



Operational Excellence:

An outcome-driven approach for
UX research

Genny Mangum, Lauren Spohr, & Lorenzo Torrez

October 30th 2020

Introductions



Genny Mangum
Sr. UX Researcher



Lauren Spohr
Principal UX Researcher



Lorenzo Torrez
Principal UX Researcher

Zillow Experience Research

- 22 researchers spanning multiple LOBs
- Diverse skill sets & backgrounds

What we're covering today

- The need for UX research operational excellence
- How we addressed this at Zillow by creating an outcome-focused framework
- How we've used our framework
- How we *hope* to use our framework
- Key takeaways

What is UX research
operational excellence?

Breaking down operational excellence

Process

User-centric

High quality

Efficiency

Rigor

Individual

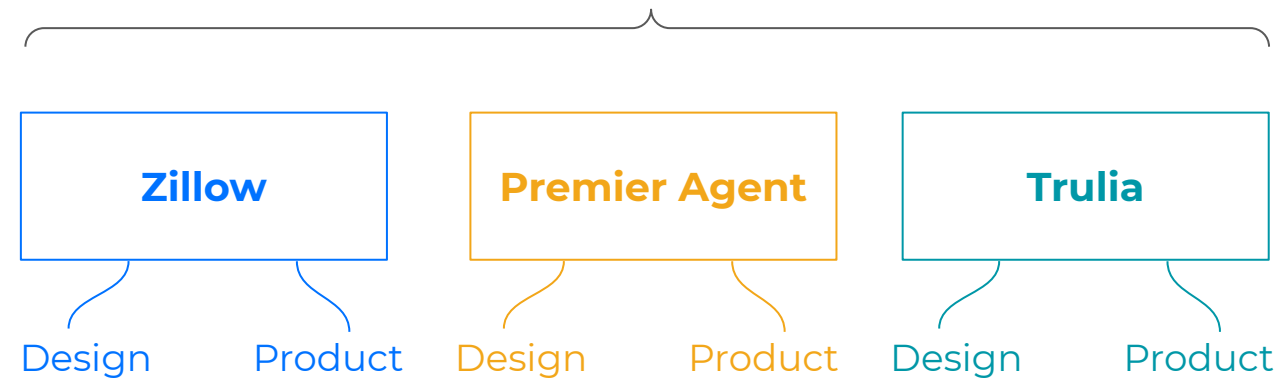
Team

Organization

How can our UX research discipline be operationally excellent at Zillow Group?

Fall 2019

UX research discipline @ Zillow Group



What does being operationally excellent mean for us?

That was our mission to figure out

Our approach to defining
operational excellence

We used an outcome-driven approach as our foundation

What is an outcome-driven approach?

It's an approach for defining and differentiating products by articulating and operationalizing the user's end state and focusing on their needs and what success could look like for getting there

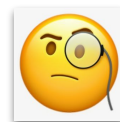
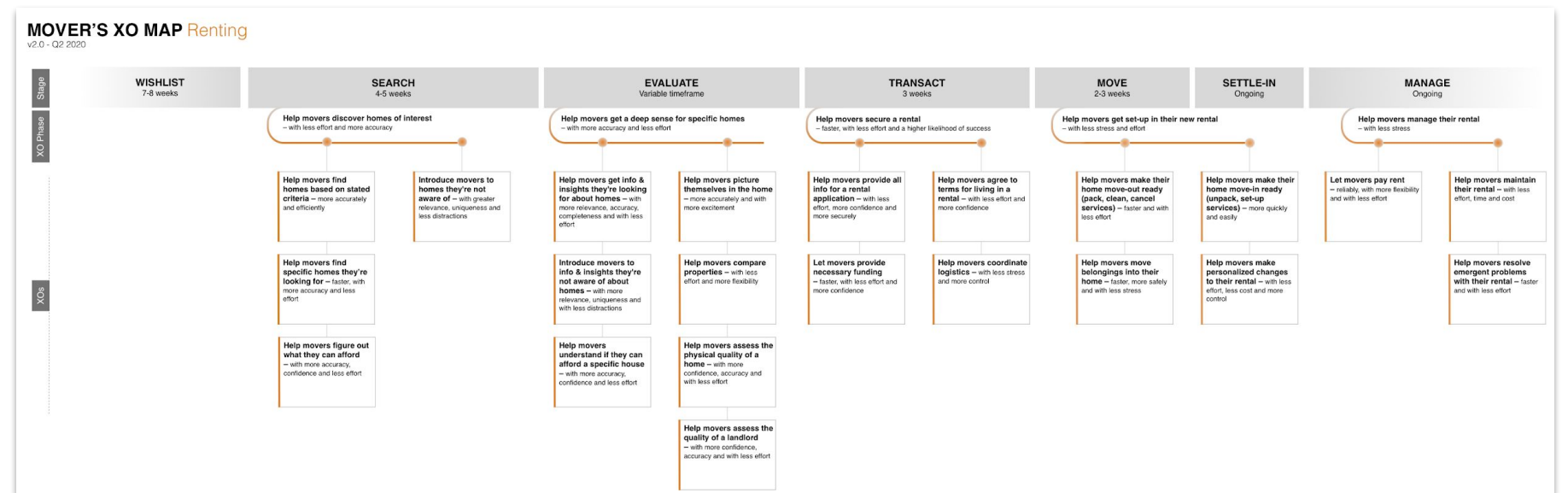
aka solving for the most important user problems (or jobs)

