



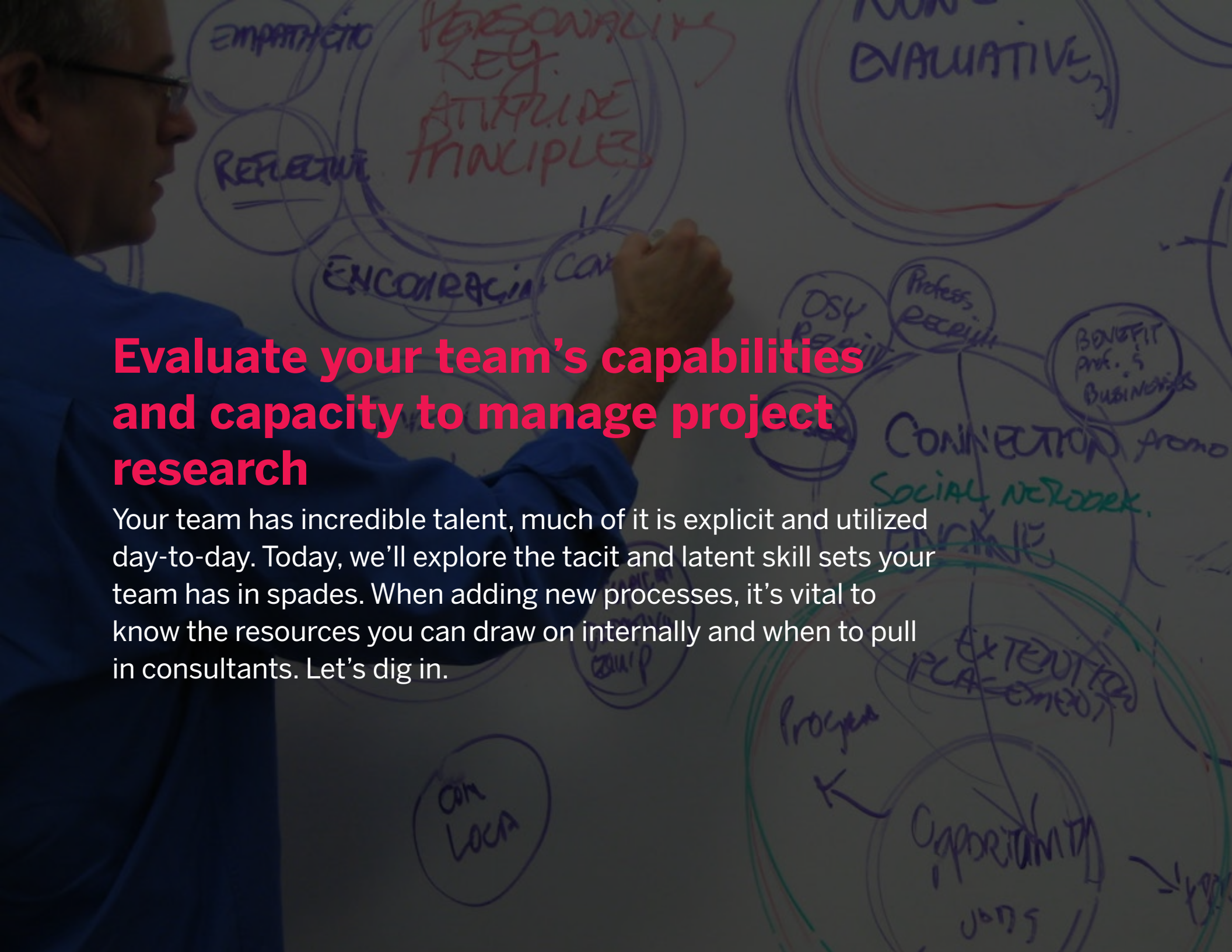
Strategies to assess your team and tackle research

The step-by-step process for design agencies on how to utilize your people, find gaps and outsource efficiently

Hello!

Do you have a big project coming up?

