



The 8 Essential Steps to Successful Research Democratization

If your company is committed to including user research consistently in your design, development and marketing processes, you probably need to conduct as much research as possible. Your mandate for insights democratization is clear: both hiring/affording the right UXR-trained professionals, and being able to sufficiently re-train those from other disciplines to fill in the gaps.

In speaking with more than 100 top enterprise companies, WEVO's learned what they've done to encourage improvements in customer experience, product ease, understanding and adoption; and even marketing campaigns. Herewith are the critical steps they've taken to enable the democratization of user research within their ranks.

1. Determine the right research problems for democratization.

The baseline need for successful democratization is to outline where and when to do it. Every company benefits from running more user studies. But these studies need to be valid, responsible and free of inadvertent bias, which can be issues when non-UXR experts create and run their own tests.

Typically, evaluative research (Does it work? Does it satisfy?) is the common place for democratization. This frees up expert researchers to spend more time doing the generative or formative research they were trained to do — and less time on rote, less complicated research tasks.



2. Make Research Ops the central command.

Teams that successfully democratize nearly all have a head of Research Ops who facilitates the democratization program, tool selection and training. The effective Research Ops head understands the inherent challenges, and develops and implements democratization in a way that preserves the reliability of research and makes it easy for non-researchers to conduct it.

3. Select the right tools for non-researchers to use.

The right tools provide the structures and guardrails to allow non-researchers to succeed. They're also simple and foolproof to protect against common mistakes, such as inadvertently biased questions or analysis, which thereby call the resulting insights into question.

4. Authorize non-researchers in the use of tools and good research basics.

Many successful insights-democratized teams or Research Ops roles run research boot camps where non-researchers learn common best practices like avoiding bias and defining research goals. Additionally, some "certify" non-researchers in use of the selected tools, meaning they are only allowed to use those tools after demonstrating specific knowledge or training. Or they assign would-be researchers weekly homework tasks that take them step-by-step through the creation of a study.



5. Assist with test contexts and goals.

Democratization does not mean handing the keys over to non-researchers and walking away. UXR teams must continue to provide oversight for other teams' research. Some companies make organizational chart changes to embed researchers with non-researcher teams to assist when needed. If that's not possible, they change the seating chart to put experienced researchers in the same general watercooler area. Or require UXR pros to staff regular "office hours" for non-researchers to attend via Zoom.

6. Provide standardized templates for each goal.

Researchers can template common research questions to help non-research teams run proper tests, depending on the goals. Better yet, they can implement a tool that offers standard questions for each research goal, so that nobody has to create or choose the questions themselves.

7. Share the work at all stages.

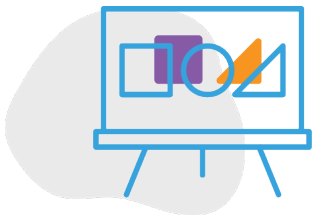
The results of most studies are shared with stakeholders upon completion. But successfully democratizing companies realize this doesn't go far enough. The people requesting the research should literally see how the process is conducted. This not only gives them greater appreciation for

the craft, but may make them reconsider making frivolous requests. It also has a way of ferreting out those conducting their own unauthorized research to learn by example.

In addition, many companies provide object lessons. One company makes moderated video sessions open to a wider audience; but the price of admission for those outside attendees is to take their own notes using the official UXR rubric. Another requires researchers to share all drafts of in-progress studies on a public Sharepoint for anyone to view.

Others adopt a practice from the world of medicine: “grand rounds,” where attending physicians, residents and interns discuss one case a week, either as a pre-intervention or retrospective. Here, researchers and non-researchers present a specific example on a monthly or weekly basis for the entire team to review, discuss and determine improvements or lessons for the next time.

8. Evangelize the wins.



Many successes of various sizes get swept up in the rapid streams of today's speed of business without a peep. Make sure the good work of democratization doesn't get lost. Research Ops and other interested parties need to make the end results of democratization regular topics of conversation or agenda items. This not only encourages the use of research, it normalizes it as a daily, regular process and cultural practice.



Like all worthwhile and transformative actions, democratization takes a little time and patience to implement and maintain. Deploying the right tools from the start makes the process infinitely easier and more successful. WEVO, the human-augmented AI user research platform, can help. With high-volume, deep feedback, proven methodology and industry/competitive benchmarks, it offers reliability, professional-level detail, and near effortless time savings for both experienced researchers and those new to the practice. Learn more at wevo.ai.