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have left live transcript Sorry about that. Thank you for requesting that appreciate that.

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So, without further ado, did I forget anything like I said I'm a little bit in a fog. I think we're good. I'm going to go ahead and start talking about tonight's event I feel like I'm forgetting something but I don't know, I know what it was.

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Please stay on mute. What the process of what we're going to be doing tonight is, I have some lovely board members here to help take your questions in the chat.

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And we're going to take your questions. We're going to select a few of the questions, and we're going to ask him at the end. So, drop your questions in the chat, we're going to have people collecting those coming through those, so that we can ask those

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after we go through our. Select questions for the panel. Okay, so feel free to throw your questions in chat, and we'll, we will pull from there. But until then, we will, we will have you on mute.

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Please, we will have a networking event tonight we have one breakout room, since it's late for Jen and she has a cold, we're only going to do one breakout room tonight but we will have a little bit of a what we call a happy hour or happy hours where we

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all kind of come together at the end, and just throw out questions to the group. So, if you're not down with networking we're going to give you plenty of time to bow out, don't worry about it, I get it.

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Sometimes you're not really wanting to do that. Totally cool give you time. But until then, let's get started with tonight's event, our panelists, so we're talking about how to repair your car on a Tuesday know totally kidding.

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We're here to talk about UX research panels, I mean, repositories. And we have a panel of fantastic UX pros. So I'm I'm going to stop sharing my screen.

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And I'm going to like this. Being a forum here, and I, my first question to the group I'd like to just do a quick round robin with everyone. Tell us, and these are our four panelists, not everybody here, these are for our four panelists so don't get excited,

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um, I'd like you to say your name, where your title where you work, and maybe a little fun fact about you. So I'm going to start with, Lori, because I know her, and I know she'll, answer me so Lori get started.

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Alright, so welcome everybody I'm Lori would occur, I am a staff UX researcher at Okta so Jared and I actually worked together.

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And I know I'm not really fun but I'm one of the co founders of the group. I used to work with Jen over at Capital One, and rec space. I can work with you one day who knows I get around.

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Oh man I live in Texas, so that's just about me.

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I'm going to pass it to Jared.

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Thanks Lori, so I'm Jared 40, I'm a staff UX researcher at Okta.

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And let's see. Interesting fact well okay here's a here's a former life fact. So before I got into design and researcher I used to, I was kind of on a pre law tracks I worked for the US Attorney's Office in DC for a while.

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That's do a lot of cool things but one of the wildest things I ever got to do is handle the original john Hinckley case files.

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So like all this stuff, prior to him, attempting to assassinate Reagan.

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That was a pretty wild.

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Pretty while I've worked with the attorney who handled that case so that was a pretty, pretty interesting piece of history that I got to handle a regular basis so that's that's a weird fact about me.

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Thanks Chad yeah hi everyone my name is Eric, based in New York. I'm currently a researcher at Instagram, but previously I worked at a company called thumbtack where I built our research archives I'll be speaking mostly about that.

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I think my shirt is pretty fun tonight is creating like a psychedelic pattern whenever I move around so I kind of like that I feel like I need to wear this more for zoom calls, other fun things.

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I'm really obsessed with Improv Theater. So, if there's anyone who likes that you should you should let me know where to go in New York, so I just moved here I know there's plenty but I need curation like there are too many options and somebody needs

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to tell me where the best stuff is.

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But yeah, excited to be be learning from the panelists tonight, and I'll pass it over to map the last one.

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Hello. Yeah. Can you hear me okay.

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Yeah, my name is Matt Wagner, I'm a principal UX research manager at Microsoft, but really on acting as a product manager for the human insights tracking system which is a platform that we've been building for the last six years to hold all of the UX

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research market insights and data science insights at Microsoft.

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Fun fact somewhat Fun fact, My PhD, was looking at the UX or the user interfaces of computer music production software and looking at the abstractions and the mismatches between music producers mental models and music software and there are some pretty

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kind of fun crossovers and parallels between sort of trying to deconstruct and create platforms for modeling user research knowledge and modeling music and kind of allowing you to manipulate things so.

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Yeah, I think that's it.

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Excellent. Thanks so much. I appreciate that. And I'm going to stop. I'm going to start with a little not going to start with the tools, which is why I know everybody's here well repository tool should I do, or should I use, I know that's why you're here

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and let's start that way, that's how I'm going to roll.

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I want to talk about some things to consider when you're thinking about repository. So, I want to talk about like what is your company.

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What are you sharing in a repository what kind of information is actually in there and maybe what are some of the formats just like what's in your repository.

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A Jared, I'll start with you.

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Thanks john, I think, you know, fundamentally, I think we're where we started and we've just for a little bit of historical reference for our repository we've been running for about two years now in its current format.

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And I think really where it started with us. Fundamentally was the artifacts the ultimate kind of final end results of research so it started with kind of your fundamentals the summaries reports, you know, any kind of presentation materials, highlight

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reels, things of that nature.

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What are what are ultimately living in our repository and I think more and more what I could see a story more in the future is more of more of the raw data right not just the transcripts and recordings of the sessions that we conduct, but even other little

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artifacts from say participatory design sessions or workshops or things that are, you know, perhaps a little bit more loosely structured data, then what I feel like folks often start with.

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So, at a high level that's kind of what we store and kind of what we're, you know looking to add into a repo as we go.

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All right.

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Anyone else on our panel feel feel like they'd like to answer that, like what kind of nuggets are in your repository.

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Yeah, I'll take a crack at it one way that I view it as there's different layers as Jared was kind of alluding to, that you can have in a repository and a lot of tools out there focus on that broad data layer and how to extract insights from that into

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reporters type things so some of the third party commercial tools, really help you with that layer.

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Whereas what we've been really focused on at Microsoft is the layer, the layer above of like, it's actually a finished artifact as Jared was saying, and how do you share those around the company, but even more so we're trying to figure out the layer above

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that, which is what are you learning across all of those studies.

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One of those key recurring themes and insights and so the we're kind of really focused on those upper layers, because we know at least at Microsoft is a ton of divergence in a particular practices at those lower layers.

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Team by team since we're, you know, pretty big organization.

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Yeah, so a follow up to that kind of how, how are you how are you sharing it How are you, tying those threads for those that need the threads tied, but also how are you not for somebody who just needs something very specific.

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Um, do you mean between those sort of upper layers or down to those the bottom layers of data.

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Well between stuff in between studies or in between data points, I mean it's yeah I'm assuming that if someone typed in search.

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They get a lot of things right.

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Yeah, I mean that the key thing we were doing is wasn't inspired by this but it's sort of in parallel this idea of the atomic insights will research nuggets that toman and others have talked about.

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We have some of the same ideas and our system around like for study report, it really does often consist of a set of key insights within it. And so our system does treat those in a database as individual insights.

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And what we're trying to do, particularly as we're hiring data scientists and such as to try and figure out how to find links and relationships with other similar insights and other studies, because there's sort of this like needle in the haystack problem

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with is the, you know, a lot of usability insights, but there's one or two of them that are really, you want to remember or they relate to other insights.

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So, in our platform you can kind of connect them just with hyperlinks but we retain those backlinks and then likewise you know as you're producing these high level insights you want the same sort of relationships and linkages.

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And then that has to flow through kind of the search experience and, you know, the ability to come easily get a link to any insight in the system.

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I could go on and on about atomic insights and some of the trade offs and and things to avoid there as well but that's probably enough for now.

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I think I want to revisit that because I think that's really valuable.

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Anybody else want to talk about kind of how you're sharing the information with with your company, and I think there's kind of two levels, right, there's what you want to share with your research team that really kind of want the, the, all the details

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all the raw data. And then what you want to share with people who are just trying to find the high levels of the quick nuggets, right. So how do you how do you distinguish between those if you do.

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Yeah, and I think that's the deeper conversation that that was pointing to because it is a different topic to get into that, what I experienced when I was at get lab and that's what I'll be talking about tonight since, Jared and I work together, he can

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take Okta.

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We use dovetail, and we actually use get lab. First, to build our own repository and what I've seen is that there's a progression just like there is a UX maturity.

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There's a progression of maturity in using these repositories, because it first starts out with, we just need a place to put all of our stuff. This give me a place to put it, which was get lab, and then you start to think but how do we get it back out,

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we have it in there now. We've painstakingly hand forged all of these insights and all of these video clips, what do we do with it.

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And that's when the library and a knee comes out and starts to talk about taxonomy, and cataloging and trying to get the organization to think very intentionally about doing some of those activities because if you don't have intention behind it, it will

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become as messy as, just give me a place to store all my stuff, because you will have 15 different tags for one product. And no matter who goes in there to search there will always be missing something, because of the tagging, and those categories systems.

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So it's, it's very very difficult it's even more difficult when you, we got to the point and get lab where we were encouraging our customer success or account managers to put their customer conversations into dovetail to we had a little template for them

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to us.

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And that's just introducing a whole nother set of data that you you have even less control over.

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And it just got really messy really quick and if you don't have a good steward of the system and the taxonomy, it's very very difficult thing to wrangle.

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Right.

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My next question, Who is in charge of your repository.

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Anyone want to take that.

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Jerry can, I can pick it up. Sure. So, I would say, I think overall it's kind of with the way this is something that is, I think starting to shift within our organization is a need for more concentrated research operations, day to day I'm kind of managing

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the repository in its current form but I would say, a lot of the ongoing upkeep and management is kind of loosely distributed across our team as well you know everybody's kind of responsible for keeping hygiene as much as possible when it comes to a product

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organization, and some of the taxonomy that we assigned.

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But as Laurie kind of alluded to, like, it's very much a full time job.

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It's something that really does take a lot of energy and focus to do well.

