Chapter 18. Crafting the Story: Engaging Stakeholders in UX Research

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Abstract. Strong methods and reporting are only a part of the UX research process. Communication, UX evangelism, and stakeholder buy-in are just as important to deploying impactful research programs. This chapter describes strategic and logistical lessons that I have learned throughout my career as a user experience researcher. Throughout, I provide insight into what is top-of-mind as I think about research projects. I also present practical approaches to communication and interactions with stakeholders at different parts of the research process.

Stakeholders are key partners during the UX Research process, and throughout my career I have learned to work with many who occupy different roles and are responsible for different aspects of product development.[1] Some of these roles are close to my background as a researcher, such as data scientists, other researchers and analysts. Others may be more technical or represent strategic functions, such as engineers, product managers, and other business leaders. For each stakeholder type, I ultimately needed to craft a story throughout the research process that resonated with them, including why I was proposing certain research questions and approaches. I also needed to ensure that my research design and delivery were compelling enough to impact product decisions. Without impact, the research was just an exercise in doing research.

In this chapter, I describe principles and behaviors that I have learned in order to plan and deliver impactful research. Impact has different criteria based on where the product is in its lifecycle as well as people problems and business problems. For example, impact could take the form of evangelism as a stakeholder comes to understand how research informs product decision-making. Or, impact could be aligning different stakeholder perspectives into a cohesive research objective. When I think about impact, I ask myself: how would the product (or understanding of the product) be different if research was not a part of this project? To that end, below are strategic and logistic principles that I have adopted to drive impact with stakeholders:

1. Define and share with stakeholders how research impacts product strategically and tactically. In order to support this objective, I suggest that

1. The opinions within this chapter are my own, and represent lessons learned from my own experiences throughout my career.

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user experience researchers (UXRs) need to be visible to many types of stakeholders. Sometimes this requires carving a space to have a seat at the table. Additionally, researchers may need to step out of their comfort zone and initiate communication with other functions (e.g., engineering, product leaders)

2. Build into your roadmaps milestones, planning sessions and syncs with stakeholders. This lesson is more procedural. The objective here is to manage stakeholder expectations through constant, clear communication.

I discuss each in the following sections.

Lesson 1: Define and Share with Stakeholders How Research Impacts Product Strategically and Tactically

There are two types of research that UXRs might engage in depending on their organization's structure (i.e., the logistical way that research is completed, including the role and scope of research). The first category is strategic research. This research looks forward and uncovers foundational principles or patterns in user thinking or behaviors. These insights inform product strategic visions because they help us understand what our users are like, what motivates them, what challenges they face, and what larger objectives they have (e.g., business objectives). The second category of research is tactical. One objective of tactical research is to uncover or fix problems within the current product (e.g., usability testing). Other objectives might include testing concepts or benchmarking designs. Tactical research is typically iterative, and is framed by how the product is expected to change over some timeframe (e.g., three or six months).

Most academic programs teach how to plan and conduct tactical research. Students learn to do usability testing, heuristic evaluations, concept testing, wireframing, focus groups, and many other methods that evaluate product features in relation to expected user tasks. However, what I found to be an area of personal growth was to think beyond current product features to shape what a product could be in the future. In order to make this leap, it was important to hear other perspectives outside of research.

Ask to Attend Meetings, Sprints, and Brainstorms Where Stakeholders are Thinking About Future Directions

These conversations are where future vision comes into focus. They help me (as a UXR) to understand the vision for the software, and position research in the strategic space with different types of stakeholders. For example, product managers might drive the overall arc of the product because of their interactions with leadership. Engineers and data scientists might be responsible for analyzing behavioral data (who, how, and where). In my experience, the superpower of UX

Research is providing insights into user mental models, beliefs, needs, concerns, and experiences (who, how, why, and what). The goal is to understand business needs and see how they align with user needs. One method to carve out space in these meetings is to provide lightweight input in the moment that affirms, challenges or raises questions with regards to user needs. By providing feedback in the moment, stakeholders can see the contribution of the researcher without having to wait for reports or larger research studies.

Lesson 2: Build into Your Roadmaps Milestones, Planning Sessions and Syncs with Stakeholders

Research is a blocker is a phrase that I actively strategize against through careful planning and clear, constant communication with stakeholders. A blocker during a project is a pain point that stops forward movement. For example, the inability to recruit for a study is a blocker; you can't do interviews without participants. I have used my meetings with stakeholders to understand their mental model for a blocker and empathize with their position, such as the need to implement product changes. Most often, the concern was that research would slow things down. Less mature UX environments might even see researchers as those people who only raise problems without providing actionable solutions. Qualitative research, in particular, has been accused of taking too much time to complete while the findings are not generalizable. Therefore, product teams and stakeholders might gravitate to quantitative research because it fits into their mental model regarding metrics, key product indicators or key quality indicators. And, depending on the industry/culture of the organization there might be a review process (e.g., IRB) before research can launch.

