# **Zillow**

# Operational Excellence:

An outcome-driven approach for UX research

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# **Introductions**



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#### **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 Rigor Efficiency

Individual Team Organization

# How can our UX research discipline be operationally excellent at 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

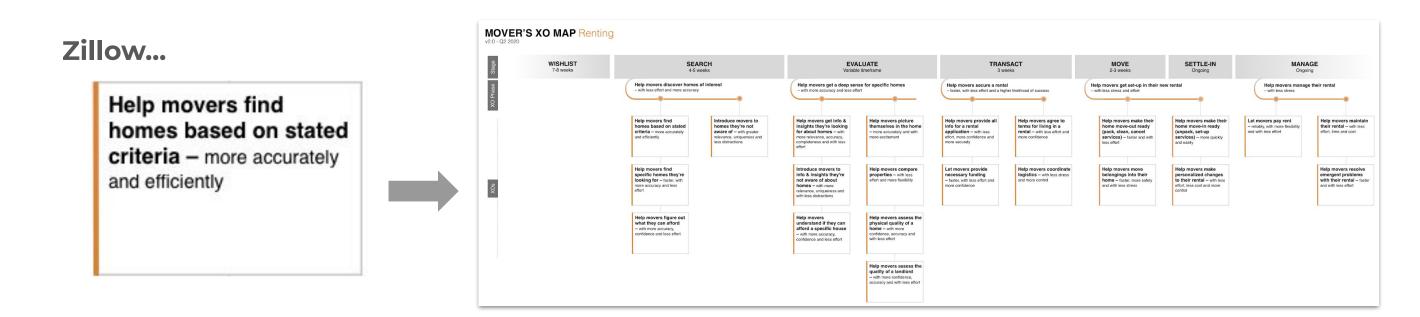
# What is an outcome-driven approach?

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





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

**EXECUTE** ANALYZE PHASE FRAME INSPIRE **DEFINE THE DESIGN THE APPROACH ASSEMBLE THE NECESSARY** DETERMINE RESEARCH NEED **QUESTIONS** TO ANSWERING THE **COLLECT THE EXTRACT FINDINGS(S) DRIVE ACTION WITH SET UP RESEARCH** MATERIALS TO CARRY OUT ...and beyond? IMPLICATIONS FOR OUTCOME **STAKEHOLDERS** TO BE ANSWERED QUESTION(S) **NECESSARY DATA** FROM COLLECTED DATA **SESSIONS APPROACH STAKEHOLDERS** 

# 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?"

PHASE FRAME

#### CONSTRUCT

**EXECUTE ANALYZE** 

**INSPIRE** 

PHASE OUTCOME RESEARCH NEED (IF ANY) DEFINE THE QUESTIONS TO BE ANSWERED TO ANSWERING THE QUESTION(S)

ASSEMBLE THE NECESSARY
MATERIALS TO CARRY OUT
APPROACH

SET UP RESEARCH SESSIONS COLLECT THE NECESSARY DATA

EXTRACT FINDINGS(S)
FROM COLLECTED DATA

DETERMINE
IMPLICATIONS FOR
STAKEHOLDERS

DRIVE ACTION WITH STAKEHOLDERS

...and beyond?

**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

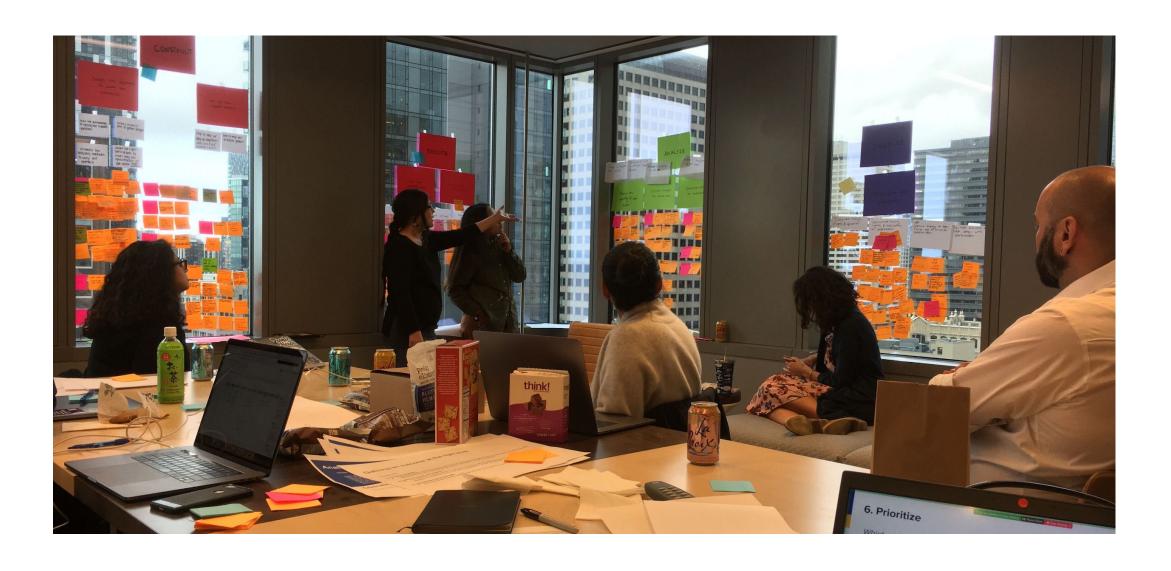
# Team activity: teams of 2 synthesizing content (1 phase per team)

