

Episode 14: Emily DiLeo

Brigette Metzler 0:11

Hello and welcome to the Research Ops podcast, an initiative of the Research Ops Community. I'm your host for today Brigette Metzler and 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 research ops, the mechanisms and processes that set user research in motion. If you'd like to know more about research ops, you can find us at our website, researchops.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](https://twitter.com/researchops). We're recording a special series of the research ops podcast in preparation for the Researchops Conf, a partnership between Learners and the Research Ops community. The conference is on in New York City Wednesday, June the eighth. Today we'll be speaking with Dr. Emily DiLeo who works in research operations at SAP. We'll be speaking about our shared passion subject research repositories. Emily's talk at the conference is going to be practical, something to draw from as you progress on your research repo journey. She's talking about the part that I think is 70% of the work, the cultural shift required to implement a knowledge management system. Given the way we currently approach user research, this is change work. It requires a shift in behaviours and beliefs. Dr. Emily DiLeo is well placed to teach us how, having a PhD in ethnomusicology, and a master's in library and information sciences. She will focus on practices that will help you organise, describe and ultimately tell the story of your research studies. I'm so excited to interview Emily, I suspect we may be about to get really nerdy because I've never met a person who better understood what's required to implement a knowledge management system for user research than Emily. Hold on to your hats and let's learn together.

So welcome Emily, thank you so much for joining us on the show. Really pleased to have you. So, in the introduction to this podcast, I was talking about how you've got a PhD in ethnomusicology, and a master's in library and information sciences, which is just such an amazing combination. How did that happen? How did you come to have that combination?

Emily DiLeo 2:54

Yeah, so, um, I had always worked in libraries, even as an undergraduate student. That was kind of my side job. But yes, I went into, I was a music major in college. And then I went on to study at the musicology. I think in retrospect, I didn't go into ethnomusicology, because I was interested necessarily in world music that's kind of an old, an older, outdated definition of ethnomusicology. I think I was actually more interested in people. I was interested in how people thought about music. I mean, of course, the sound of the music would draw me in. And I'd be I'd be interested to know how the sound was produced and how people thought about the creation of it and the consumption of it. That but yes, so I went on to do a master's degree in Ethnomusicology in the UK. And I studied a borough in East London, I studied kind of music making in that borough, so maybe that was the beginning. Yeah, that was the beginning of that kind of, you know, more practical ethnography. Right. So I was talking to kids that went to school, I was talking to cultural organisations and leaders at that time, that borough had a lot of

asylum seekers in it. And so I didn't really actually see much music music going on, and I knew there were all these different people there. And so I was very curious to know like, what the story was so,

Brigette Metzler 4:48

okay, yeah, I can. That whole thing about the storytelling is, is does it sound like with Library and Information Sciences? What's the attraction there?

Emily DiLeo 5:02

Yeah, so, um, I think that was actually just more of a practical, a practical add on. So after I finished a PhD in ethnomusicology, when I had gone on to do a PhD, I was on the faculty job market. And I think everybody knows how difficult that is to find a position. And in the meantime, I had taken a library job at Yale University, and I was working in the music library in the archive. And, you know, after two or three years there, I was, like, you know, I really don't think the faculty track is for me, I don't, you know, it's just not fruitful. And I really liked this work I'm doing so when I, you know, do this degree as I go, and I did it, you know, very gradually, just course by course, as I, as I actually did the work over a number of years.

Brigette Metzler 5:58

And so, what's the what's the passion there? How do you experience your sense of joy when you're doing that sort of Library and Information Sciences type work?

Emily DiLeo 6:10

That's a good question, too. Because I mean, really, what I brought into that degree, and I did archives management, and I can talk more about the difference there. So it was really, about archives, which is a little bit of a different practice. It's a different theory and practice than straight up librarianship. But it has a lot to do with storytelling. And it has a lot to do with voice and agency and transparency, and all those things that really interests me about ethnography.

