

ResearchOps Podcast: Episode 10, Kasey Canlas

Brigette Metzler 0:11

Hello, and welcome to the ResearchOps podcast, an initiative of the ResearchOps community. I'm your host for today Brigitte Metzler. I'm one of the co-chairs of this huge global volunteer-run community. As always, I'm assuming if you're listening, then you might know a little bit about ResearchOps, the mechanisms and processes that set user research in motion. If you'd like to know more about ResearchOps, you can find us at our website, ResearchOps dot community, or on our medium publications in English, French, German and Portuguese. Follow us at TeamReops on Twitter, find the group on LinkedIn and join in the conversation at hashtag ResearchOps. We're recording a special series for the ResearchOps podcast in preparation for the ResearchOps conference, a partnership between learners and the ResearchOps community. The conference is on in New York City on Wednesday, June 8th, we cannot wait to finally be able to see each other in person.

So today we'll be speaking with Kasey Canlas. Kasey leads the UX research operations at Genesys, the global leader in cloud customer experience and contact centre solutions. Kasey previously led UX research operations at McGraw Hill, a leading global provider of digital products and services. While she's always cared about protecting research participants, the recent updates to data privacy laws led her to examine the current research processes to establish safeguards and best practices around handling participants' data. Kasey is excited to share her experience identifying potential data privacy issues, and finding solutions for compliant research practices. With new data privacy laws frequently emerging such as GDPR, and the more recent trends to court decisions, it can be challenging to evaluate your research practice to see if current processes are compliant. It's crucial to document the necessary PII in your processes to provide the safeguards when needed. Kasey's talk will give

actionable steps for the audience to take to build a secure data privacy compliant research practice, such as how to evaluate existing processes, what information needs to be documented, along with essential steps and best practices to add to your strategy. In my talk today, with Kasey, we covered all of those things. But we also look at what kinds of skills you need as a research operations professional. We talk about her emerging role as she's emerged in her ResearchOps practice. We talk about her role within an organisation and how to best make really good partnerships and good relationships across your organisation. And we also talk a little bit about both of our experiences as people with ADHD, who are also research operations professionals. We both agree it's a really fantastic augmentation of the ResearchOps role. Because we can always handle lots and lots of things all at the same time. We talk about ResearchOps as a team sport, and we talk about communicating about human-centred design with the organisation and about governance and legal processes with our researchers.

Welcome, Kasey to the ResearchOps podcast. I'm so pleased to have you on the show, I have been watching your career develop over the past few years just from afar. And so it's really nice to be able to finally sort of be in a room, even though it's virtual, with you so that we can sort of dig into how ResearchOps has happened for you and full about your talk that you're going to give at ResearchOps Conf, welcome to the show.

Kasey Canlas 4:20

Thank you. It's exciting to be here. It's funny that you say that because I've watched you, and like, looked at all of your articles and it feels like there's a bit of a smaller niche ResearchOps community since we're so new, so you know the names and you're like, I know her. I've looked at all of her stuff on repositories and situations. So yeah, admiration goes both ways.

Brigette Metzler 4:42

Lovely. Thank you so much. Um, so for people who don't know you, do want to tell me a little bit about, I mean, obviously at the ResearchOps conference in June, you're going to be talking about something really specific that everyone just wants to know, tell me about your backstory. How did you get to be so brilliant, and how did you get to understand all of those things? Tell me, where did you go?

Kasey Canlas 5:12

So I used to be working as a media project manager. So I was like managing vendors managing art specs, and I kept realising, there's better ways I could be doing this, I'm spending so much time doing admin work. And it's just, it's really boring. I'm listening to way too many podcasts and books. And so I started figuring out ways that I could automate things or make it easier on myself. And we created a taskforce when I say we, there were several others that were similar to me, like automatically starting to change, things make things better. And it was really something big that brought me into the eyes of the management. And they thought that I would be perfect for the new research operations team, and the new UX research team at McGraw Hill. And so I was about to leave and have my first child. So my child is pretty much the age of my ResearchOps career, because I came back from maternity leave. And it was just absolutely a weird time to be like, a mother and now in a new job. And I believe I said, it's been chaotic before, when you have a kid, and there's no way of looking up a rulebook, or there's no way to find out what's wrong, or how to do this or that. And so ResearchOps, even though there was little information to find, there was enough out there that it was like a treasure hunt. So you could find a little bit from designOps sites, you could find some from where Kate Towsley had posted about how she was establishing her ResearchOps practices. And so it really was

a hobby of mine, just like learning more and more. And one of the things was data privacy, like I loved learning, how can we do better for our participants, because I'm very empathetic, like, I just always put myself in other shoes, which can be good and can be bad. But in this case, it's good because I always am like, how can we make our participants who choose to work with us have a better time? Like, how can we improve their experience, because they're giving us a piece of themselves, like when they choose to work with us, when they choose to meet us and talk to us. We deserve to give them an easy experience, because we don't want them to leave frustrated, we don't want them to feel like their words weren't heard, or we aren't thankful to be there with them. And so part of that was really data privacy. One of my first things that I got into was informed consent. So actually, when you see NDAs, and they are protecting the companies, there's a thing called informed consent, and that protects your participant.

