimize them during the research?

Tools

    7. How does the training look like in practice?

    8. Which kind of tools have you used? How do you deliver the training?

        a. Examples: docs, slides, practical exercises, shadowing?

    9. What would be the ideal tool for you to train?

    10. What would be the ideal tool to give the trainee?

Methodology

    11. What kind of method can be taught vs not?

        a. Examples: interviews, surveys, focus groups,...

        b. Why?

    12. What kind of research?

        a. Examples: evaluative, generative, exploratory/foundational

        b. Why?

Practical tips: Training set up

    13. Going step by step in the research process...

    14. Planning: Tips and tricks to helping scope and plan research

        a. How do you help your stakeholder plan the research?

        b. What do you do vs what do they do?

    15. Moderating: How to train non-researchers to effectively collect valid data from humans

        a. How do you ensure your stakeholder is ready to moderate?

        b. How do you teach them to ask the questions in the rightful way?

        c. How do you ensure that they are listening and taking notes and not just hearing what they want to hear?

        d. What do you do vs what do they do?

    16. Analysis: Teaching non-researchers how to synthesize & tell stories with qual data

        a. How do you empower them to do the analysis?

Research process

    17. Which part of the research process is hardest to teach?

        a. Why?

Role of the researcher

    18. What is your role?

        a. Collaborator - co-creators throughout the project, partner throughout

        b. Trainer/mentor - beginning + end

        c. Advisor - always there for feedback

    19. Hand-holding vs freedom?

20. To sum up, what is the other person doing vs what are you doing?

Lessons learnt/recommendations

21. What things became obvious only after the training was done?
22. What would you have done differently?

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3 INTERVIEW GUIDE FOR STAKEHOLDERS

Interview guide

Who: Potential trainees

This interview guide is referred to on section 4.2 - Interviews with practitioners.

TIMELINE: Project emerges ➜ Prioritization ➜ Assign researcher ➜ Scope research ➜ Plan research/methods ➜ Recruiting/logistics ➜ Moderate sessions ➜ Synthesis ➜ Write/present deliverables

1. Interview goals

- Understand the experiences of other functions with research
- Understand what research means to trainees
- Understand what the training looks like in practice
  - When, where, and why to train non-researchers?
- Gauge suitability for training in research
- Gauge interest for training in research
- Measure compatibility of research activities in the workflow of other functions
- Understand preferred delivery of the training
- Training set up
  - Planning: Tips and tricks to helping scope and plan research
  - Moderating: How to train non-researchers to effectively collect valid data from humans
  - Analysis: Teaching non-researchers how to synthesize & tell stories with qual data
- Role of the researcher
  - What is the role? Hand-holding vs freedom? What is the other person doing vs what are they doing?
  - Could they potentially do things independently?

2. Interview structure

Section	Goal	Time
Intro	Warm-up	5 min
Previous experiences with research	Understand perception of research	5
Suitability and interest	Gauge interest for training and suitability of training in their work	5
Tools	Tools used to deliver the training	5
Methodology	Methods most suitable for training and research stages	5
Practical tips: Training set up	Tips and tricks per research stage	5
Role of the researcher	Collaborator, advisor, mentor	5
Anything else	What should I know	5

3. Interview questions

Intro & previous experiences with research
1. In a few sentences can you describe one or two of your experiences with UX research.
2. What is UX research for you?
3. To what extent is UX research useful for your work?

Suitability and interest
4. Have you ever done user research before?
    a. Tell me more
5. If not, is this something that you ever considered doing?
    a. Why/Why not?
6. In which situations would you consider useful being able to do the research yourself?