who + job + measure of success

We've been championing an outcome-driven approach for defining and executing product operational excellence

Zillow...

Help movers find homes based on stated criteria – more accurately and efficiently



Could this work for our use case as well?

Applying this to UX research

UX researcher + **???** + **???** = **designing for UX research operational excellence**

who + **job** + **measure of success** = **designing for product excellence**

Benefits of an outcome-driven approach

Inherently solution agnostic

- Build a methodological and org-agnostic foundation to work from
- Apply it to numerous team needs

Scoped and measurable

- Use these as 'units of analysis' to gauge our success and progress

Familiar to the majority of our research practitioners (XOs)

- Use this as a shared team foundation with minimal onboarding

Creating a UX researcher outcome map

- Core team aligned on an outcome-driven framework as solution to defining what it means to be “operationally excellent”
- One member of core team developed a draft framework
- UX Research Offsite used to further build & refine the framework
 1. Align
 2. Ideate
 3. Build
 4. Share, revise & align

1. Align on phases of UX research framework



Feedback on high-level phases

- Do these capture what we as researchers do at a high level?
- Anything missing?

2. Ideate tasks by phases

Team activity: independent brainstorming via post-its

- Brainstorm “jobs” for each stage: ***what are common jobs or tasks that you as a researcher go through at each phase?***
 - Frame
 - Construct
 - Execute
 - Analyze
 - Inspire

Post-its: “What are you doing?” + “Why are you doing it?”



WHAT: Reach out to additional stakeholders to gather questions.

WHY: Ensure my research is broadly applicable.

WHAT: Capture quotes from sessions.

WHY: Put into presentation to make it more persuasive and clear.

WHAT: Email report to broad distribution list.

WHY: Ensure other teams know what research has been done.

3. Build outcomes

Team activity: teams of 2 synthesizing content (1 phase per team)

- Affinitize post-its
- Write “final” outcomes, referencing:
 - Post-it's
 - Draft outcomes
- Tape each outcome on the wall



