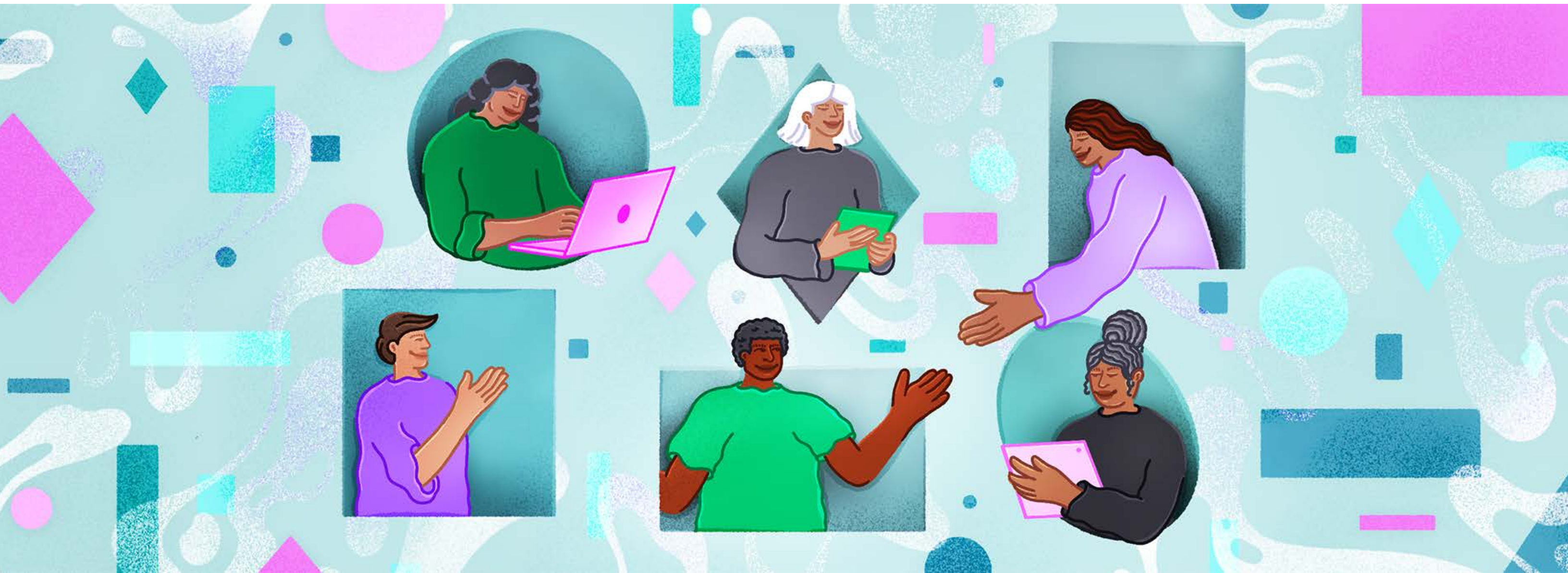
The People Nerd's Guide to

Building and Scaling a Research Team

By Andy Warr

Use this playbook to develop your management skills, make the case for a team, hire the right people, and take your department from the initial design to an advanced, impact-driving function.



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INTRODUCTION

Embracing New Challenges

Throughout my career, I have had the privilege to found, build, and scale research teams at Airtable, Google, and Meta. The first team I built was at Google—a team of two full-time UX researchers and one contractor working across the Chrome and ChromeOS products.

At Meta, I built the Instagram research team—16 product researchers. Most recently, I built the research team at Airtable—21 people working across market research, research operations, and UX research.

In this playbook, I'll share the tried-and-true approaches that I have found to successfully build and scale a research team. We'll go through everything from gaining management experience and designing the team model to expanding the function and fostering healthy growth.

Whether you're a leader yourself or a practitioner, you can use these strategies to develop and grow your research practice and team.