Brigette Metzler 6:43

Yeah, and, and I can hear as well, you're talking about that voice in transport, transparency and agency. And I think, when we're doing research operations, a lot of that work is how do we carry that agency and voice and story all the way through, across the whole of our research lifecycle? So it's, yeah, it's seeming to me that this is probably where that passion combines, would you say?

Emily DiLeo 7:14

Yeah, I would say so. And then, you know, from, you know, an ops perspective, and also kind of brings in the work I did with the union, I was part of a Yale where, you know, just kind of really sharpened my sense of the work. And who does the work? And what is their experience of doing the work? Which I think, you know, positions me for ops, because I'm, I'm, I am interested in the researchers, I'm interested in the researchers experience, right, I'm researching the researchers, which is very interesting to me, because it's a relatively new field UX for me. And

so I want to know, you know, what's your experience of, you know, as a researcher, what is your story? What is your story of the research that you just did? Yeah, right.

Brigette Metzler 8:06

So, yeah, definitely. So, I mean, I think it's one of the beats that we sort of miss and, and I think, you know, when you look at the difference between, and I'd love to explore about the difference between archives and libraries. When you think about research repositories, or knowledge management systems, let's say, because there's a lot more than just research repositories, as we know, when you, when you think about those things, the difference is, you know, if you go to a library librarian is all about getting to the knowledge, whereas in the user research, sort of role that is emerging from research operations. It's also about how do we carry this story through and make sure that that knowledge transfer occurs and story gets told, faithfully, and, and all of that sort of stuff? Tell me, you're very clear about how archives informs your practice. Can we talk about that more? I'd love to understand what that means.

Emily DiLeo 9:07

Yeah, so you know, maybe if I can just reflect a little bit on what you just said about the story. So when you're an archivist, basically, you are brought a collection of materials, you come upon a collection of materials, you know, in various ways, and then you have to make sense of it. Right? So you have to figure out what is the story behind this material. I'm sitting in front of these photographs, these letters, these sound recordings, oftentimes, the person who owned them is has passed away. And you don't often have access to any kind of firsthand knowledge about what these things are. So you kind of have to, um, you know, to a lot of research and figure out what things are and then, you, as the archivist have this really important job to do which is describe the material. Describe it and organise it, keep it as closely organised as it originally came to you as possible is kind of one of the main rules of archival practice. But it's this idea of description, and making sense. And then you pass that along to the user. So my kind of what I used to champion when I was working as an archivist was this transparency, which comes from ethnography, which was, you know, as archivists, we need to talk about what our role was when we process that collection, you know, so because we may have done it the wrong way, or we may have overlooked something, or we may we made decisions on how to organise something. And nobody knows why we made those decisions unless we write them down and tell people why. Yeah, right. And same thing with research, right? Nobody knows why we conducted a research study the way we did, unless we tell that story somehow.

Brigette Metzler 11:10

Yeah. And you have been giving that some thought to because, you know, part of the the challenge of having a knowledge management management system that sort of moves beyond the time of the researchers as if the researcher is not actually there in the organisation anymore. And thinking about how is this different from how I experience research as an academic, where, you know, my work will be out in the public domain, and it will be referred to and yet I never really have that same sense of, of concern about people understanding the context. And I realised, recently, of course, that when you come to the table, expecting that that context, needs to travel with the research that that's just a part of the embedded practice. Whereas in user

research, we researchers expect to be able to be there we're there telling the story, and somehow we are changing that. So you indicated and that, that knowledge management systems in user research is change work. And I think you're going to talk about that a lot in your talk. And I certainly wholeheartedly agree, should we talk about about that, that change work that needs to be done in organisations and how your experience is there?

Emily DiLeo 12:36

Sure. And I mean, again, you know, what you just said about and what I was talking about that like reflecting and telling the story of the research. That was something that Sam Ladner talked about at the advancing research conference. And she called that rigour? You know, she said, This is what makes the study rigorous is that we can we choose a method, and we can tell people why we chose that method. Right? So following that line of reasoning, like, you know, that this kind of storytelling of our own process can only make our research practice more rigorous. Yeah.