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And I think the, to the extent that you can build good habits around things like your taxonomy like your governance strategies, and the educational and socialization aspects of your repository as well all feeds into kind of that day to day management

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the repository itself so whether that falls on an individual or a team or a selection of people i think that's that's really fundamental to it being successful.

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All right.

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How about you, Matt, who owns the repository.

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I'm in my case, I guess technically me, although I riffing off, Jared and Lori both I would say the key is to have people with, you know, library and information science background who are in key points influencing the kind of controls around what's coming

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in and it's quality and it's appropriateness of tagging.

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So for example, just making sure that every document that comes in is appropriately tagged, and not just kind of crowdsourcing or hope it's going to work for the over the best because I think you do just end up with a kind of Missy pile, if you if you

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don't take that approach.

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Alright, thanks. So Eric I have a question for you, um, how do you structure the information.

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Is it by Team by project by day, product something else, what's worked well and maybe what lessons have you learned along the way about how you how you structure your repository in the information.

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Yeah.

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So, the archive we build that pack for cell phone pack is not Microsoft right like some tech has, like, three 400 people probably right now, and seven researchers, so when we started out we did actually, like, as researchers we totally geek out on a topic

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insights and we're like, oh my god this is so cool we less than two Tomer Sharon's like podcasts whatever like, Oh, we have to try this, and then we very quickly realized that like we don't even have a common definition among the four of us four of us

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us at the time of what a nugget is and what an insight is, and we don't have a taxonomy and like who's going to do this we're all really busy and then we realized okay let's just create a place where all our reports go so that's what we ended up doing

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so like the unit that is being stored as a project and attached to that is, you know, the final output and like a summary of findings, etc. And we don't have too much of a taxonomy, to be honest, like we do have tagging but we are not doing it in a very

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structured way it is crowd source so that's not very reliable and we we have like basic metadata like the quarter this, it was made, who was participating so thumbtack has like two main types of users professionals to sell their services customers to

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buy the services. So like we would add that so you could like filter easily, but what we really focused on was making sure that it was searchable so like the person who put it in didn't have to think too much about them by selecting the right tags in

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this field and by putting in the right thing here, as long as the main information about what the study was about to say the summary, it would be searchable.

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And we found that that is often how people ended up using it to like they wouldn't really use the filters that we build, or the scrolling through the columns, they would just like, ask their question, essentially in the search bar and and hope to find

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what they needed.

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Oh, I think you're muted.

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Yes, I was. Thank you. So it sounds like it's kind of loose, not super structured, and you're relying a bit more on searching.

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Yes.

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Okay, great, just like they do with us right hey do you know if anything, do you have any research on this and what do you know about this. Right, it's, it's still that same kind of let me just ask Google the question, What time is it in Australia right

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now, and it'll tell me the answer. I don't have to think about tags or how somebody structured that data but unfortunately, the tools are not there yet.

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Would you say that's the case for you.

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Would you say that's the case for you. I your you Eric is like they do a search and maybe come to you, because they're still can't find it, or are so self reliant, so it's actually, I was thinking about this too, I think, again, when we started off with

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this idea. We were hoping that we would like, be able to like, avoid, you know, a pm pain in the researcher hey what do we know about payments or what do we know about trust, and then that research had to like spend hours finding that and reporting back.

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or like, Oh, you can just go to our archives and find yourself turns out. No, because people. I mean, maybe they just don't have time. They don't actually know what to look for, even, like, you know, there might be like a little bit of like translation they may be a study was about. One

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study was about. One feature that and I was called something else and this pm it's new so I didn't know that. So what we often found is that the main users of the archive was actually the researchers ourselves.

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So, instead of spending a lot of time digging up the old stuff to answer that very pointed good relevant question. We're going to archive and because we had built it and we were familiar with it and it was well organized stupid much more much quicker

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just find our own work, like I remember, stopping to use Google Drive and I just used to archive to find my own reports, because they just faster to just use that interface.

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Yeah, just to add off of what Eric said I think another thing that we've noticed.

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Through the use of our repository in addition to it be easier for lightweight like I said to find our own work which was a problem we definitely had before.

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I think the other thing by encouraging people to, to search it while they may not always find the answers that they're looking for, what we've what I've started noticed too is it's, resulting in people coming to us with better questions.

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A lot of times you know you get that initial everybody's kind of had that shoot from the hip, like research question like hey I have this like assumption that I want to validate and I want to come to the research team to figure it out.

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And I think, by kind of introducing the idea of like well we have like a huge body of knowledge of all sorts of topics and while I may not answer every question you have automatically what it can do is perhaps inspire a little bit more focused thinking

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or potentially open some doors to some new questions that you hadn't even considered. And when it comes time to plan research, you know, we found like pm and designers and people who use our repository or are coming to us have a lot more focused ways

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of thinking that I think ultimately results in better research getting put into the repository, you know, going forward.

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Interesting. Jared I have a quick follow up with that. Have you ever had a these questions influence a potential research project, the questions that they asked you.

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Oh, you mean in terms of like what what ultimately gets planned.

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Yeah, like, Oh, that's a good question maybe we should do some research on that because we don't have any research yet, but your experience around something like that.

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Yeah, I think that's something that we have noticed, come into like we've had, I think there's two kinds of ways that we've approached that one we have had people come to us with with questions I think that have, if not outright create a new studies at

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least influence like oh that is something we should maybe at least put on our roadmap or consider for future work if we don't address them in that moment, I think the other thing that I'm sure we'll talk more about this, you know, in at a higher level

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for repositories is we've been able to kind of uncover broad thematic kind of almost secondary meta research of our own body of work right it's like okay, we're looking at the last three years of our work and we're seeing the same pattern come up again

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and again, that maybe internally amongst our team we've talked about, but we've never really like, Oh, I remember that one conversation from like six months ago that we have this customer Oh my customers and same thing, like being able to actually consolidate

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that and then up level and saying look, here's the schematic thing you don't have to take my word for it. Here's all the little nuggets that we pulled from various unrelated conversations with them all lined up talking about the same thing.

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So I think that's also where new research is starting to come from less less reactive more proactive.

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Right. Great.

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So I'm going to move on.

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And I'm going to talk about tools, because everybody wants to know about tools. So, my question my first question is, what do you look for when you're looking for or building out a repository tool.

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Matt, you want to start with that.

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Yeah, I could make you represent the, you know, build it yourself. Yeah, group, or approach, I would say that it's is a deceptively I mean there are there are some good platforms you can build upon but anyone who's thinking of building their own platform

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for doing this it is a deceptively deep problem to solve what I think on the surface it can seem simple but if you're doing anything beyond the basics of like over, you know we're attaching a research document.

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If you want to build your own atomic insight system, I guess. Not that that's exactly what we've done but it is very It is a very big undertaking. So, I wouldn't suggest that unless you are kind of considering you know putting multiple developers and

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pm, and all the other things you need for other repository like librarians and other things on it for, you know, many years.

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So, I'll leave it at that. Given that Scott about experience and I think it's returning really good dividends for us. But it is a very big undertaking.

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Okay.

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And Eric How about your thoughts what it, what were you looking for in a repository tool.

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Yeah, I think the main thing for us was we needed a relational database, and like someone who is not a computer science major and not a librarian like I didn't even know what that meant.

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When I first was introduced to the concept, but I now yes I've had to learn. So essentially, it allows the database works this way like every project is just one row in some source of truth somewhere and then it has all this like all the columns that

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are attached to it. And then you can sort, organize the database by those columns are those features so for example, by out of project one, it was done in quarter to, and then a project to.

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He was also done in quarter two I'm going to add project three who has done in quarter for, and then I can have another view that only shows the projects from quarter one and only shows the projects from quarter for example, and that is only possible

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in a relational database, unless you want to like deal with like, you know, if you have a spreadsheet for example you, you're going to accomplish that by just filtering the whole table, but that becomes really complicated if you want multiple people to

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use the database folks you want multiple different permutations of those filters. So that was the most important thing, and that's why we chose coda, which is the tool that we've used is because they were essentially that company was actually founded

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on the idea that we need to make relational databases, easier to use and allow people to build applications, or like that's essentially what we did right like on top of it so it was a very good fit between our need and what that product was meant to do.

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And how's that been working out.

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So I left some talking about a year ago so I don't know exactly how it's being used, but it's I can mainly speak about like my experience be the being the person who built the tool and how to work, or built the repository how to work in the tool and how

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to work with coda, the team that built that tool was amazing because the Kota team at the time I'm sure they're still operating this way for insanely responsive to my feedback and my concern.

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So, I remember like multiple times asking for something and then a few weeks later, my like account manager would like messaged me and say like hey we included that feature in the most recent launch.

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So for example, one thing that was important for us was to be able to have one like one set of users the researchers themselves, we wanted to have access to a version of the archive that they can edit, so that they can easily add their own work, they

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can update work they can fix errors, etc.

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But then for people who aren't researchers, we did not want them to do that so for example if you imagine if we had just use a spreadsheet. And, you know, on Google.

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There's no setting like there is like a view only setting but you can filter it.

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There's a comment setting, etc. And then there's edit setting and if you have the Edit setting, then people can mess things up. But what we're able to do with coda is have essentially a public view of the archive that people can still filter they can

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search through, they can buy, they can like, organize the data in different ways, but their actions aren't saved. So, it's only saved for that user in that session, and when they find what they need, they leave, and the database itself remains unchanged.

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Great, thank you.

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Lori popping over to you I know you have experienced with a few different repository systems so why don't you talk about some of the differences and the pros and cons of some of you've dealt with in the past and present.

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Yeah, I was gonna say so.

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When I joined get loud they were using get lab, as a repo for the research. Get lab is not a research, we go Get his code repo.