- 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



PHASE

PHASE OUTCOME

> ACTIVITY OUTCOME

#### **EXECUTE**

COLLECT THE NECESSARY DATA

Capture participant behavior (observations, events, etc.)

Capture participant attitudes (recording self-reported input, etc.)

PHASE

PHASE OUTCOME

> ACTIVITY OUTCOME

#### EXECUTE ANALYZE

#### COLLECT THE NECESSARY DATA

#### ASSESS THE QUALITY OF DATA

#### EXTRACT FINDING(S) FROM COLLECTED DATA

DETERMINE IMPLICATIONS OF FINDINGS

Capture participant behavior (observations, events, etc.)

Identify incomplete, incorrect, or irrelevant data

Organize data to identify patterns

Answer original research questions

Capture participant attitudes (recording self-reported input, etc.)

Fix or remove incomplete, incorrect, or irrelevant data

Mine the data for facts and findings

Synthesize findings with existing knowledge

Capture findings and insights

Align findings with broader business context

Articulate actionable next steps and/or opportunities for partners & stakeholders

**PHASE** 

PHASE OUTCOME

> **ACTIVITY** OUTCOME

#### EXECUTE ANALYZE

DESIGN THE APPROACH TO ANSWERING THE QUESTION(S)

SET UP RESEARCH **ACTIVITIES** 

Prepare research

COLLECT THE **NECESSARY DATA**  **ASSESS THE QUALITY OF DATA** 

Identify incomplete,

incorrect, or

irrelevant data

**EXTRACT** FINDING(S) FROM **COLLECTED DATA**  **DETERMINE IMPLICATIONS OF FINDINGS** 

Determine what methodology(s) can be used to satisfy the research questions

materials are needed to

carry out the research

(e.g. discussion guide,

necessary materials

Recruit the right

target audience

Determine what

click-through)

Produce the

to carry out

approach

they are

participants for data collection (e.g. provide context, prime, provide homework)

Prepare partners and stakeholders for data collection (e.g. observation, engagement)

Capture participant attitudes (recording self-reported input, etc.)

Prepare research environment for data collection (e.g. ensure tools are

Prepare structure to collect data in participants to ensure and extract findings from representative of the

ready)

Capture participant behavior (observations, events, etc.)

> Fix or remove incomplete, incorrect, or irrelevant data

Organize data to identify patterns

Answer original research questions

Mine the data for facts and findings Synthesize findings with existing knowledge

Capture findings and insights

Align findings with broader business context

Articulate actionable next steps and/or opportunities for partners & stakeholders

**PHASE** 

PHASE OUTCOME

**ACTIVITY** OUTCOME

#### EXECUTE ANALYZE

#### **INSPIRE**

#### **DESIGN THE APPROACH** TO ANSWERING THE QUESTION(S)

SET UP RESEARCH **ACTIVITIES** 

COLLECT THE **NECESSARY DATA** 

**ASSESS THE QUALITY OF DATA** 

**EXTRACT** FINDING(S) FROM **COLLECTED DATA**  **DETERMINE IMPLICATIONS OF FINDINGS** 

**DRIVE ACTION WITH PARTNERS & STAKEHOLDERS** 

Determine what methodology(s) can be used to satisfy the research questions

participants for data collection (e.g. provide context, prime, provide homework)

Prepare research

Capture participant behavior (observations, events, etc.)

Capture participant

attitudes (recording

self-reported input,

etc.)