4. Share, revise & align

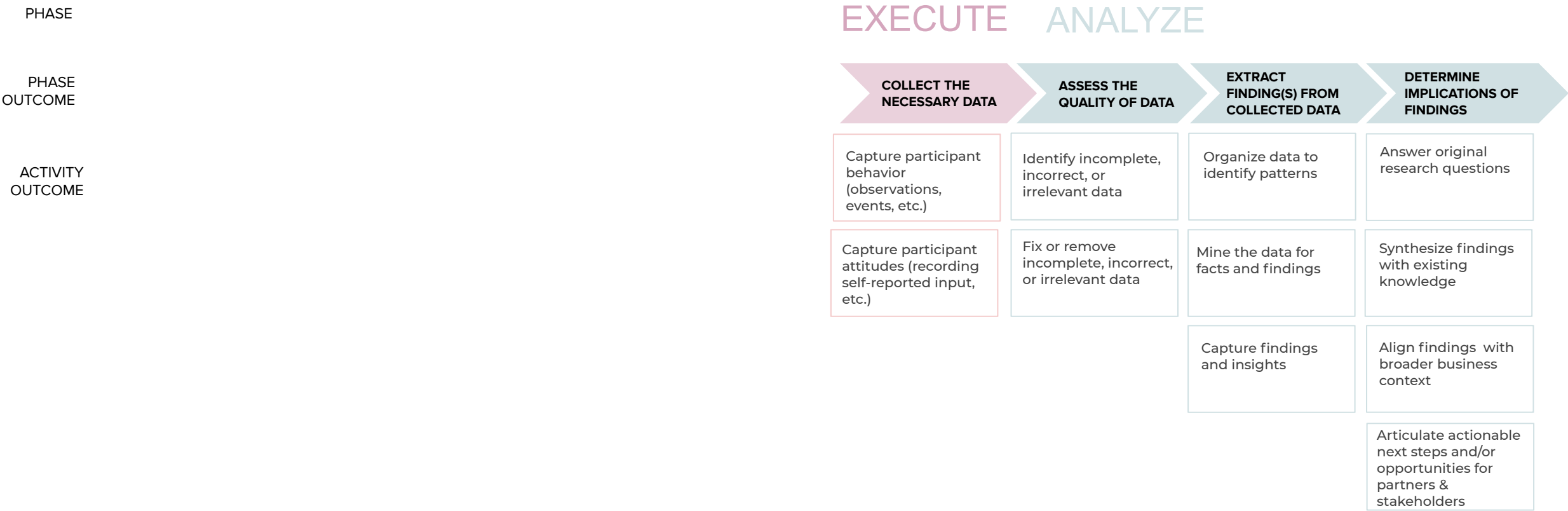
Team Activity: each group presents their Phase & granular outcomes



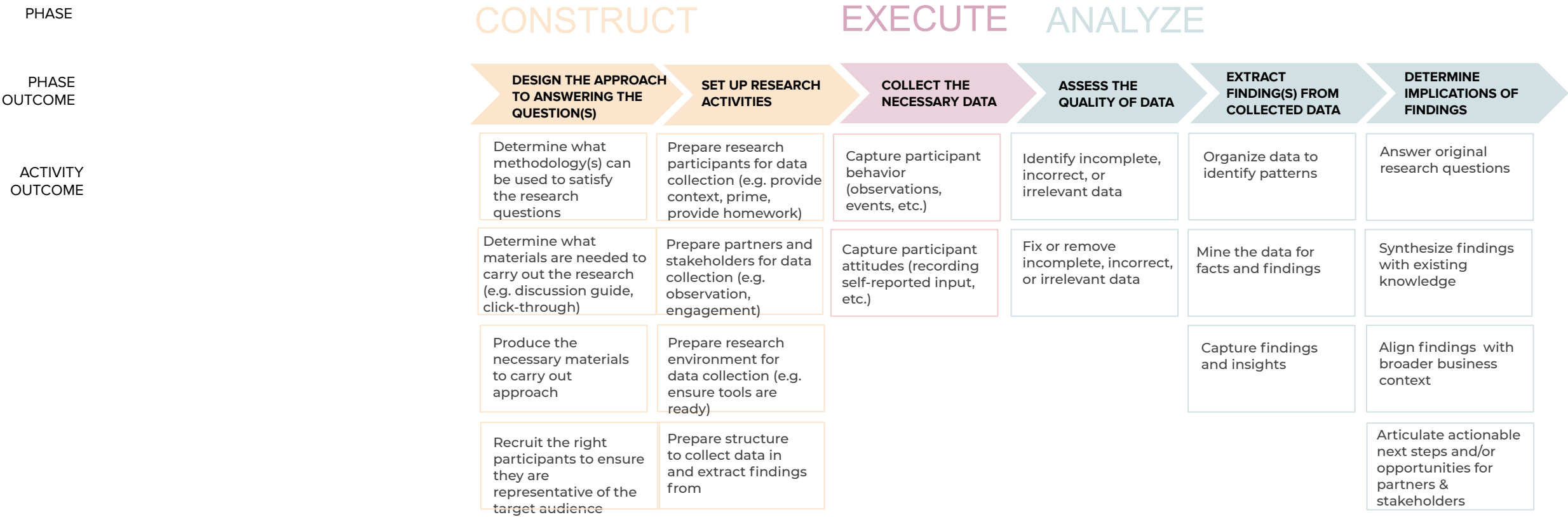
UX Researcher Framework

PHASE	EXECUTE
PHASE OUTCOME	<div>COLLECT THE NECESSARY DATA</div>
ACTIVITY OUTCOME	<div>Capture participant behavior (observations, events, etc.)</div> <div>Capture participant attitudes (recording self-reported input, etc.)</div>