PART 1

How to Lay the Foundation for a Dynamic UX Team

Before you scale up a research team, you need to build up your managerial skills first—and get organizational backing.

This section focuses on the prerequisites to building a team, which includes gaining management experience, as well as building or identifying the need for a team.

Build up your prerequisites

Volunteer to lead a project or team

This is a great way to get experience managing people and resources. You can volunteer to lead a project or team within your current organization, or you can look for opportunities to volunteer outside of work.

Before managing people at Google, I first led five cross-functional teams who conducted research across the US understanding consumers' experience with the first-ever Chromebook and ChromeOS. While this didn't involve direct people management, it did require coordinating people and the work, which are two essential management skills. This helped prepare me for managerial roles down the road.

Manage a contractor or vendor

While you won't be responsible for a contractor or vendor's development and growth, you can oversee the progress and quality of their work. A vendor relationship tends to be project-based, which is a good starting point. Managing a contractor may last six months or more. Start small and build up.

When I first hired a few contractors at Google to scale research, it allowed me to gain additional experiences coordinating people and their work over a longer period of time than a single project. Doing so also helps you learn to manage administrative tasks, such as approving billable hours.

Manage an intern

Working with an intern will provide you with the opportunity to manage their work, as well as their development and growth. Given that an internship program is designed for an intern to gain applied experience and develop skills, they may not be independent and will require attention. The duration of the internship will also mean this experience is timeboxed.

When I managed my first intern at Google, the experience allowed me to coach a researcher for the first time. We worked together on applying the intern's research skills in an applied context, and considering the implications of research findings on a product.

Take a management class or workshop

This is a great way to learn the basics of management and to develop your management skills. There are many different management classes and workshops available, so you can find one that fits your needs and interests.

My manager at Google supported my journey to the management track enrolling me in Google's flagship management course. In addition to learning concepts such as situational leadership, I was also able to learn from a cohort of new managers from other disciplines across the company.

Classes and workshops can especially help give you that extra boost towards becoming a team leader.

Shadow a manager

Take this as an opportunity to learn about the day-to-day responsibilities of a manager. Ask your manager if you can shadow them for a day or two. This will give you a chance to see what it's like to manage a team and to learn from their experience.

Getting management experience before becoming a manager is important. It will help you to know if management is the right path for you, and it will also help you to develop the skills you need to be a successful manager.

Meeting with both new and experienced managers helped me learn from their challenges and experiences.

Build a case for a team

Not everyone becomes a manager with a team already built out for them. You may have to build a case for headcount in order to build a team from the ground up.

Here are a few strategies to make a case:

Document what work is NOT being done

In addition to documenting the work you are doing, explicitly document what work you're unable to do. Map this work to company priorities. For example, let's say you're working on the highest priority project already. You don't require a reprioritization, and it's recognized that the unstaffed work does in fact require support. This makes a case for additional headcount.

When I was at Google, a VP of Product asked me to outline what else we would be able to accomplish with an additional researcher. Since working at Airtable and Uber specifically, I have found it to be a more compelling argument to outline what we will not be able to accomplish with the available resources, which may prevent a company goal from being achieved.

Identify skill gaps

If there is a persistent need for a specific type of work (e.g., quantitative research) and this isn't a skill you possess, make a case for additional headcount.

When I worked at Airtable, we were expected to report out a user attitudes survey each month—but we didn't have a survey researcher on the team. Since we reported the user attitudes survey to executives on a quarterly basis, this conveyed the need for that particular skill set.

Show the value of your work

Identify projects that have had an impact on the business, such as making decisions or leading to certain outcomes. If a company wants more of these outcomes, there is a case for additional headcount.

Build a case for a team

"When sharing research results, a great way to get stakeholders bought into the value of our work is by sharing curated "scout (participant) profiles" on dscout.

These shareouts give them the ability to watch participant video submissions, read a few key entries, and really connect with their customers/users. Getting a bit of the raw data into their hands is a game changer."