Brigette Metzler 13:15

So that can look like I know, in my own practice, for example, we have a very large research plan, and the researchers are like, Why does this research plan have to be so long? That's a good question. And it's because it's trying to draw out that story. But how do you embed that practice? At SAP? For example, how does it look?

Emily DiLeo 13:38

Yeah, that's, that's a good question. So that's, you know, what I've what I've been thinking about, as, you know, when I come into new organisations and see how they do things, and I think probably the first concept that I go to is description. So, archival description, right? There's, as you know, some people may know that archives has like a very lengthy handbook that archivists use, to put together description. And so there are certain ways that you describe things and, you know, it's all it's all very, very detailed, this handbook. But what is so interesting when you come into an organisation, and I think everybody knows this is that you kind of, you know, you might like go to the SharePoint and kind of poke around and look and see what people have done. And it's just kind of a slog, because you have pretty much no idea of what you're looking at, or you know, you look at a document you don't know anything. Like there may not even be a date on the document, first of all right, but like, you don't know what it was used for. Like if it was a good document if it was a good study, like there's no indication of the story behind that document. And, you know, we all know how, you know what turnover is like at companies. And that just seems so odd to me that like, how can you build build on a corpus of research when it's not described? And when it's, first of all, you're lucky if it's all in SharePoint. Right. So that's certainly one practical thing I'm going to talk about in the talk is just kind of like how to do that. And it's, it's pretty simple, pretty simple to do these kinds of practices, like just just to enter in that level of description. And in SharePoint, you can, you know, you can easily just add a column and just just write you know, whatever is important to your team, like, we use this for this, and it will or this was just a draft, or, or whatnot, so that when people look in your file, they can just scan their eyes down and just see what's there. And there's a story, right, first of all, it's easier, it's not such a slog. And second of all, if you just going through the process is another

thing that Sam Ladner said, because I listened to her talk again, the other day, actually at work. And just the process of going through and reviewing those documents and describing them is like analysis. Yeah, it's analysis, right. It's like more longitudinal analysis, and it's a practice that's worth doing. For all sorts of reasons.

Brigette Metzler 16:27

Yeah.

I'd love to dig into that sort of meta analysis and opportunities in research repositories. Should we first of all, they start at the beginning. So, you know, how do you how do you how do people go into an organisation? So the first of all, you said that they, you, you shouldn't get in and start to describe the work? What are some of the the change aspects? What are the some of the cultural things that need to change there? Or that you need to sort of influence when you're when you're trying to get started?

Emily DiLeo 17:01

Yeah, so I think it's gonna vary. I again, you know, just because of my background, I'm not, I'm not a straight up librarian, or straight up archivist, right? I think I am primarily an ethnographer. An anthropologist. So when I go into an organisation, I don't really decide what needs to be done for quite a while. I need to know, a lot. Right? I need to know what the researchers experience is, like, I need to know like, what are the pain points in the research org? You know, there's a huge range of, you know, maturity of research practices. So, I mean, in order to make that shift, you have to meet people where they are. That's what that's like. I know, this has been said before, but librarians like to say that too, right? Like, we need to meet our users where they are. You know, there could be a lot of I mean, there's all sorts of work that you could do, but just depending on what people are ready to do, and what what people feel is the most critical thing to do at this point in time. But I would say, you know, just to answer your question more directly, like, I think the main thing is just time, I don't think researchers have time or are given time to really do this kind of reflective work. But it's not incentivized either. Right. So it's just not part of the practice. So you kind of have to dig in to see like, why this isn't happening. I did know of a lead researcher who would do kind of the debrief after her studies, and record it. And I thought that was genius, because a super light lift, like no one has to write up anything. And you have that documentation to refer to if anyone wants to know what really happened to that research study. As long as you cover this, we have the right questions in that debrief. All they have to do is listen to it. Yeah. Yeah. So yeah, so it's time.