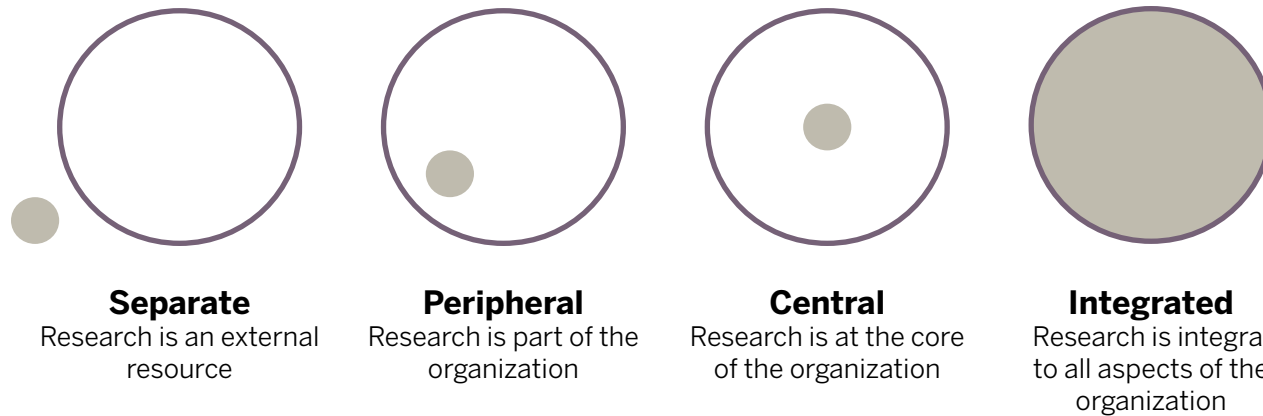
Good for you! Now it's time to roll up your sleeves. The next few pages will help you figure out how to staff it with the right researcher to get the results you need.

A man in a blue shirt and glasses is writing on a whiteboard. The whiteboard is covered in handwritten notes and diagrams. The most prominent text is 'PERSONALITY KEY ATTITUDE PRINCIPLES' in red. Other words include 'EMPATHETIC', 'REFLECTIVE', 'ENCOURAGING', 'NON-EVALUATIVE', 'CONNECTION', 'SOCIAL NETWORK', 'EXTENDED PLACEMENT', 'CAPABILITY', 'JOB', 'PROCESSES', 'OSY', 'PROFESSOR', 'BENEFIT', 'BUSINESS', and 'LOCAL'. There are also arrows and circles connecting these terms.

Evaluate your team's capabilities and capacity to manage project research

Your team has incredible talent, much of it is explicit and utilized day-to-day. Today, we'll explore the tacit and latent skill sets your team has in spades. When adding new processes, it's vital to know the resources you can draw on internally and when to pull in consultants. Let's dig in.

A non-stressful way to evaluate your team + available resources



Choosing the right business model

How you incorporate research into your business is pure strategy and, frankly, available resources. The diagram above describes how research can be adopted, both as a lone business model and as a long-term path. Within each how you manage projects, staff, and approach requires a different strategy.

We all need a non-stressful way to evaluate our team + available resources. This document will help you decide your strategy.

Let's take a big picture look at your business to identify the gaps that may be present (+ how to fill them). The next few pages will help you assess your team, capacity, and capabilities.

Assess your ability to do the work

No matter how experienced, it's vital to assess your team's true capacity and capabilities. Is your team, "as is", actually able to handle the responsibility and new roles for your projects?

Here's exactly how to break down your team's capabilities and identify the gaps that may be present (+ how to fill them).

In house team assessment

You and your team have skills. Assess your business' current skills and identify where you have gaps.

	Years of experience		
	None	> 5 yrs	> 10 yrs
Research knowledge			
• Survey			
• Website analytics			
• Interviews			
• Workshops			
• Team management			
• Research Ops			
Research skills			
• Moderation skills			
• Writing skills			
• Speed and efficiency			
• Analysis skills			
Management skills			
• Logistics			
• Recruitment management			
• Method decision making			
• Strategy/approach			
• Client management			
• Business development			

Training up your novices

In the 0–5 columns? Slow and steady mentorship, with guidance, and strategy will be the most help towards creating a strong foundation.

Firms that hire junior research staff thinking they can easily jump in and run with a project are not setting themselves or the junior staffer up for success. That junior will leave within a year. Juniors need mentorship and guidance.

If you want research inside your design firm, bring on a consultant to build up your team's capabilities through hands-on project training, research coaching, and leadership. Have them lay a solid foundation of resources and practices for your team to work from. Work closely with them to learn from their expertise, guidance, and long-term project vision. Your people will learn from the best, and be knocking out quality research in no time. Plus, they'll know the vocabulary to speak confidently and smartly with clients.

Backfilling people to execute

Are you more of a 5–10 type of firm? High on research leadership but low on people to execute their vision? Bring on consultants to support and add warm bodies to get things moving. Experienced help eases the load on individuals and moves projects faster with fewer missteps.

Evaluating external resources

When hiring an outside partner or contractor, you want to make sure you're investing wisely and with guaranteed ROI.

Outsource

Hiring a freelancer or consultant has the same risks and benefits as a new pair of shoes. Use the prior page to assess their research skills, assess your consultant's business savvy here.