Rosalind Koff
Director, Customer Experience & Research at dscout

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Building a case for headcount can be challenging, but it's important to remember that you're ultimately trying to help the company succeed. If you can demonstrate that additional headcount will help the company achieve its goals, you'll more likely be successful.

When I worked at Airtable, the CEO asked his Chief of Staff and I to understand the differences in ease of use between Airtable and a competitor. Once we completed the work, the executive team wanted the same done for other competitors as well. Given my limited bandwidth, it wasn't possible for me to conduct this research, but it did result in us hiring a Principal Research to conduct ongoing competitive research.

Unfortunately, there have been cases where senior UX researchers have been lured to companies with false promises of building a team and becoming a manager, only to find that the company doesn't have the need or resources to do so.

Identify (and confirm) the need for a team

If you're considering joining a company with the explicit ask to build a UX research team from the ground up, make sure to establish the need for such a team before accepting the position.

Unfortunately, there have been cases where senior UX researchers have been lured to companies with false promises of building a team and becoming a manager, only to find that the company doesn't have the need or resources to do so.

To avoid this situation, ask the company the following questions:

Have you already invested in research?

Ideally, the company should have conducted research themselves or hired a contractor to conduct one or more research studies. This ensures that they know what research is—and gives you some indication about the type of research the company needs.

How have you used research previously?

This will allow you to determine if the company knows how to act on research.

Do you have a budget and headcount set aside for research?

Research doesn't come free. At a minimum, teams need money for participant incentives. You may also need funds for contractors, vendors, or tools. Budgeting for research expenses is a sign that the company is willing to make an investment. Furthermore, having a headcount set aside for research is a sign that they see the need for a team of researchers.

Do you have executive (C-suite) support??

This is essential for the success of the UX research discipline. Executives need to believe and understand the value UX research brings to a business. An executive being part of the interview loop is an indication of executive support—they are investing their time.

Why build a research team, and why now?

Adding a new function and building a team needs to be a purposeful decision. A company may wish to build a research team because of specialized skills needed or the volume of research needs.

When I interviewed at Airtable, the company had several leading indicators that they were serious about building out a team. They had hired three contractors before deciding to hire their first full-time UX researcher. They also had four headcounts set aside for the research team. Furthermore, cofounders and C-level executives were part of the interview process, demonstrating their buy-in to hire for this role.

If the company is unable to answer these questions satisfactorily, it may be a sign that they're not ready to build a UX research team. In this case, it's important to proceed with caution and make sure that you're comfortable with the risks involved.

Key takeaways

Gaining management experience before becoming a manager is essential for knowing if management is the right path for you. Taking these steps will also help you develop the skills required to be successful.

Building a case for a team requires identifying what work isn't being done, finding skill gaps, and showing the value of your work. And if you consider joining a company to build a team, it's important to establish the need for a team first.

PART 2

Build Your Ideal UXR Team from the Ground Up

Building a new research team from scratch is an exciting prospect—but it's also easy to get overwhelmed, prioritize the wrong things, or head in the wrong direction.

In part one, I outlined the prerequisites to building a team, which included gaining management experience and building or identifying the need for a team.

In this section, I'll walk you through the activities and decisions you'll need to make when starting to build a formidable research team.

Keep in mind these experiences are based on a career in the tech industry working on B2B and B2C products. Even if you have a different set of considerations for other industries, these tips could still be helpful jumping-off points.

Do it yourself

Before building a team, conducting research yourself allows you to…

- Establish working relationships with cross-functional partners
- Understand how they operate, and what their needs are
- Begin to establish a research identity and understanding of research priorities

Take on a research project

When I joined Instagram, before hiring anyone I conducted evaluative and foundational research studies to fulfill some of the immediate needs of the product team. And when I joined Airtable, I partnered with a contractor to build a research roadmap for a product team. I then conducted in-depth interviews for a market research project, eventually hiring a full-time employee to execute the research roadmap for the product team and beyond—which mapped to a company priority.

