# "UX Roles" Survey?

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# Goal

- To identify what people's perceptions are of what a Researcher does vs. what a Designer does

# Problem I was trying to Solve

- Everybody I talked with had a wildly different viewpoint of who does what

- When we came up with the separate Research function, the Researchers talked about what they do but nobody brought this up with the Designers or changed the way they work

- I had to buy steel-toed shoes

# What did I do?

- Created a Survey and sent it out to the CA Researchers and Designers
- Made a copy and posted it outside of CA to see what others think
  - U-Test
  - UXPA International Facebook page
  - Boston UXPA Facebook page
  - Boston UXPA Slack
  - Emailed it to some UX people I know

# Here are the Results

- Side by Side

# Responses

- CA: 44
  - Researchers: 14 (31.82%)
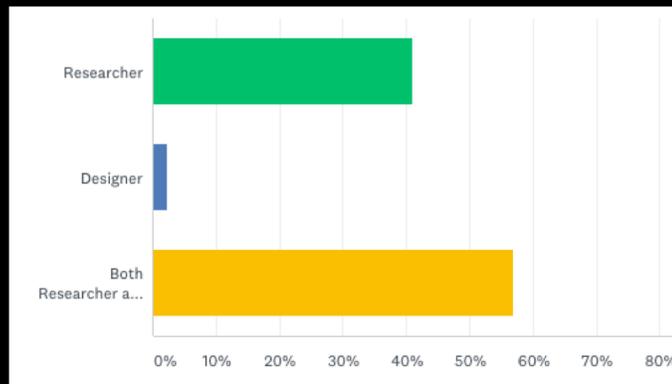  - Designers: 21 (47.73%)
  - Other: 9 (20.45%)

- Outside CA: 95
  - Researchers: 50 (52.63%)
  - Designers: 22 (23.16%)
  - Other: 23 (24.21%)
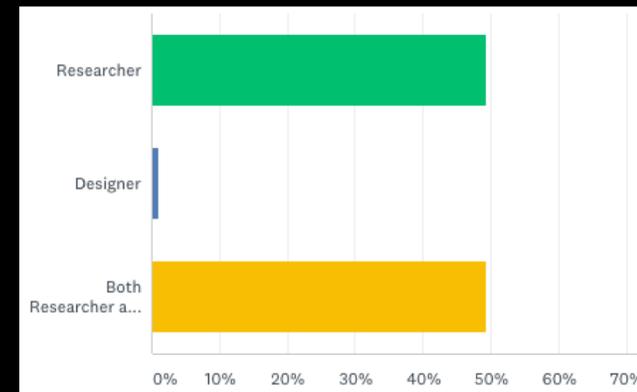
# Competitive Analysis

- CA:
  - Researchers: 18  (40.91%)
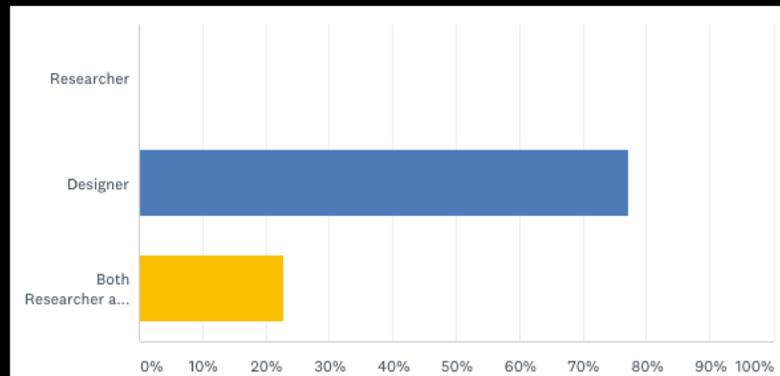  - Designers: 1      (2.27%)

- Outside CA:
  - Researchers: 47  (49.47%)
  - Designers: 1      (1.05%)
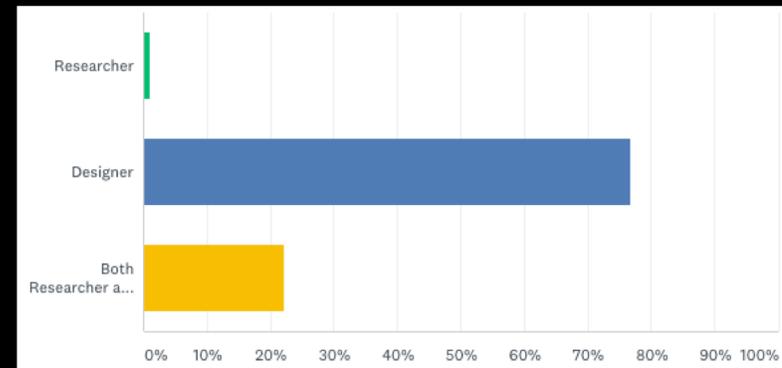
# Wireframing

- CA:
  - Researchers: 0
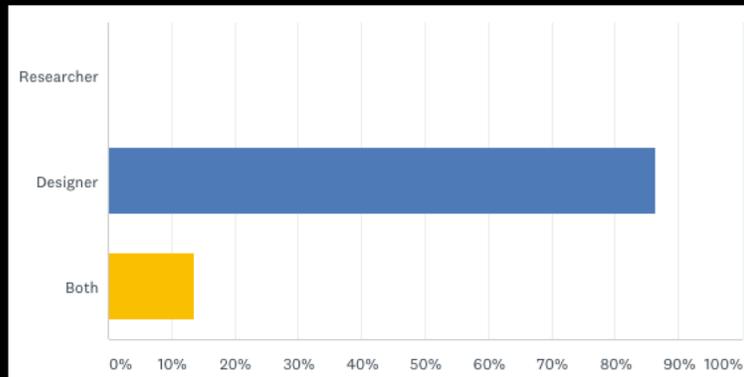  - Designers: 77.27%

- Outside CA:
  - Researchers: 1.05%
  - Designers: 76.84%

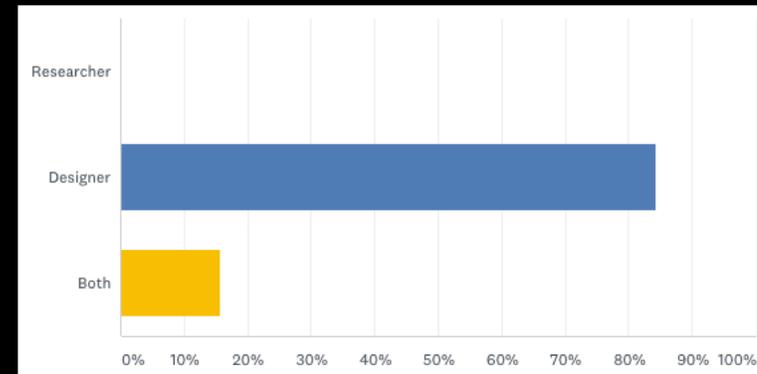# Create Prototypes

- CA:
  - Researchers: 0
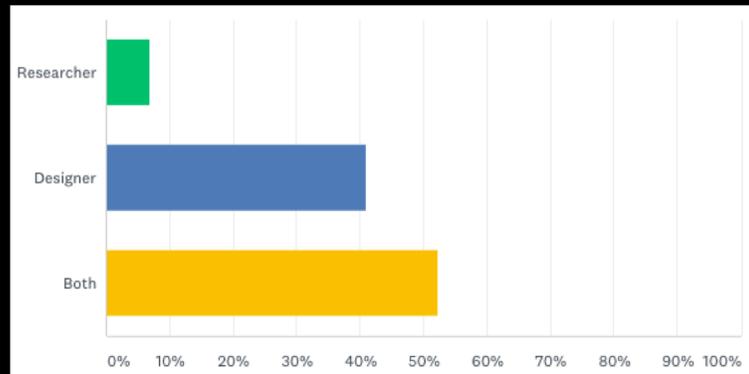  - Designers: 86.36%

- Outside CA:
  - Researchers: 0
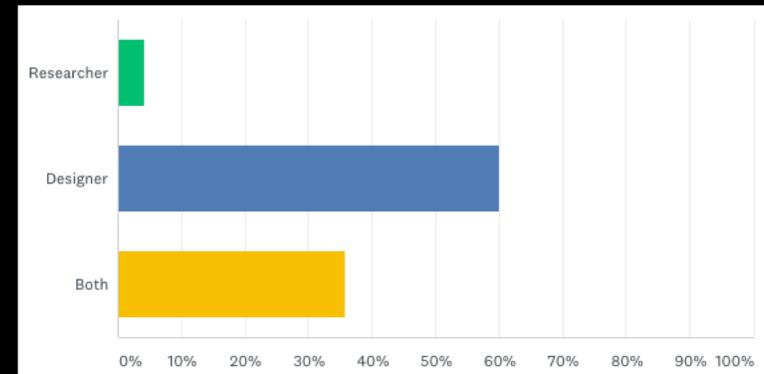  - Designers: 84.21%

# Create a Design Plan

- CA:
  - Researchers: 6.82
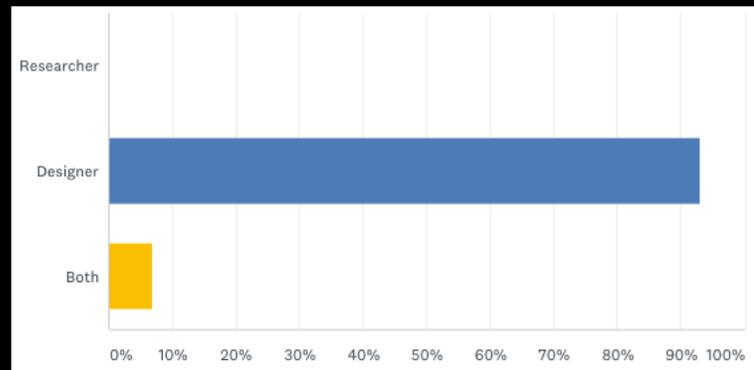  - Designers: 40.91

- Outside CA:
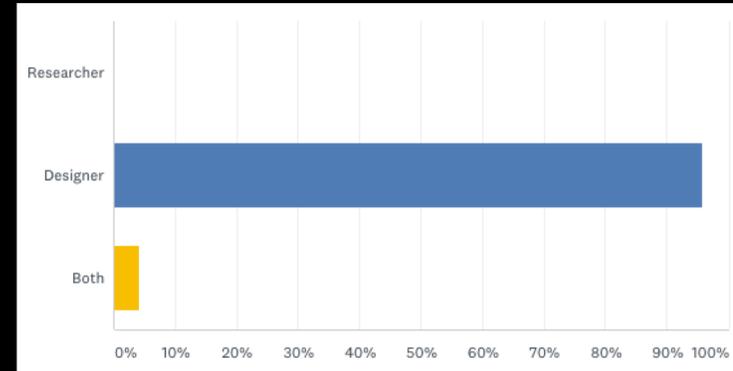  - Researchers: 4.21
  - Designers: 60

# Create Icons

- CA:
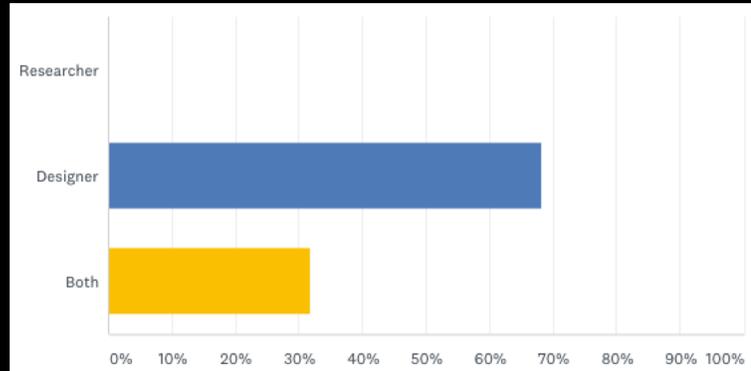  - Researchers: 0
  - Designers: 93.18



- Outside CA:
  - Researchers: 0
  - Designers: 95.79

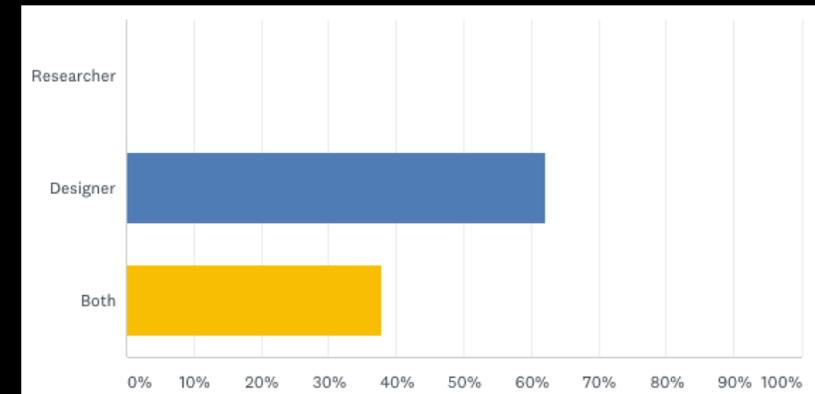# Help create, use, and enforce Style Guides (palette, branding, fonts, elements, etc.)