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It was fine when there was a team of two researchers, but as a team grew, it cannot scale with what we needed to share across the company as a company grew.

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So then we went to dovetail dovetails very small company, they're out of Australia, which is where their support is go Australia but if you need something in American time zones, you're going to wait till tomorrow to give me answers so be aware of that.

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My biggest advice is to be honest with yourself at your team size and your team bandwidth to support, working with a tool. If you're a team of one.

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If you can get them to pay for something great. Do you have the time to be on the phone or on chat support with that team, who was making that tool for you, versus doing the job that your company hired you to do.

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Everybody has to make that decision for their themselves.

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We needed more support than I think my organization understood that we needed, with dovetail it's not a bad product.

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It's just we didn't have the luxury of who we have now Jared, to have somebody who was the main point of contact for that tool to help us set it up to help us understand all the nuances to get the templates going, and so it was a very crowd sourced thing,

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and it does very English word but like Higgledy Piggledy it was just kind of like Frankenstein's together on our end because we couldn't give the time to it.

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So that would be my advice is to really be honest with yourself and your team structure your company structure and the support that you may have or don't have when you're really looking at these tools because if there is no magic tool out there there's

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no one to have them at the Microsoft weather mascot I'm very curious about that.

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But there's no one tool that you can actually buy out there that will solve all these problems for you. There is not no matter what those sales people tell you, it will not.

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There are a myriad of things you have to do to solve problems, and they even then, I don't know if anybody's got it down.

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Okay. So you mentioned get lab, you mentioned, of dovetail, any thoughts on any other repositories that you have experienced with.

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Those are the two big ones I mean I've used spreadsheets, not ideal is as Eric mentioned, I fiddled around with air table a little bit but still it's got limitations to it as well, because that's a little bit.

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Then, because I it's not I know companies who are using air table I don't know if anybody's in the chats mentioned at your table but can you go into pros and cons of that a little bit.

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air table I don't know if anybody's in the chats mentioned at your table but can you go into pros and cons of that a little bit. Well, like there's no dovetail has transcription service so you can upload a video and it will transcribe it, and you get the transcription so if you're a pm doesn't want

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the transcription so if your pm doesn't want to watch a video they can just simply read it or you can search the transcription for the clip that you're looking at your tables just a repository of data.

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So you're going to have to do that somewhere else and you can. It's just another step in another tool that you have to support pull that information back into their table structure.

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So again it's that it's that balance of what do I need what can I support what can I work with. How much time do I have to deal with it all.

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Yeah, that's fair question, uh, Jared.

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How about what How about your experience pros and cons of tools that you've worked with presently or in the past. Totally. So this is the part where I take my researcher hat and I push it over to the side nails put my procurement hat on, because this

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was this was definitely when I was. When selected our repositories will little over two and a half years ago I went through this whole process right. I did to seize for about half a dozen tools.

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I did a PLC with air table for us just to prove out the idea and see where the wrinkles were.

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And I remember I I did at the time I dove demo dovetail rebellious and ultimately what when we went with was enjoy HQ.

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And really, when I was thinking about this process I kind of looked at it from kind of through five different lenses was kind of really that I built on it and kind of an internal rubric for myself, to think about how I was going to evaluate these tools

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and I use kind of the same lens of evaluate any tool but it was particularly important when looking at a repository and the first one really came down to for me especially when we were thinking, starting small with a ton of data.

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The first thing was portability, you know if this doesn't work out, or if you know we need to migrate that data portability, in and out right like how am I going to get three years worth of work three to four years worth of work into this tool, what does

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that process look like.

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And so you know speaking for our organization particularly you know we we tried some other tools and found that like the import experience wasn't too gray or it didn't really render in a way that didn't involve a lot of massaging to get it to a usable

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state.

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So you know data portability in and out was a big one.

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the kind of integrations that the tool offers like being able to have it talked to other tools in our stack, either now or in the future, it's something that we're thinking a lot about especially lately as our team grows and and we start to scale like

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having multiple tools build a call back and into that repository without us having to do a lot of manual transfer is a big part of it.

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On the topic of scalability, you know, that's the other thing is, as interest in this tool is growing everybody's finding out oh there's all these great resources and information in here that can get in there and dig around, you know governance is a huge

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thing like really being able to make sure you have the proper controls in place so that the right people get access when they're supposed to get it, and And ideally, that kind of idea of least privilege access to only what they need to know more.

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That's something that I feel like a lot of these tools still need to kind of refine a little bit but we found strategies, over time, and coupled with education to give people that kind of proper level of access that can be real contributors and collaborators

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in that respect.

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I think compliance, obviously is a huge one that you know none of these tools get into our through at least from Africa, I'm sure it's all companies but especially, they don't make it through the front door without sock to, right, like, you know, if they

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don't have sock to compliance, they don't have, you know, sample integrations where they can you know securely provide a connection to, you know, our company and it's a set of tools, it's not going to make it past the cutting room floor, but also this

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extends to of course our participants right like things like GDP or compliance and CPA or a huge, huge part of this and, you know, being able to respond to those requests in a, in an effective way is something that's really, really important.

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And then of course, like I mentioned it last but of course ease of use is super important.

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Um, you know, that's how easy is the tool to navigate news but also what's the documentation like what's the support look like, you know, how is the onboarding experience and how was your vendor relationship.

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Those are all things when you're considering a tool. The way I often tell people is it's, you know, it's not a, you're not searching for a life partner, you're looking for a bus route.

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And you're really just trying to find what's the tool that's going to get you closest to where you want to go, you're still going to have to walk probably the last few blocks, because all tools are but like what's really going to get your closest is really

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like what I looked through I think of all those things in totality.

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Great, thanks Jared.

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One more follow up question for you, you mentioned enjoy HQ, and I'm noticing a lot of mentions in the chat of that tool specifically, could you talk a little really briefly talk about the pros and cons of that tools specifically.

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Sure, I have to put a huge caveat of fraud.

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I've worked with Sophia very closely over the last two years I've done some speaking engagements with her at UXRZ Souza Sophia can tell I'm sorry the co founder of enjoy HQO.

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So, and they've since recently been acquired by UserZoom as well. We're, we're not currently users and customers, except indirectly through enjoy HQ but I have to put that disclaimer up front that I've worked with the co founder closely on.

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said, even prior to that, I think the thing that stood out when we procure the tool originally was how how responsive they were to feature development they're a small team as well, like coda and they were definitely willing to build and iterate and take

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feedback like all good research tools should I think really what stood out to us in the early days was the support for single sign on and security was something that they had out of the gate.

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Their transcription features were especially good.

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I think how the in the searching and indexing of information was particularly powerful they started with that.

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So while it was very taxonomy forward, they really thought about the underlying search, which drives a lot of those core interactions.

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If I can say there were a few soft spots, I'd say.

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Some of the higher level linkages like kind of like what Matt was talking about what they're doing with their platform of being able to really up level, beyond the beyond the reports and summaries and connect those higher level themes together I think

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that's still kind of a work in progress for for them. They have the, the tooling in place. I think it's just kind of making those semantic Connections is still a little challenging, and of course as a result of an acquisition there's always questions.

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But from what I've seen so far they've handled it well.

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And I think you know we're, they're still continuing to build and develop new features.

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Okay, thanks for that. So I've seen some mentioned in the chat have some kind of wiki style tools like condense or Confluence kind of a, you know, those kind of platforms.

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Does anyone have any experience, examining those kind of platforms and maybe have you used one or maybe why you did not do that kind of repository of format.

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Anybody have any thoughts on that from our panel.

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We did start at Microsoft and the large research group we're at and using a wiki to store more about kind of reusable durable knowledge, and it was actually the limitations of that that led us to really wanting to kind of identify specific insights within

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that content and be able to link and network and create that kind of graph of interconnected evidence within that you want, you're most likely be missing from at least the basic wiki solutions, and you get more of if you move to, you know, the enjoy HQ

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or

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the Australian one DFL. You know those types of solutions, give you more of that like research structure that I think is actually quite valuable from my experience.

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Okay.

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Anyone else think of really thinking about those kind of platforms and maybe didn't go with it for any particular reason.

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No, Eric.

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I can speak a little bit just really quickly to, we did look at Confluence for a hot minute.

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I think how successful something like that in my limited experience has been is how well your Confluence is organized to begin with, and kind of what your company culture is around it.

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My experience is, you're more likely to find the lunch menu.

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Hard to be able to find what you're looking for some time.

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So the prosper we did have some research data in there before, we decided we needed a separate place for it.

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But we just found like that was, that was kind of a challenge. That's why we we ultimately didn't go that route, doesn't mean it doesn't work for others but that's speaking personally.

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Yeah.

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Great, thanks for that. So there's been a few mentions I know that Eric mentioned it mad about tumors atomic insights, and I think that there might be some who are not familiar with that concept, or you know what that means.

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So, would one of you like to explain what atomic insights atomic level is for for newbies, like, who don't know.

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Yeah, I'll take a crack, I think the the key idea or the simplest version of it is that, Well, there's different ways to formulate it maybe but then each of your each of the things you know would be a unique research nugget, and that those could sit in

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a database, I guess fundamental is the idea of treating the things that you're learning as Database entries, rather than kind of a more of a report mindset.

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I will say from the stuff I've read of this, when they talk about insights, they're not always.

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When I think about insights I think about more of a statement of facts like a claim or a thing, you know like, Hey, you know, parents feel a certain way about family safety on the internet, you know, and they'll be actually a way you phrase it as like,

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Oh, that's an insight.

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But sometimes it's a bit more like, I was just chunk of stuff we know.

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But yeah, it's really that idea of these, these units of knowledge.

