

User Research Strategy: Goals, Choices, and Tradeoffs



- Research at scale as a portfolio of strategic choices



- Three governing questions: what to learn, what to give up, who decides



- One shared tradeoff vocabulary for research, product, and ops leaders



- Roadmap: goals, choice architecture, methods, operating models, cadence, impact



- Maturity = how systematically evidence shapes decisions, not studies shipped



Why Research Strategies Fail Without Explicit Choices



- Research as a service desk: the queue sets the agenda



- Scope creep: whoever asks loudest defines the work



- Insight debt and prioritization debt compound silently



- Strategic research $\neq$ generative research; scope drives impact



- **Discussion:** which pattern costs your organization most per quarter?

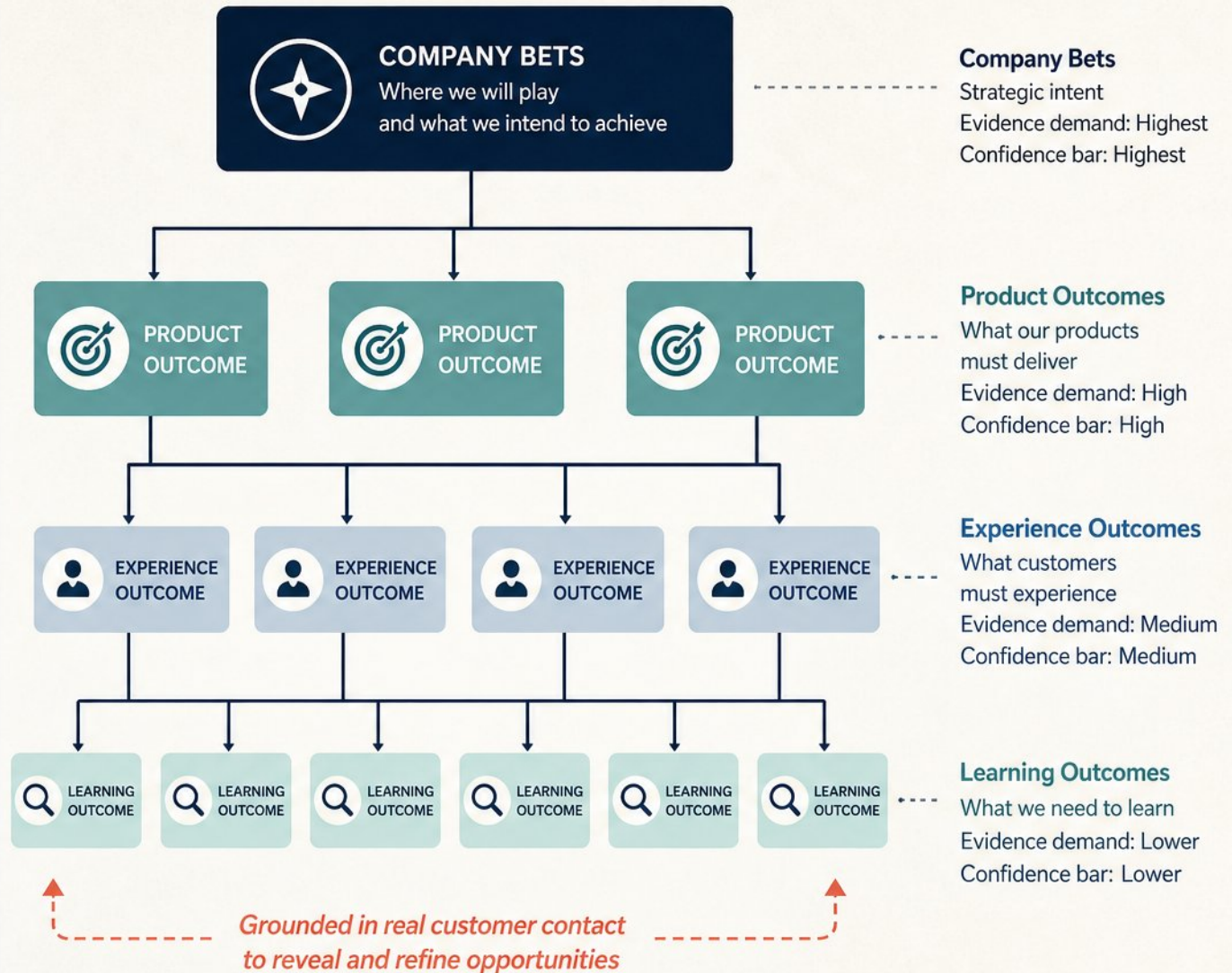


From Business Objectives to Researchable Learning Goals

- Separate decision goals (what changes, by when) from knowledge goals (what we seek to understand)
- Goal hierarchy: company bets → product outcomes → experience outcomes → learning outcomes
- Each level carries a distinct evidence demand and a different confidence bar
- Anchor one measurable outcome at the root of an Opportunity Solution Tree
- Surface opportunities from real customer contact, not whiteboard invention