Brigette Metzler 19:18

Right. So part of the role of research operations, then if I'm hearing you, right, is about creating that sense that that time is well spent, and embedding them. Mm hmm. Yes, yeah. Yes. And, and so tell me, you mentioned incentivize people being incentivized to do it or not do it and, you know, what are some of the types of indications that you see in organisations that maybe they might be ready to look at knowledge management systems for user research? Doesn't always happen it's often just get the recruitment, right? When does it become something about knowledge management?

Emily DiLeo 20:05

Yes, well, from what I can tell, as I've kind of observed kind of in the Re Ops Slack channel, and just looking at what people are talking about, I'm not sure that organisations think they're ready for the right reasons. Right? There's, I think, I feel like people are still grasping at straws a little bit. And like the best argument, they can come up with this, so we don't duplicate effort. Right? To me that, for me, that's still an open question. Like I really, I really would, would love to kind of solidify that reasoning a little bit more. Because you do have to talk about, ultimately the bottom line. Right? When it talks to when it comes to knowledge management systems?

Brigette Metzler 20:56

Yeah, cuz it's on a scale, right? I mean, how much? How much effort and energy do you put into building a knowledge management system? As opposed to? And use of the research?

Emily DiLeo 21:08

Absolutely. And I don't? I mean, the problem is, and I would say, it's, it is a problem that, like, most places are not hiring an information science person to do these repositories. I mean, you know, this, right. So, you know, from your study is that, you know, I talked to folks all the time, who were just like, uh, I don't really know what I'm doing, I know what I'm doing. And, and that's not a great place to start. I mean, it's kind of, it's super stressful, right? Like, if you don't know where to start. And then there's, you know, this other I think, kind of problem about a repository, you know, being kind of a buzzword, and meaning so many different things. And absolutely, as an, you know, that finding that you all came up with, like that people don't seem to know how to define what the repository is where they go forward with it before doing that, which is so odd to me.

Brigette Metzler 22:12

It's odd to me too

Emily DiLeo 22:15

Right? I mean, it could be that your need is actually quite simple.

Brigette Metzler 22:18

Yeah. Yeah. Right. That's right. So yeah, let's reflect on that. I think in the, you know, in the in the project that the community has done, we've got a finding of having four different types of, of knowledge management systems. So you've got your research register, you've got your insights hub, you've got your research data repository, and your library. Do you have you seen those? Or what do you think? What have you seen play out in organisations? What are people aiming for usually, and they don't know what it is they think that they're doing?

Emily DiLeo 22:57

Well, I think the problem is they're aiming for everything all at once. Right? Like they're reading about all these things, and how great they are. And then unfortunately, actually, a lot of the tools are made that way. Yeah, they're kind of like scat scattershot, is that the right word? I don't

know, they're just, they seem they're confusing to look at as a librarian, because they seem to want to do all these different things. When the rules of engagement, not to mention governments and everything, governance, and everything else is so different for a research library versus an insights hub. Right? Yeah. Just having raw data in somewhere. It's just a completely different project. Right. It's just you can't, it's hard for me to think of those things in the same bucket.

Brigette Metzler 23:46

Yeah, yeah.

I agree. Because the governance is gonna be slightly different, right? And, and then how that story gets told, maybe?

Emily DiLeo 23:59

Yeah,

yes, for sure. I mean, they just have different functions, as far as I'm aware. And I don't you know, what, one thing you know, I, I do, which I think kind of ensures some level of success is when I come into an organisation, it's just look at the strategic goals of the org, right? Because I think too, like the more you can tie your knowledge management repository, whatever it is, you're trying to build into those goals. Now, the better chance you are of getting that kind of upper level support, which I think is critical.

Brigette Metzler 24:40

Yeah. Should we talk about the bit that doesn't get talked about very often? Which is which is basically the you know, the funding I think is problematic, because you've got a group of researchers who might tend to be in one space who are going through all the effort and all of that sort of work for the entire organisation. Do you see? How do you see that change work going on there? I mean, I think about silos, breaking down silos and all that sort of stuff. Talk to me about that, that aspect of knowledge management. Any any thoughts or opinions about it?