	Yes	No	I don't know
Do they have insurance?			
• Errors + Omissions			
• Workers Comp			
• Vehicle			
What's their business entity?			
• EIN			
• LLC/Corp/SCorp			
• Sole Prop			
• Freelancer			
What resources do they have?			
• Office			
• Staff			
• Equipment			
What do they bring to the project?			
• Experience + effectiveness			
• Activities from the proposal			
• Integration with staff			

Your consultant's sophistication

Hiring freelancers has its place. But when your client's livelihood is on the line, yours is too. Have a frank discussion with your consultants to better understand their process, favored working conditions, and the resources they bring to a project.

Businesses with a great deal of sophistication will have similar business practices—insurance, bookkeepers, and an EIN. In California, freelancing has changed—individuals that do what you do are now be considered employees. That changed how clients and agencies bring on external resources.



Tip: If you don't understand consultant capabilities, ask.

- Walk through a typical project and ask where their work fits in.
- Review their work samples to see if you understand them and how they would impact your work.

Questions to keep you sane

Do I or my staff have the capacity to manage the research for this project myself?

- Yes = Keep it in-house
- No = Outsource to a research company

Do I know what kind of research I need?

- Yes = Keep it in-house
- No = Outsource to a research company

Do I or my team have the skills necessary for the research I want to include?

- Yes = Keep it in-house
- No = Outsource to a research company

Are the results of this project critical to my client's survival?

- Yes/No/I don't know = Hire a trusted external research resource

Assess your clients' receptivity to research

Are your existing clients clamoring for UX? All of your clients? Gauging their knowledge, use, and willingness to turn to you for research is just as valuable as evaluating your team for their skills. Don't leave anything on the table.

Getting the right research

Clients' knowledge of your process and of the different types of available research is key to this assessment. They may claim to have the research but it's the wrong kind, such as market research with segmentation data. Very few have need- and design-based research that supports design development.

The checklist on the right gives you insight into your client's receptivity to using research to qualify your design work and your ability to sell that research. Consider it a first step in developing a clear sales, marketing, and project strategy to address your clients' explicit needs.

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	Client has internal marketing department
<input type="checkbox"/>	<input type="checkbox"/>	Client regularly conducts surveys
<input type="checkbox"/>	<input type="checkbox"/>	Client has UX Designers
<input type="checkbox"/>	<input type="checkbox"/>	Client has UX Researchers
<input type="checkbox"/>	<input type="checkbox"/>	Client purchases surveys
<input type="checkbox"/>	<input type="checkbox"/>	Client purchases discovery research
<input type="checkbox"/>	<input type="checkbox"/>	Client asks you for UX (or talks about)
<input type="checkbox"/>	<input type="checkbox"/>	Client asks you for research (or talks about)
<input type="checkbox"/>	<input type="checkbox"/>	Client products & services are outdated
<input type="checkbox"/>	<input type="checkbox"/>	Client shows a lack of consumer knowledge
<input type="checkbox"/>	<input type="checkbox"/>	Client has no design or marketing

How do we structure for research?

Your assessments have clear implications, risks, and advantages. Let's set the strategy for your business by relooking at that diagram.

Separate

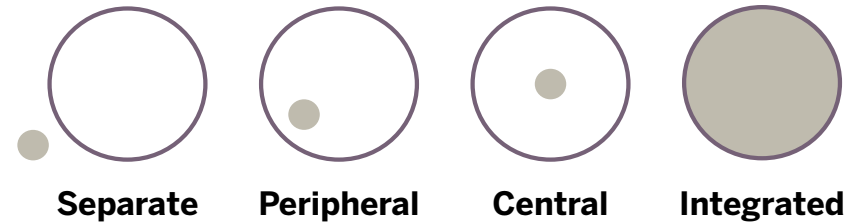
Pros: Keeping research as an external consultant means you can do what you do best, design.

To be successful, you have:

- Developed a strong working relationship with a few freelancers and research agencies.
- Set your projects up for success, make sure that you know the ins and outs of research, and how best each of your resources likes to work.

Cons: You are reliant upon...

- Unknown external forces—ie. when your consultant is unavailable.



Peripheral

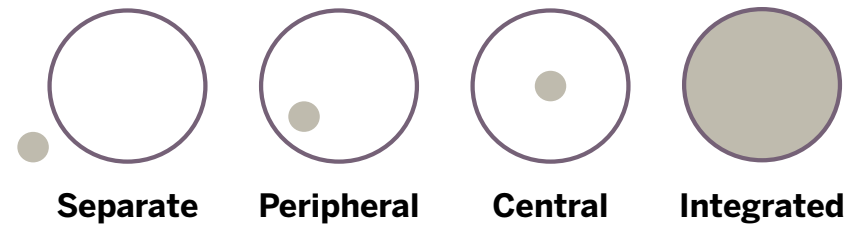
Pros: Your primary concern is design, with a side of research.