 **Red flag:** if no one can name the decision, decision-maker, and evidence window, do not schedule

 **Practical test:** ask which decision this study changes, and when evidence can still alter it



The Choice Architecture of a Research Portfolio



- Three separate axes: generative/evaluative, qual/quant, large/small scope



- Refuse the "strategic vs. tactical" collapse—scope drives eventual impact



- Balance risk reduction, opportunity discovery, confidence, foundational understanding



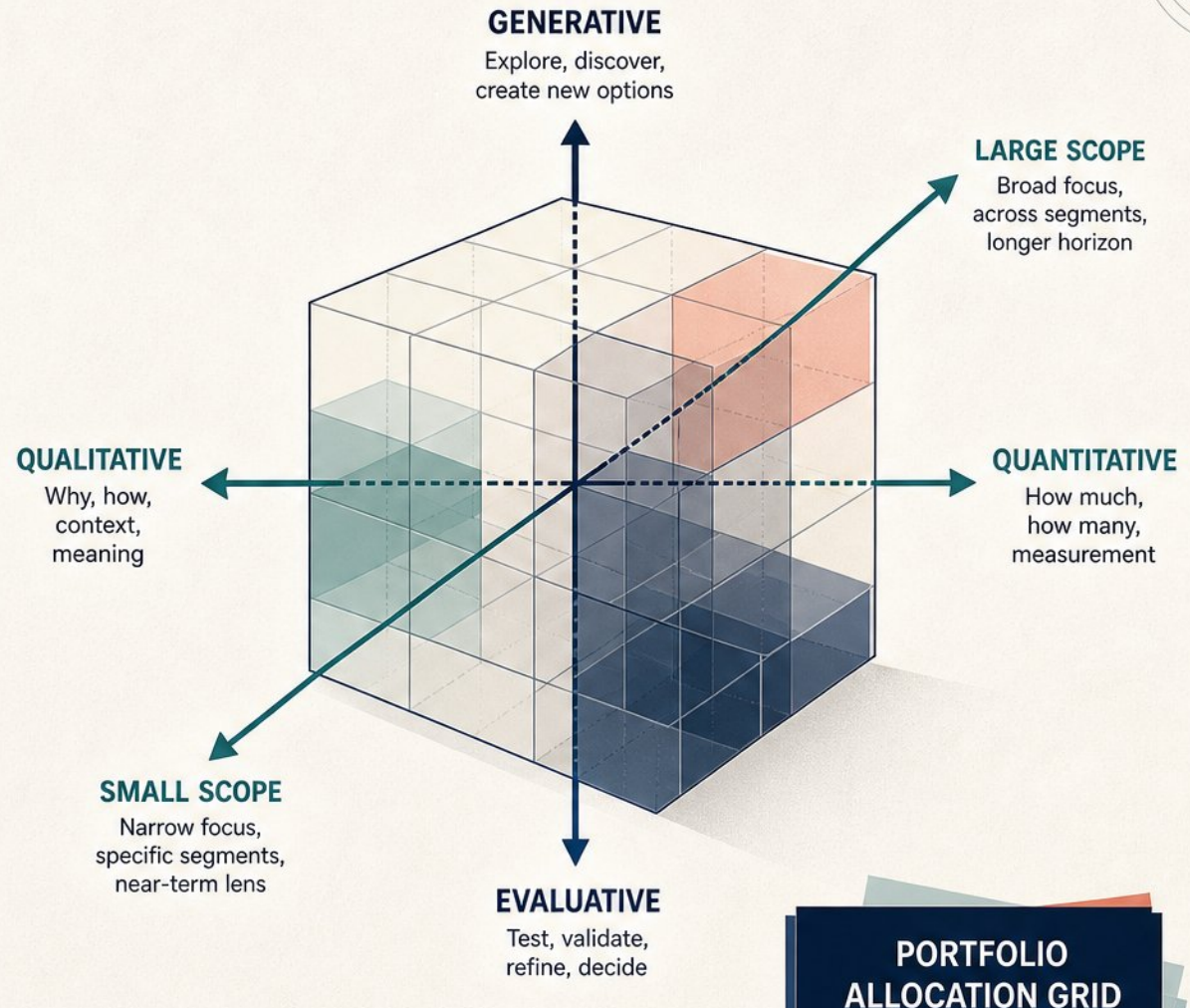
- Name coverage choices: which segments get attention, which stay under-covered



