

ReOps Project Management Brief

Started on: 7/21/23

Last updated on: 7/21/23

Background

Describe what the project is about, what's its context and background.

Describe why it's being carried out. If it's a part of a wider customer journey, link it here.

Research Operations is a critical piece of UX Research at Orcasound. From recruiting study participants, to gaining participant consent, and ensuring participant privacy, ReOps provides the resources and policies required to run an ethical UX Research practice and comply with the law.

The Orcasound UX Team has access to a Mailchimp account with a pool of Orcasound users that have opted into being participants for UX Research studies. Access can be gained by signing into the UX account and accessing the Orcasound UX Gmail account for the one-time access code. Please reach out to [@Brendan](#) for access.

To build the Mailchimp account with the pool of Orcasound users that have opted into being participants for UX Research studies, a process has been established. Please reach out to [@Brendan](#) to learn more and help with this ongoing task.

We have a consent form that participants must fill out before they participate in a session. It can be found here: [MAKE A COPY: Consent Form](#). It's unclear how to have the session moderator fill out the form after the participant-alternative form platforms or solutions would be welcomed!

If you would like to understand what persona type your participants fit within, some are tagged in the Mailchimp account. For those who are not tagged, there is a short form in Mailchimp they can fill out, and the answers reviewed to place them in the correct persona type. Please reach out to [@Brendan](#) to learn more.

Since Orcasound is a collection of volunteers, we do not have a budget. Please use free resources. You are not encouraged to pay for resources out of your own pocket, but you may if you want to. Orcasound is not liable when a volunteer uses a paid resource to conduct Orcasound UX work, and is not a representative of volunteers regarding any contracts entered into by Orcasound volunteers.

Objective

Describe what is the ideal future you want to have once this project is finished. What is the outcome you're looking to get out of this?

How does this fit into your team's and/or company's wider goals? (Link them here.)

What is the benefit for the business?

What is the benefit for the user?

- 1) Objective 1
 - a) To provide needed resources for Orcasound UX Research studies
- 2) Objective 2
 - a) To build and maintain a pool of Orcasound users who have opted into being study participants

Key results & Success criteria

How will you know the project was successful once it's finished?

Think KPIs, OKRs, UX metrics, benchmarks, company targets (whatever your company is using).

- 1) Key result 1

- a) Provides needed resources to Orcasound UX Researchers upon request, using industry standard platforms using only free access
- 2) Key result 2
- a) Builds and maintains a pool of Orcasound users who have opted into being research participants, providing access to the Mailchimp or other platforms that contain participant name, contact, and other associated data

Target audience

Describe the target audience for this project.

You can link to your personas.

- UX Researchers running studies
- UX Design or other team members running studies

The team and stakeholder map

Define team roles and responsibilities.

List stakeholders and describe what level of involvement is needed/expected.

Who is the decision-maker (sign off)?

[Note: One way of doing this can be a RACI matrix]

Stakeholders:

- **Main Orcasound Stakeholder:** Can provide background on who, what, where, why, and how for project requirements, including technical limitations. Limited, as needed involvement. *Scott Veirs*
- **Principal UX Manager:** Can provide background on who, what, where, why, and how for notification system, including technical limitations, but will refer to Main Orcasound Stakeholder. Involved as needed, is contacted before Main Orcasound Stakeholder, and directs project lead. Signs off on work when requested. *Brendan Thatcher*
- **Product Manager:** Can provide background on who, what, where, why, and how for notification system, including technical limitations, but will refer to Main Orcasound Stakeholder. Involved as needed, is contacted before Main Orcasound Stakeholder, and directs project lead. Signs off on work when requested. Facilitates UX work to production in GitHub. *Brendan Thatcher*
- **UX Managers/Other UX, Dev, or Other Leadership:** Can provide background on who, what, where, why, and how for notification system, including technical limitations, but will refer to Principal UX Manager or Main Orcasound Stakeholder. May not be direct reports but can be as needed. *Various*

UX Team Members

- **Team Lead/Co Lead:** Schedules, leads, and sends reminders for weekly team stand up meetings. Can be an individual contributor (IC) as well. Writes or delegates the writing of user stories in Github when design is sent to production. Reports to Principal UX Manager.
- **UX Researchers (IC):** Plans, conducts, and reports on UX Research for project. Accesses Research Operations program to recruit participants for studies. Reports to Team Lead/Co Lead. *Various*
- **UX Designers (IC):** Designs based on user research as reported by UX Researchers. Reports to Team Lead/Co Lead. *Various*
- **Other UX Roles As Needed (IC):** Content Strategists, UX Writers, and any other UX-oriented roles who contribute their core competencies as needed. Reports to Team Lead/Co Lead. *Various*

Dev Team Members

- **Front End, Back End, Full Stack Devs:** Assigned issues by Team Lead/Co Lead or designate to develop design work. Uses established frameworks that meet the needs of technical specifications.

*** Note:** Any team member can transfer roles at any time. There is full support for exploring different roles for professional development. Please communicate role changes with teammates and leadership as needed.

Scope

What's in scope

Describe what definitely needs to be worked on and why.

Providing UX Research resources for Orcasound UX volunteers

What might be in scope

Often, there are those 'maybe areas and topics' — list them and describe conditions under which they could be included (e.g. if we have time, if we find out enough evidence in user research, etc.)

Providing UX Research resources for Orcasound volunteers who are not UXers

What's not in scope

Describe what the design team should not challenge (e.g. hard technical constraints, change of CMS, major design overhauls during a platform migration project, etc.)

[Note: I use this one more as a guide to understand which topics will be hard to change, which things shall be taken as project constraints, and what the business values as a status quo. However, in practice, if you make some key discoveries which could significantly help the product and you have a really strong rationale for them, everything can be challenged.]

Providing UX Research resources for non-Orcasound volunteers

Dependencies

Are there any other teams, people, technology or anything else that the success of this project is dependent on? Describe them.

- Availability of free web-based platforms
- Multi-user access ability
- Ability for Orcasound UX Team members to know about and access resources- for example wiki on GitHub providing links and access information

Risks

List risks and caveats that need to be considered.

E.g. What are the risks to the success of this project? What would happen if we don't meet the deadline?

- Not providing industry standard UX Research resources
- Failure to ensure privacy of Orcasound user personal information
- Failure to train UX team members to access research tools and ensure privacy of Orcasound user personal information

Deliverables

List tangible artifacts that this project is expected to deliver.

- Various UX Research resources as needed

Ways of working

Communication

What communication tools will you use and what for? (Email vs Slack vs JIRA vs Zoom, etc.)

Slack channel: [#ux-research-ops](#)

Shared data

Where is the project space/folder and all the materials relevant to the project? Does everyone have access? If not, who will make sure everyone has it?

- Project folder: [Research Ops](#)
- GitHub Product Repo: <https://github.com/orcasound/product>
 - GitHub project: <https://github.com/orgs/orcasound/projects/34>

Additional notes

If there is something else, specific to this project, state it here.

UX Project Resources: Link to GitHub wiki here