Emily DiLeo 25:24

You mean getting? You mean getting things? Kind of getting getting it off the ground?

Brigette Metzler 25:30

Yeah, I think, so,

Emily DiLeo 25:32

Repositories seem to start from a researcher, right? Or two, or three. Who have like this particular interest and feel that like, or frustration, right, like, like, why are we doing this work again, like, over and over and over, right. And so, you know, as they start thinking about this, you know, how to how to kind of problem solve this area. And they, you know, it usually is this kind of like small group of really kind of dedicated individuals who are really interested in this particular aspect. And they kind of get together, and if they're lucky, they'll be able to hire, you

know, someone to come in, right. So like at Thomson Reuters, I was a contractor that came in to do that work to help them do that work. And I think that's probably like, a best, maybe best case scenario, in terms of standing up a repository is to have an information science professional, there with you, as a member of the team, as you're standing it up. Of course, an even better case scenario is to have that person to, you know, to have a librarian, right, or, or someone on the ops team who has those skills to keep it going, because it has all sorts of growth potential and all things sorts of things to manage, right? Because what I'm, what I'm kind of afraid, I might see, well, I guess I should say, I've seen it before, right, folks that have stood up their own repository or thing that they think that the, the organisation should have, and it crashed and burned. And now it's just sitting there. Right. And so, you know, you also have to come in, you know, I've, I've come in and talk to those people who tried to stand those things up, and, you know, figure out what happened. So it's hard. And it's frustrating, you do have to drum that up. But I think, and I hope that what I can present and the things that I can talk about at this conference, can help people kind of do things on their own in their orgs, that are, that are not like, if you're not ready for a repository, but you're ready for that change, you can still make those changes, you don't have to implement a research repository, right? Like, a repository is just a place. Well, in archives. It is, right? That's, that's the definition of a repository. And archives is just like a place where archival material lives, right. You can use whatever you want, you can use SharePoint if you want. You just, you know, what I'm hoping is just to kind of come up with these kinds of principles and like ways for people to do this work. That's really the work of a repository. It's not choosing a tool. Right. Yeah.

Brigette Metzler 28:26

Right. Right. That's, I think, is that the sort of place to start that research register kind of place where you're just making sure that it's all known and all of that kind of stuff?

Emily DiLeo 28:39

Sure. Sure. I haven't. Yes. I mean, I would, I would say, so I have not seen a register like that. But I mean, that doesn't mean anything I've only, you know, been in UX for a year, but But I definitely, you know, would go into an org and like, make a list of what I would call data sources. Right? So make a list of like those little repos that may get set up here and there, you know, in different different parts of the company. Maybe you know, customer feedback, maybe they have something that they use, and then just kind of, you know, consider which one of these things should go into like a larger repository and which ones maybe shouldn't should or just better standalone tools.

Brigette Metzler 29:30

Yeah. So what will people learn if they come to the conference from that?

Emily DiLeo 29:37

Well, yeah, what what I would love to show people is is just, you know, talk about those skills and talk about the things that I don't think people may not think about, right, where are you when you are kind of in the heat of, you know, turning out a research study. You know, you're not going to think about like, labelling your labelling every document or, you know, in the document,

but you know, can be very simple things that you can do, right, I'm gonna, I'm gonna try and keep it to those very simple light lift kind of activities, practices behaviours, actually is what I like to call them, like behaviours that you can implement in your research practice that will just make everything, I think easier, less of a slog, and more rigorous, right. And like, ideally, there would be more rigour and more storytelling, right? Yes. So I would encourage that, right. So you can look, you can look at a folder in your SharePoint and see a research study and all the documents around it, and you can see the story right in front of your face. Right, you don't have to wonder how did this turn out? Was this used? Right? Like you could, you could put whatever, add whatever you want to that story?

Brigette Metzler 31:01

Yeah. Yeah. And a final sort of question, what do you think are the challenges for research ops as it's embedded in organisations? What's your take on that?