- CA:
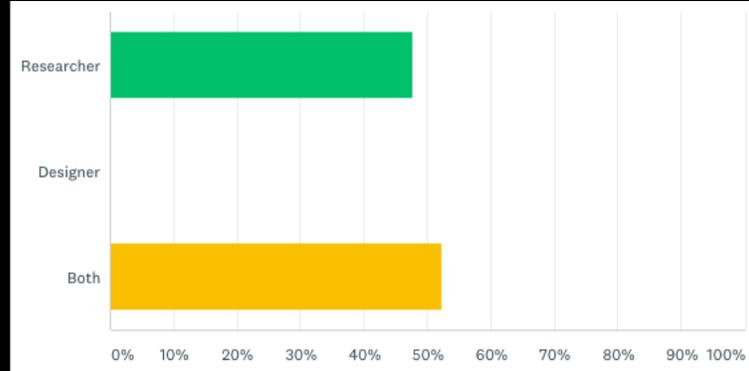  - Researchers: 0
  - Designers: 68.18



- Outside CA:
  - Researchers: 0
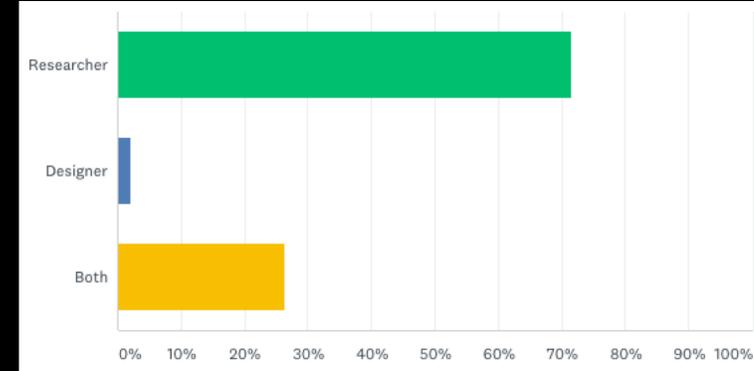  - Designers: 62.11

# Create Personas

- CA:
  - Researchers: 47.73
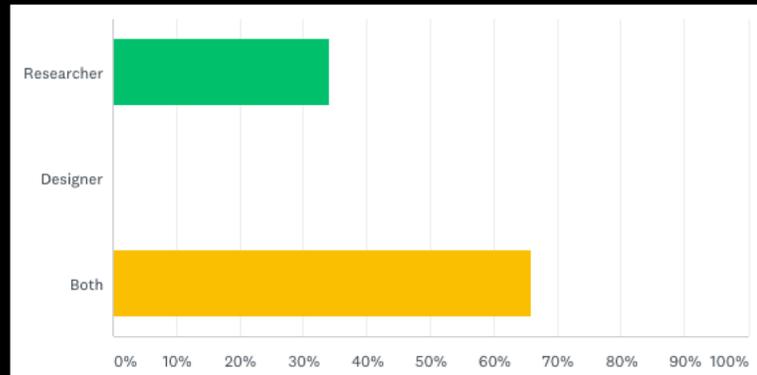  - Designers: 0

- Outside CA:
  - Researchers: 71.58
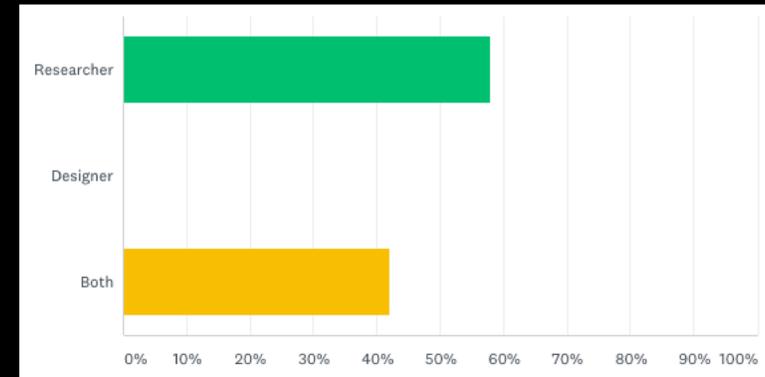  - Designers: 2.11

# Stakeholder interviews

- CA:
  - Researchers: 34.09
  - Designers: 0



- Outside CA:
  - Researchers: 57.89
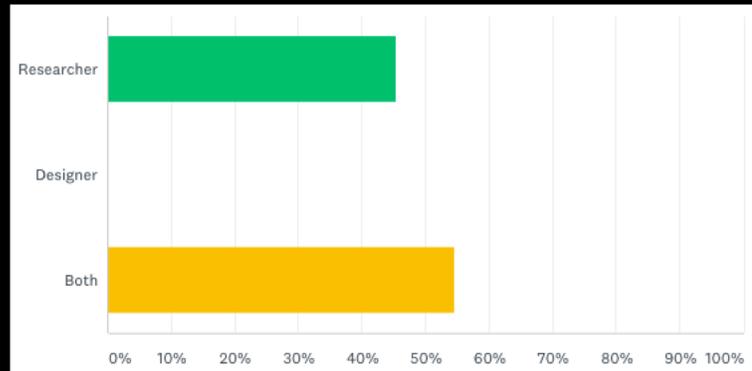  - Designers: 0

# User interviews

- CA:
  - Researchers: 45.45
  - Designers: 0



- Outside CA:
  - Researchers: 77.89
  - Designers: 0
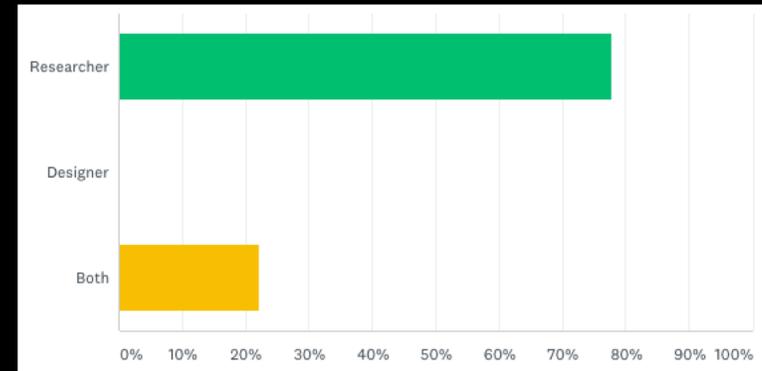
# Heuristic Evaluations

- CA:
  - Researchers: 45.45
  - Designers: 4.55



- Outside CA:
  - Researchers: 60
  - Designers: 5.26
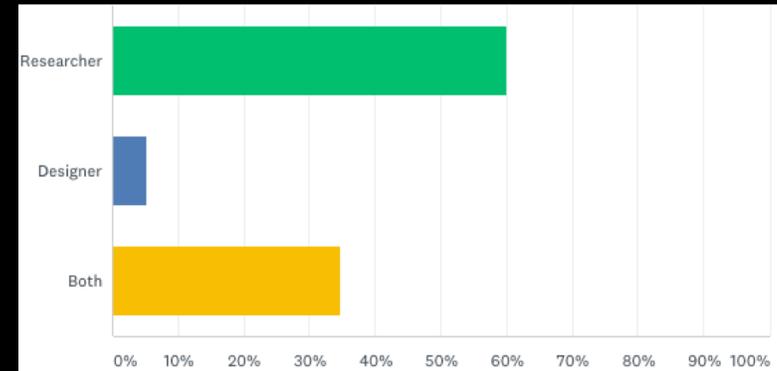
# Diary Studies

- CA:
  - Researchers: 86.36
  - Designers: 0
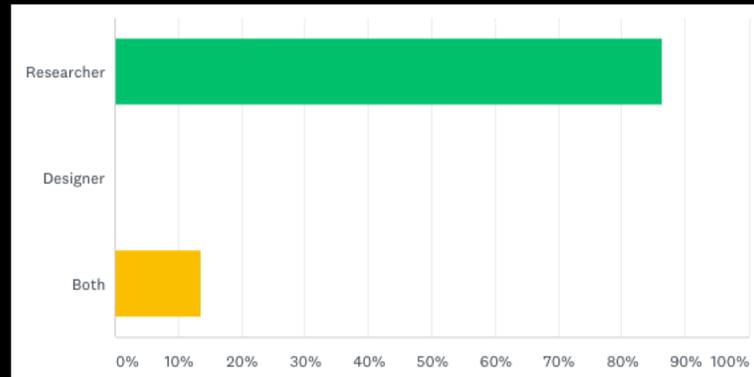


- Outside CA:
  - Researchers: 91.58
  - Designers: 0
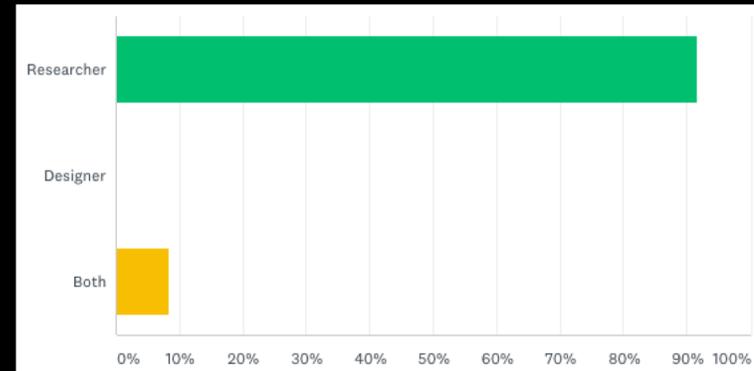
# Tree Tests

- CA:
  - Researchers: 77.27
  - Designers: 0
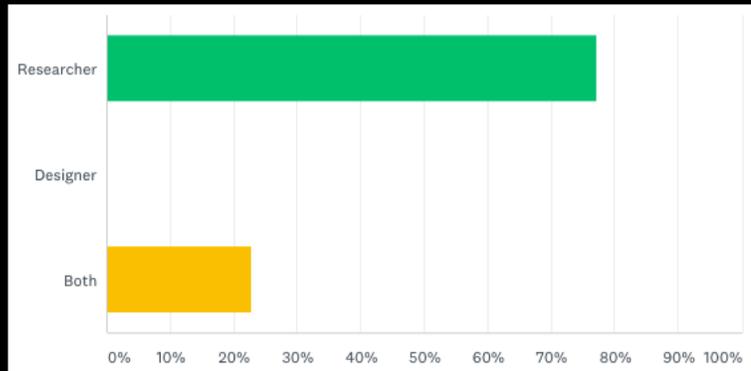