- Timing slots: continuous discovery, milestone research, post-launch validation



- Allocation heuristic: embedded teams ~10% to long-horizon; portfolio teams 30–70%



Deciding What Each Study Must Buy: Methods as Tradeoffs



Method	Depth 	Breadth 	Speed 	Cost 	Confidence 
 Field Studies	● ● ● ● ●	● ● ● ○ ○ ○	● ○ ○ ○ ○	● ○ ○ ○ ○	● ● ● ● ●
 Interviews (Moderated)	● ● ● ● ○	● ● ● ● ○ ○	● ● ● ○ ○ ○	● ● ● ○ ○ ○	● ● ● ● ○
 Unmoderated Testing	● ● ○ ○ ○	● ● ● ● ○	● ● ● ● ○	● ● ● ● ○	● ● ● ○ ○
 Surveys	● ○ ○ ○ ○	● ● ● ● ●	● ● ● ● ●	● ● ● ● ●	● ● ○ ○ ○

- Each method trades depth, breadth, speed, cost, and confidence
- Field studies: \$15,000–\$50,000 per study, deepest insight
- Interviews: \$50–\$300 per participant; moderated usability: \$100–\$300
- Unmoderated testing: \$20–\$70; surveys: fractions of a dollar per response
- Reuse findings across decisions — single-use research is the most expensive
- Say no when repository evidence, analytics, or a live test suffices

Minimum Viable Rigor: Calibrating Effort to Decision Risk



- Working formula: MVR equals rigor of insight minus decision risk



- Researcher owns the rigor assessment; stakeholder owns risk tolerance



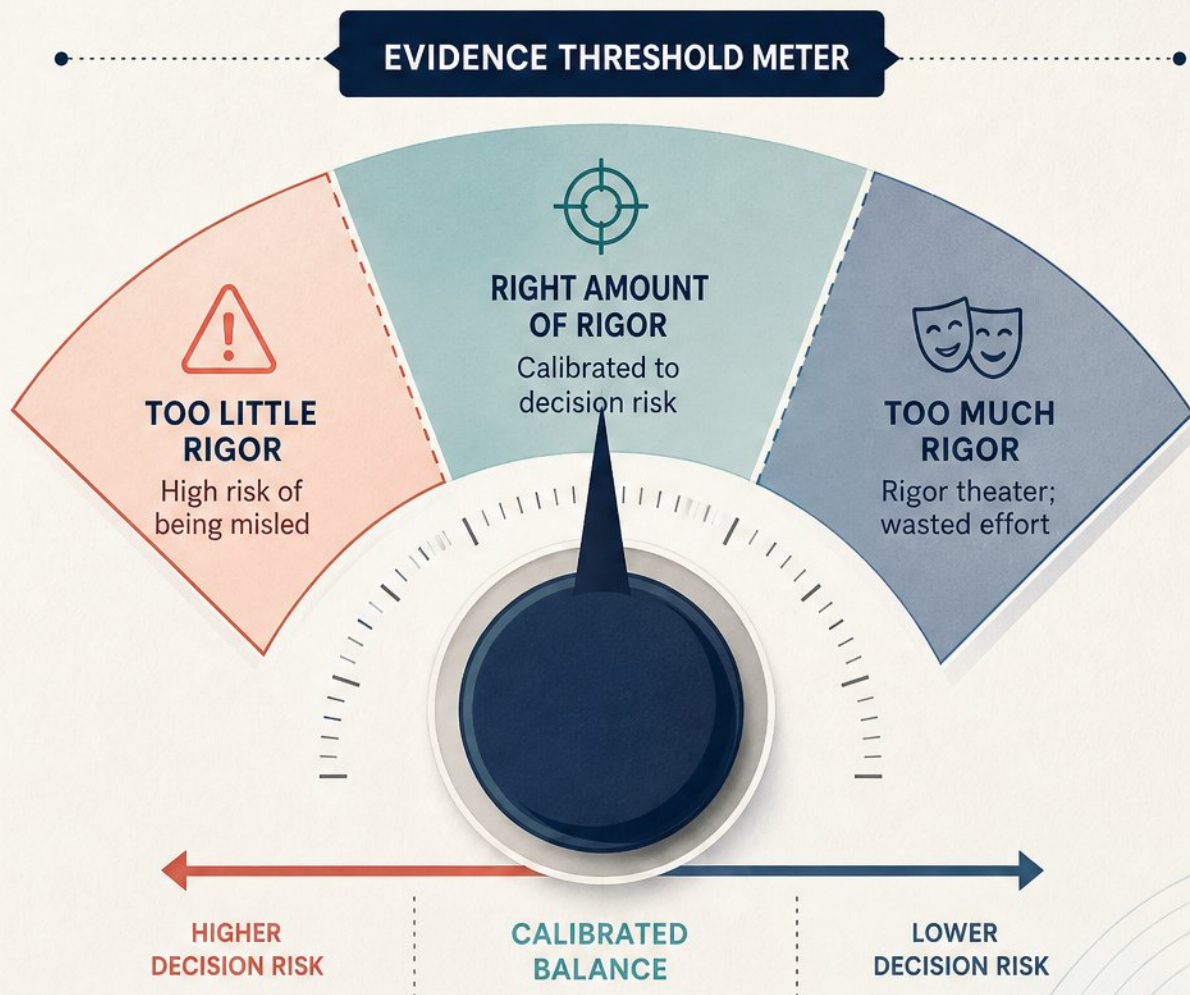
- Too little rigor misleads; too much is 'rigor theater' arriving after the decision