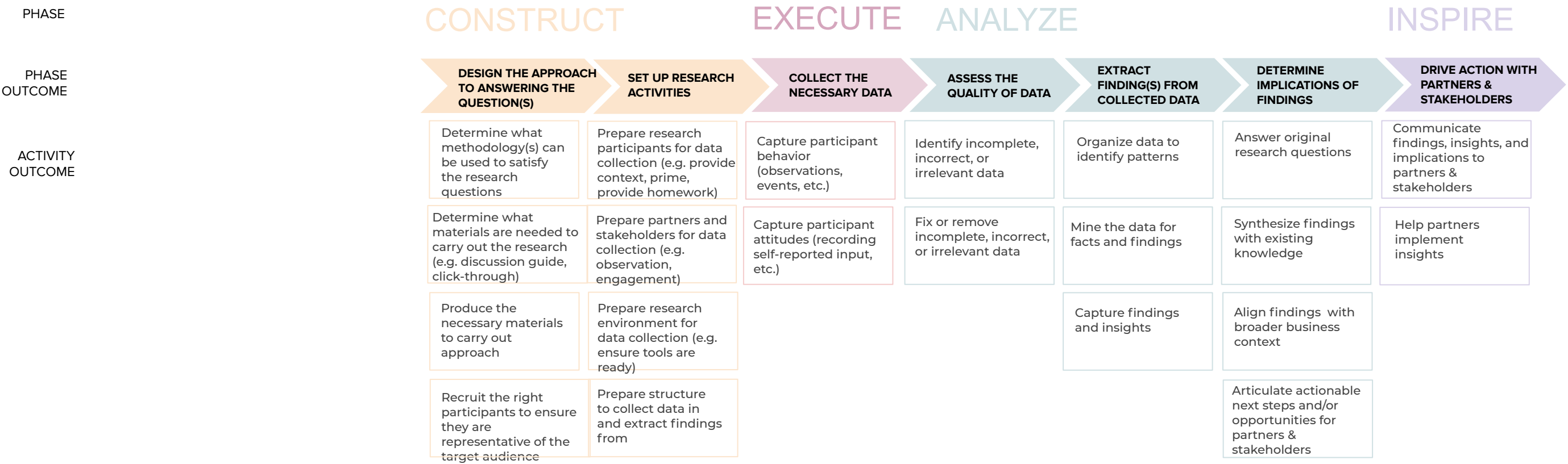
UX Researcher Framework



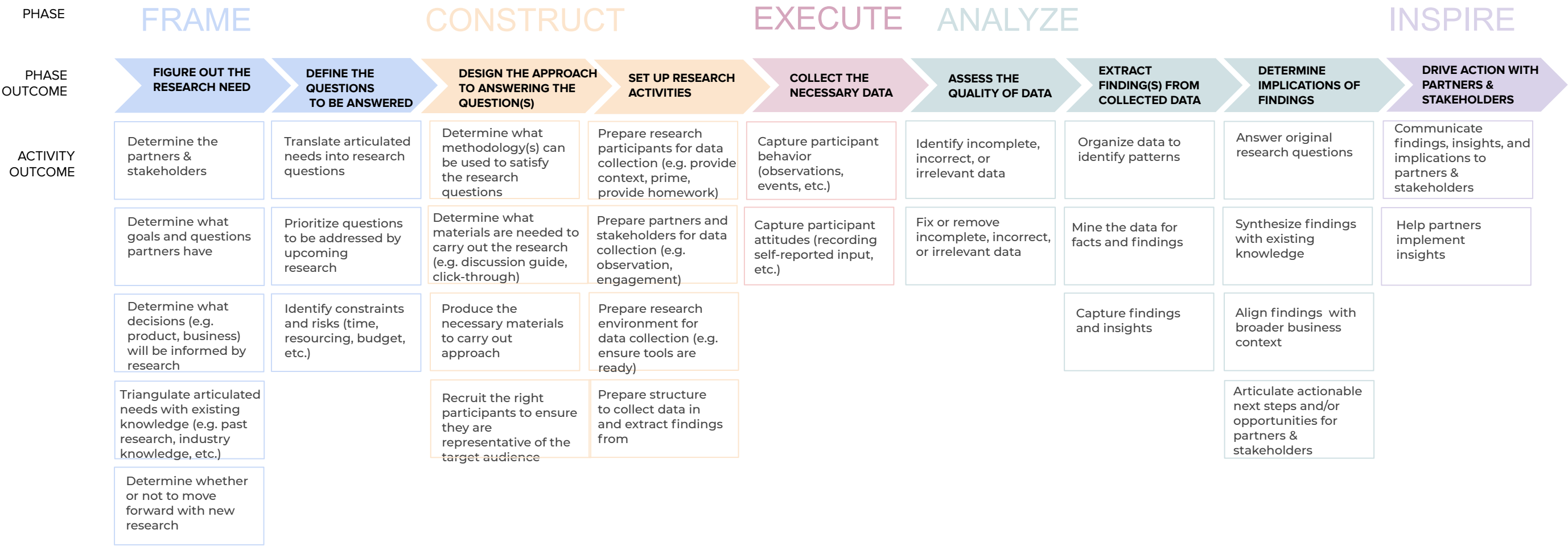
UX Research Framework



UX Research Framework



UX Researcher Framework



KEY ENABLERS

ORGANIZATIONAL INFLUENCE		TECHNICAL COMPETENCE		PRACTICAL SKILLS		OPERATIONAL EXCELLENCE		OTHER
Strengthen relationships with stakeholders & partners	Instill confidence in stakeholders	Stay up to date on UX/research trends	Develop skill with a breadth of methodologies	Coordinate time with others	Communicate intentionally with others	Adhere to regulations or standards that relate to my work	Ensure that others (researchers, partners & stakeholders) can find insights	Stay up to date on real-estate and industry trends
Align/drive consensus with stakeholders & partners	Stay up to date on ZG news & trends	Develop deep expertise with a particular methodology		Review the work of others	Have a sense of work-life balance	Find something that already exists (e.g. past research)		

How we've used our
outcome-focused framework
& future applications

Framework applications

1. Measuring quality
2. Interview guide/question bank
3. Team skills assessment
4. Future applications

1. Measuring Quality

Goals

Develop an approach to set a bar for research quality on our team

High level questions:

- How can we create a quality bar for high quality research?
- How do we ensure that we are maintaining quality in our practice?
- How do we work to improve quality on the team?

1. Measuring Quality

Process

- A. Identify what quality research looks like for each phase of the framework**
 - Team workshops to gather input on what high quality looks like for each phase of the journey

1. Measuring Quality

Process

B. Determine what it means to be successful for each of the phases in our framework

DESIGN THE APPROACH TO ANSWERING THE QUESTION(S)

Determine what type of data (i.e. behavioral, attitudinal) is needed to answer the question(s)

Determine who the target population is

Determine how to recruit the target population

Determine how much time is needed to answer research question(s)

Determine what existing UXR methodologies can be leveraged, if any

Determine what stimuli are needed to facilitate the research

Determine what tools can be used to facilitate conducting the research

How will we know we are successful:

- We are confident we have selected the most appropriate method or mix of methods to answer the questions we are trying to answer
- We have done due diligence and reviewed previous research and/or consulted with experts/leads on the team
- We are able to replicate the study
- Passes peer review