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And if I bridge a little bit into to bridge a little bit into kind of like critique of it and how it's done better or worse, I guess. Yeah, yeah. So I think the key thing, and I think it's fundamental to the whole idea of a research repository is you

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you have to be thinking about when it's being authored it is being authored in in a context for a purpose usually for a specific set of stakeholders in a given moment.

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And part of the point of the repository is, though, to create content that people will come back to in a different context at a different point in time, and be able to consume that.

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I think the the simplistic version of research atomic nuggets, is that that they're just these like factoids that you kind of create and put into a database, thinking that people will come back and consume them and they'll be useful in the future at some

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future point within your kind of topic or maybe to another team that's adjacent.

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And I just want we really found is that, that just sort of is very challenging and difficult in practice. As I think, Eric will sort of alluding to is that you're just all of your researchers are super busy you're doing work principally for media stakeholders.

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And you, it's very hard to find the motivation to go off and kind of create these like these isolated research nuggets that are kind of independent and putting them into a database with the hope that one day someone might contribute to it.

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And then the other question I have is, is it really the best consumption experience for your stakeholders or your future researchers will becoming their hands to kind of consume these isolated floating kind of nuggets in a database or to the Family Safety

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example, wouldn't they prefer to come and consume a well kind of polished can curated piece of content with a set of things that are known about a topic or an area like Family Safety like what do we know about prayer parents on the internet and keeping

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safe you know it's like, it's not just going to be one nugget, it's going to be like a, almost like a document or set of like a website where you go and like here are the things we know and here's how to think about it is the supporting evidence.

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Um, so I guess that sort of works into our approach which, in the time since we started we've seen kind of the, you know, enjoy HQ and dovetail and other platforms that have some of the nuance of like documents that have insight structure within them

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or represented within them in some fashion, or even notion encoder, kind of like a database within a document type structure.

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And I guess the, the other thing to think about. There is the we're working on I guess the other vendors are probably thinking about is how to support sort of this just in time curation activity which is, if you don't really have time to go off and like

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all of these like here's everything we know about topic x. How do you make it easy for people to contribute to such a body of knowledge on the fly. And I think that's, that's the really tricky and tough bottom, you know what we're focused on.

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But yeah, I'd be interested to see what the other people think that mirrors your own sort of view on it or if you would like to disagree and be interested as well.

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I can jump in, so like I think for us like, you know, The main reason why we didn't go with like an atomic insights, or like kind of like nugget level storage was because yeah no one had time to do that any of us like it felt like we were designing for

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a may be valuable thing that potentially could be realized in the future, but we had so many immediate needs that could be solved better with a different tool.

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Asset reflected more of this though, I actually think the premise of storing and combining nuggets may be faulty. Because the reality is that like observation specifically through qualitative research are dependent and influenced by the context in which

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they're collected. So if I have an observation that says people really don't want hotdogs at night. That's going to matter, like, who said that, when did they say that how they how they feeling how did I ask the question, was it presented next to pizza

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it's an option or next to vegetables right like an old context gets easily gets lost when you just store and try to combine these nuggets. So I actually think that sometimes we might be doing ourselves a disservice if the goal is to actually generate

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knowledge by trying to think that we can do these shortcuts by like storing the data at this level.

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I of course don't have any proof to suggest that that's going to happen it just it's just like something that I worry about and. And it's also related to someone in the comments, asked a great question before which is like.

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Isn't it a problem that your stakeholders aren't using the repository themselves and like how can you get them to use it more and actually don't think that's a problem like I'm actually fine with that you know PMO designer asking the question, the researcher

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spending a little bit of time finding the answer and then communicating that in a conversation or a document because the researcher is going to be equipped with skills and experience to interpret the data points from this different studies in a way that

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someone from another function necessarily isn't a lot of people are but not everyone.

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One thing I just, Oh, go ahead.

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I was just going to to back up what Eric said about the atomic nugget piece, I think, well, I'm pretty sure I know that this is the genesis of the tag issue, because you trying to tag the shit out of an insight so you can find it enough times to make

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it worthwhile or pull the context through these tags and you've got 35 tags on one sentence.

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You've lost the thread at that point because even if you're going in and searching for hot dogs, and you've got a tag on that one inside this hot dog.

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You have no idea where it's come from you have no idea who you talk to, or what the question was or what the task was can you just have, they don't like to eat hot dogs at night.

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And it's the tools are trying to solve that by giving you the categories and the taxonomy but I don't think that that's really how that's going to be solved I'm not quite sure how that's going to be solved.

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I think that tumor had a good direction to try to break these monolithic 89 page reports, apart into digestible pieces.

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But I also see that it's been taken way to the extreme, which is something we tried to get lab and he didn't really work to really get the nugget down to a sentence did that's all you put into the repo at one point was a sentence, I was like, well about

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what, what am I supposed to write, I write two sentences no one cent.

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And it's just not usable at that level.

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Yeah, I would agree with that I will say I do believe that, though, that there are insights with in your reports, and there is a way to bring us together where, if you can have, like, here is a piece of work done on a particular contents context here's

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all the content around it that is going to be consumed in a moment by a group.

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but you do want it to be more searchable fundable linkable references to the things within it that you learnt. You want to be really careful how those might be pulled out but you.

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Yeah. Do not start with the assumption that you can just like break everything into pieces and just have a database of those pieces like the starting point has to be that unit, and that's true whether it's your study report for a particular moment, or

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if it's the higher level knowledge that we're working on creating in our platform. It's the same again. So I definitely agree with what I'm hearing but I think there is a way to bring it together to, as long as you retain that context, and think of the

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vessel of that report or document or website or have you think about it as being important more important unit.

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Yeah, I love, I love the debate and in the, in the go around here. Not to mention insights and information that don't make the report, right, still nuggets but just not quite important enough to make it to that final report, like say somebody comes in

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and like I need everything we've ever learned about onboarding. Well that's a time when you need those tags. It just, we need to level set where we are and I want everything that has to do with this topic.

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And so, those searchable content, you know, maybe it back to Lori's point but do you lose context what about onboarding, you know, but at least there is the opportunity to gather everything that didn't quite make the cut in a report.

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Yeah, just just to add to that, I think that's something that we're starting to see like, like, Lori and Matt have kind of talked about we're starting to see products picking around the edges of that problem right so like enjoys keys version of this stories.

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so they're essentially larger higher level vehicles for taking insights, whether they're from entire reports or summaries that you've written on a topic or, like, orphaned insights that may not have like be or maybe not part of a larger summary that are

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still relevant to whatever you're trying to do. I think the key thing with those and with a lot of these tools for Fender reflects this thinking is that it's a very manual process right, it still requires a lot of hand curation, and it requires a lot

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of thought. So, one way you could look at that as job security, but at the other hand, it's, it speaks very much to this challenge of being able to kind of comprehensively stitch together disparate pieces of information with varying degrees of context

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into something that's entirely new.

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I think one one place that we have found value in kind of those metal roll ups of information is for new hires right people come into a new space.

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Jen when you say like what do we know about onboarding, it's like, well, that's a lot, but we do have, we have noticed these big trends with onboarding right there well supported.

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We're already kind of operating within a certain bounds of context that we can be confident, the insights that we're attaching are relevant.

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And in those kind of big blocks of insight we can kind of produce or deliver that to someone who's new and help them get up to speed more quickly.

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So that's where we have some counsel early value.

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All right. Great, thanks for that. That was fun. That was a good dancer, I love it.

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Um, so, what, what if you don't have the resources, the money to buy a tool.

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Any suggestions on what what can you do to kind of be scrappy and work with what you've got.

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Eric, you have any thoughts on that.

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I'm trying to remember I don't think we paid for Kota.

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Like I think we, or or it wasn't much because I don't remember like having to ask for a lot of budget.

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Well, I think, then, then what I would do like yeah if you have, I think everyone, even Matthew who works at Microsoft is strapped for resources like that it's just a fact of life.

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And I think what we did was we listed out all the like possible benefits we could get from an archive. So for example, like I mentioned before, oh, a product manager could go and find their own answer without bothering the researcher, it can give us a

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way to keep track of all the project we're working on.

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It sets an expectation that when you're done with something, it has to have a report, because sometimes not, researchers but other people who did research in the company wouldn't really produce that they thought it was fine to just like send a slack message

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or something's like no, we have to store it so that we can reference it, etc. But what we did is we like list of those and we prioritize them and said okay, sure, archive has the potential to live lots of benefits, but let's pick the ones that we really

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care most about and then optimize for that so I think especially for someone who's resource constrained, that's probably my best advice is to just like.

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Don't get too excited about all the potential things that they can do just really make sure that it does the one thing that needs to do really well for you and then you can always change your mind later and iterate.

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Thanks for that.

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Lori Do you have a perspective.

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I was chatting in the chat, because there's like 1001 question So what was the question again. The question is, you don't have money to buy a tool. Oh, yeah.

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Pray,

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and again seriously like if you need a tool and you can't convince your organization to get you that tool, do you need to stay there, because they're obviously not supporting your job, or the tools you need to do your job.

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If you need to stay there you want to stay there, spreadsheets better than nothing. Air tables better than nothing, see if there's any internal tool that your company already owns that you can leverage to put repo type things into.

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So it may be it doesn't store the videos, maybe there's a link to every video on Google Drive or something. For the time being, maybe you need to work really hard to figure out what is the PLC proof of concept that I have to prove order to get the budget

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budget for the tool figure that out and work toward that goal to see if you can get budget for the tool. And then when you do pick a tool and the tool, they all kind of do the same thing.

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Like I said before, nobody's going to solve your problems 100%, but it will be a good place to start.

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Like, yeah build on what Laurie said and kind of speaking to my own experiences a research manager and my prior life. Um, you know, I think there are a ton of ways you can just store, like let's say you're writing your report up and presentation software

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or Docs or emails whatever you know, there'll be a place where you can put those and get back to them, it might not be great but it'll be okay.