- Outside CA:
  - Researchers: 76.84
  - Designers: 1.05
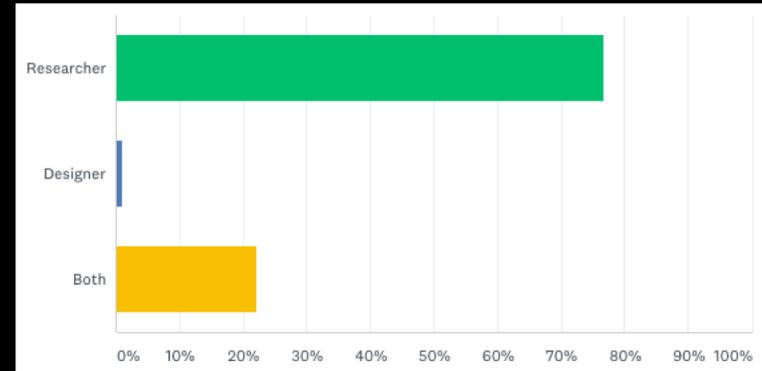
# Lead Design Thinking Studios

- CA:
  - Researchers: 13.64
  - Designers: 22.73
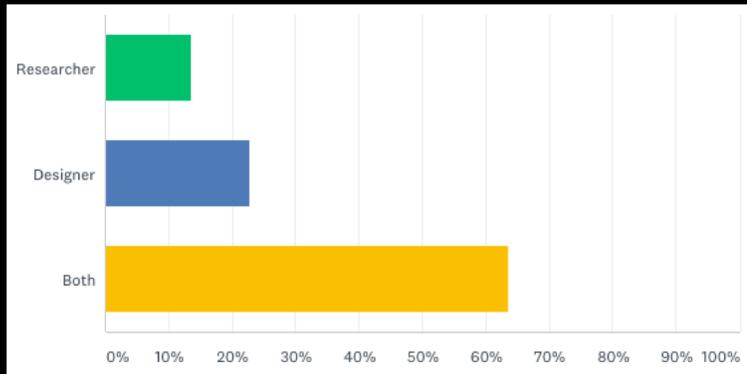


- Outside CA:
  - Researchers: 23.16
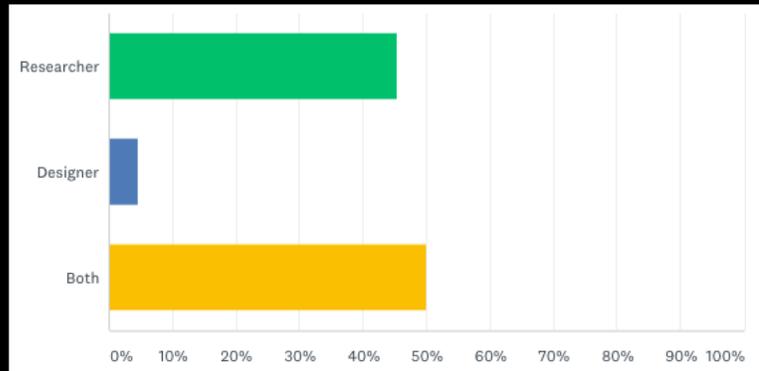  - Designers: 25.26
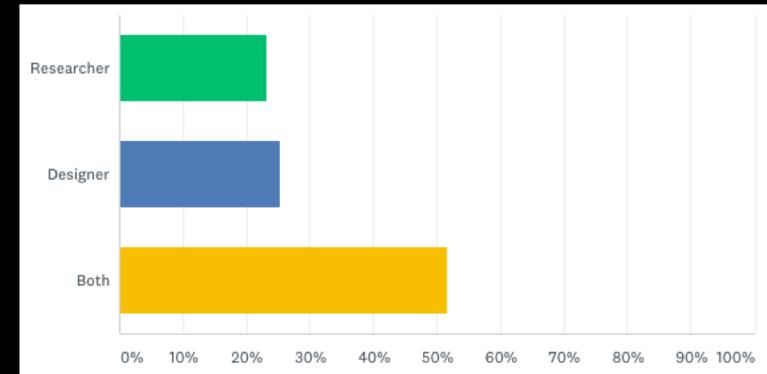
# Lead Brainstorming Sessions

- CA:
  - Researchers: 11.36
  - Designers: 22.73
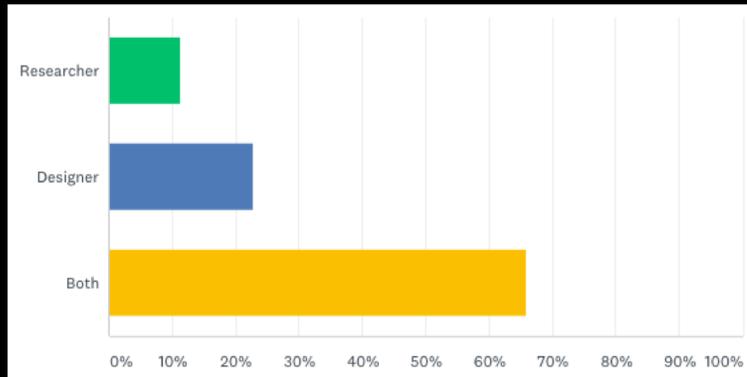


- Outside CA:
  - Researchers: 25.26
  - Designers: 14.74
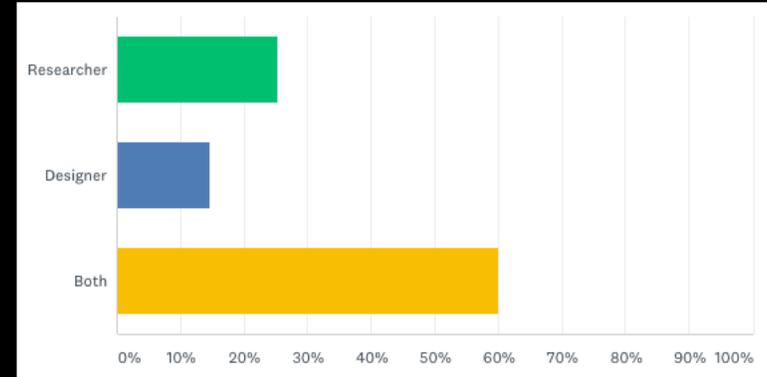
# Card Sorts

- CA:
  - Researchers: 70.45
  - Designers: 0
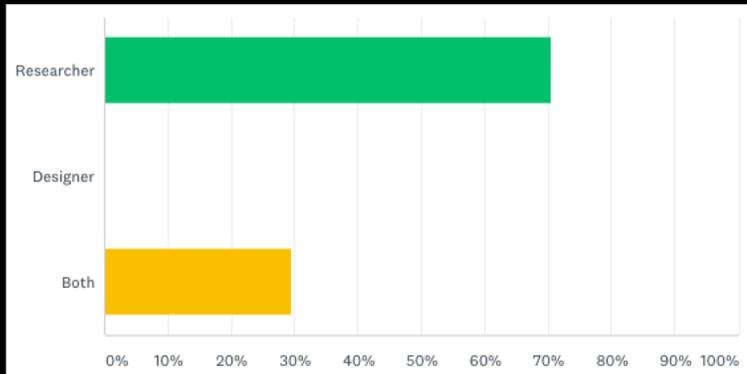


- Outside CA:
  - Researchers: 81.05
  - Designers: 1.05
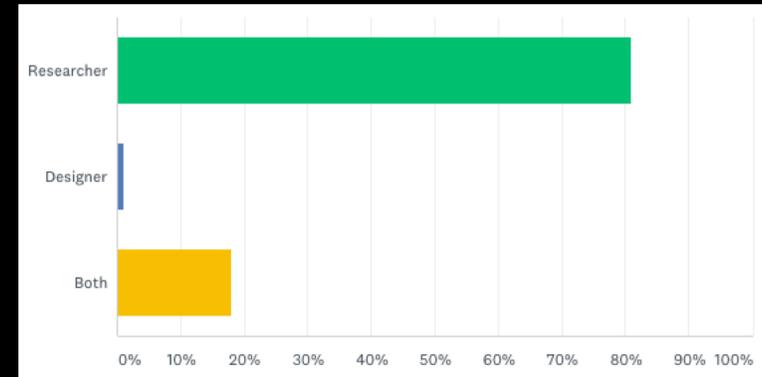
# Create End to End Experience

- CA:
  - Researchers: 4.55
  - Designers: 40.91
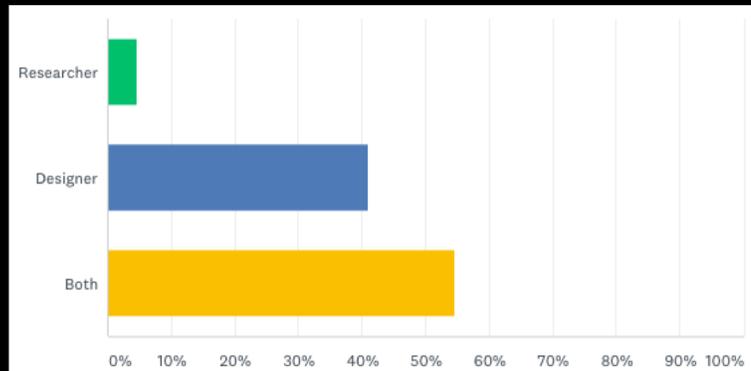


- Outside CA:
  - Researchers: 3.16
  - Designers: 32.63
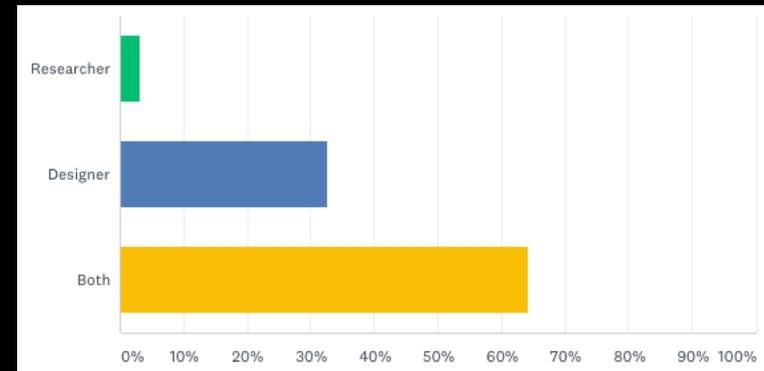
# Create Layout/Navigation

- CA:
  - Researchers: 2.27
  - Designers: 72.73
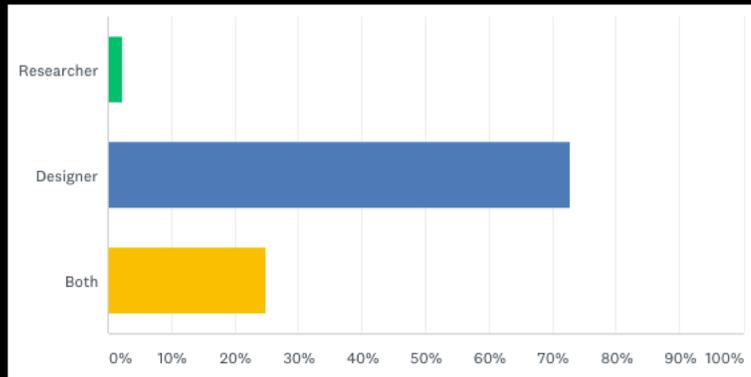


