

Research Repository

Migration Recommendations

A UX research repository has two main themes of content:

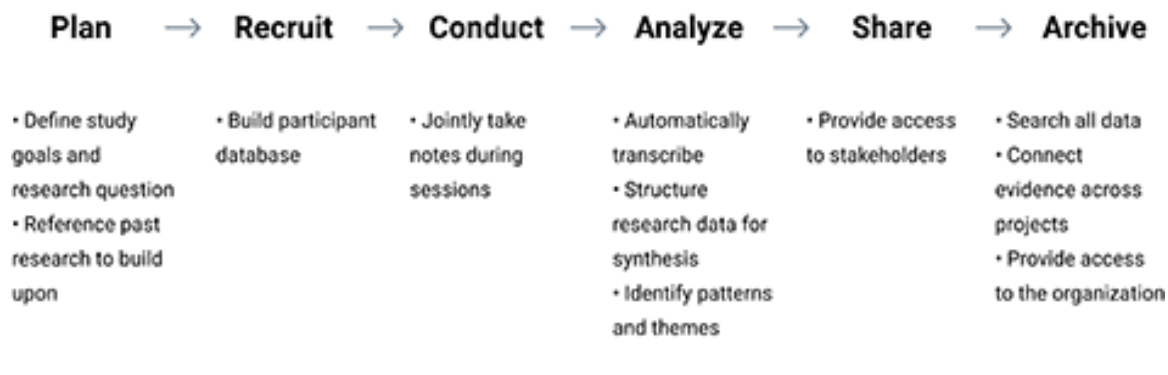
- Raw data (input) – the stuff that fuels thought and is the substance of the investigation
- Assimilated intelligence (output) – the intellectual constructs that are devised through analytically processing the raw data

On any UX project, you might have numerous contributors as well as repository users – even interdepartmental – which makes more sophisticated demands of repository software.

Creating a research repository is less about implementing tools and more about designing better ways to share knowledge and improve decision-making. As part of improving your current processes, you will have to introduce changes, and this is one of the most challenging aspects of any organizational project.

Planning

1. Understand your stakeholder's expectations. It will uncover the gaps in communication and processes that you need to consider when implementing your repository.
2. Understand your typical knowledge storing process:
 - Do you talk to customers regularly or do any customer research?
 - If so, what is your process and where do you store your findings?
 - How do you use research findings to make decisions?
 - Do you share that information? If so, how?
 - If you don't do research, do you use any research done by other teams? If so, what type of research and formats do you find most helpful?
 - Could you tell me the last time you did research or used research data from another team to make a decision?
 - Did you share the impact of that decision or your decision-making process with somebody else?
 - What are your thoughts on the way research is shared and used in the business?
 - Anything you would like to see improved?
 - What do you think could be the pitfalls or reasons for failure for this project?



An example of the UX research study roadmap

Useful links:

[How to develop the right taxonomy for your UX research repository](#)

[How to Organize, Automate, and Tidy Up your User Research](#)

[Using UX Research Repositories to Foster Organizations' Customer Centricity](#)

Data Management

The type of data you decide to centralize in your repository should help researchers connect the dots more easily, gain more context on the research that has been previously done and facilitate their analysis process.

It should also help the product team answer questions quickly and build on top of existing insights.

3. Define the data types, you collect, for example:

- **Infrastructural** – the typical org charts, SOPs, and other organizational framework-related documents
- **Research** – strategy, planning, requests for research from other departments
- **Data and Insights** – reports, snippets, sightings, recordings, transcriptions, raw notes, artifacts, recommendations, OKRs – anything containing and conveying actual subjective observations or reasonings.
- **Analysis** – proprietary outputs from 3rd party software systems, exported into a shareable file format like CSV or Text, for example.
- **Contacts** – panel or participant details, useful for follow-up

Identify what is worth keeping and what is not useful anymore.

Taxonomy

Taxonomy allows you to divide and group a large information set into more manageable chunks. It helps you visualize how you want to organize your data.

Taxonomy is not set in stone. As you get deeper into your data analysis with your initial taxonomy, new categories and attributes will certainly emerge. Qualitative data is rich, and uncovering patterns and themes is an iterative process. Be flexible. You won't really know if your taxonomy is working for you until you and

4. Set the hierarchy and dependencies between the data pieces. This will be a base for the information architecture in the repository tool. Think about the first-time users of the repository – what would be the most intuitive way to find information on a specific topic?
5. Define topics and their values as a tag for metadata that would help to quickly find the needed information by some parameters. It's important to consider both the information's intended users and the data's content when designing your classification system.

🔥 Potential Nuggets Tagging Taxonomy we are going to use in Cardlytics.