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I think the other interesting thing to think about is like culturally, what is your research team doing in terms of curating knowledge that you think is useful over the longer term, what I used to do with my team is like just have a running list of like

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even if our wiki or like whatever super basic thing, like we stood and just a Word doc, like here are things we know about working on a digital store for the first time.

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Okay, well we should know some things about stores will, we're doing a bunch of research usability studies, a lot of that sort of thing but we should be learning about kind of the patterns and experiences of stores and first run experiences and stores

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and all sorts of stuff let's create a place where we'll put those insights and it does require a tremendous amount of discipline from you as a manager and your team to be able to do that and try and prioritize building out some of that work.

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But the best tool in the world is what I'd like to think we're going to try and build that tool but you know it's really tricky that tool doesn't really exist, that's, it's more a cultural problem, or thing for you to prioritize in your research team

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do we care about curating this high level knowledge on key topics will not. And if you don't, then yeah I'd like just pop your stuff in some sort of folder structure and make sure you can search across it and that's going to be just degrees of improvement

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potentially.

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Just, just the I'd really love to kind of connect these two threads I really love what Lauren Matlin what all three of you have kind of talked about here and just starting with Maurice advice for like looking for tools that you already have within your

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organization as a potential starting point. It's amazing, like having sorry to wait into procurement waters, it's amazing all this stuff we have that people don't know we have.

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It's really kind of incredible.

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And so, like, you being scrappy and looking for things that you might be able to co op, even if it's in a proof of concept capacity to help you get started but it has another kind of implicit benefit I think that kind of talks about what you mentioned

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and that's getting to understand the culture of your organization better. Like, what tools they're using to do what kind of jobs, what's working well, what isn't getting used at all, what's getting used all the time.

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You know, those are things that you can help better understand how your organization operates and in turn, like how they might consume research, which could then guide whether you're building a tool from scratch or you're picking a tool from a vendor

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like this, that can help you make really really informed decisions I can save you a lot of heartache later.

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So let's think about what you do what you need to consider when you're kind of just restarted just starting our repository.

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What do they need to know to get started.

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What are your tips, tips and tricks on like, all right, you're going to start a repository. Don't forget this, or do this. Lori, I think you need to do a needs assessment.

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Because talk about, well, what are the problems you're trying to solve.

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You're trying to create a team of 10 out of one repo won't do that for you.

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If you are trying to create a place that other people could query it might help.

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Do you need help with transcription. Do you need help with creating video clips and been getting faster with video clips by using the transcript in searching in the transcript to find the video clip that you need to do.

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Do you need help, trying to you meeting your team need help, trying to see the bigger picture. The forest through the trees because you're all working on different business lines and you have no idea what each person's up to a repo could help with that.

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What is the problem that you are trying to solve. With this tool figure that out. First, come up with a list of features that you might would like this tool to have.

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And then go out and look at the different ones. Just like user zoom and user testing, there's really only a handful of tools out there that are really really out of the box.

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Things that you can unpack and use tomorrow.

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Go look at them see how they they measure up against your teacher was that you've come up with.

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And don't forget about your dev teams and your product teams as well and your designers who will be consuming hopefully the information that gets put into this repo and think about the features they might want to see too.

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Thanks for that, Matt.

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I know you did, you know, maybe from the bill perspective, what were you thinking about when you needed to build.

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Well, I mean I i think it can even speak to just one of the two things that like the cool things that I think you should know just starting out the real basics and one is think about the cost value trade off of the individual, how much work.

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have in your organization is like downward kind of authoritarian power, that sounds really extreme is why wouldn't it but you know sometimes there's a leader who says look we're going to put everything in a repository, right, because the process that's

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do it. If you have that, that's fine.

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Often you don't so you really need to think about why people are going to put it in will see incentive for them how much time it's going to take him much friction as there.

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And if you can't solve their personal value they're going to get out of it, then you might not bother starting because it will devolve, and it can be personal value to it for people, or you can bring down the the amount of energy that's required to put

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it in, but you need to kind of solve for that early, or have kind of top level buy in and someone who can help drive it through and make it a priority for people who are like, kind of want to do it but sort of don't find the time.

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And then the second one is, you should consider until automatic machine a machine intelligence gets there which it might in the near future, but until then you know I would say consider just paying someone to do the metadata, and that actually relates

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to the point before around the cost value like how to just make it so people don't have to spend energy, having accurate metadata for so people can slice and dice and search.

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Yeah, there's two things to think about.

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Okay.

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Eric, any thoughts, tips and tricks on setting up a repository.

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I'm just gonna plus one Lori know what you need, and make sure that you get the top need salt first and then take it from there.

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All right. How about you, Jared.

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I think everyone here is really covered it well i think it does come down to at the end of the day just knowing, you know, somebody, somebody that college jokes like see me doing research of like Yeah, that's it.

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It's just really like, understanding the needs of your stakeholders and your organization at large, you know, just like any, any good research project right you want to make sure you're solving the right problem outside and asking right questions from

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the outset.

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Absolutely. So how do you get buy in, how do you get buy in from your team, how do you get buy in from your partners to use this I know Eric you mentioned it's okay if the designers or pm to ask us.

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Some people don't want to be asked questions, just use the repository.

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I can see the pros of that too I'm just kidding. But how do you get buy in, what are some of the tactics that you have used to help the team to help move the team along to adopt.

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Is this a big change. So what do you do to get everybody on board.

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I can speak a little bit to what I did.

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You know, it started with just reaching consensus amongst our team that we had a collective problem right like we had, we shared the same challenges and problems.

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And we all agree we needed some, some approach that, you know, like Lori mentioned like coming up with a list of features that we thought might help address this problem or thematically things we wanted to solve for.

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I wind up doing a proof of concept stage and vendor evaluation stage and then ultimately presented that to our VP of design for approval. And that was like I said about a six, a six month process and to end.

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And we're fortunate to have really a really supportive, research and design culture doctor, and so that was something that we got an open ear to from the outset I know that's not always the case or it can be a challenge but I think just coming prepared

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and showing that you've looked at the spectrum of the problem and looked across looked at examples and looked at the competitors and done your homework.

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I think really is kind of one way to get there.

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And that you have a perspective, how to get adoption by in.

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Yeah, the two levels to that one as if you're trying to get it off the ground, we sort of just started building a prototype. And, you know, using some money that we had to just get it running because we couldn't get it approved otherwise and then once

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we got it running then we could show it and then get ongoing funding so that's one thing on that side might work if you have, if you're able, in terms of getting people engaged like non researchers using it, which is a question a little bit in the comments

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Um, what we've been trying to do with some awesome success and some other places less success is try and drive the usage of our repository upstream and the researchers process for sharing.

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If they shoot if they like altering the research and presentation presenting it and doing everything with the team and then it's like an afterthought to put it in the repository.

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It really is this like tax, whereas if you can provide value upstream to use the repository is kind of a key place where you're sharing the preliminary results and then as it comes together, the more detailed results and stakeholders are coming there

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to consume that and you'll see that your, your message to the team like hey the results of here Come take a look.

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that and you'll see that your, eat your message to the team like hey the results of here Come take a look. Early and it's not like an afterthought.

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Then those stakeholders start to learn oh this repository is a place where I can get insights, all of the stuff is here. And then it's a way you can start actually driving ongoing engagement, you can learn about your stakeholders, you can know what their

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interests are from a platform standpoint, or analytic standpoint, whether or not that applies to you, you know you can really, you want to get it early in the process to get people learning about their system

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into that.

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Eric, any thoughts.

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I did the same thing as Laura I was reading comments I was still talking about.

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We are.

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We have to stop and just we'll just chat.

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I'm just like, I like, I want to like, bring some of the commenters in because like people definitely have more experience with this than I do, based on on their very insightful comments.

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I mean, I don't know, like I think it's for us at thumbtack getting buy in from like people outside of the research team wasn't necessarily like a prerequisite to do it because like, again we optimize for the value that gave us right like it gave us a

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faster way to find our own work and our immediate colleagues work and the work from these like Jason teams but also did research, like that was actually a huge value of like PMM for example, did a lot of research at thumbtack because they have the skills

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skills to do so and they had questions that our team couldn't answer. So, but they had like, you know, different norms around sharing they had different norms around.

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You know rigor, they had different norms around storage and bringing all that together was really helpful because then you could also be able to show them and other stakeholders, the difference sometimes between studies and like which types of insights

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to perhaps draw larger conclusions from and perhaps which ones to be more careful. Careful with at Facebook or Instagram where I work now. The research library that we have is very different right and I actually think it is primarily again though a tool

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for researchers so like we are required to offload all our work there, and I haven't actually used it very much because it's a lot faster for me to just search on like our internal communications platform workplace to find work that I have shared or someone

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else has. But I know that there are other stakeholders in the company for whom the libraries input credibly important, and again I think it goes back to, like, yeah, that buying just needs to come from the people for whom you're really designing it and

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making sure so that it almost becomes less of buy in and more about, you know, are you actually giving them the value that they need.

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But one of the things that kept going, was this concept around.

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That's great. What the hell are we going to do with this stuff that you found out, are we doing anything with it. I don't even know. Should we do even even researchers because we're even doing anything with what people do.

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So it became a way to start to track the impact of research so not only put the research in here but now we're going to try to abstract out the impact and so the way that we did that was, we had all the insights in dovetail, but then we pulled out what

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we called actionable insights, which was basically the definition was something somebody can do something about and put that back into the get lab repo, and tagged the proper PM, who were responsible for that part of the product, as well as, there's a

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tagging system in the repo product, and we tagged it as actionable insights. And so tagging it in that system allowed us to pull metrics to see what we call them issues are merged request, which ones were open still after a month after two months after

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six months so which ones had been closed, and worked as addressed. So we could see like which ones are actually getting pulled into the product by who, at what point in then we can go ask why, why didn't you put this into the product what happened to

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this, because one of the chat questions was like what do you do with stuff that happened a week ago in the product change or six months ago and the product changed.