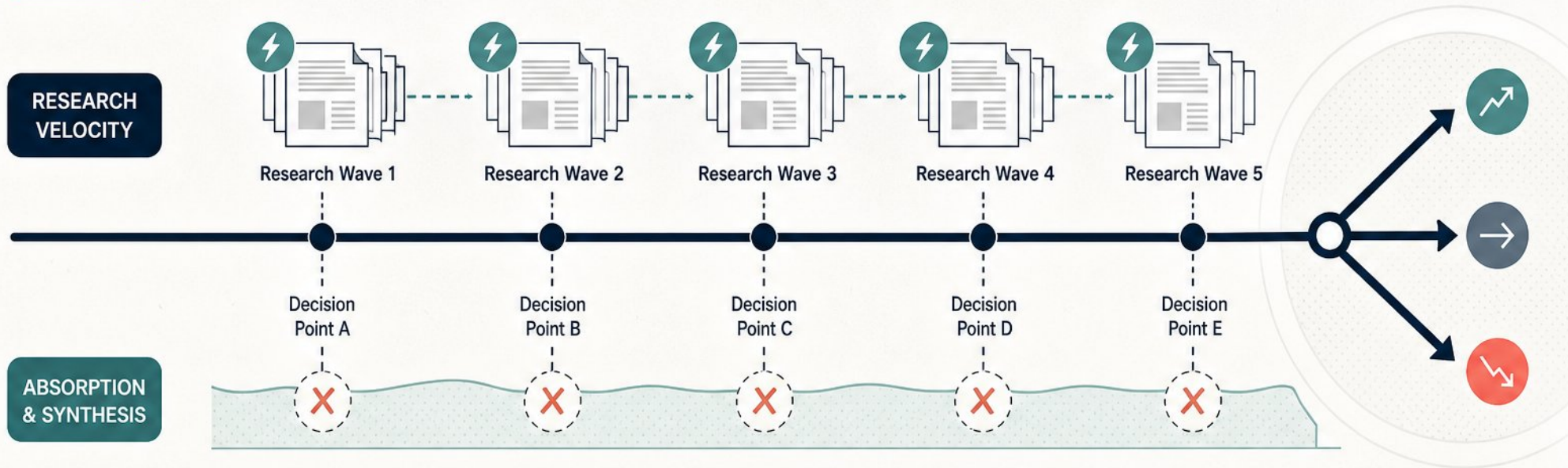
- Risk-tiered defaults: low-risk tweaks to A/B tests, medium-risk unmoderated study, high-risk deep dive