Fix or remove incomplete, incorrect, or irrelevant data

Identify incomplete,

incorrect, or

irrelevant data

Organize data to identify patterns

Answer original research questions

Communicate findings, insights, and implications to partners & stakeholders

Determine what materials are needed to carry out the research (e.g. discussion guide, click-through)

necessary materials

Produce the

to carry out

approach

Prepare partners and stakeholders for data collection (e.g. observation, engagement)

Prepare research environment for data collection (e.g. ensure tools are

Recruit the right participants to ensure they are representative of the target audience

ready) Prepare structure to collect data in and extract findings

from

Mine the data for facts and findings Synthesize findings with existing knowledge

Help partners implement insights

Capture findings and insights

Align findings with broader business context

Articulate actionable next steps and/or opportunities for partners & stakeholders

EXECUTE ANALYZE **PHASE** FRAME INSPIRE **EXTRACT DETERMINE DRIVE ACTION WITH** FIGURE OUT THE **DEFINE THE DESIGN THE APPROACH** PHASE SET UP RESEARCH COLLECT THE **ASSESS THE** FINDING(S) FROM **IMPLICATIONS OF PARTNERS & RESEARCH NEED QUESTIONS** TO ANSWERING THE OUTCOME **ACTIVITIES NECESSARY DATA QUALITY OF DATA COLLECTED DATA FINDINGS STAKEHOLDERS** TO BE ANSWERED QUESTION(S) Communicate Determine what Prepare research Answer original Determine the Translate articulated Capture participant Organize data to findings, insights, and Identify incomplete, methodology(s) can participants for data research questions **ACTIVITY** needs into research behavior partners & incorrect, or identify patterns implications to be used to satisfy collection (e.g. provide OUTCOME stakeholders auestions (observations. irrelevant data partners & the research context, prime, events, etc.) stakeholders questions provide homework) Determine what Determine what Prepare partners and Prioritize questions Fix or remove Synthesize findings Capture participant Help partners Mine the data for materials are needed to stakeholders for data goals and questions to be addressed by incomplete, incorrect, attitudes (recording with existing implement facts and findings carry out the research collection (e.g. partners have or irrelevant data upcoming self-reported input, knowledge insights (e.g. discussion guide, observation, research etc.) click-through) engagement) Determine what Identify constraints Produce the Prepare research Align findings with Capture findings decisions (e.a. and risks (time. necessary materials environment for and insights broader business product, business) resourcing, budget, to carry out data collection (e.g. context will be informed by etc.) approach ensure tools are research ready) Articulate actionable Triangulate articulated Prepare structure Recruit the right next steps and/or to collect data in needs with existing participants to ensure opportunities for and extract findings knowledge (e.g. past they are partners & research, industry from representative of the stakeholders knowledge, etc.) target audience Determine whether or not to move forward with new research

#### **KEY ENABLERS**

#### ORGANIZATIONAL INFLUENCE

Strengthen relationships with stakeholders & partners

Instill confidence in stakeholders

Align/drive consensus with stakeholders & partners

Stay up to date on ZG news & trends

#### TECHNICAL COMPETENCE

Stay up to date on UX/research trends

Develop skill with a breadth of methodologies

Develop deep expertise with a particular methodology

#### PRACTICAL SKILLS

Coordinate time with others

Communicate intentionally with others

Review the work of others

Have a sense of work-life balance

#### OPERATIONAL EXCELLENCE

Adhere to regulations or standards that relate to my work

Find something that already exists (e.g. past research)

#### OTHER

Ensure that others (researchers, partners & stakeholders) can find insights Stay up to date on real-estate and industry trends

# 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

#### 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?

#### **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

#### **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 or 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

#### **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

# TO ANSWERING THE QUESTION(S)

MATERIALS TO CARRY OUT
APPROACH

ASSEMBLE THE NECESSARY

SET UP RESEARCH SESSIONS

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 Create new materials to facilitate research