Doing the work allowed me to determine the skill sets needed. I also learned how to work with the team, established how to work with research, and evaluated if there was a persistent need for a researcher. This was especially important when deciding whether or not to hire a full-time employee.

When a manager joins an existing team, I encourage them to conduct their own research study to build a first-hand understanding of the research practice and build empathy for the work of their company.

Journey mapping as a tool for cross-functional research

“By bringing the wider team into the research and journey map development (i.e. Product Design Lead, Product Managers, Content Designers, etc.), our partners developed a shared personal experience with the work. Our partners felt more connected to the pain points of our members, as they were able to see that reflected in their memories of the journeys they’d witnessed.”

Tatiana Vlahovic
Senior Product Research Manager at Credit Karma

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Learn to replace yourself

The greatest lesson a previous manager taught me when building the research team at Instagram was, "Learn how to replace yourself". He recommended that I evaluate what work took the majority of my time, which should be the highest priority work given limited resources, and then hire someone to do that work. This would then free up my time to work on the next high-priority opportunity.

In 2014, Instagram had three product groups—engagement, growth, and monetization. The engagement product group was responsible for the core Instagram app. It was also the team that had the most research requests, mapped to company priorities and the most cross-functional partners. As such, I hired a senior researcher to work with this group. This freed me up to work with the growth product group, which was the next immediate priority.

Design the team

Before you build a team, you need to design it. More specifically, this includes how the team will be organized, such as which product team a researcher will work with and how they will work with them, based on the number of headcount you have to hire.

Decide on an operating model

Before building a team, you need to consider how you will structure the team. In my experience, there are four possible team structures:

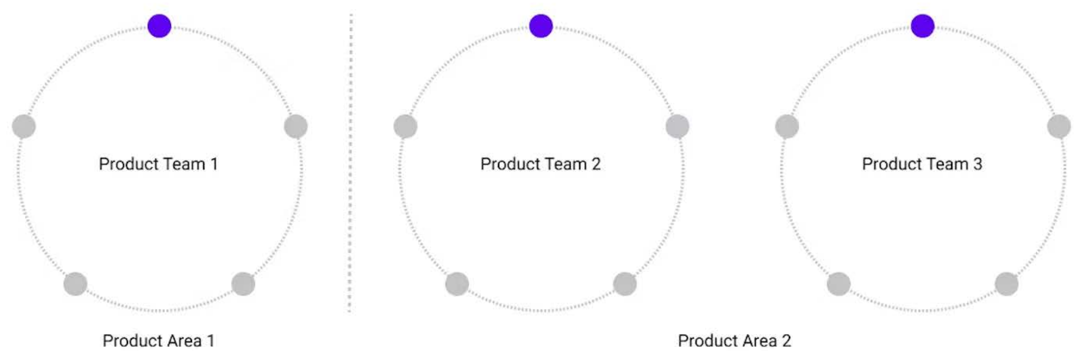
1. Embedded
2. Service
3. Hybrid
4. Shared

1. Embedded

The embedded team structure is a popular approach that assigns researchers to a specific team, enabling them to become subject matter experts in a particular area and build relationships with cross-functional team members.

However, it's essential to prioritize teams carefully, especially when there are more teams than researchers available. If priorities change frequently, the embedded team structure may not be suitable, and it may be necessary to move researchers to different teams.

Leaving researchers on teams that are not a high priority for the company is also not feasible. Therefore, it's crucial to ensure that people are allocated correctly before hiring additional staff when adopting this team structure. By taking these factors into account, organizations can successfully implement the embedded team structure and reap its benefits.