- AI synthesis can look clean but wrong—human validation stays load-bearing



Speed Traps: When Faster Research Degrades Decisions



- Velocity without absorption time: findings stack up unread



- Compressed analysis defaults to surface themes, contradicted later



- Recruitment shortcuts corrupt samples while velocity metrics look excellent

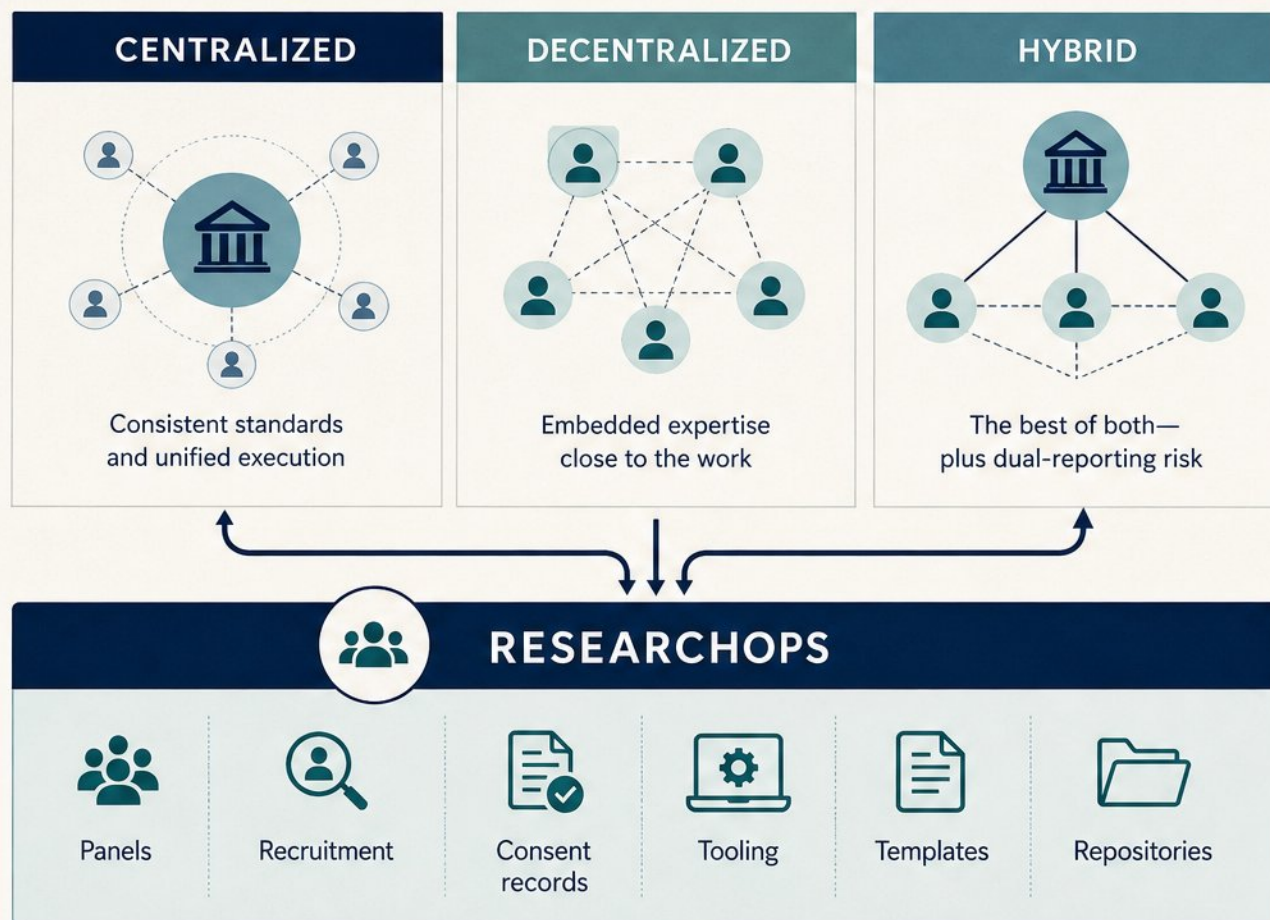


- Watch for: low implementation rates, long finding-to-action gaps, recycled findings