There are times when I have felt behind the ball with staying in step with product teams and stakeholder demands. My solution has been proactive communication in my roadmaps about the scope of the work I am planning, the timelines for this work, and documenting shifting priorities. This process has looked different across my career (e.g., charters, mural boards, roadmaps), but one practice has been consistent: create milestones for each stage of research. With regards to impact, research output takes center stage. My next suggestion is:

Be Clear About What stakeholders can expect at the end of research

Output for research can take several forms, such as formal reports, research papers, slide decks, executive summaries of findings and recommendations, or even thought pieces that synthesize and contextualize a larger body of research. Regardless, prime stakeholders by being clear about what your plans are. In the roadmap, build in time to get feedback on the output. Be clear about how you expect the output (e.g., recommendations) to impact your team's goals.

Be Strategic About Which Stakeholders You Engage with the Most on a Project by Project Basis

Identify which stakeholders are the most important for a given project in relation to research. Then, plan regular meetings with these stakeholders. My argument is simple: there is only so much time to meet with people when a researcher also has to plan and execute research. Maximize your impact by speaking with the right people who make key decisions during development. For some projects, you might need an experimental environment because the product is in the experimental stage, so a regular check-in with engineering is essential to sync about their findings and decisions from these experiments. For a tactical project, the output might be usability findings or concept testing insights. Therefore, a regular sync with design is advantageous to understand their perspective. Or perhaps, a new process or product is being developed. In this respect, it might be necessary to sync with data science, subject matter experts (e.g., managers), or other leaders. I suggest to use these meetings to get updates about any changes to business or product objectives. Use this information to prioritize (or de-prioritize) proposed and on-going projects.

Use Syncs and Other Milestones to Educate Stakeholders About UX Research Over Time

Throughout my career, I have worked with stakeholders who know about UX Research and are excited to have us on the Team. I have also worked with stakeholders who didn't know what a UXR does, but wanted to learn. And, I have also worked with resistant stakeholders who did not think that research was valuable. So, I have adopted the practice of educating stakeholders about UX Research in bite-sized chunks over time. This reduces their cognitive load, and allows me to point to recent examples of how UX Research was valuable or explain the research process in real-time.

Now, some researchers might argue that our job is to plan, execute, and report out on research. Why should we have to "defend" or "educate" others about our research? Who has time for that? Over time, I have learned to evangelize research while empathizing with my stakeholders. My argument is that research can seem like a mysterious process. We are knowledgeable about a wide array of methods that have strengths and weaknesses. We strategically decide how to execute research in a way that maximizes resources without compromising data integrity. We have our own jargon and come from many different academic disciples. We have insight into our process, but why would product teams know our culture and understand our decision-making unless we invite them in?

I have learned to invite stakeholders behind the curtain over time through a three-part approach: provide rationales, seek alignment, and demonstrate

research. My goal is to reinforce that research is a partner to product, and to build authentic relationships with stakeholders. I discuss each part in turn.

1. **Provide rationale.** Create documents or reserve a few minutes during regular meetings with key stakeholders to answer questions about methodological decisions. I have found that a detailed research plan provides stakeholders with insight into why the research is being done with a particular sample, and why certain questions are being asked (or not). Throughout the research process, the research plan can be referenced during meetings. A more difficult story to explain is why one method (or type of data) is better to answer research questions. In these situations, I have presented a table to stakeholders that breaks down each research question, the pros and cons of using a given method to answer those questions, and what type of data we can reasonably expect to collect using each method. For example, if we decide to collect interview data to answer a research question, then we can reasonably expect data that is detailed and answers why and how users are interacting with a product. But, if the stakeholders require more large-scale insights to feel confident with changing directions, then we need to choose another approach to get data to support that decision. Similar to a research brief, the table becomes a tool to facilitate conversations at different phases of the research project.
2. **Consistently seek and confirm alignment.** The primary technique that I have found to quickly ensure alignment is a kick-off meeting where the research brief is presented to key stakeholders. The goal of the kick-off is to carve out a space to communicate the proposed value of the research, to be transparent about methods and timelines, and to clarify the role of each stakeholder in the process. Additionally, I might ask stakeholders for any relevant milestones in their roadmap that might impact product direction over the course of the research project so that I can check-in and confirm that there are no major changes that could impact the value of the research.
3. **Demonstrate research.** I have learned that some stakeholders better understand what research can do once they see it in action. My primary approach is to invite stakeholders to research sessions with users as well as pilot sessions that I might hold with other researchers. After these sessions, we all debrief about what we saw. During the course of the research and in future interactions, I can refer back to what the stakeholders saw and experienced in order to illustrate key datapoints or to provide context to a story that I am telling. An additional benefit of inviting stakeholders to pilot sessions is that it provides a contextualized view into how we administer sessions. One of my fondest memories is when a product manager told me that they had no idea about everything that goes into

planning and executing research. They continued that they didn't realize, for example, how I actively planned for worst-case scenarios to ensure that we got meaningful data. This PM became one of the most vocal champions of UX Research.

Conclusion

This chapter describes strategic and logistic approaches to building stakeholder relationships over time in order to maximize the impact of research programs. As researchers, we are methodological experts. But equally important to impacting product direction are persuasion, communication and stakeholder education. The approaches that I have detailed have worked for me, but I acknowledge that each researcher works within different organizational cultures. I encourage each researcher to approach these principles as inspiration, and apply the ones that resonate to their teaching and research practice.