- Outside CA:
  - Researchers: 1.05
  - Designers: 68.42
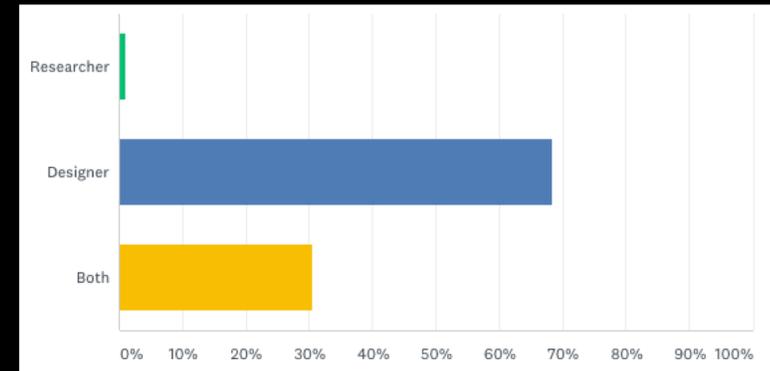
# Cognitive Walkthroughs

- CA:
  - Researchers: 45.45
  - Designers: 2.27
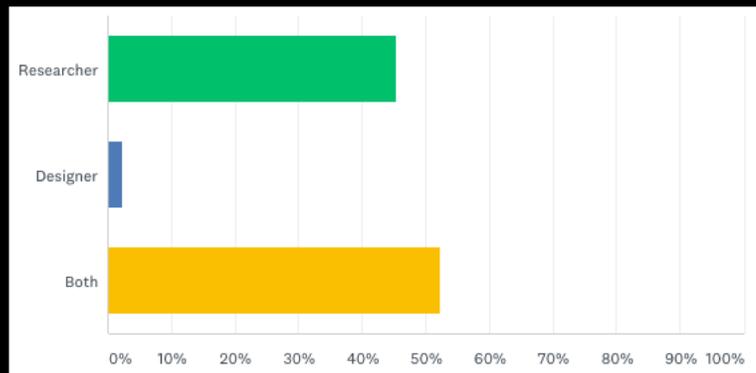


- Outside CA:
  - Researchers: 62.11
  - Designers: 3.16
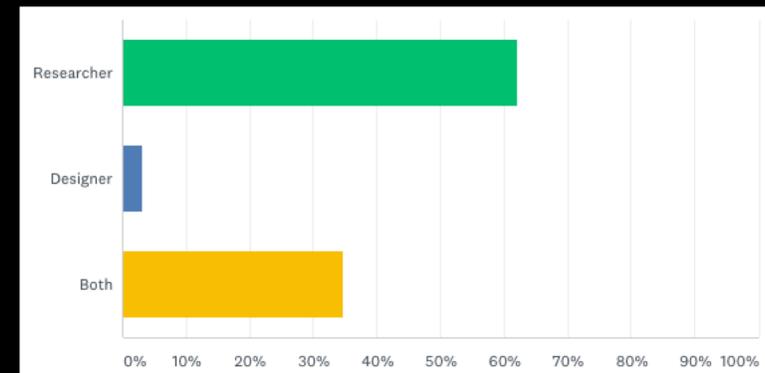
# Contextual Inquiries

- CA:
  - Researchers: 50
  - Designers: 2.27
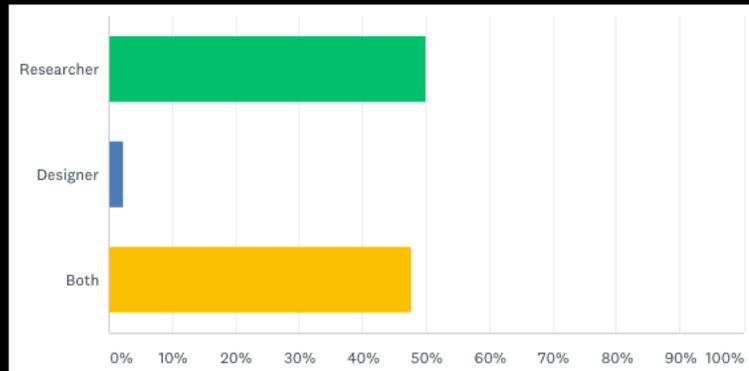


- Outside CA:
  - Researchers: 77.89
  - Designers: 3.16
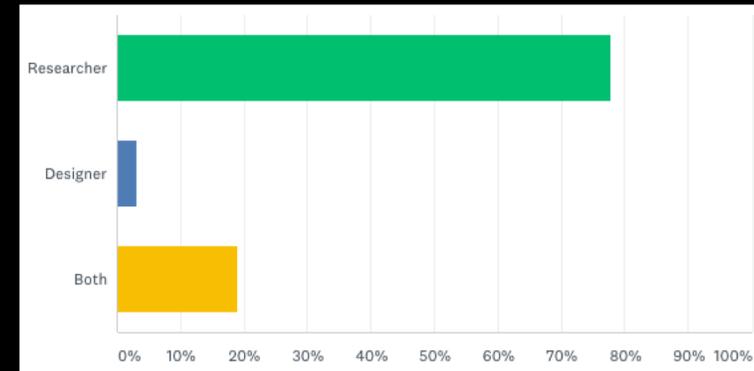
# Taxonomy

- CA:
  - Researchers: 29.55
  - Designers: 20.45
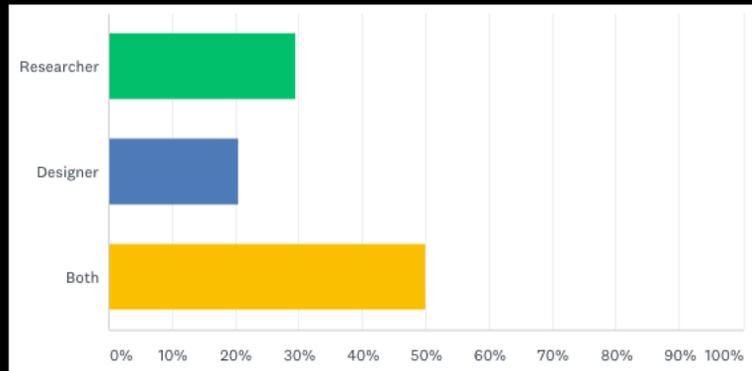


- Outside CA:
  - Researchers: 37.89
  - Designers: 14.74
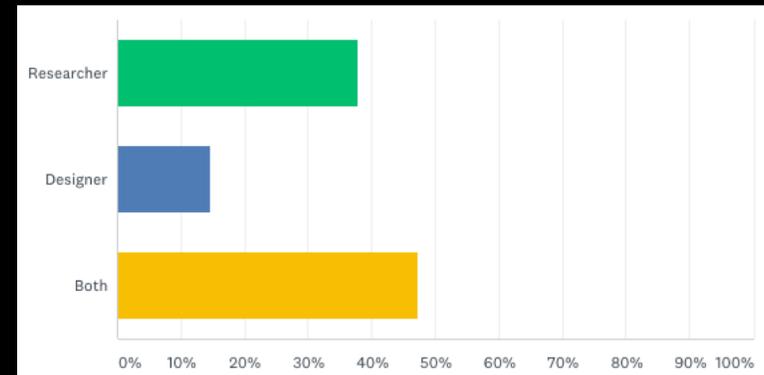
# A/B Testing

- CA:
  - Researchers: 54.55
  - Designers: 2.27
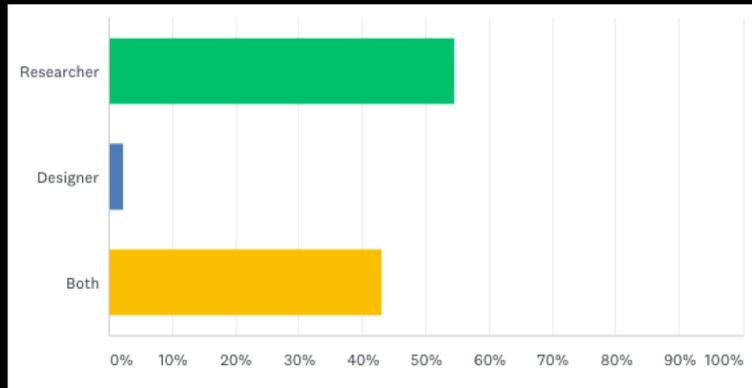


- Outside CA:
  - Researchers: 60
  - Designers: 2.11
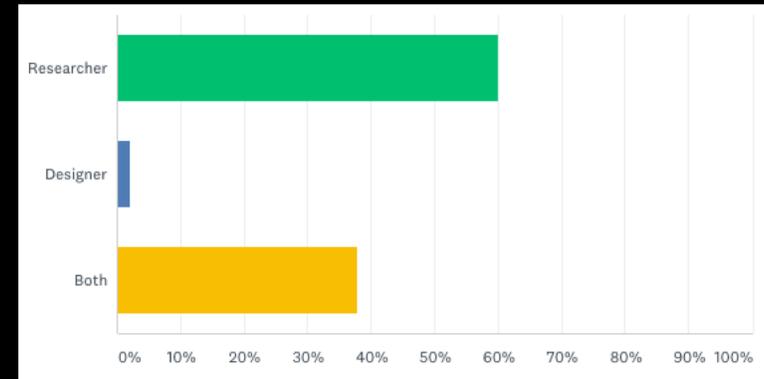
# Strategize with Product Management

- CA:
  - Researchers: 6.82
  - Designers: 22.73



- Outside CA:
  - Researchers: 8.42
  - Designers: 10.53
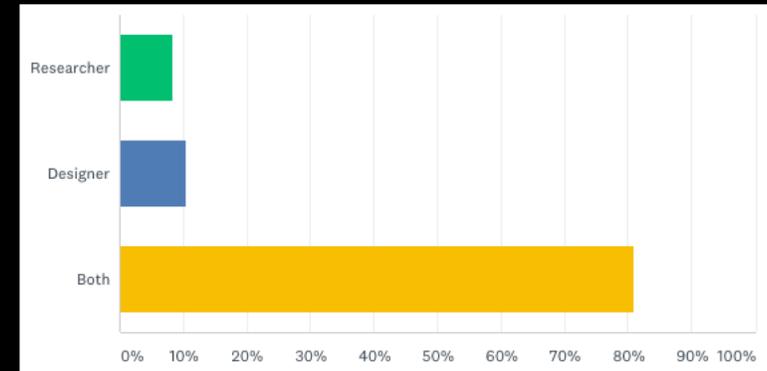
# Journey Mapping

- CA:
  - Researchers: 31.82
  - Designers: 6.82



- Outside CA:
  - Researchers: 48.42
  - Designers: 6.32
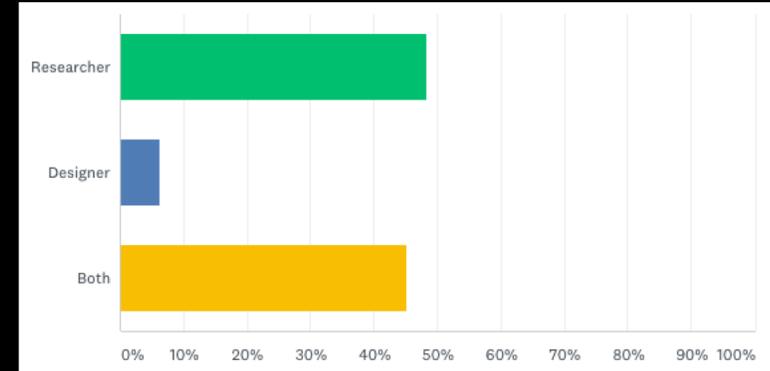
# Usability Studies (moderated/unmoderated, formative/summative)