- Calibrate cadence: batch around decisions, schedule synthesis weeks

Choosing an Operating Model for Research and Research Ops

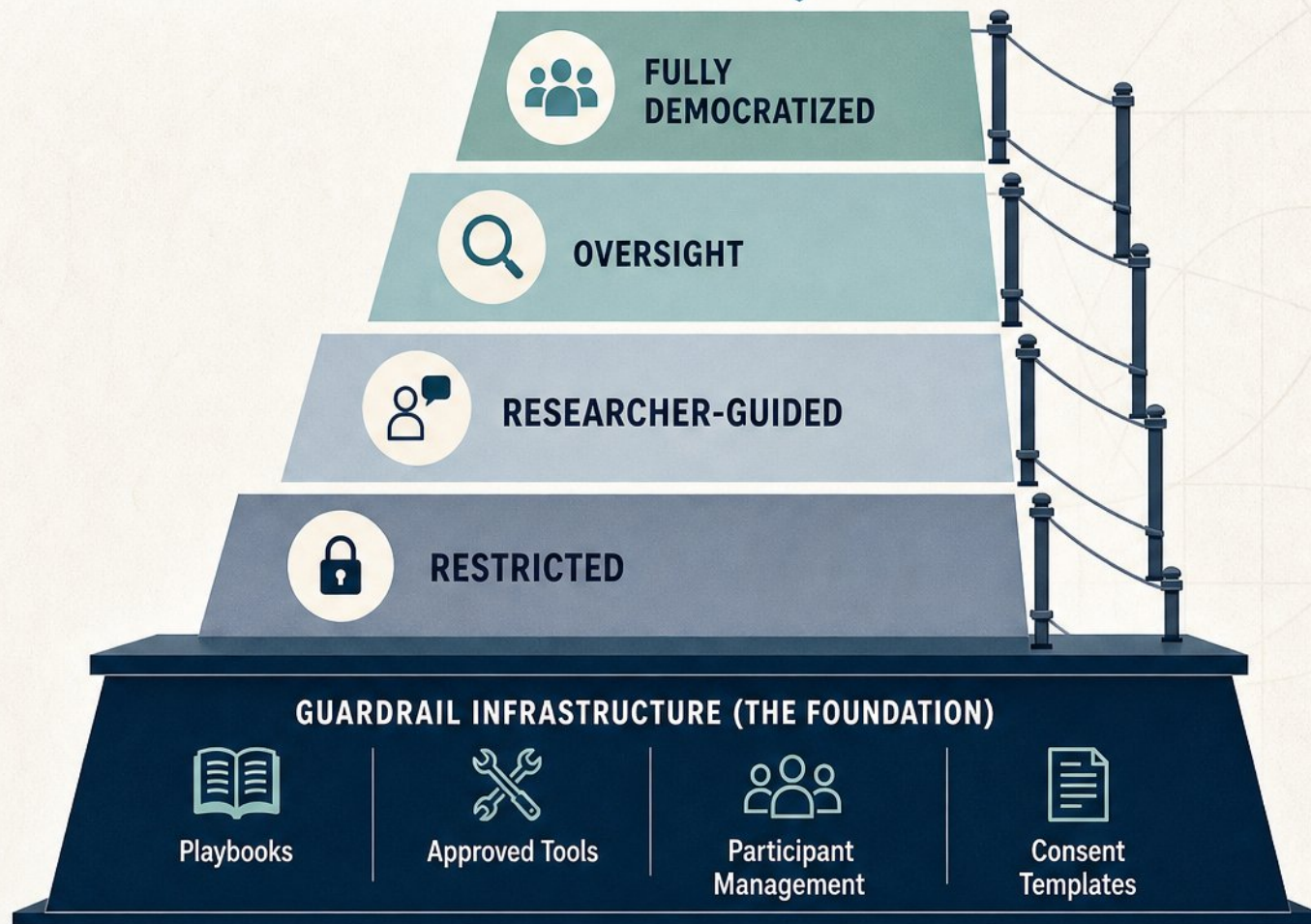


- Centralized: consistent standards; decentralized: embedded expertise; hybrid: both, plus dual-reporting risk
- Four ResearchOps models—solitary, specialized, distributed, elevated—match team size
- ResearchOps owns panels, recruitment, consent records, tooling, templates, repositories
- Sourcing options: in-house, agency, governed democratization, hybrid—each with real cost bands
- 2026: capacity plan against demand; AI-native, human-in-the-loop operations

Democratization With Guardrails, Not Abdication



- Infrastructure first: playbooks, approved tools, participant management, consent templates
- Four tiers: fully democratized, oversight, researcher-guided, restricted
- The documented tax: 73% of researchers correct or guide non-researcher studies
- Highest risk is synthesis and confirmation bias; templates plus review protect it
- Readiness: a research specialist, recruitment mechanism, tool budget, PM appetite, leadership alignment



EVIDENCE THRESHOLD METER

The right level of evidence for the right decision, with guardrails that scale.

Stakeholders, Decision Rights, and Who Actually Decides



- **Map influence:** executive sponsors, product trios, design partners, legal and privacy



- **Name one owner** for five calls: intake, funding, pivot, resourcing, kill



- **Committees blur all five**—everyone assumes a veto



- **Use RAPID, not RACI:** recommendation, agreement, input, decision, performance



- **Ask stakeholders:** what is at stake if this research never happens?

RESEARCH DECISION



Intake

DECISION OWNER (ONE OWNER)