Brigette Metzler 7:56

Yeah. Yeah. Okay. So it sounds as though to me data privacy is more or less just a process of having a good relationship with a participant. Yeah, and, you know, I think I've heard you mention, heard you talk about it being like your role being about creating a safe space. Does that, is that right?

Kasey Canlas 8:25

Yeah, I would say that's really accurate, because you never know what they're going to tell you when you're having interviews. It might seem like the conversation is going in one direction, and then they might bring something out, that's personal, or they might bring something out that really touched them. And so it's always important for them to feel comfortable with your researchers to feel comfortable with you. I always like to sign my stuff that I send out, like

when it's from me, so they know like, well, that's Kasey again, she sent me another survey. However, that's just to give a face to the name.

Brigette Metzler 8:59

Yeah. Okay. So it's like a full participant journey kind of thing. Yeah, yeah. Yep. Fantastic. And so can you tell me a little bit about how, you know, so I, I try to talk to my bosses about research that's being a team sport. Because, you know, if you don't have a big team, you kind of need a whole bunch of people to help you. So what does that you know, it's a really technical field, especially in that bit in data privacy. Can you tell me about, who are we partnering with in your organisation, when you're doing that?

Kasey Canlas 9:37

You always want to find your data privacy person, your data privacy officer, you want to find your legal counsel, whoever that may be. I had just started at my current job and I was just like, who's your data privacy person who you speak to for legal and they were just like, what? Like, yeah, I want to, I want to get to know them. They're going to be my best friends, because we're going to be talking about a lot of stuff. And not everybody wants to talk about data privacy, and they will. So that's the great thing.

Brigette Metzler 10:07

That's true.

Kasey Canlas 10:09

Getting them to learn.

Brigette Metzler 10:11

Yeah, they'll know that with you about that stuff.

Kasey Canlas 10:15

It's true. And once you show up on their doorstep, and you say, Hey, I'm trying to bring data privacy to my team, they're not going to shut you out, they're going to be like, Okay, let's have a conversation.

Brigette Metzler 10:25

Yeah, yep. And so, you know, ResearchOps covers lots of very disparate fields, which is fantastic. For people like us, who, you know, have ADHD and maybe enjoy lots of different fields all at the same time. So, you know, I can think of tools, being about data privacy, and maybe your research data, and you've mentioned recruitment. Can you talk about the breadth of like, where is governance and data privacy not a thing, almost. It's just everywhere.

Kasey Canlas 11:03

Pretty much everywhere, because even if you think about how you store your files, who are you giving access to - that's data privacy. And when you talk to somebody, okay, you probably need consent from them, if you're going to record them, if you're going to record their video, you know, I mean, if they if you wanted to use something, when you're giving like a report back to your internal teams, like you have to have their consent for that, which is a great thing. Often

people are scared of the fact that there's data privacy laws, because it can make it harder for you, but it's great, because it's actually making it better for you at the same time. So as a research operations person, you have a lot more to figure out. But as a human being, it's nice that your rights are slowly getting better and better to where you can give the consent.

Brigette Metzler 11:54

Yeah, okay. Definitely.

Kasey Canlas 11:58

I would say there's none.

Brigette Metzler 12:01

It just covers. So if I'm a research operations person, or I want to get into the field, does that mean, it sounds like I just about need a law degree rather than a research degree, is that right?

Kasey Canlas 12:13

No, not at all. The great thing about research operations is it touches pretty much anything and everything. And it is what you make it. There's all kinds of different positions that you can work in as well. You could do participant recruitment, if that's something you really like building panels, talking to people. I mean, you can, if you care about, I don't have a law degree. I have a video production degree, I would have made a videos and somehow so I am not the

law person and I'm not speaking from a privacy or law perspective. I'm just speaking as someone who cares about us being protected.

Brigette Metzler 12:52

Yeah.

Kasey Canlas 12:53

So yeah, I would say that you could do whatever really intrigues you, because that's the thing you'll switch and it might change, you might decide that you really love teaching others. So maybe it's democratising research.

Brigette Metzler 13:07

Okay, so, so basically, we can hear that you can pretty much come to the table with any skills whatsoever. And it mostly for you, it sounds to me as though that connection with people and being that kind of central point is the bit that kind of fires you up.

Kasey Canlas 13:28

Yeah

Brigette Metzler 13:29

Yeah.