- CA:
  - Researchers: 70.45
  - Designers: 0
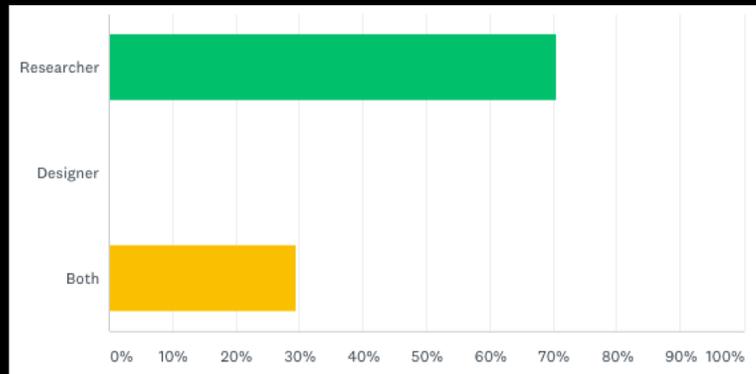
- Outside CA:
  - Researchers: 76.84
  - Designers: 0
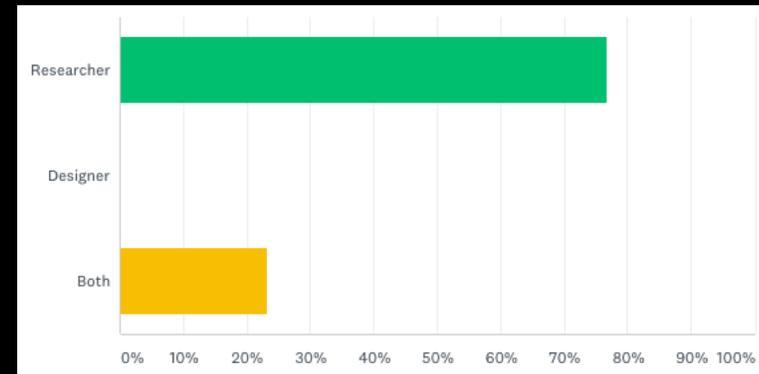
# Workflow Analysis

- CA:
  - Researchers: 22.73
  - Designers: 9.09
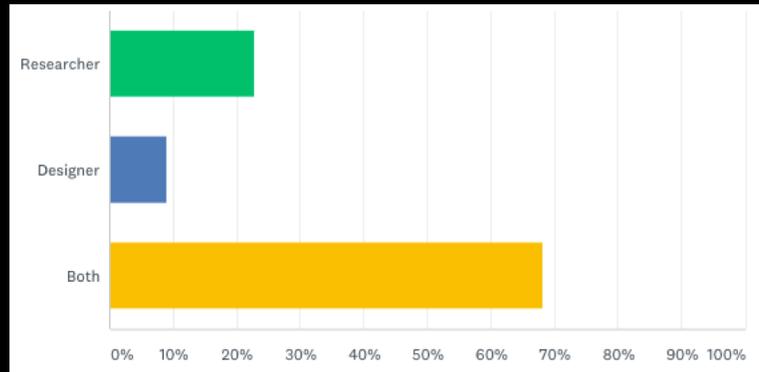


- Outside CA:
  - Researchers: 44.21
  - Designers: 3.16
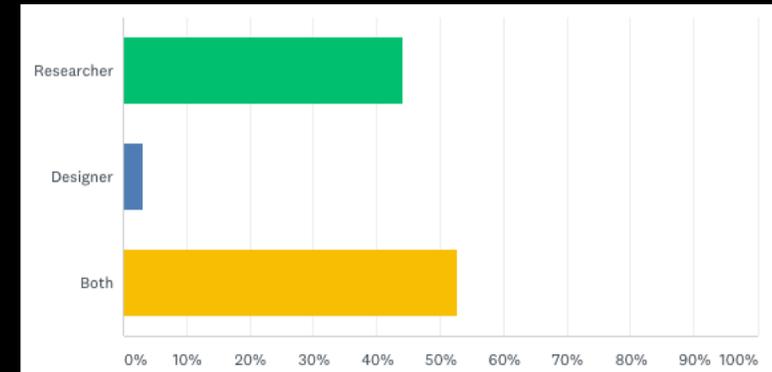
# Surveys/Questionnaires

- CA:
  - Researchers: 79.55
  - Designers: 0
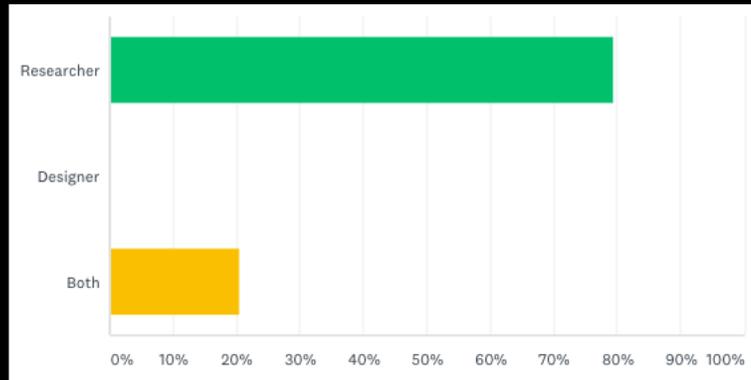


- Outside CA:
  - Researchers: 83.36
  - Designers: 1.05
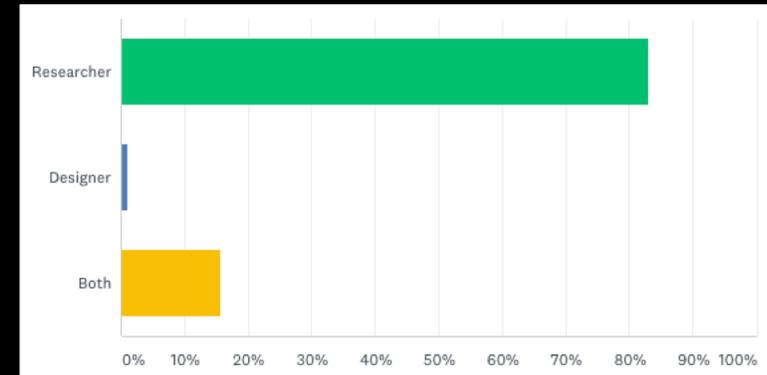
# Create Hi-Fi Prototypes

- CA:
  - Researchers: 0
  - Designers: 93.18
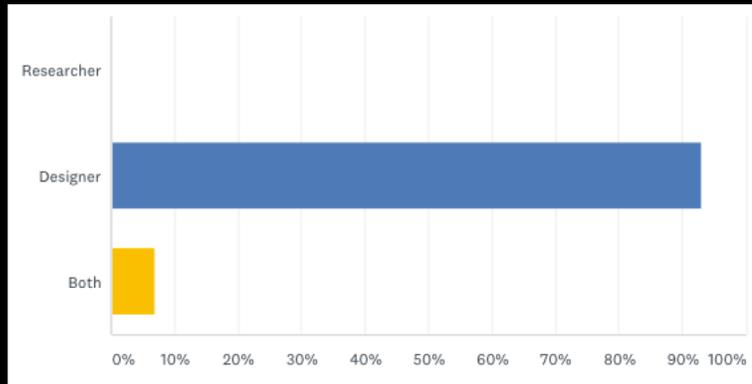


- Outside CA:
  - Researchers: 0
  - Designers: 94.74
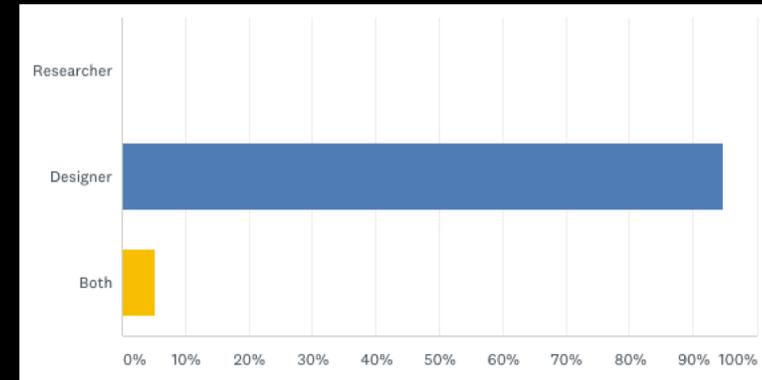
# Create Clickable Prototypes

- CA:
  - Researchers: 0
  - Designers: 90.91
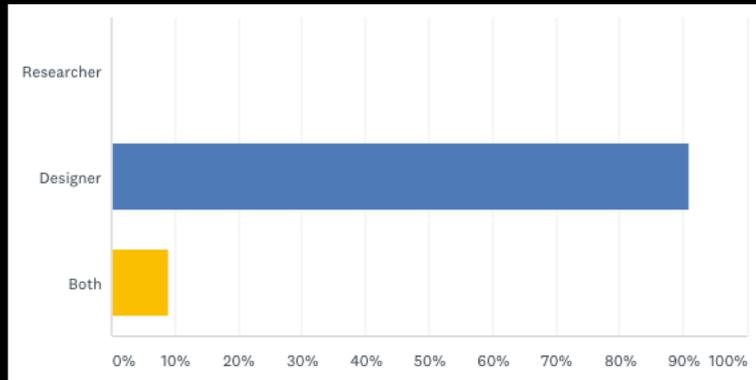
- Outside CA:
  - Researchers: 0
  - Designers: 89.47
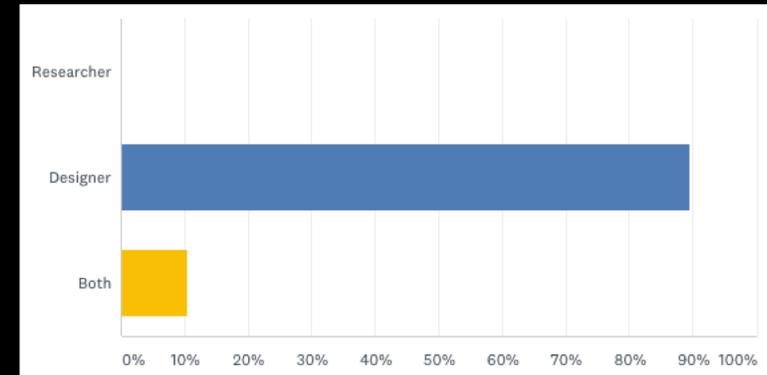
# Implement research findings into design

- CA:
  - Researchers: 2.27
  - Designers: 59.09
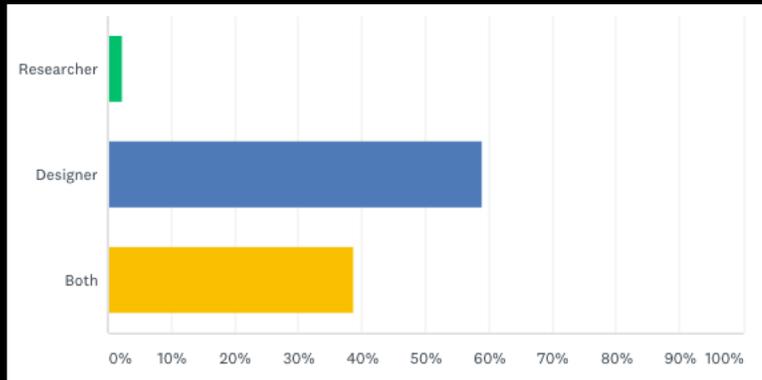
- Outside CA:
  - Researchers: 1.05
  - Designers: 66.32
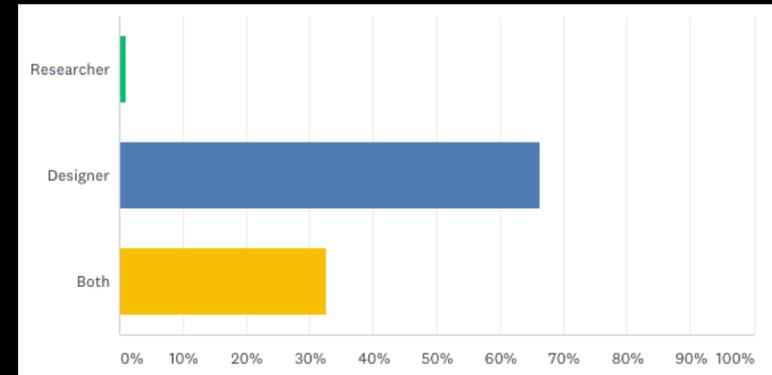
# Task Analysis