Research Intake Owner

DECISION FORK & ESCALATION PATH

Agreed

Escalate



Funding



Research Funding Owner

Agreed

Escalate



Pivot



Research Pivot Owner

Agreed

Escalate



Resourcing



Research Resourcing Owner

Agreed

Escalate



Kill



Research Kill Owner

Agreed

Escalate

RAPID



Recommendation



Agreement



Input

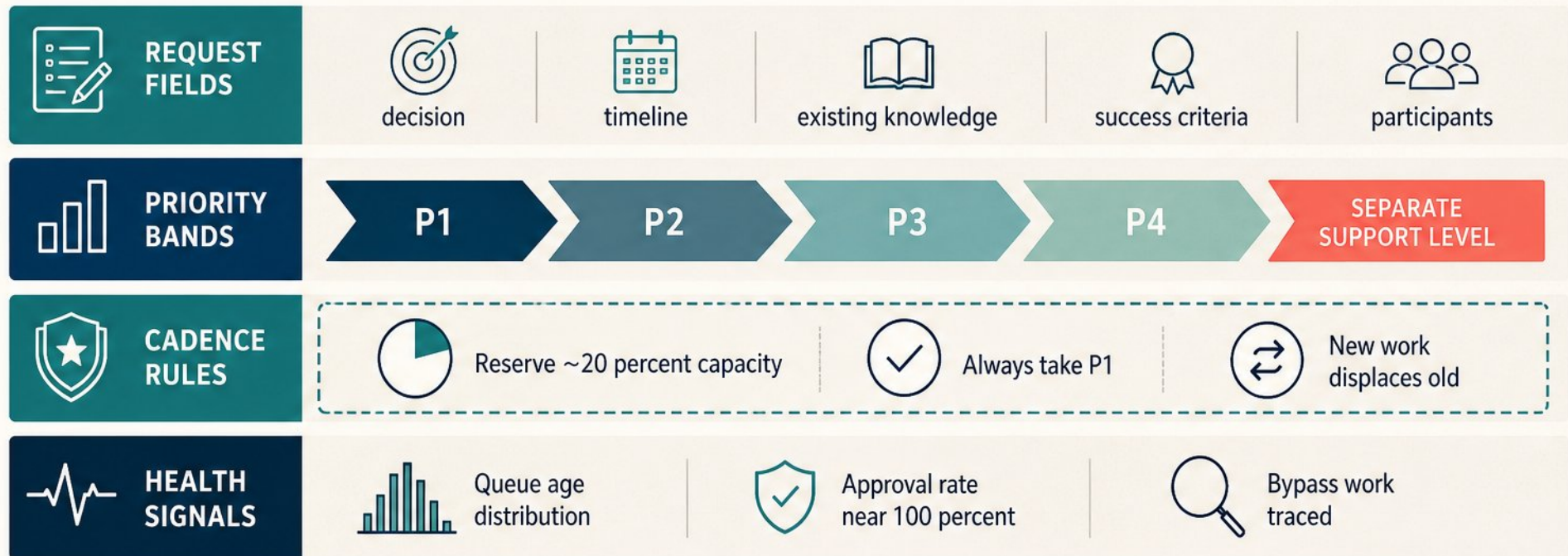


Decision

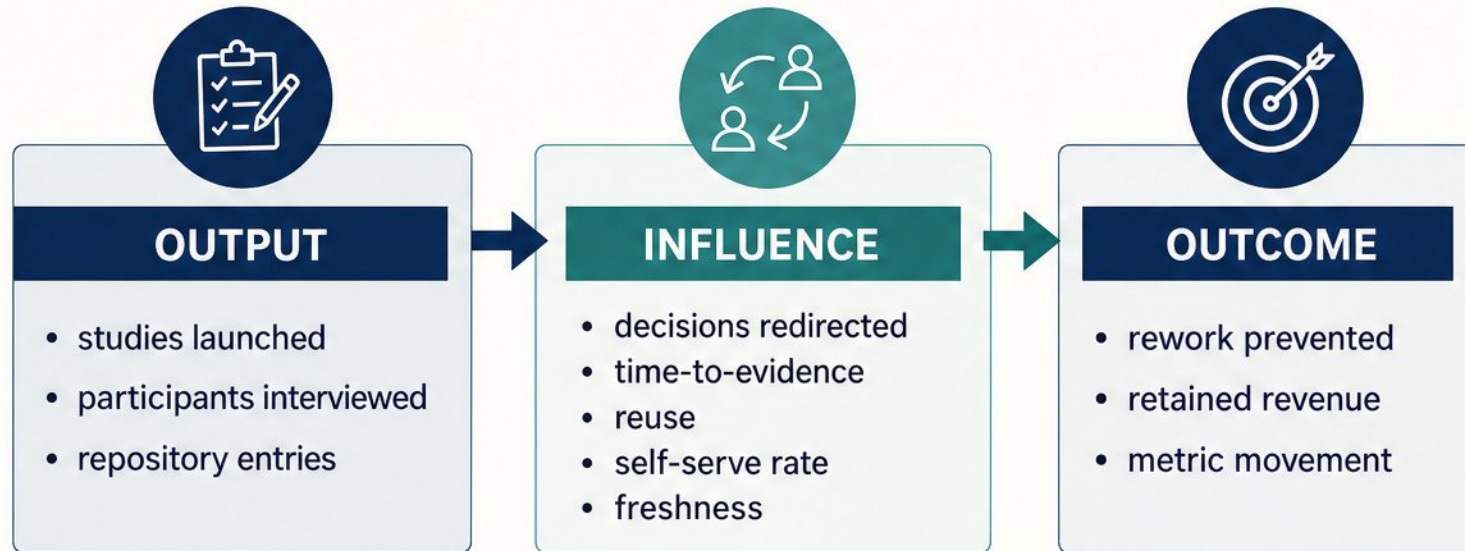


Performance

Operating Cadence: Intake, Prioritization, and Review



Measuring Impact and Paying Down Insight Debt



Decision redirection count:
highest-leverage starting metric, one line per study



Translate upstream UX metrics into revenue, cost, risk, speed, retention



Preventative impact counts: stopping the wrong build is real impact



Credible claims: state counterfactual, conservative credit share, disclose investment

EVIDENCE THRESHOLD METER



Stronger evidence. Greater impact.