Tools
7. How would a training with a researcher ideally look like in practice?
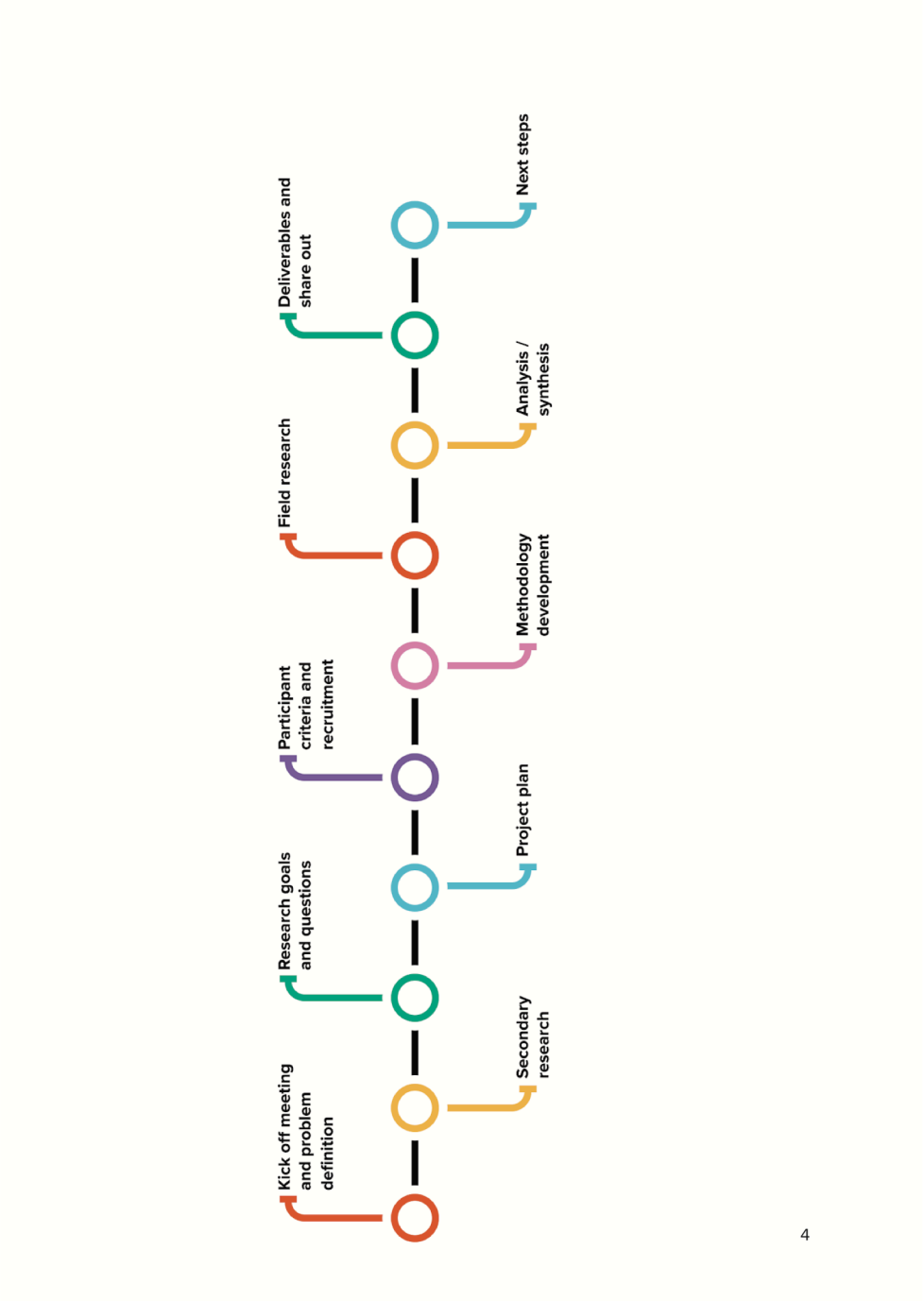8. How would you like to receive it?

      a. Practice vs theory

9. What does the day to day look like for you?

10. How much time could you actually commit?

11. What would you like to receive training on?

12. Given the following timeline, which stages do you think you would need the most support on? [show picture of timeline]
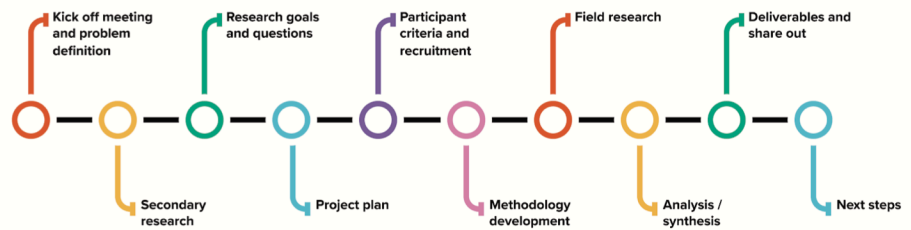
Role of the researcher

13. What kind of support would you expect from the researcher?
    a. Collaborator - co-creators throughout the project, partner throughout
    b. Trainer/mentor - beginning + end
    c. Advisor - always there for feedback

14. Hand-holding vs freedom?

15. To what extent would you value being able to do this autonomously in the future?

16. To sum up, what is the other person doing vs what are you doing?

Kick off meeting and problem definition

Research goals and questions

Participant criteria and recruitment

Field research

Deliverables and share out

Next steps

Analysis / synthesis

Methodology development

Project plan

Secondary research

4

4 EXTERNAL TOOLKITS REVIEWED

These materials are referred to on section 5.2. - Other toolkits.

This table documents the different external toolkits that were reviewed to gather inspiration for the final solution.

Toolkit	Format	Company
IDEO Design Kit	Website / cards	IDEO
IDEO Design Kit Travel Pack	Cards	IDEO
18F Method Cards	Website / cards	18F
Design Method Toolkit	Website / cards	Digital society school
Mozilla Open Innovation Toolkit	Website / cards	Mozilla
Microsoft Inclusive Design Toolkit	Website / cards	Microsoft
Design practice methods	Website / cards	RMIT University
Design Thinking Bootleg	Cards	Stanford dschool
Design Thinking Playbook	Deck	Stanford dschool
Hyperisland Toolbox	Website / cards	Hyperisland
Austin Center for Design – Design Library	Website / decks	ac4d
Practical UX Methods	Website / decks	Tonic3
UX Design Kit	Workbook	
Open Design Kit	Website / decks	Bocoup
Service Design Toolkit	Workshop materials, poster, manual, technique cards	
DIY Toolkit		Nesta
Design Research Techniques		CFC Medialab
UX Collective UX Design Methods and Deliverables		
UX Mastery		