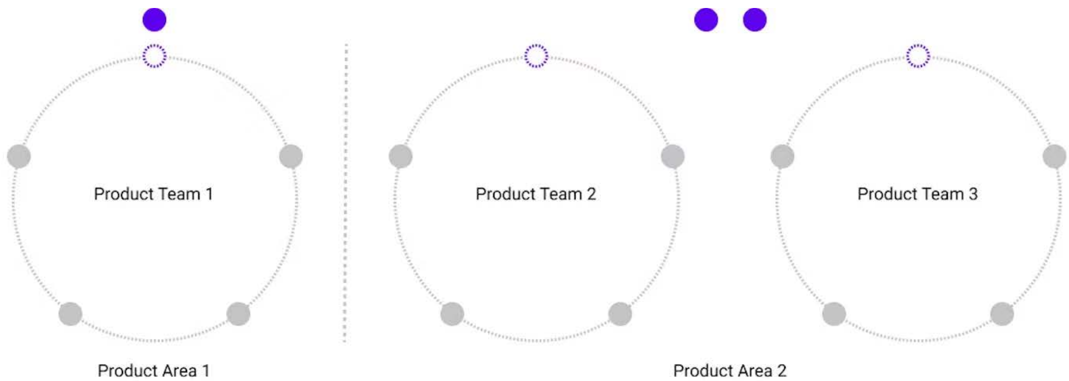
2. Service

The service team structure assigns researchers to time-bound research studies for product teams, with projects typically determined based on company priorities. While this approach offers a lot of flexibility and can quickly adapt to changes in priorities, it also means that teams don't have dedicated research support, and they may work with a variety of researchers

This can make it challenging to establish rapport and trust between the research team and the product team. However, by providing clear communication and project management processes, this structure can still be successful.

Furthermore, this structure can be more suitable for specialist research functions, such as quantitative survey research, where a product team may not have a need for a dedicated person.

Overall, the service team structure can be an effective approach for organizations seeking to execute research studies quickly and efficiently—while also ensuring they align with the company's strategic priorities.



3. Hybrid

The hybrid team structure is a flexible approach that combines the benefits of the embedded and service team structures. In this model, researchers are assigned to projects within a particular area, allowing them to develop a degree of domain expertise.

This structure also enables researchers to work on the highest priority projects and establish relationships with teams within an area, building up trust and understanding. While not as rigid as the embedded team structure, the hybrid team structure still provides some level of consistency, which can be essential for conducting high-quality research.

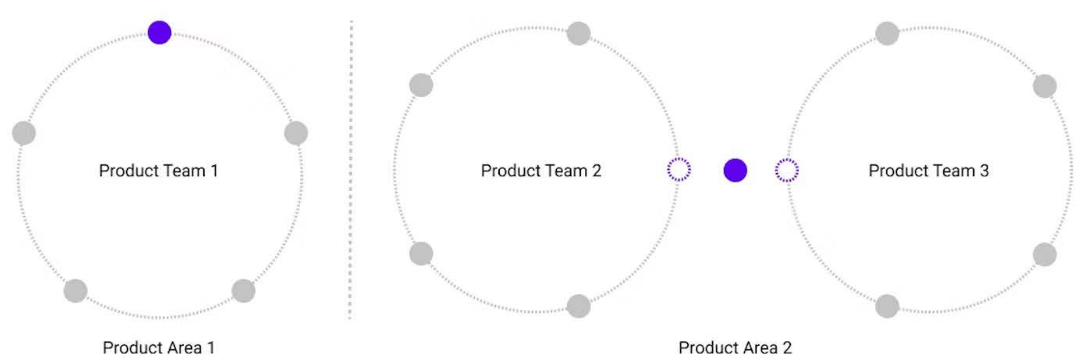
By striking a balance between flexibility and consistency, organizations can leverage the hybrid team structure to achieve optimal results from their research efforts.

4. Shared

The shared team structure assigns a researcher to multiple teams, which can include teams within the same area or span multiple areas. This approach is typically adopted by smaller teams to maximize coverage and make the most efficient use of available resources.