Kasey Canlas 13:29

Yeah, it's funny, because we kind of are, I don't want to say invisible, if you're doing your job, right not as many people know, you exist sometimes. But you really connect a lot of different people and sometimes it's up to you to find those connections. They might even be where you don't realise. Just like being in meetings and hearing people talk. Basically, I've found that a lot of some of my best connections have happened when I'm in meetings, and someone mentioned something offhand and then I want to find out a little bit more about that. And it's an opening for something that we're currently working on. It might not be in the works yet, but it's something that we can move towards in the future. So.

Brigette Metzler 14:16

Yeah, that's a really nice pick up, I think, you know, something I notice about the way I work, and I suspect that it's an operations thing, more than more than anything, is that ability to see it's going to be useful down the track. So I'm going to start now. And that's, I think, that's about the different speed of research operations. Can we talk a little bit about that? Because obviously, like, as you say, if it's if it's working well, it's invisible. So, but in order for it to work well, there's a whole bunch of stuff that has to come beforehand. So yeah, does that ring true to you, that whole need to start way back when?

Kasey Canlas 15:04

It's not always the thing that screaming loudest at you. Yeah, and that's the thing I think that's important too is sometimes you might be directed to take care of this thing, because it's very visible, but like your core elements of like, even

information architecture, so just like how you choose to structure your research reports, or your readouts or your tooling documentation, if you don't have a good information architecture, you will lose everything and find yourself searching for it constantly. So there's those core core things, I think, that are very important. And it involves having conversations with those who are higher in the departments, wherever you may be, like higher in the research, or, and just trying to find out, what is their goals? What do they want to have happen? And then how can you support that. And so sometimes it's foundational, sometimes you're building a participant panel, sometimes you're doing information architecture, naming structures, or repositories, as you well know.

Brigette Metzler 16:11

Yeah

Kasey Canlas 16:12

Are like the backbone of everything. But other times, it can be fun side projects, where it's just a little avenue that maybe it's something that you can find new incentives for your participants that you didn't realise existed, or partnering with another part of your company that also wants access to your, your, like users, or your people that you interact with, and your customers. So often, you find that there's not that there's not that much difference between you and often other people and ops. If you happen to look through all of your ops people, I bet you'll find some real friends there because they want to know everything about everything too.

Brigette Metzler 16:56

It sounds like it's almost like a personality type.

Kasey Canlas 17:00

Right?

Brigette Metzler 17:00

You just want to know.

Kasey Canlas 17:03

That should be like a prerequisite, are you curious? Because you're gonna get curious about a lot of things.

Brigette Metzler 17:09

I love it. So your talk at ResearchOps Conf? You've said that you're going to be able to we're going to get a walk away from that with some real actionable things. Can you talk me through a few of those things? Obviously, you know, you don't need to give me a whole talk. But what am I going to be able to take back home with me? You know, I'm partnering with my legal team right now on a new thing. And what should I learn from you, Kasey?

Kasey Canlas 17:39

Well, first off, I'm going to do a disclaimer and say, I am not legal. And I am not data privacy, I am straight up research operations, because I think that's important to get out.

Brigette Metzler 17:48

I agree.

Kasey Canlas 17:49

But I will say that from a research operations perspective, we have a great opportunity to affect a lot of how research is done and how stored I'm thinking of how much your ethical practices, right, like our ethical maturity. And so it's very important to kind of clean house, as you'll say, and you know, how you can walk into your grandmother's house, and there's maybe dust everywhere, and you don't know where the trinkets are from, like, the different areas, they weren't labelled, so you don't know if this is like a prized heirloom, or maybe this is a teacup that just bought at a yard sale. And that's kind of essentially how PII is, you might collect it haphazardly, and you're just like, Oh, yes, I'll definitely use this later but then maybe the link to someone who knew how those connected has disappeared. And so now you're just standing there holding a \$2 tea cup filled with PII, and you're like, do we need this? If I take this out, is it is it going to be an issue? So it's really taking note of all of the different PII across your practice and where you're collecting it. And it's okay if you haven't had a good map of where everything is because that's why we're doing this is where is the information, what do we need to do with it, and why do we need to keep it. And I will be sending, not sending obviously, I'm not going home with everyone that comes to them. I know right? I am very fun on plane rides, you can ask my husband.

Brigette Metzler 19:38

Totally, come to Australia.

Kasey Canlas 19:41

I will my sister-in-law is from there, but I would love to just like be able to provide you with actionable tips on here's the steps I need to go through in order to have a better idea of what to take to my chief data privacy officer and my legal officers and say, do I have any issues here I need to look, is there any parts of my process that I should maybe zero in on and make better or even data security, like, who needs access to this, and should I limit the audience's that we have.

Brigette Metzler 20:16

Yeah.