- CA:
  - Researchers: 38.64
  - Designers: 6.82
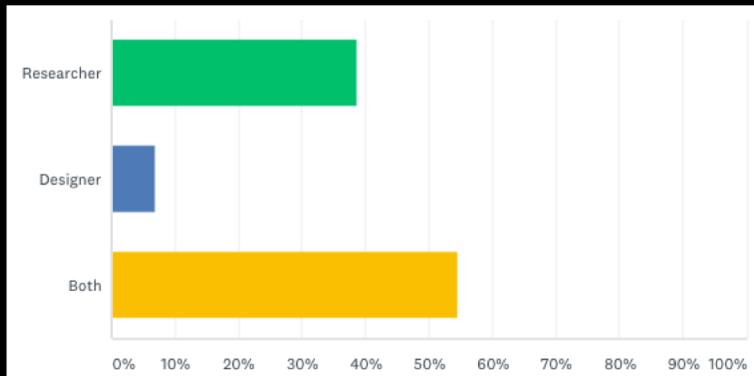


- Outside CA:
  - Researchers: 68.42
  - Designers: 3.16
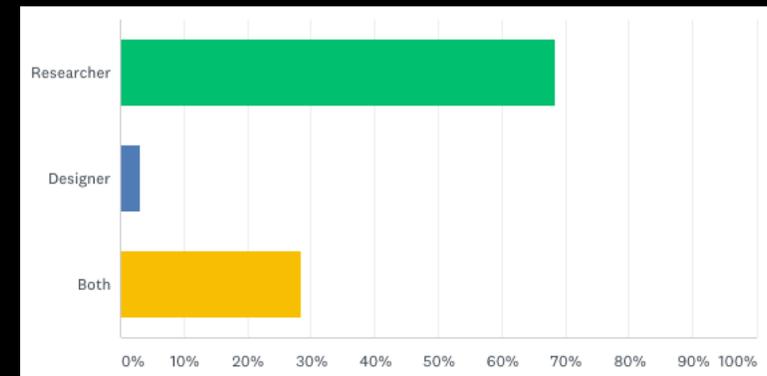
# Create Design Specs

- CA:
  - Researchers: 0
  - Designers: 88.64
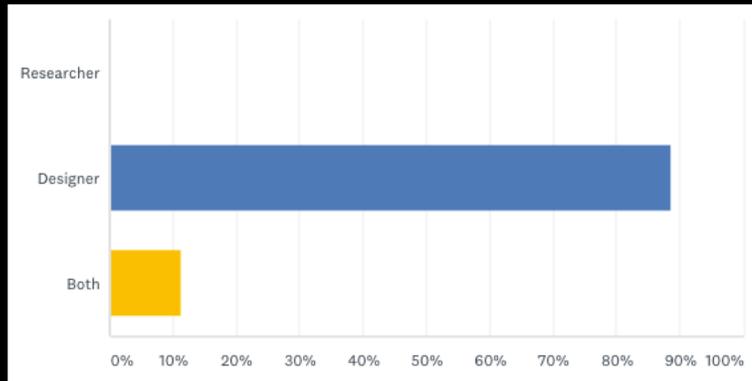


- Outside CA:
  - Researchers: 1.05
  - Designers: 78.95
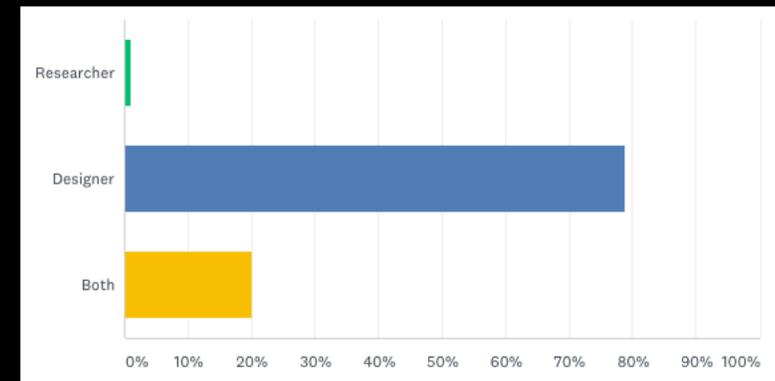
# Identify Target Users

- CA:
  - Researchers: 20.45
  - Designers: 0
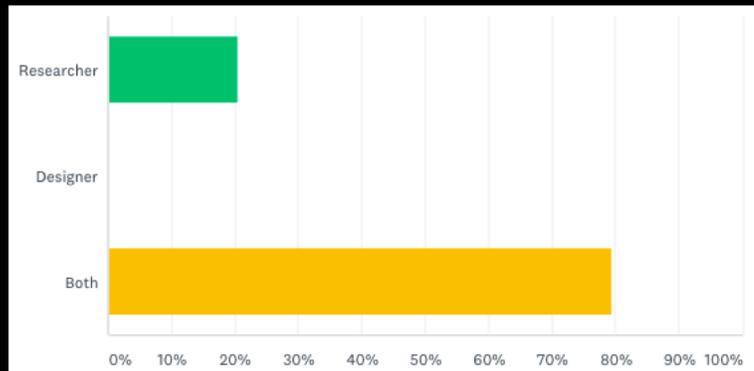


- Outside CA:
  - Researchers: 53.68
  - Designers: 2.11
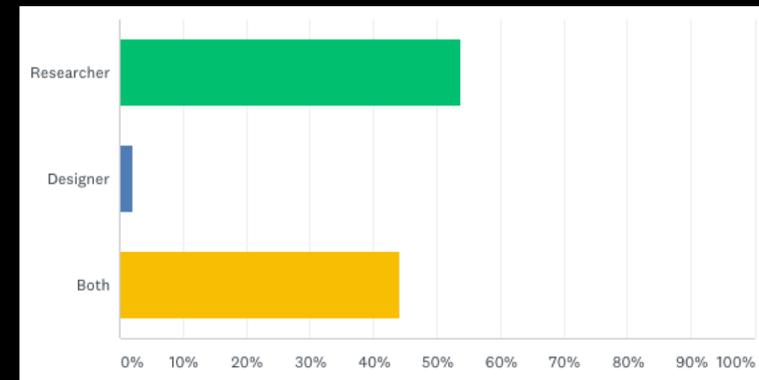
# Be the sign-off to verify dev built what was designed

- CA:
  - Researchers: 0
  - Designers: 68.18
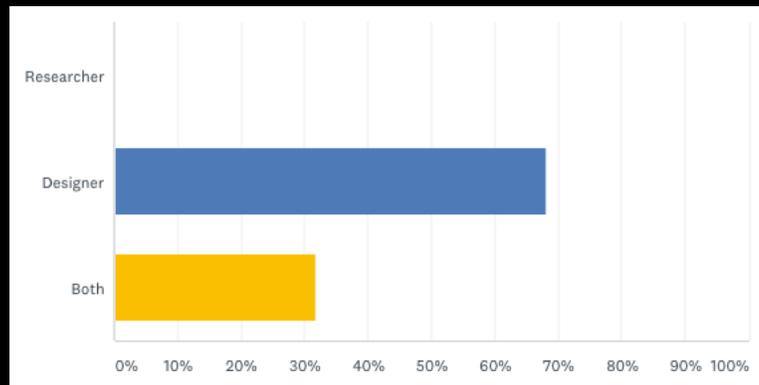


- Outside CA:
  - Researchers: 6.32
  - Designers: 64.21
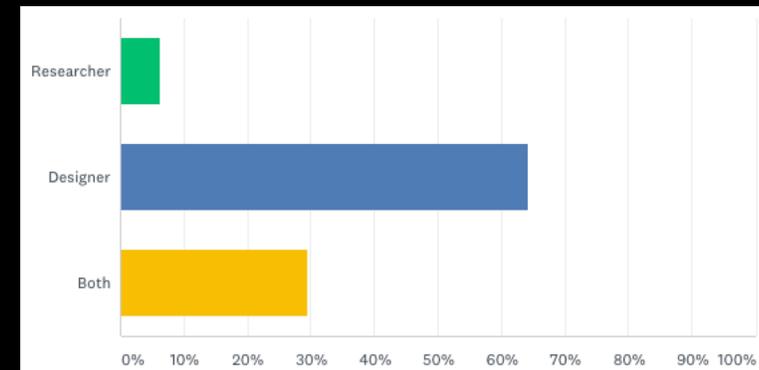
# NPS Survey Analysis (UX Perspective)

- CA:
  - Researchers: 63.64
  - Designers: 2.27
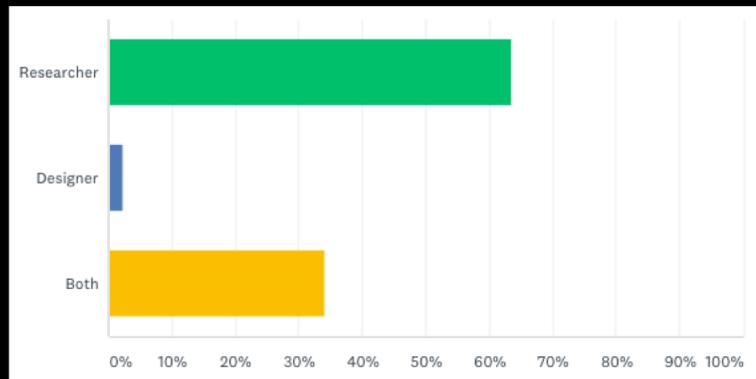
- Outside CA:
  - Researchers: 77.89
  - Designers: 2.11
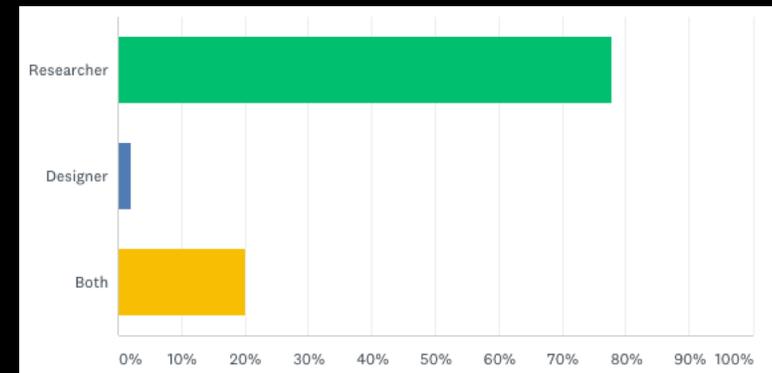
# Design Reviews