Revise existing materials to facilitate research Recruit the target population

Provide context and/or prime participating research subjects

Provide context and/or prime participating stakeholders

Ensure necessary tools (software, hardware, etc.) is ready

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

#### **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

## **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

#### 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?

#### 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.

#### **Process**

forward with new

research

# I. 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

PHASE FXFCUTF ANALY7F INSPIRE FRAME **EXTRACT DETERMINE DRIVE ACTION WITH** FIGURE OUT THE **DEFINE THE DESIGN THE APPROACH** PHASE SET UP RESEARCH **COLLECT THE ASSESS THE** FINDING(S) FROM **IMPLICATIONS OF PARTNERS &** RESEARCH NEED **QUESTIONS** TO ANSWERING THE OUTCOME **ACTIVITIES NECESSARY DATA QUALITY OF DATA COLLECTED DATA FINDINGS STAKEHOLDERS** TO BE ANSWERED QUESTION(S) Communicate Determine what Prepare research Answer original Determine the Translate articulated Capture participant Organize data to Identify incomplete. findings, insights, and participants for data methodology(s) can research questions **ACTIVITY** partners & needs into research behavior identify patterns incorrect, or implications to be used to satisfy collection (e.g. provide OUTCOME stakeholders questions (observations, irrelevant data partners & the research context, prime. events, etc.) stakeholders questions provide homework) Determine what Prepare partners and Determine what Prioritize auestions Fix or remove Synthesize findings Capture participant Help partners Mine the data for materials are needed to stakeholders for data goals and questions to be addressed by incomplete, incorrect, with existing attitudes (recording implement facts and findings carry out the research collection (e.g. partners have upcoming or irrelevant data knowledge self-reported input, insights (e.g. discussion guide, observation, research etc.) click-through) engagement) Determine what Identify constraints Produce the Prepare research Capture findings Align findings with decisions (e.g. and risks (time. necessary materials environment for and insights broader business product, business) resourcing, budget, to carry out data collection (e.g. context will be informed by approach ensure tools are research ready) Articulate actionable Triangulate articulated Prepare structure Recruit the right next steps and/or needs with existing to collect data in participants to ensure opportunities for knowledge (e.g. past and extract findings they are partners & research, industry from representative of the stakeholders knowledge, etc.) target audience Determine whether or not to move

#### **Process**

research

# 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

EXECUTE ANALYZE PHASE FRAME INSPIRE **EXTRACT DETERMINE DRIVE ACTION WITH** FIGURE OUT THE **DEFINE THE DESIGN THE APPROACH** PHASE SET UP RESEARCH COLLECT THE ASSESS THE **PARTNERS &** FINDING(S) FROM **IMPLICATIONS OF** RESEARCH NEED QUESTIONS TO ANSWERING THE **OUTCOME ACTIVITIES NECESSARY DATA QUALITY OF DATA COLLECTED DATA FINDINGS STAKEHOLDERS TO BE ANSWERED** QUESTION(S) Communicate Determine what Prepare research Answer original Translate articulated Organize data to Determine the Capture participant Identify incomplete. findings, insights, and methodology(s) can participants for data research questions **ACTIVITY** partners & needs into research behavior identify patterns incorrect, or implications to be used to satisfy collection (e.g. provide OUTCOME stakeholders auestions (observations. irrelevant data partners & the research context, prime. events, etc.) stakeholders questions provide homework) Determine what Prepare partners and Determine what Prioritize questions Fix or remove Capture participant Synthesize findings Help partners Mine the data for materials are needed to stakeholders for data goals and questions incomplete, incorrect, to be addressed by attitudes (recording with existing implement facts and findings carry out the research collection (e.g. partners have or irrelevant data upcoming self-reported input, knowledge insights (e.g. discussion guide, observation, research click-through) engagement) Determine what Identify constraints Produce the Prepare research Align findings with Capture findings decisions (e.g. and risks (time. necessary materials environment for and insights broader business product, business) resourcing, budget, to carry out data collection (e.g. context will be informed by approach ensure tools are research ready) Articulate actionable Prepare structure Triangulate articulated Recruit the right next steps and/or needs with existing to collect data in participants to ensure opportunities for knowledge (e.g. past and extract findings they are partners & research, industry from representative of the stakeholders knowledge, etc.) target audience Determine whether or not to move forward with new

#### **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

#### **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

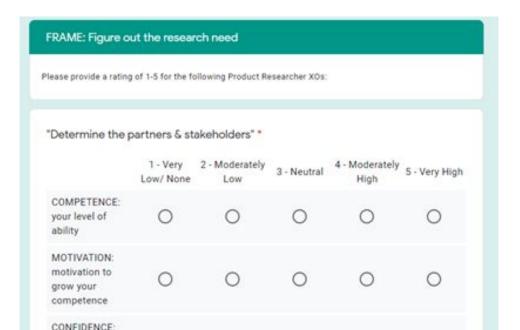
#### Goals

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



# 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