Worked Scenarios: Startup, Scaling Product Organization, Enterprise Portfolio



STARTUP



RESEARCH CAPACITY

One or two specialists

STRUCTURE

Lean and informal

BINDING CONSTRAINT

High uncertainty



SCALING



RESEARCH CAPACITY

Embedded researchers plus ResearchOps

STRUCTURE

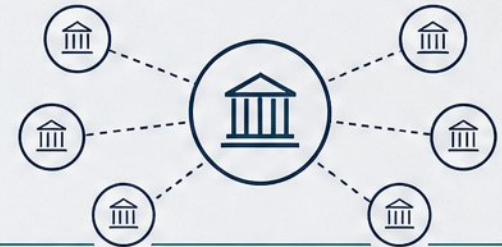
Tiered democratization

BINDING CONSTRAINT

Repository-first defaults



ENTERPRISE



RESEARCH CAPACITY

Multiple product lines

STRUCTURE

Central standards with distributed authority

BINDING CONSTRAINT

Published decision rights



- **Common traps:** strategy theater, single-method over-indexing, funding by anecdote, skipping pilots



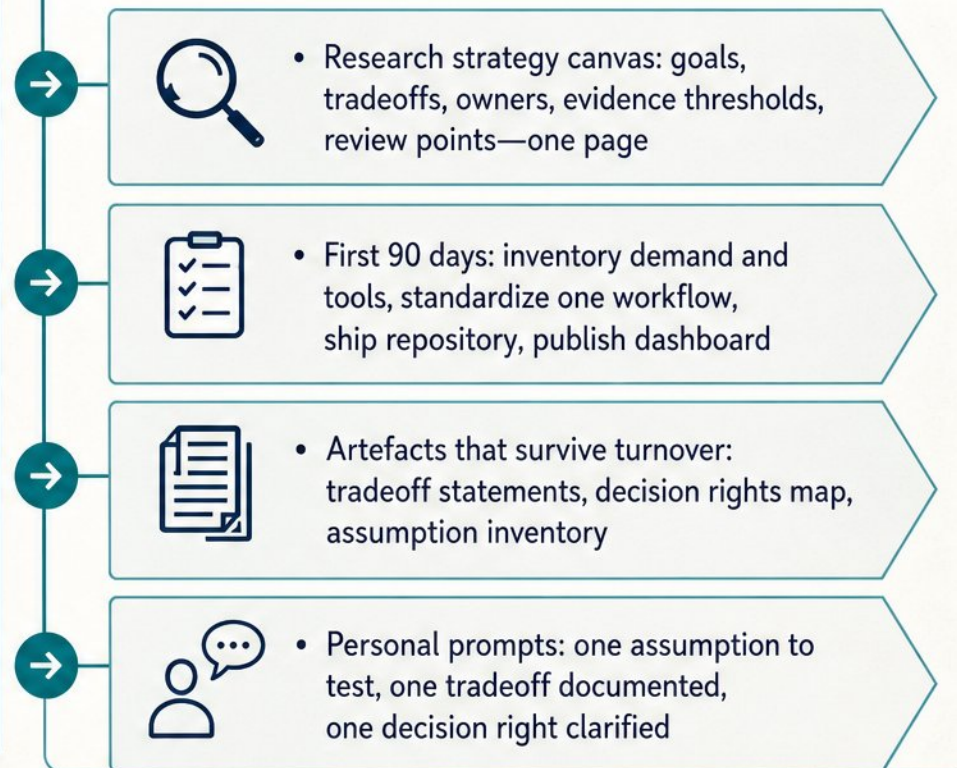
- **Exercise:** locate your organization, then name the constraint binding hardest right now

Making Strategy Choices Stick: One-Page Canvas and a 90-Day Plan

ONE-PAGE RESEARCH STRATEGY CANVAS

GOALS	CHOICES	TRADEOFFS
		
OWNERS	EVIDENCE THRESHOLDS	REVIEW POINTS
		

90-DAY PLAN: SEQUENCING FOR ACTION



Closing commitment: name the decision you will stop making on intuition



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