- CA:
  - Researchers: 2.27
  - Designers: 45.45
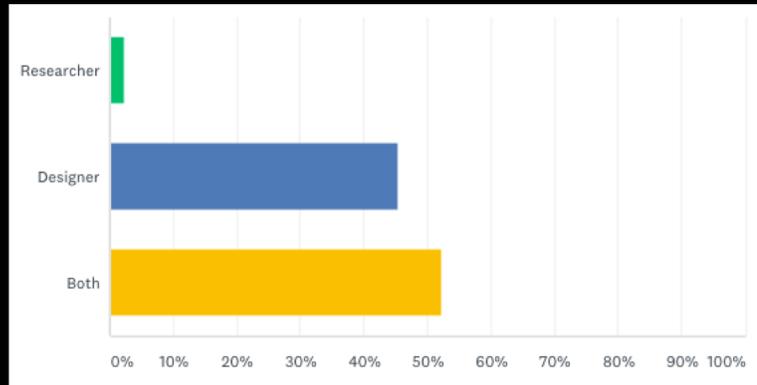


- Outside CA:
  - Researchers: 4.21
  - Designers: 46.32
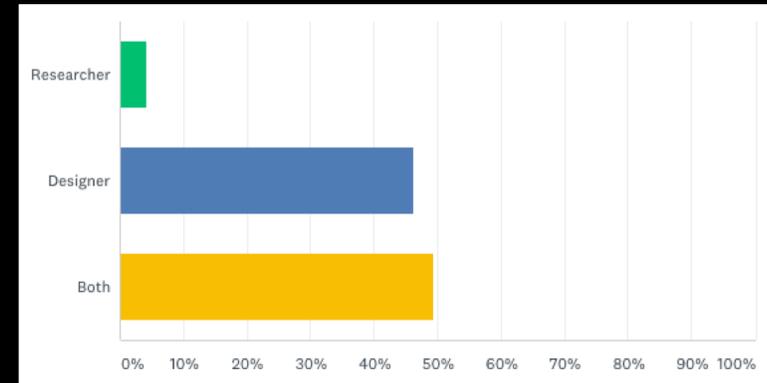
# Validate prototypes

- CA:
  - Researchers: 36.36
  - Designers: 9.09
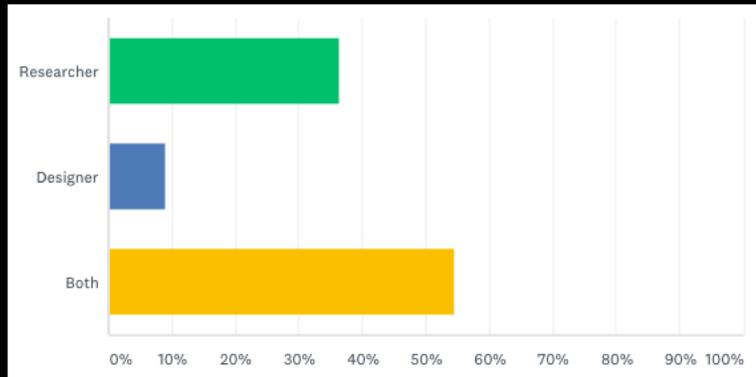


- Outside CA:
  - Researchers: 42.11
  - Designers: 10.53
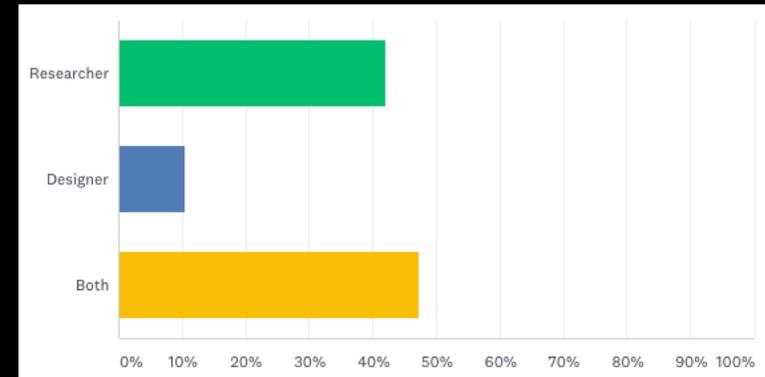
# Lead Collaborative Design Sessions

- CA:
  - Researchers: 2.276
  - Designers: 29.55
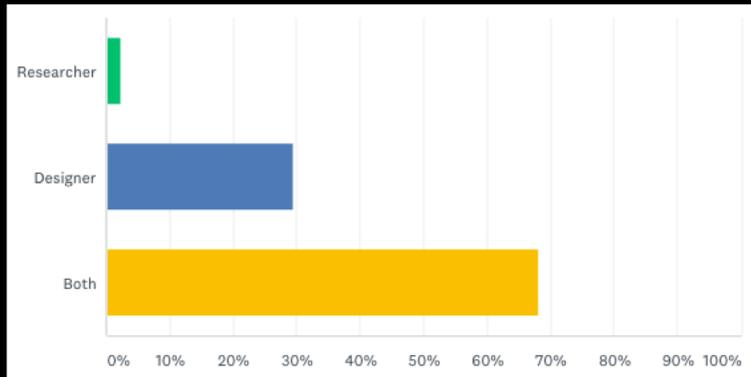


- Outside CA:
  - Researchers: 5.26
  - Designers: 48.42
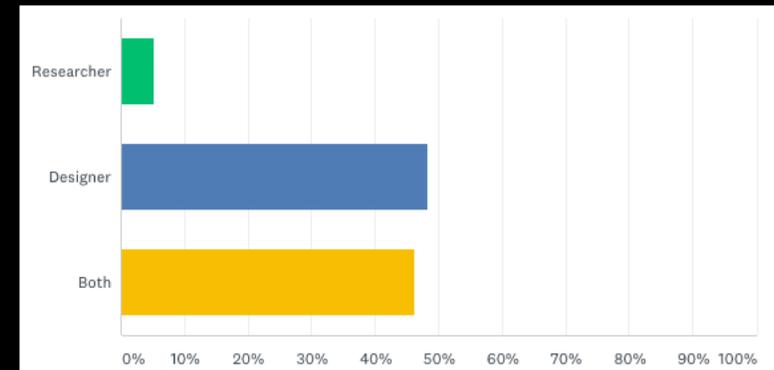
# Work Closely with Dev

- CA:
  - Researchers: 0
  - Designers: 54.55
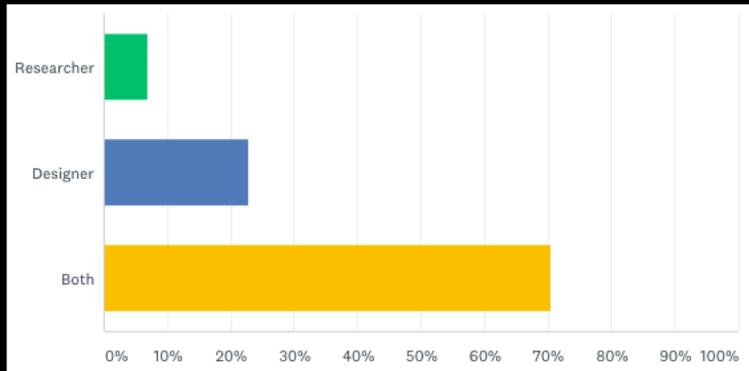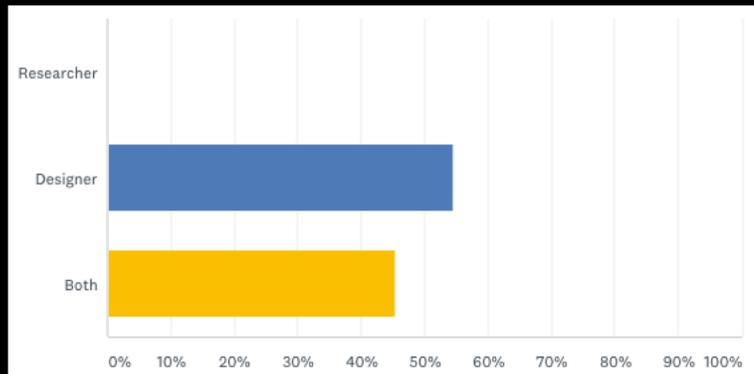
- Outside CA:
  - Researchers: 0
  - Designers: 44.21
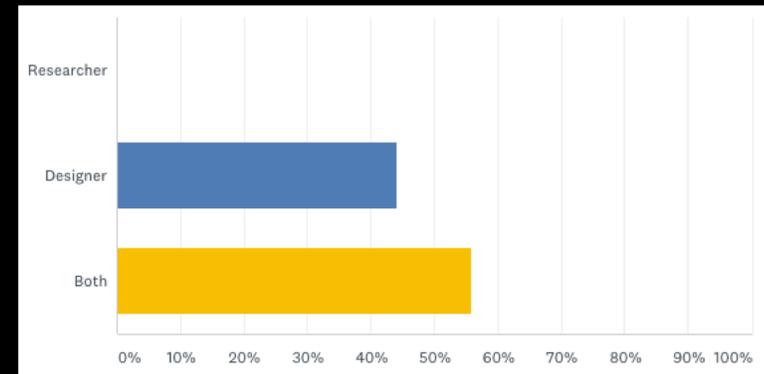
# Work Closely with Product Management

- CA:
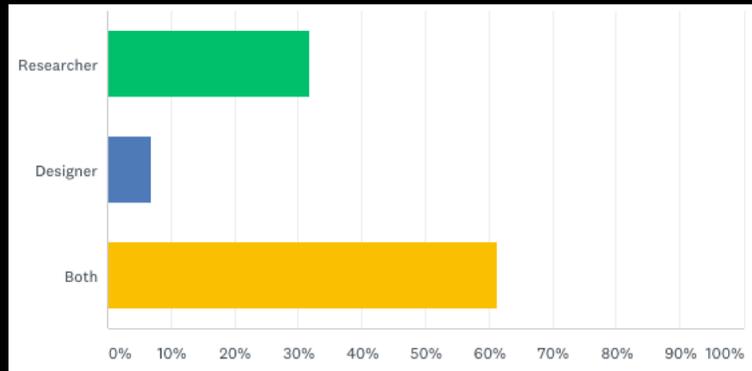  - Researchers: 6.82
  - Designers: 20.45
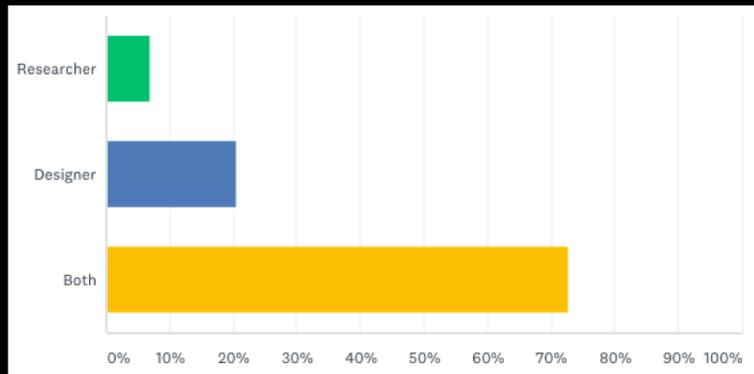
- Outside CA:
  - Researchers: 5.26
  - Designers: 5.26
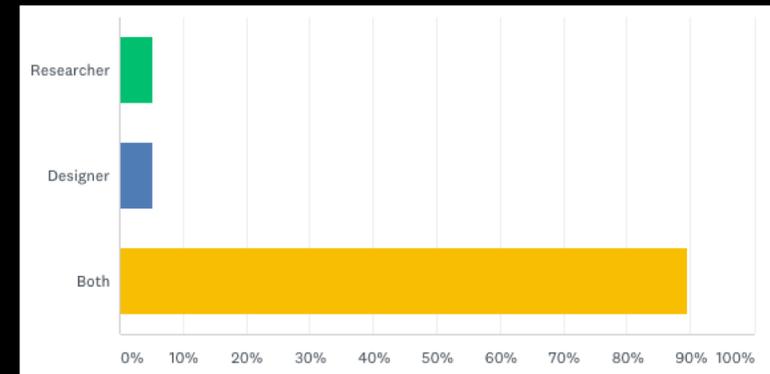
# Foundational Research