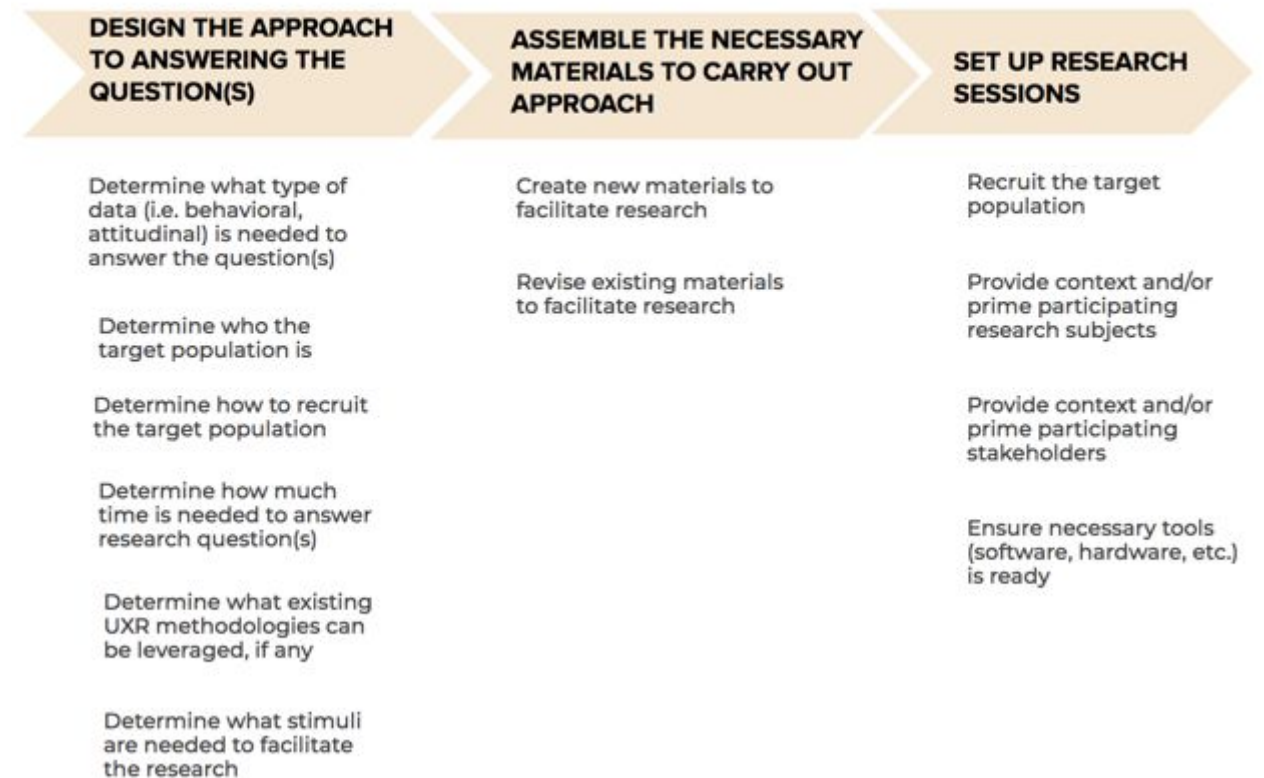
1. Measuring Quality

Process

C. Gather/Create/Organize: Guidelines and Best practices, checklists, documents

- What activities, templates, guidelines, processes and/or examples do we have of high quality for each phase
- Which would need to be created in order to achieve high quality

CONSTRUCT



One example was to collect examples that we as a team had for study plans for different types of studies that we felt represented the criteria for high quality

1. Measuring Quality

Process

D. Ensure these best practices, guidelines, templates live in an easily accessed, shared database

- Team Drive
- Onboarding guides for new researchers

E. Ensure we have processes in place to set standards with team and maintain high quality over time

- Ensure all study plans are reviewed with peers prior to launch
- This can be more organically in peer meetings
- Should be with Senior or Manager level

1. Measuring Quality

Output and Next steps

Continue to activate the framework

- Identify other processes that can serve to facilitate high quality on our team
- Explore other ways in which we can maintain high quality

2. Interview guide/question bank

Goal

Increase the consistency, equitableness, objectivity and efficiency of our team (i.e. employee) recruitment process

High Level Questions

- How can we be more **consistent** in the questions we ask research candidates?
- How can we be more **equitable & objective** in the criteria we use for evaluating candidates?
- How can we be more **efficient** in our hiring practices by creating a bank of questions that managers can select from that illuminate the candidates experience and abilities in the core competencies?

2. Interview guide/question bank

We'll know we're successful when...

Hiring manager can open a P3 role, go to the P3 folder, find the right set of interview resources, duplicate the templates (interview plan, questions), plan the interview, and share the plan with co-interviewers.