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So we wanted to try to capture some of that. That way, and dovetail and going back, oddly enough and using get lab. As a repo help with that.

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Excellent. Thank you. So I know that there are a million great questions in the chat, and we've addressed a few of them along the way I appreciate that the speakers are kind of staying on top of that probably better than I am.

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But I am going to be able to ask, it's getting a little late. And so I am going to ask one question from the chat.

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But we might have to do a follow up panel I might have to do some follow up questions and maybe we could do a recording or something because there's so many good questions from the audience that I would love your perspective on as well.

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So let's think about that. But before we go our final question is what kind of ethical concerns.

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Might there be around a research repository. Anybody have any thoughts on that looks like Eric looks like you have some thoughts on that.

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Or if you need a moment to think and anybody else has a, anybody can chime in.

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I guess you know something that's obviously when you're talking about the storage of all, a lot of personally identifiable information you know MPI and a large volume.

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That's always a concern. Right.

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You know, for both for patient or for this could be for participant privacy.

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We do, we do also deal with healthcare companies so there's that.

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But it's, it really is something that we, we think a lot about, and it's something it's an ongoing discussion.

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When we think about our research repository. There's a lot of differing kind of guidance and governance in terms of how much information do you remove or obfuscate or, you know, baton striking that balance with meeting the additional context about the

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person you're talking to. That's the constant push poll it's like well no I need to know this person's information not their personal identifiable information but I need to know what organization they were for, I need to and it's sometimes it's helpful

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I need to and it's sometimes it's helpful to know if you talk to the same person in different contexts, to look to see if there are patterns in the feedback they've given to you over say like a year or two years so they tend to bring up the same thing

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when you talk to them. So there's always that kind of like tension and push pull between like how storing the least amount of information about a participant that we can, where we're protecting them while still being able to derive the most out of the

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time we have with them.

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And this also extends to other ways we integrate with the repository things like capturing consent an NDA is, and being able to think about things like being able to prime participants prior to their participation with a clear code of ethics and guidelines

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of their expectations and their expectations of us, and things like that so there's a lot that feeds into that but it's definitely a. It's definitely a given take, but you know participant privacy's always at the forefront.

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Yeah, and to that point Jared made. We also at up to us. God respondent user testing the live conversations, as well as a couple of other different platforms and we have to make sure that those platforms can support our NDA.

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And then our procurement process that Jared is very very faithful to will ensure that their NDA that their panelists agreed to matches with ours, so we do try to cover it for those reasons so they're not sharing anything that we're going to show them,

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but internally. You have to build a culture of.

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This is a customer or potential customer, this isn't someone who you should treat unfairly or with, with lack of respect, you really shouldn't treat neighbors.

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But, you know like, you have to build that culture into the company, so that you don't have people who think it's called a polar clip and pass it around because somebody said something funny.

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I've had that happen at a place where I used to work, and it's just right up there with them showing up in the lab and laughing so loudly behind the mirror that your participant can hear them that have to.

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It's the same thing.

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So you have to kind of just build that culture reiterate, we treat everything with respect this is data this is a person's thoughts and processes and, you know, whether it's a cancer patient talking about their, their path to recovery, somebody's car

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getting repaid because their spouse passed away, or just an IT admin complaining to me about some setting that they hate.

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It's all stuff that sensitive to them, and it's very important to them and they're sharing it with you. The researcher, and I'm sharing it with my product managers and my dad's and my designers, and I want them to understand that it's, it's sacred that

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that trust that they instill in us, and luckily I work in a wonderful place and they do but it's a culture that you may have to build upon where you are.

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Thank you. Erica Matt, any thoughts.

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I mean, I think it's I don't think of repository has any additional ethical considerations than the rest of your research practice.

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If anything.

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You are nervous about starting a repository because they will expose data in ways, you should probably like stop working on the repository and work on your data storage and share best practices first.

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Oh, go ahead. No, I was just saying that oh yeah you got to make sure it's before it gets into the repository that it's, it's all ship check.

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Absolutely. Well I wanna, I want to wrap with classic researcher question, and this is for everyone or no one to answer is there anything else that you'd like to talk about that we didn't go into tonight.

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Anything else you'd like to share.

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Any final thoughts.

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I just there's just so much there's so much that happened in the chat that I couldn't even get to.

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Yeah, I know this is something that is very salient to our all of our interests at this point I think we are constantly trying as a people to do more with less, and a lot of times repose are seen as that magic holy grail that will allow us to do more

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with just went to all we need is one tool.

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But I think that the panelists tonight have done a really great job and hopefully communicating that it's not just a tool it's a whole set of processes and a whole support system that you have to have in order to leverage that tool in the right way to

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push. Push your organization forward.

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I just I'll just add to that, you know it's it's absolutely a company culture consideration, I think I would also just add that I'll be I'll be the relentless optimist here so you can do it, do it we did.

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We did have a repo, you know, two years ago.

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And I think, you know, my advice would be just start small, start scrappy and start scoped yay schemas.

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But I think like really just thinking tactically. You know I know there's a lot of folks out there who are teams have one.

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And, you know, I think. In those cases, sometimes it feels like a disadvantage that you're by yourself. But the other thing that you have an advantage them is, you know your process better than anyone and at least in the beginning you only have to cater

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to you.

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Um, so, you know, start there and really like it. You don't have to you like Larry said like you don't, you're never going to buy your way out of this problem.

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And even like I think Matt has shown like even building comes with challenges right with all the power and flexibility like there, you know, there's no silver bullet.

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And so just really think deeply about what your team needs what your organization needs, and just start and just start really.

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Final thoughts.

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Um, I had a few things I wanted to hit and I hit, we hit them all. So, yeah, I just wish everyone the best of luck and just re emphasize, a lot of it is about coaching, more than tolling, and if you can get the culture right in your team.

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And then, you know, the risk can follow the tooling is not that important if you get the cultural right.

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Excellent. Eric.

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That's really similar to like my last thought was like, I had like this like accidental benefit from building an archive which is in order for it to work.

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I mentioned this before, like, if the thing that gets submitted as a report that every project has to end with a report, and for the researchers on my team of course that always happen, but then it turns out that like some of these other teams who were

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doing research, research that was actually done really well. Never put that in together into something that was like worthy of being called a report for this actually highlighted to me as a resource manager at the time the importance of communicating

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to them why it's so important that you distill your findings and can communicate them well. So that I wasn't just saying like, oh, put your like long list of notes into a doc and submit it know like you actually have to like put in the effort of synthesizing

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and consolidating and communicating what you're learning. And that of course that is actually the main thing that people push me back on because they were like that's extra work, and I'm like well that is how you make your work valuable.

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So that was like a nice accidental thing so maybe that's my last thought is like think about how the tool you're building, what types of habits, it's going to encourage in your organization, because that is often the case, like, if you think about if

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you if you walk into a room and all the chair so I've set up facing the front, you're automatically going to assume someone is going to stand up front, and tell you what to do that as a habit shaped by the structure of that room, and like software tools

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So yeah, those are my last thoughts.

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Yeah, that's really great. What I love the most about tonight's discussion.

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I mean yes the tools important but we covered so many other things that are that you need to consider. And I think that that was my personal goal.

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I'm kind of hoping that that's where this would flow. And I'm glad that we did talk about other things taxonomy and structure and all the other things that go along, it's not just pick a tool off the shelf, and it's good to go.

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There's so many other considerations when it comes to our repository and sharing out our insights with our team and our partners so thank you so much for that.

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I think everybody give like a applause use the emoji user, show your hand show your video all those things let our panelists know that they were fantastic, not because I'm saying that they were but you know that they were too so thank you so much loved

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it.

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Valerie's gonna throw the link to our survey in the chat.

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And please let us know what you thought, and how we can improve on future events, and I am going to share my screen for a little bit because we're going to break out into rooms so we're going to have our little networking session right now so thanks again

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to all our panelists, you're welcome to join if you so if you choose but giving people time to drop off, they're not really feeling like being social right now I can respect that as well.

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So I'm going to go ahead and start sharing my screen again thank you all, thanks to our panelists. Have a great afternoon, evening.

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If you're signing off.

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Here we go. One second.

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So again Mallory is throwing up the survey link in the chat. Whoops.

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Let's share this.

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All right, sharing the right screen says follow up survey follow up see that on the right is the sharing. Yeah. Yeah.

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Yes, yes, it was doing great stuff. Thank you. Alright so fill out the survey, there's going to be a link to it in the chat, I think, I think, I don't know.

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Now you should throw that in there I missed it if you did.

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And it's also going to be up in a, in a follow up email

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that will be coming your way. Later on, probably tomorrow.

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So we have a few house rules, we want to, this is a respectful community it's really important that we treat everybody with respect and give everyone a chance to speak.

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There's a lot of introverts and like speak, there's loud and people like me that jump right in and speak but everybody give everybody a chance to speak.

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also get your LinkedIn.

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Link ready. Throw that in the chat when you go into your breakout rooms and talk to your friends.

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We want you to be kind and empathetic empathetic and assume positive intent and no offensive comments against this just basic human being stuff, folks, be good to people.

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That's all we're asking.

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So, when you go into a breakout room again have your LinkedIn handle, ready to go, or LinkedIn link so that you can share that with your community. We're going to go into a breakout room.

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We're going to go in there for like 12 minutes or so.