To be successful, you have:

- Staff who can handle research logistics and knowhow to incorporate the results. You may even have someone who can execute on simple tasks.
- A strong relationship with research consultants that will do the heavy lifting.

Cons: You are reliant upon...

- (Limited) Staff knowledge and experience; and
- Available manpower hours



Central

Pros: Research is a service you add to every project.

To be successful, you have:

- Dedicated research staff to manage and implement research on projects
- Developed a process to incorporate research into each project

Cons: You are reliant upon...

- (Limited) Staff knowledge and experience; and
- Available manpower hours
- It's expensive

Integrated

Pros: Everyone in the organization champions research, can conduct research for their role, and knows when and what types of research to deploy.

To be successful, you have:

- A head of research
- Regular training and/or dedicated staff on each team
- Projects don't start or end without research

Cons: You are reliant upon...

- Limited by staff knowledge and experience; and
- Available manpower hours
- It's expensive

Take stock with these 3 questions

Executing on research and the subsequent analysis and synthesis of the data means having the right team in place for the activities at hand. You know this. One thing we know, each project requires different methods to get the answers. Let's make sure you've thought through everything.

Can we succeed without a dedicated researcher? What we know:

Research: Some interviews can be conducted by untrained individuals when they are backed by the right intent, explicit goals, and open-ended questions. Other methods require training.

Analysis: Framing meaning for the client and the project is difficult to do. Novices neglect analysis for an easy answer and faster turnaround—negating the value of doing research in the first place.

Synthesis: Likely your team has some of these skills already. Guided activities with a trained researcher ensure proper execution and prioritize your team's design thinking chops.

Can I be transparent with the client?

Absolutely, and maybe you don't have to.

Research isn't in your team's wheelhouse so you've hired a consultant and now have to communicate what that relationship is to your client in an authentic manner. There are pros and cons to white labeling their service or describing them as a partner organization. Do what's most authentic and honest for your business.

Once you've determined how to describe their role in the business, determine what role they'll play in project meetings and client management.

- Are they coming to meetings?
- Do they have client management duties?
- Can they call the client?



What should I know if we move ahead with our current team?

The questions matter. Craft open-ended questions. Then allow your participants to answer first by using pregnant pauses—people hate empty space in a conversation and will fill it automatically. Don't answer first. And, don't test your ego or validate your ideas.

The participants matter. Recruit very specific people, five will give you the bell curve of answers to your design challenge with very few outliers. The larger the client the more segments you'll need to speak with.

The how and what matters. Work backward from the answers you need and define how best you'll get those answers. If you need aesthetic preferences to build your activities to naturally result in your goals.

Spend time with the data. Solutions become ho-hum when you don't dwell on what you've heard and observed during research. Use your design skills to illustrate the patterns you found—it's the best kind of thinking while doing.

You are the customers' champion. Tell their story; design for them. When you put consumer insight into the design, it takes on the qualities that make it sticky and lovable to consumers. Your passion for the end-user's needs teaches your clients how to be their customers' champion.

Design, test, then design again. The solution has many potential directions. Allow your team to conceptualize many potential outcomes, learn from it, and then design for real. It changes what's possible.

How to know if it's time to outsource

While the previous charts help with thinking through resourcing your projects with your current team and network, there are other strategic considerations, including:

When you lack experience

- When the research you do isn't getting you effective answers; or
- Neither you nor your team knows how to do the necessary research.

At Hopscotch Labs, we see this frequently. Agencies hire team members with a certificate for UX. Don't get caught with inexperience, a six-week class is no replacement for deep expertise in the subject. Supplement your team to execute well.

To stay competitive

- When your competitors and clients all have UX designers and researchers.

Skills and practices are always changing. Stay on top of the market and keep your ROI high by bringing in the right resources.

Amazon

- When Amazon is considering entering your client's market; or,
- When your client is facing a tight market, with low margins and too many competitors.

Amazon is incredibly flexible—they'll shift to new domains and quickly dominate. If your client is facing a tight market or a rapidly changing landscape you are better off bringing in an outside consultant than going it alone.

Jumpstart design innovation with the right strategy + research.

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About Hopscotch Labs

We were founded in 2014 to learn what matters to your customers to set your products apart in the market. Through our efficient research processes we refuel your team and help to create magical experiences that positively impact your bottom line.

We move you forward.