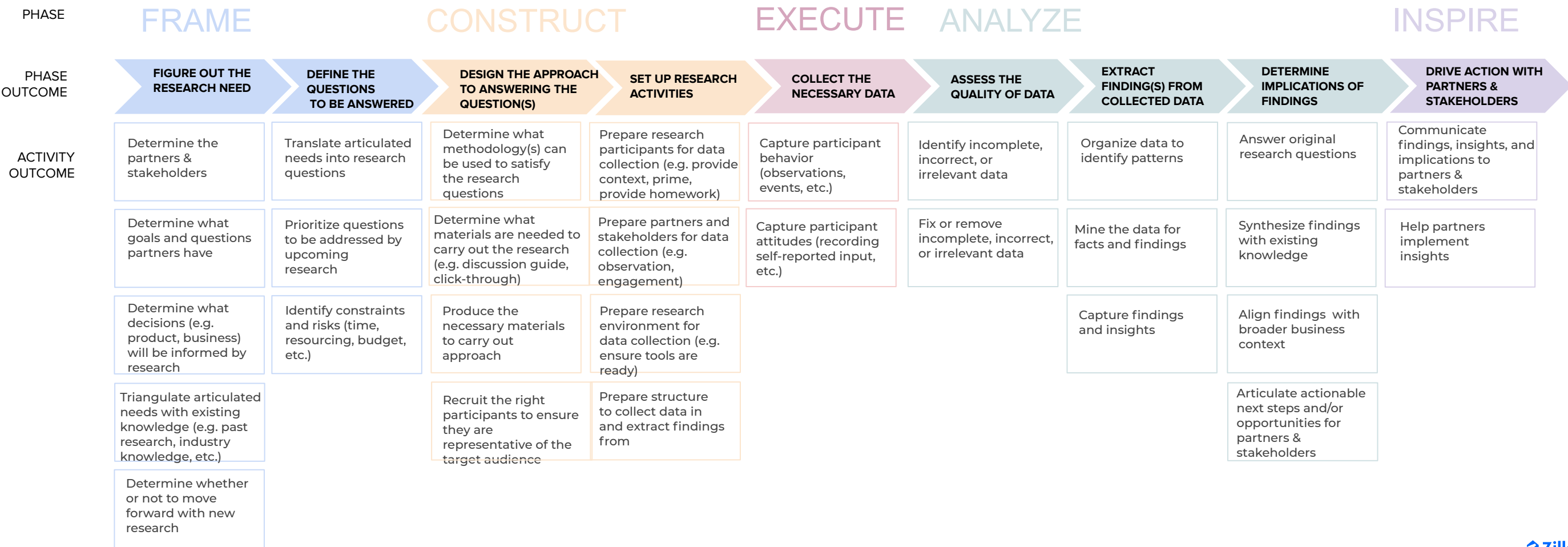
Ideally, hiring manager could spend at most 1 hour prepping materials for a full interview loop.

2. Interview guide/question bank

Process

1. Gather and synthesize common questions we ask during interviews

- Collected all questions that our team have asked candidates
- Sifted through UX forums, sites to find other questions that are asked during UX interviews