Emily DiLeo 31:12

Hmm, I think, you know, having just having just been on the job market, which is like, particularly crazy right now, there's just a wide range of ops practices. Um, it can be everything from, you know, Oh, these are the tasks that we don't want to do. Or we don't have time to do is researchers to like, like, super strategic positions. And I think that just hiring for that tactical work. I think that that is very short sighted. Yeah. I don't think it I mean, I'm not the first person to say this, of course, but I, I think, you know, certainly, you can have a team that has people on it, who are tactical, and also people who, you know, have been around the block for research like those are, that's an excellent position for a person like that to be in, I find it odd that a lot of places ops is seen as kind of like a secondary, secondary position, which it never comes across to me that way. Because I'm like, wow, to be on ops team, you have to know about research, you have to know what these teams are trying to do. And you have to be able to help them whether that's tactical or strategic or coaching. And you've got to have those those people on that team as well. Right, that you're gonna get the most bang for your buck for sure.

Brigette Metzler 32:46

Yeah, exactly. Exactly. Yeah, good. Yeah.

I think that, yeah, that whole strategic end of ops probably is a degree. It's the bit that the challenge right now, is being able to articulate really well what that does.

Emily DiLeo 33:03

And I don't know where that I don't know where that work lives now. Right? Because I'm like, okay, so research ops, like that kind of work is not new. Right. That's just work that has been done by researchers. So the strategic portion of it, I think, is, I mean, certainly also something that's done by researchers. But my guess is that, that kind of struck those strategic conversations are always like, captured or like, put into action. I don't know, by having someone who, who is kind of quote in charge of the strategy, right? Or at least kind of corralling it somehow, then you can make it a little more actionable. I would think.

Brigette Metzler 33:50

Maybe it speaks to the pain points of how research operations sort of arise in the first place. Is that that lack of that programmatic view or lack of capacity to be forward thinking that knowledge management might grant you. Do you see? Yeah, you see that in your your knowledge management systems that it grants you that capacity?

Emily DiLeo 34:10

Oh, for sure. I mean, it's not the only one, sure, right? Because I mean, I talk to, you know, even the folks on ops teams who do tactical work, like who do participant recruitment, they know everything that's going on. Yeah. Right. It's like, you know, that they, they, their eyes are on, on all those things, right. And that's what the ops, ops team is like. And you may they may be the only ones who actually know especially in a very large organisation, like the ones I've worked in, where yeah, where there's all sorts of things going on in the nooks and crannies of organisations and this, these ops folks are the ones who know what everyone is doing.

Brigette Metzler 34:53

The hub to all of the spokes. Fantastic. Well, thank you so much for your time today, Emily. It's been just wonderful to get into that whole knowledge management stuff and the storytelling aspect of it. Yeah. Yeah, that's such a gift that you that you bring to the profession. Yeah, that combination of storytelling. And yeah,

Emily DiLeo 35:18

I just, you know, I really just want to, you know, and here's maybe my union background coming into, but I just really do want to empower people, I do see that, you know, UX research, user research is hard. Because you have to advocate in the fields, like researchers are constantly advocating for the work they do. And that's really hard. That's really hard to have those conversations every day. And, you know, if if you know, these ideas, knowledge management and behaviours can help, kind of, you know, organise and make things more rigorous and somehow more impactful, then that's great. That's great.

Brigette Metzler 35:59

Fantastic. Well, thank you so much. We'll see you in New York. On June the 8th.

Emily DiLeo 36:04

Yes, yes. Awesome. Thank you, Bridgette.

Brigette Metzler 36:13

And that's the end of today's podcast. Don't forget, you can find tickets to the Re Ops Conf 2022 at ReOpsConf2022.joinlearners.com. It's on Wednesday, June 8, in person in New York City, or online. You can see Holly, myself, most of the research ops board, 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 research ops community on Slack. If there's someone you'd like us to talk to, please let us know. We hope you'll join us next time the research ops podcast. We'll see you soon in the Slack.