- CA:
  - Researchers: 70.45
  - Designers: 2.27
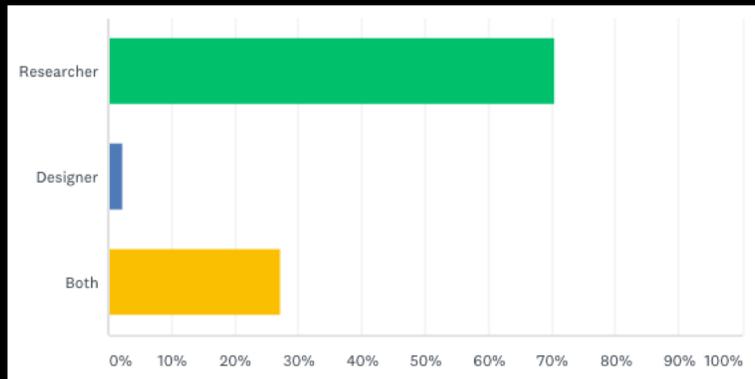


- Outside CA:
  - Researchers: 87.37
  - Designers: 0
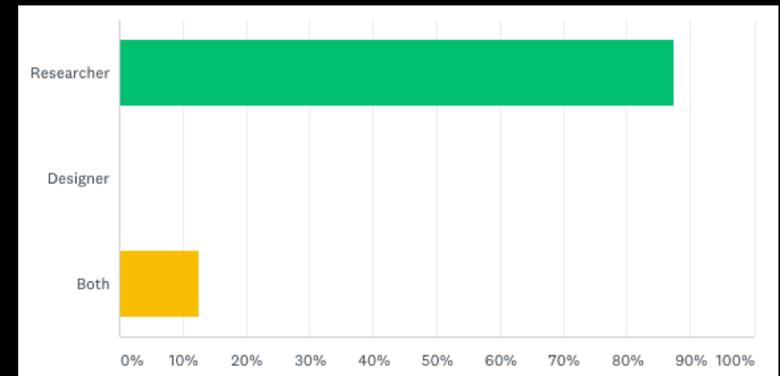
# Pencil Sketches

- CA:
  - Researchers: 4.55
  - Designers: 45.45
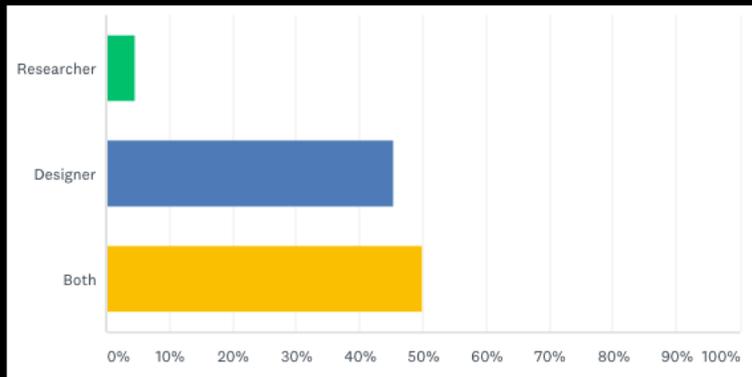


- Outside CA:
  - Researchers: 2.11
  - Designers: 51.58
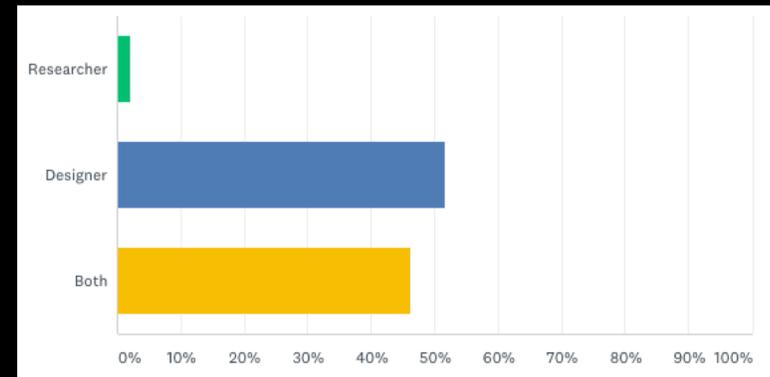
# UX Roles List

- Note that I DO BELIEVE Researchers and Designers should partner up!

# Researcher

- CA
  - Competitive analysis
  - Create personas
  - Stakeholder interviews
  - User interviews
  - Heuristic evaluations
  - Diary studies
  - Tree tests
  - Card sorts
  - Cognitive walkthroughs
  - A/B testing

- Outside CA
  - Competitive analysis
  - Create personas
  - Stakeholder interviews
  - User interviews
  - Heuristic evaluations
  - Diary studies
  - Tree tests
  - Card sorts
  - Cognitive walkthroughs
  - A/B Testing

# Researcher

- CA
  - Journey mapping
  - Usability Studies
  - Surveys/Questionnaires
  - Task Analysis
  - NPS survey analysis
  - Validate prototypes
  - Foundational research

- Outside CA
  - Journey mapping
  - Usability Studies
  - Workflow analysis
  - Surveys/Questionnaires
  - Task Analysis
  - Identify Target Users
  - NPS survey analysis
  - Validate prototypes
  - Foundational research

# Designer

- CA
  - Wireframing
  - Create Prototypes
  - Create Design Plan
  - Create icons
  - Create, use, enforce Style Guides
  - Create end to end experience
  - Create layout/navigation
  - Create hi-fi prototypes
  - Create clickable prototypes

- Outside CA
  - Wireframing
  - Create Prototypes
  - Create Design Plan
  - Create icons
  - Create, use, enforce Style Guides
  - Create end to end experience
  - Create layout/navigation
  - Create hi-fi prototypes
  - Create clickable prototypes

# Designer

- CA
  - Implement research findings into design
  - Create design specs
  - Be the sign-off to verify dev built what was designed
  - Design reviews
  - Lead collaborative design sessions
  - Work closely with Dev
  - Pencil sketches

- Outside CA
  - Implement research findings into design
  - Create design specs
  - Be the sign-off to verify dev built what was designed
  - Design reviews
  - Lead collaborative design sessions
  - Work closely with Dev
  - Pencil sketches

# Both/Either

- CA
  - Lead Design Thinking Studios
  - Lead Brainstorming sessions
  - Taxonomy
  - Strategize with Product Management
  - Workflow Analysis
  - Work closely with PM

- Outside CA
  - Lead Design Thinking Studios
  - Lead Brainstorming sessions
  - Strategize with Product Management
  - Work closely with PM

# Action Items/Next Steps

- Thoughts?

# Thank you!

# Additional Comments: CA

- Involve design in PI Planning - both

- When I talk about ethnographic type research, I expect the researcher to lead it and include the designer to make sure that we are exploring contexts relevant to them. There is some overlap. Frankly, I'd prefer to see this as a RACI model: Responsible, accountable, consulted and informed. I think it would better help understand who does what… and from what perspective

- Market Research (Segmenting, Targeting, Positioning)- Researcher Information Architecture Mapping and associated activities like card sorting, affinity mapping, etc.- Researcher Stakeholder Meetings, Design Briefings- Researcher Engagement with SWAT and Customers- Researcher

# Additional Comments: CA

- Flow diagrams: Both Brainstorming: Both Affinity Diagramming: Both

- There's no clear line separating research and design; they are both part of User Experience; we should promote collaboration within our teams as well as engage PM, dev, etc

- Honestly, instead of hardcore designers or researchers, we need more generalists - who can do both. Unlike B2C orgs like FB and Google - where customer base is very broad, their attitude and desires change constantly, and they churn our new features and products at a very high velocity - our customer pool is pretty small, s/w teams do not churn out features every week, and velocity is pretty low, which means we do not have lot of research related needs. One person should be able to handle both. The role separation also creates an unnecessary layer within the design space. Instead of defining roles as designers and researchers, we should groom everyone to do everything; this way, if the designer does not have the bandwidth for research or design, he can reach out to other designers on other teams to get the help. UXers weak in research but design should learn research and UXers weak in design but research should learn design.

# Additional Comments: CA

- On additional note I wish to add that the work in the BUs are assigned by the BU manager based upon a designer's or a researcher's availability. It is therefore imperative that manager are given more information on the roles and duties performed by each role. This would really help. For ex: Agile Ops has Designers who lead design/ brainstorming sessions however in my past experience I have seen researchers taking the lead while running brainstroming sessions.

# Additional Comments: CA

- I believe the primary role of a researcher starts with findings and hence he is the richest source of and most suitable for giving thoughtful structure to those insights and findings till making low fidelity wireframes, so that at any point the findings are not lost in translation. The designer can then take it up from Low Fidelity wireframes and Site Navigation to give the detail into design like choosing the correct design patterns, elements, and then making sure that its implemented correct.

- If you want to resolve the issue of ownership, stop calling it two different roles and train the personnel to be fluent in multiple areas.

# Additional Comments: CA

- Mostly, there should be a team work between designers and researchers to achieve and impact product experience together rather than clear separation of each other's responsibilities. IMO..

- In many of the places that I said both-- I look to the person with the most experience in that area... like leading design studios. Frankly, i prefer to see an outside facilitator work with the designer and researcher to create the experience to get the desired outcomes.

# Additional Comments: CA

- The owner of some of these, like brainstorming and design sprints, depends on the scope and desired outcomes of the event. In some cases I interpreted "Both" as "a co-owned activity" and in other cases I interpreted it as "either role should be able to own this."

- Q5: I'm not very familiar with a Design Plan. Q17: End to End experience can mean a lot of things; I wasn't sure how to answer this one.

- Some activities here I think should be a collaboration, and ownership on those activities is kind of either/or. Example: Brainstorming sessions and collaborative design sessions. Certainly, a user researcher should have the facilitation skills, but designers can have them, too. And researchers should participate based on the insights they have, just as designers should participate because of their special knowledge. So, in such cases, it's hard to say one role owns it over the other.

# Additional Comments: External

- Just a note: It is my opinion in the digital product design world that a researcher/design partnership is akin to what was the art director/copywriter partnership in the hay day of advertising. Because we are often putting function over form with our user experiences, the best way is to have a researcher who loves and understands visual design to be a true partner with a visual designer who loves and understands the power of real primary research. When you know rules, you can then break them and invent!

# Additional Comments: External

- If it involves pixels, it's the domain of the designer. If it involves research methodology, it's the domain of the researcher. My researcher works with PM more than dev. My designers work equally with Dev and PM.

- Recruiting - Researcher Analytics & data analysis – Researcher

- Data analytics - research User requirements definition - both Goals and metrics setting - both Multi-phase R&D planning - research or both (not either)

- Visual design - visual designer

# Additional Comments: External

- The line is often blurry and should always be a partnership. I've been UX for a really long time, like 25 years. In the early days I did both the design and the research. I still find that's very powerful because often design issues come up where you can draw back on some earlier research to help you make a decision, and that aspect of the research wasn't fully documented in the research report. (It's just too hard to capture everything or even to know what's going to be relevant to a future decision. ) Now I find I play researcher role in some situations and designer role in others. I think some amount of fluidity is not all helpful, it's critical to getting good at either one. It's a good way for a designer to learn what designs really work, and it's a good way for researchers to know what insights will be truly helpful.