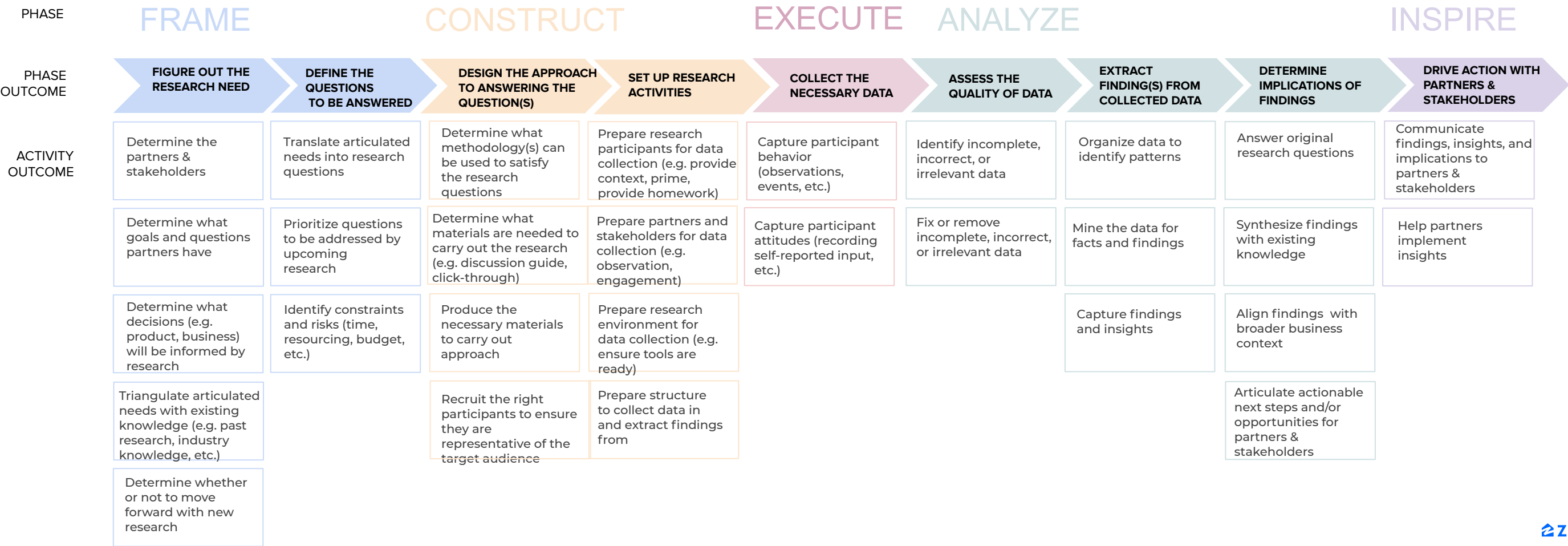


2. Interview guide/question bank

Process

2. Aligned these with each phase of the Research Outcome Framework

- Overlay of questions onto the journey map
- Allowed us to see trends, themes and gaps in our question coverage



2. Interview guide/question bank

Process

3. Determined leveling for each question

- Aligned with design team leveling guidelines/expectation and company core competencies
- Integrated these into our question set for consistency

4. Worked with team leadership to vet questions, align on leveling

5. We will be activating the question bank in our upcoming candidate interviews

2. Interview guide/question bank

Output and Next steps

Start using the question bank as we interview candidates and evolve it through usage

- Addition/deletion of questions
- Refinement of our leveling criteria
- See what works and doesn't work

3. Team skills assessment

Goals

Understand where the overall team stood as it relates to the UX researcher framework

Process

Anonymous survey, giving ratings of 1 - 5 on the following...

- **Competence:** your level of ability
- **Motivation:** motivation to grow your competence
- **Confidence:** confidence you can grow given current opportunities

FRAME: Figure out the research need

Please provide a rating of 1-5 for the following Product Researcher XOs:

"Determine the partners & stakeholders" *

	1 - Very Low/ None	2 - Moderately Low	3 - Neutral	4 - Moderately High	5 - Very High
COMPETENCE: your level of ability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
MOTIVATION: motivation to grow your competence	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
CONFIDENCE: confidence you can grow given current opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. Team skills assessment

Output

Report summarizing overall trends, by Total as well as Individual Contributors vs. Managers

Takeaways

- **Competency:** highest in qualitative research, particularly in the setup phases. Lowest = quant, assessing quality of data
- **Motivation:** most motivated to increase organizational influence and grow practical skills. Lowest = improve in areas where we rate ourselves as pretty competent + setting up quant research
- **Confidence:** most confident we can continue to grow in areas where we are motivated to grow, including organizational influence and driving action with stakeholders and partners. Lowest = areas where we feel least competent, particularly quant areas

Future applications

Mentoring through identifying “skills masters”

Build upon the skills assessment match highly skilled practitioners with those seeking to grow that particular skill

Setting goals and measuring progress

Use skills assessment to drive individual goal-making. Identify team gaps and plan deliberate activities to grow particular skills

Key learnings

What worked

Involving the team

Creating a draft enabled us to not start from scratch as a group. Enabling the team to refine and stress-test the framework ensured shared ownership

Identifying potential uses upfront

Having a strong sense of how you can use the framework helps ensure there is momentum post-development

Incorporating with other often-used frameworks

Finding synergies and connection points with other frameworks (e.g., goal development and skills by level) helps with adoption

Opportunities for improvement

Hold core team accountable

Need to be deliberate and persistent with milestones and deliverables

Further activation

Have a plan for how to come up with additional uses (otherwise it risks sitting on the shelf)

Change management

Re-orgs, new team members, etc. How do we maintain and grow our shared knowledge?

Additional opportunities: sharing & reconciling with other research disciplines at Zillow

Better educate colleagues on what we do (and don't do)

Could help us be involved earlier and more often in various initiatives

Better understand what other related disciplines do

Could help us make sense of the types of questions and disciplinary bounds of market research, data science, and behavioral economics relative to our framework

Help Zillow understand how to best leverage each of its research related disciplines in isolation and together

Could help facilitate operational excellence at a larger scale and encourage top-down action to better align disciplines and set them up for more organic collaboration

Final thoughts

The exercise of **building a shared understanding** of what you, your team and similar practitioners in your organization do is valuable in of itself

This dialogue can...

- break down misconceptions
- illuminate similarities
- set you up to tackle a variety of team initiatives

How you build this understanding & how you ultimately use it is up to you!

Thank You!

Questions?

Interested in joining us? See our current opportunities at [zillow.com/careers](https://www.zillow.com/careers)