Useful links:

[How to develop the right taxonomy for your UX research repository](#)

[From Generative Interviews to a Strategic Roadmap with Atomic UX Research](#)

[Building a customer insights repository](#)

[The atomic unit of a research insight](#)

Example Research Repository

Search:

Select:	Filter:	List of Findings:																								
Reports	Product ☒	<table><thead><tr><th>Product</th><th>Topic</th><th>Severity</th><th>Finding</th></tr></thead><tbody><tr><td>GoFreeBo.com</td><td>Login</td><td>High</td><td>Don't see the login button</td></tr><tr><td>GoFreeBo.com</td><td>Login</td><td>High</td><td>Hard to tap on phone screen</td></tr><tr><td>GoFreeBo.com</td><td>Login</td><td>Medium</td><td>A little hard to read on phone</td></tr><tr><td>GoFreeBo.com</td><td>Login</td><td>Good</td><td>Noticed the "remember user name" checkbox</td></tr><tr><td>LiveUpBo.com</td><td>Login</td><td>High</td><td>Don't know login benefits</td></tr></tbody></table>	Product	Topic	Severity	Finding	GoFreeBo.com	Login	High	Don't see the login button	GoFreeBo.com	Login	High	Hard to tap on phone screen	GoFreeBo.com	Login	Medium	A little hard to read on phone	GoFreeBo.com	Login	Good	Noticed the "remember user name" checkbox	LiveUpBo.com	Login	High	Don't know login benefits
Product	Topic	Severity	Finding																							
GoFreeBo.com	Login	High	Don't see the login button																							
GoFreeBo.com	Login	High	Hard to tap on phone screen																							
GoFreeBo.com	Login	Medium	A little hard to read on phone																							
GoFreeBo.com	Login	Good	Noticed the "remember user name" checkbox																							
LiveUpBo.com	Login	High	Don't know login benefits																							
Findings	Topic ☒																									
Recordings	Severity ☒																									
Transcriptions	Contact ☐																									
Plans	Status ☐																									
Schedules	Research Method ☐																									
Requests	Date ☐																									
Methods																										
Resources																										

NNGROUP.COM **NN/g**

Access Protocols

6. Define the roles and access levels for your repository.
 - How many people in the organization can freely browse the whole repository?
 - What type of user will access only high-level summaries vs. raw data?
 - Who oversees designing and maintaining the taxonomy?
 - Are multiple teams able to access all the data or only data that is relevant to their areas of operation?
 - Which type of users can submit/upload information to the repository?
 - How many administrators do you need and what is their role?
 - Who will oversee connecting the dots across multiple projects and business units?
7. Make sure your maintenance rules include clear information about:
 - How to contribute to the repository
 - What type of customer/user information can be stored
 - How to request access
 - How to share information from the repository to another tools, teams etc
 - What labels, tags or categories can be used to organize the information
 - How to record new insights
 - How to collaborate on information stored in the repository
 - The rules of engagement will change over time so make sure you keep the documentation up to date and easily accessible.

🔥 [Repository Access Management Template](#) by EnjoyHQ.

Tools

8. Define required and optional features for the repository. Here are a few things you totally need to consider when selecting the right tool for your research repository:
 - **Supporting tags and metadata**, to help people find items by the most granular topics
 - **Searchable by keyword** (e.g. for research on a certain product feature), project, team, finding, severity, status, and more
 - **Hosted in a tool that people can easily access**, use, learn and that matches the organization's culture and mental model
 - **Portable**, so that repository elements can be easily exported to other applications or formats
9. Keep respondents' data private and secure. Make sure you will work with tools that are GDPR compliant. If your repository is going to store identifiable information about your customers or users, here are a few things to consider:
 - Your customers need to know that you are storing that data and where it is stored. Normally this information is communicated in your terms and conditions.
 - Your research subjects may need to fill out consent forms accepting the use of their information for research purposes.

10. Compare tools and select the best fit for you.
- 🔥 Research Repository Analysis.xlsx that we made while selecting the best one.
- 🔥 Research Repository Playground in Airtable we're developing right now.

Useful links:

[Dovetail vs. Condens vs. EnjoyHQ: How We Chose Our User Research Repository](#)

Maintenance

11. Devote some time to test the tool with the sample data.
12. Update taxonomy and page hierarchy if needed. You won't really know if your taxonomy is working for you until you and your team start to use it.
13. Define your migration strategy:
 - **Big bang migration.** Some teams feel like it's better to get it all done at once, normally driven by how much of a priority the research repository is in their organization. If it is a priority for the team, normally they can have multiple people focus on the migration during a given period of time. In this case, migration becomes a project that may take a week or two, with multiple people uploading and categorizing previous research insights and projects.
 - **Migration as we go.** This approach is for teams that can take things a little bit slower. These teams are normally spread thin with multiple projects and need to make progress on their insights management strategy without stopping everything else. In this case, teams may decide to just migrate research relevant to the next quarter's theme or migrate just the last year of research one hour a week. You can create a schedule where migration happens every week. but slowly and consistently.
14. Reorganize the information to fit the unified framework you've just created. Look at your current data through the repository prism. It's ok when there will be a lot of gaps in previous data.
15. The migration part requires a lot of manual effort. But then for new data, you'll already know what to focus on and the maintenance will become almost automatic.
16. Invite and onboard collaborators and stakeholders.
17. Create roll-out strategy to increase team awareness on the data you're collecting and how it might improve their work. For example:
 - Monthly or quarterly emails to highlight the latest research or collaborations taking place in the repository
 - Ad-hoc message about changes in the taxonomy or protocols (for researchers)
 - Ad-hoc training workshops/internal webinars with new team members being onboarded to the repository