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12 to 15 minutes, probably four to five people. When you go there tell everybody what your name is Tom what your specialty is are you a designer researchers strategists Product Manager.

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Chef, whatever you are. I don't know what your, what your kind of into. And then we're going to work our networking question is What did you think about the take on research repositories, not just the tools but what was talked about tonight Let's, let's

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talk about what we learned and maybe share some other resources or stories that we're interested in is, you know, that might be helpful to others or just share what you thought.

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So I am going to stop sharing. So again, it is a what what interests you about the panel.

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And I'm going to.

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I should have got these rooms, a little bit more ready than I did.

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So let's go ahead, you have to hit join.

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It's going to send you into breakout rooms and you have to join so I'm going to do that now. Maybe 1215 minutes, and then we'll pull you back into the main lobby.

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And we'll just have a general chat amongst each other. All right, so why don't we do that just want to make sure we're good to go here, One second.

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I got too many rooms go on one second. Let me fix that.

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All right, here we go. See you in a few minutes.

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but I'd hate to invest in something and then find out that it was over engineered for us.

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You know, and so I'm sort of curious about the buyer's remorse component of it.

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I don't mean to hijack what you're saying I'm just, it's just sort of tangential I think to what you're what you're asking.

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Yeah, my company when we buy into get a repository we were to researchers and the head of Unix, who could also do research, and had one person who really loves tools, and she investigated and we taught her some requirements that we thought were relevant.

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Yeah, and then we ended up with Android Q, which has some awesome features and some features I have to say, especially now, right now it's just me. So we're just hiring a new head of UX and we need more researchers but right now it's just me and I have

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zero time to manage anything around it. I do upload the videos because there's a transcription feature in it that's really great that I really love and it saves me time, because sometimes when you can't quite remember something from your notes you wonder

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what the heck does that mean, then I can just do a text search and then I find immediately. The, so the transcript, the text bit, and that is linked to the video so that if you find the text area, you know when the video this so that's really great.

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But in terms of tagging and all that.

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That's, I can't do that. And also I'm worried what if some at some point somebody says no you don't have get the money anymore. You can use it and then all the data is in there.

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So I've been keeping it in Google Drive like we used to just to make sure because you know its proprietary software and I want to be able to have it available if I need to.

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In terms of data management.

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Yeah, so, yeah, I'd like to try that more with somebody else was also a researcher, but I've not had the opportunity. So, yeah.

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So I understand what your question is coming from. and you have to think about it to bias, just riffing off on what dora dora fed.

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If it just me who has issues with the transcription services, which are AI lead.

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Because the atomic in fights and everything that became talk about I can't really, you know, copy paste them from the transcripts. I literally have to sit and, you know, correct the transcript which is literally me doing from Hello introduction, you know,

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and then thank you for whatever the low end diabetes, and so the entire then on top of the tagging processing you know highlighting picking out clips reads, all of that, it just sort of becomes redundant.

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And at that point of time I sort of consume the data so many times that I'm just ready to spit out the final report.

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Instead of sort of making it into snack or be things.

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So, you know, at least in terms of the question that came was raising I'm not really sure if anybody has any sort of process, given the fact that the tools that are meant to help us are not actually doing the job that they're meant to do in its entirety,

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or to its full capacity, or is that the problem that I tend to encounter almost on a daily or hourly basis.

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So you sparked a really fascinating topic, in my opinion, which has to do with where that data lives like sometimes those insights like it just occurred to me that sometimes those insights might be better.

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Like a attributed to a persona. For example, right, it may not be just an insight that sort of hangs there in some space, but you can like, put it somewhere and

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I'm not sure where exactly where to go with that but it's, it feels

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about the larger the larger meet researching ecosystem, but the problem with that sort of both sort of in five, you have to be at least I tend to be very careful with it, go with it sort of get very difficult to sort of get internal stakeholders, whether

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it's the design team or the product team to sort of make them understand the traceability of it as to where that sort of insight is coming from.

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So those sort of often sting you will have to sort of find way.

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I really liked the idea of thinking of traceability.

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Because that's what I think is so valuable is, as you flow through from your research through your, your experience design process, and your roadmap process and your backlog process.

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There needs to be traceability all the way through, so that the people that are producing something know what the outcome is that they're aiming for and why they're doing it, it helps to bring meaning into their lives for one thing, and into their work,

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but it seems to me that you should all the research that informed that particular thing should be accessible, so that people can kind of refer back is like, why you know, because my big question with this is, who's the audience like what what is the use

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case for using a repository, as your, as you're moving through your development process, like what is the real use case for that are people actually going to stop and go Wait a minute, I'm going to go and really look at all those videos, and make sure

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what I'm building right now is the right thing, you know, it seems to me that that synthesis is really important and that the bulk of the research that fed into the synthesis and the ultimate synthesis and insights that are feeding into things that are

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actually being created. That's the important aspect of the database element of the repository is beyond the repository itself into the other tools that are being used in the organization that are producing the, the, the experiences that are aimed at the

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outcomes of hopefully the experience vision or at least the strategy or the roadmap of the organization.

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is I already in our little chat room breakout room before us saying that I have the problem, then when I try to prepare the research insights from a piece of research into atomic nuggets and then do that for several pieces in order to sort of.

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So our use case would be to cross synthesize to see what are the things that came up that we're not actually topic of this specific study but they came up anyway.

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And I do want to capture them somewhere so that later on. I can look at them. Right. And if I then go across our projects. And then I try to quantify so how important a thing is this is a just one person telling the same thing 10 times, or one one organization

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with several individuals, always going on about it but nobody else has that experience, or is it really a universal pattern. And I've not seen a repository that can enable this process easily because what I tried, you see the nuggets that items, but you

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don't see the context you have to put each little narrative to click and click until you know are this is where it's coming from. But by then, honestly my head has forgotten what I'm really after I get lost.

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So, this is.

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So I have a use case but I don't have a process that really fulfills that even though the tools seem to indicate it can do that. But it's the process and the culture around it that's not that we haven't figured out.

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Absolutely. I think that research is really more like a live concert than a recording.

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And that's how it should be treated.

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You know, and it's responsive to the audience at the time and it's a serial it people walk away with their impressions and their and their, their emotions and their feelings around that performance, and they may or may not buy the CD or, you know, quit

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on Spotify or whatever.

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But a ton of energy and a ton of resources on building up this tool with the hopes that you're going to have some kind of valuable useful thing. It would seem to me that that money and effort is well spent.

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elsewhere, well spent sitting down with the developer talking about the research that you just did, and and and and inviting those developers to join your research and if it if it's travel costs or whatever.

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It seems to me that that would be a better use of use of it. And the most important thing for your repository is a proper naming convention, so that you can you know basically just do basic indexing in terms of finding things.

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Yeah, to use, or for synthesis and analysis rather than managing up the sounds.

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Exactly.

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I was just gonna say that I think what comes to mind is especially in all this discussion of repositories and how might you use them for you know your particular situation I think it's sort of like if you think of it.

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What just occurred to me is if you think about it in terms of, you know when you're building a new product, you have to consider the use cases, you have to consider the end goal, what are people going to be doing with it.

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So every research repository is going to be different depending on what the use cases are who the end users are going to be our product managers looking at your research, are they just designers, is it the like C suite, who's who's consuming this information.

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So then what information needs to be there, and specifically for where I'm at, you know, we didn't have research so I'm, I finally was able to get a researcher to help, who's doing the competitive analysis and kind of foundational research and going through

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all the calls that I've gone through in the past and we use a Boma for sales and I was just like, well I'm using that now because it has transcripts, you can highlight things you can mark things as a pain point or a goal or, and they don't sell it to

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use a user researcher so I I just ping them all the time like you know i'd be great for researchers and maybe you should sell us to research because like, researchers will use us like you can highlight things and tag things and comment on things and create

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snippets and then I'm having my researchers, pull those snippets that are referencing different feature sets that we know are pervasive have pervasive issues that we can't get to, but we need to like gather all that data so that when we get to that project

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and improving that future we have all of those snippets together so he's creating a snippet playlist of all of those things and they all reference back to the original call so you can see the context, if you so choose.

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But, um, yeah I think for us we're looking at it like I want to kind of start it out so that future projects, anyone can gather the data know what people were saying.

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And, and, again, two doors is my quantify how many times is that coming up. Also integrations is important, you know, hoping to get something with Zendesk because support tickets are just not searchable to find where people are complaining about certain

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things, and then because we are b2b SAS, so then we want to be able to contact that company if we're doing targeted research and interviews in the future.

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So, how, how, like how might we search Zendesk in a way that is going to pull the data so that we can use those tickets later on as reference points, and to quantify how often this is coming up and for road mapping in the future so you know we have a

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lot of use cases and so that's where I'm not really sure what we're doing or what my point was, but yeah. and it's not that late here. I'm in California.

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But today was wrong.

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I appreciate it. My, my, I don't have all the answers, and I don't know if anyone here does, but they're probably going through a lot of the same struggles, for sure.

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Anyone else have any questions or thoughts about what was covered tonight.

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Matt still here. if you wanted to ask Matt a specific question.

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I was just gonna say that I suggest, I recommend this to every single newbie and anyone trying to get into meetups or networking or anything I always recommend this group because it always has really great panels.

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Thank you Matt for, for sharing and being here, and and so many great attendees who have such, there's always amazing people in my breakout groups.

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Yeah, kind of ridicule that too. Yeah,

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question.

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Has anybody else tried to remotely collaborate. At the same time, using a research repository, speak a little bit more to that Doris.

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Then I really my colleague. Product Manager in the states me in New Zealand.

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We were in a Google meet or zoom or whatever we used.

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And we wanted to tag, so we had run the sessions together, remote sessions.