Kasey Canlas 20:16

And it's very important. And I think that once you have that information, and you've kind of looked at everything you have, you can start creating a research privacy policy on how you're using that information. You can create your informed consent document, because you now know, here's how I'll protect your information. And here's the information that I plan on collecting and here's when I plan on no longer storing it.

Brigette Metzler 20:40

Yeah.

Kasey Canlas 20:40

And here's why I'm taking it. So it's all of these little pieces and parts and just really like cleaning house, dusting everything.

Brigette Metzler 20:47

Sounds fantastic. I can't wait to have a much more clean house at work...

Kasey Canlas 20:54

You're going to KonMari everything.

Brigette Metzler 20:58

Yeah, I hear you. Fantastic. And, yeah, is there, is there anything else that you wanted to cover off that you want the listeners to learn about or to hear about before we, before we finish up?

Kasey Canlas 21:16

You have ADHD don't KonMari because you might end up with like 15 pairs of jeans on your bed, and you just want to go to sleep. No, let me think, I think I would just say, you're not alone. Even if you're a ResearchOps team of one, you are not alone, you have the other researchers on your team, you have any managers that you're working with, you have anyone that you're supporting is

probably in your corner. And there might be certain things that you can also reach out to them for help. So you don't have to take it on all by yourself and just making sure you breathe, because I know with ResearchOps, we can have 5000 things running at us at once. And it can be hard to figure out what the priority is. And that's one thing where I always tell my boss, what's the priority right now, like...

Brigette Metzler 22:06

Right.

Kasey Canlas 22:06

You tell me what's the biggest priority? Because you might think, Okay, here's these three things. And then they show up and they say I have two more things for you. And you're like, Whoa, I already have three things. Yeah, where does it go? So yeah, I think it's giving yourself grace and being able to take a moment, take a breath and say, what's the priority here and then just focus on that one thing, because as we've talked, ADHD, I can be a little scattered and sometimes I can want to work on things that I love the most. And so I'll really want to deep dive into that one thing when maybe I should be working on something else. Yeah. So it always helps to ask priorities and get re-centred.

Brigette Metzler 22:48

Yeah, yeah, okay. So I guess I'm hearing, you know, ResearchOps obviously, is a team sport across the entire organisation and that you're just this fantastic central conduit. And, you know, who wouldn't love you, your sole, sort of reason for being is to create safe spaces for everyone, you know, in terms of data,

privacy, and all those kinds of things. And, and, you know, to be honest, it sounds to me as though having ADHD, and being a research operations person is actually a really good thing. Like that you can hold a million things at once. And, but yeah, I hear you on the, on the need to, to, to get some help with the prioritising it can everything can feel like it's on fire at the same time sometimes, can't it?

Kasey Canlas 23:40

Yeah, you're holding a small bucket.

Brigette Metzler 23:42

Yeah, but that's why it's a team sport, right?

Kasey Canlas 23:47

Yes. And I mean, it's great to I guess this is one more thing that I always think is important. If you're by yourself, if you're a one man band, just take note of what you could do if you had more help, and start jotting down that information. Like how much more could you provide if you had headcount, and maybe it won't happen that year. Maybe it'll happen the next year, the next year. But I think as research operations starts becoming more of a defined field, we're getting more of the communication out. People are going to realise that if you have a good research operations professional on your team, they can make your researchers so much more efficient that they can operate and do so much more work at what they're good at versus trying to handle other things that maybe isn't their forte.

Brigette Metzler 24:43

Yeah, yeah. Awesome. Yeah. So really, and being able to scale the impact of what it is that they're doing, and all of their brilliant work as well. Yeah. Fantastic. Well, thank you so much, Kasey. It's just been an absolute pleasure to meet you, finally, you know, I can't wait for you to come to Australia and come and KonMari, my work and my home.

Kasey Canlas 25:09

It will end up terribly. I hope not. There's got to be a better way.

Brigette Metzler 25:14

It's always good to do things that spark joy.

Kasey Canlas 25:18

Yeah. Oh, Marie Kondo man, she's going to be sponsoring this podcast.

Brigette Metzler 25:23

Sounds like it. Okay, thank you so much. And we'll see you again soon.

And that's the end of today's podcast. Don't forget, you can find tickets to ReOpsConf2022 at [ReOpsConf2022 dot joinlearners.com](https://reopsconf2022.joinlearners.com). It's on Wednesday, June the eighth in person in New York City, or online. You can see Holly myself, Kasey, most of the research helps board all of our speakers and of course, others

in the community at the conference. We're so looking forward to seeing you all there. We hope you enjoyed today's podcast. If you want to hear more, please subscribe, or join us in the ResearchOps.Community. If there's someone you'd like us to talk to you please let us know. We hope you'll join us next time at the ResearchOps podcast or we'll see you soon in the Slack.