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And, and then we had the interviews uploaded into enjoy HQ, and we wanted to do all the tagging together.

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And, yeah, and it didn't update. So, when whoever of us was was selecting and typing etc. The other one always had to do a refresh, and there was a bit of a pain.

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So I was wondering if there is any tool that anybody has used that did work.

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We had to use Google docs for that and then we had to take the Google Docs we made with the comments, we can use that live and take it version we use notion at a time.

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It was like an exit wasn't the best one.

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Yeah, okay.

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So what we've done at some point we gave up. And we exported what we already had into intramural, which actually worked quite well. Because some, the way and once we could then each, each sort of thing was just creating one posted.

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And then we just followed our usual way, but we had wanted to try it all and enjoy it didn't work.

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Yeah, I could, I could.

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I agree with that. So we've done a fair bit of remote research and development work.

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And we've mainly use mirror so we've definitely haven't had the same scale and needing the challenge of looking at insights across multiple projects for a single client or multiple clients yet.

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But that's that's one of the things that were interested in kind of hearing about today of how people live at taking on that challenge.

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I think to exactly what Linda mentioned a little bit earlier around that traceability and what I've been mentioned, is, is let's say you've got that that's that research and it could be quantitative, qualitative could be complaints or it could be website

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analysis Google at Google Analytics, it could be interview observation work diary studies, whatever it is, tracking all that in and and and if, if, let's say it's a video just putting a link to the recording which you might have elsewhere on Google Drive

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on Vimeo wherever you might have recorded it.

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But what we found was the mirror, having using neural as much but Miro has been quite good at collaboratively going through rearranging things adding tags, adding emojis to them.

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One tip I would say is if you are using it.

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Then, it helps because you can. There are integrations with other tools already out of the box. You have to pay for them. Unfortunately for some of them, but just simply exporting into Excel and then from Excel there's a lot of things you can do obviously

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CSV files can go anywhere pretty much these days.

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But one of the things I would suggest is for that traceability.

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Sometimes I'd say if you start off with an interview with someone, you might have an empathy map you might have, you know, just all the road bits of detail that they said all the, all the key observations all the key quotes, let's say all in one area.

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And then you want to do some thematic analysis or you want to do something, you what you want to put it into some sort of structure. Structured Analysis let's say one thing and in the past that have done is caught, rather than just moving that across,

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and just saying that this person that came from this person making a copy of all of those and then rearranging those. So if I find a personal link that links back to that source, then I can look at what was the context that this was said in so in case

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case I do need to case, we get to the point where we've gone, you know, the observations and evidence through to the insights through to the through to the problem statement or opportunities that that means for us through to them the ideas of features,

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and then through to the backlog of user stories in order to deliver those features. So having that traceability sometimes we might have a moment where we're development in development and someone says hey look, we can't do that or that's going to be much

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more expensive than if we did this. So then we can go back and say, Well, why do we arrived at that idea and you can work backwards and go, Well, this was the planet sold.

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So if we have this new idea will that save that solve that original pain, yes or no. And then you can go from there so that kind of traceability is something we've been looking for in a tool that mirror is, it sounds very simple it's not Excel or or it's

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definitely not dovetail or enjoy HQ I haven't even looked at any of those, but it definitely sold our needs for now.

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I'm in the academic field. There is Atlas Ti. I don't know if everyone knows about it.

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Atlas ti solve this problem in the academic research shield. My adding relational links to say nuggets, or say of this, what you've what you've been saying.

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So, if, if we have like 10 nuggets, and we don't, we have to click on them and know each one of them in each tag that it nuggets nuggets has the Atlas ti has a feature that adds this relational links, so it has it adds like this nuggets, explain this

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insight, and this nugget relates to this insight. And as you go, and in the information in your research. It finds a map, like a broad map of the foundations of your research and foundations of relationships.

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There is another tool which does this very well, which is obsidian. It's a new to which being used people have been using in anthropology, and it has this map, which basically does what you've been saying as well.

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So it's some tools for us to check out.

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Thank thanks for sharing that least appreciate it. I haven't heard of those tools, so it's always good to learn about new tools that are out there.

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Eric you have your hand up was that just to know. Okay, nine days I was from the last one yes okay just making sure, um, how about one more question or comment before we wrap up for the night.

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Anyone.

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Well this was my very first UX research strategy event, and this was pretty awesome. So, thank you. Jen, for moderating and to all the panelists and all.

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All of the attendees, this was really cool. I can't believe I didn't know about this recently where have I been.

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Well thank you tell your friends, we always want more and more peeps coming.

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Appreciate that. Well, I have a question. Yeah.

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When we finally get back to a normal life. if we ever get back to a normal life.

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Do you think you'll be having some of these still remotely, or will you go back to in person. So I know you guys are, Texas. Yeah, we're going to end everything.

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Once the pandemic is over.

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Right, with is the pandemic ever going to be over, totally kidding right like what's normal, who knows.

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That's a good question Elizabeth, I think, I mean we may have an occasional we've talked about this as a, as a group right we may have an occasional get together in Dallas because that's kind of our roots and, but not all of our board members or even

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in Dallas. So, but we're going to stay online our community is the is the world, its global now, and how could we like not include everybody right like, you know, everybody's part of the UX research strike community now, so I don't see it would be a rare

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occasion, if we had something in person. It would probably involve cocktails. Just because that's me, but I see us always going to have online virtual global events.

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Right, thank you. I look forward to more they that they're all great. Thanks Elizabeth, David, hand up. Yeah.

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So, first off, thank you so much for hosting this I mean this was amazing. I am brand new to UX developer here, but it was awesome, great getting feedback, and you know it's, as far as I thought it was really interesting about, you know, trying to catalog,

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all your insights is, and I guess the question I would have is.

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Have you ever had a situation where maybe your insights were just incorrect or maybe you just kind of want to say okay, you know, maybe their old maybe the historical that they don't know no longer apply because I mean reality is is you're going to be

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working those personas reworking, you know, having discovering new findings that might eventually kind of kick the old insights to be less important like is that I just curious how how you manage that sort of thing.

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That is the thing, right, especially on evaluative like user testing as the design changes and evolves some of those old test results are not applicable anymore.

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So I don't know how every company. I'm kind of the kind of mindset of, I don't want you to trash everything, but you also have to consider your viewing us point in time I think Lori was talking a little bit about that to the context around.

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You can't just be like, Oh, this, this green button worked really well. Well we haven't been branded with green first four years so I don't care what this before that doesn't apply here anymore right like be be real.

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So I mean, I'm not maybe funny or anything David I'm just saying like, I wouldn't throw anything away but also keep in mind if something's a few years old.

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And it's kind of like usability testing or something like that might be a little might be a little dated.

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Anybody else have a perspective on that or, David, do you have a follow up, or I was just I was just gonna say to that point to you know as a developer, You know sometimes there are bits and pieces of features that are left hanging around from, you know,

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two years ago, three years ago, five years ago, and having that historical context is really important because you try to trace back Hey look, this is, this is an area of feature where a bug was found or, hey, you know, maybe, maybe this, maybe there's

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a buck here but in reality is it really a bug maybe it was an art, maybe it was something from a previous design or previous feature that you know is, kind of, you know, maybe, technically not a bug like where did.

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Where was that historical context, you know, made and why, why was that even more important why was that decision made.

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We talked about that in our group. And I brought up the topic of corporate amnesia. So, I think somebody was saying, designers tend to think well you know I did the research and I implemented it so I don't need to document it.

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But what if that designer leads and what is in six months somebody's asking, Well, why was it done that way you know where's the backup, you know where's the data that's backing up that decision.

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Having that in a repository, you can go and find that and and see for yourself, why exactly something was done.

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Yeah, I also have something for that. So, we've tried Android, who found it cumbersome to take everything, and we use so a confluence catalog with all our research findings.

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and so that we haven't easily accessible source of the memory of what happened, and our company. And, I insist on always including.

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Who did we recruit you know what were the criteria so that people who look at the research in retrospect, can understand the context in which it was sitting.

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So that yeah so that they can even if things have changed, they can sort of see it from the description in the beginning, and and what I'm also doing is so for example we went under went to merge just recently.

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We recently had a high turnover of people, and I simply start the conversation again research that I presented two years ago, I say okay we have done this research, it wasn't this in this context, and it answers the following questions but now we have

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this other situation and I think that this raises these these questions, and let's explore them together, so I make sure that I give the context. So I mean I think it's great to have a repository where people can just look browse by themselves, but I

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still think it belongs in your context, and you have to keep the conversation going. So, research that just sort of sits there is sort of a little bit didn't.

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I think you have to make sure that people listen to it people understand it, and then also engage with the other people and learn from them. How has the situation changed you know if it's like you're your sister company, what is the context then tell

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that I can tell you how the research might fit into that scenario. So this is how we go about dealing with this this old research. Yeah, that's good point doors thanks much Linda, want to wrap this up.

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Yeah sure, I'll just go back to my saw about traceability.

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You know the consciousness of whatever I'm doing needs to lead to some kind of actionable item, and the idea to from our lead from your last session with CO creation.

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I think that any effort of research it, you can do a written report or some kind of artifact but the most effective thing is to workshop that as quickly after the research is conducted as possible, and synthesize that and have the outputs of that workshop

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be actionable items that are then traced back to your point about about the historical so it's like it needs to get traced backwards and forwards. Right.

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And if it's if it's traced right from the, from the, from the origins of it, then that's going to exist, and.

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And it also encourages the cultural shift from research being a box that you check and then you move on and just do whatever you're going to do to it being synthesized an integrated into the whole process, not only as a stream of artifacts, but as an

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integration of thought processes and thinking about what you've learned and what you're going to do about what you've learned within the whole team that's building the product or feature.

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Yeah, that's very good point.