However, the shared team structure can present challenges, including the need for frequent context-switching by the researcher, which can be disruptive for both the researcher and the team. Context switching can also result in a loss of focus and decreased productivity.

Despite these challenges, the shared team structure can be an effective approach for smaller teams seeking to balance research coverage with limited resources. By setting clear expectations and with effective time management, organizations can mitigate the risks associated with the shared team structure and leverage it to achieve their research objectives.



When building the team at Instagram, we first adopted the Shared team structure. However, we found that the context-switching was problematic—context-switching increases cognitive load and can result in burnout. As such, we transitioned to the Hybrid team structure.

The Hybrid team structure was what we initially used at Airtable. When hiring more specialist functions, such as a Research Operations Specialist and a Quantitative UX Researcher, we adopted the Service team structure, operating across the company.

It should be noted that the structure you choose to begin with is not the structure you have to use forever. In the next part of this series, we'll discuss how the team structure needs to evolve in order to scale research.

Determine how many researchers to hire

One way to decide how many researchers to hire is based on ratios. A company will typically evaluate what it plans to build in a fiscal year and how many engineers it needs to do so, which will then inform the estimated headcount for other functions.

Many tech companies size product teams based on ratios. While ratios vary between companies, a common and ideal ratio is considered:

20 engineers : 2 designers : 2 product managers : 1 data scientist : 1 UX researcher

We arrived at this ratio at Airtable by looking at companies of a similar size and companies with similar annual recurring revenue.

As ratios are based on the headcount to be hired and UX Research is typically a function that is hired once a company reaches a certain size, additional headcount is often needed to reach the target ratio. Otherwise, the function will likely be understaffed.

Hire generalists

Regardless of the team structure you decide on, it's important to hire generalists when first building a team. A generalist is a researcher who is experienced with a wide variety of research methods and can apply them to a variety of problems.

This is important when first building, because there will be more projects and teams than researchers, and they may have to adapt based on changing priorities. The first three UX researchers hired at Airtable were generalists. Adopting the hybrid operating model, they worked on the Core, Growth, and Platform product areas.

> *Block at least two hours each week to focus on hiring. I would use this time to reach out to potential candidates, review resumes from our recruiting team, message candidates in our hiring pipeline, and write hiring packets for offers we were planning to extend.*

Focus on hiring

A research leader should always be focused on hiring. I will never forget Mike Krieger, the CTO and co-founder of Instagram, telling a story of how he would spend a lot of his time keeping the servers up and running. However, this prevented him from developing the Instagram app further.

This problem was exacerbated as more people started using Instagram—it took more time to keep the servers up and running. Mike uses this as an example of why hiring is a vital part of scaling a company, requiring dedicated attention and time.

Block dedicated time for hiring

Block at least two hours each week to focus on hiring. I would use this time to reach out to potential candidates, review resumes from our recruiting team, message candidates in our hiring pipeline, and write hiring packets for offers we were planning to extend.

Message potential candidates yourself

Even if you have access to a recruiting team, send messages yourself. This drastically improves the engagement rate of potential candidates. At Airtable, we had candidates reach back out to us months later when initially not interested because of the hands-on approach we took.

Design the interview loop

An interview for an individual contributor (IC) commonly consists of a:

- **Recruiter phone screen** (30 minutes) to confirm the candidate meets the requirements listed in the job description
- **Hiring manager phone screen** (45 minutes) to dig deeper into the candidate's experiences and values
- **Full interview loop** which will include a:
    - **Portfolio presentation** (60 minutes) for the candidate to present two case studies
    - **Research skill interview** (45 minutes) to assess a candidate's knowledge of and expertise with various research methods
    - **Collaboration & Communication interview** (45 minutes) to evaluate how a candidate works with cross-functional partners

- **Product interview** (45 minutes) to understand how a candidate translates research insights into actionable recommendations
- **Values interview** to determine if the candidate exhibits company values

Interview loops will vary between companies. Clear and crisp written communication was highly valued at Airtable, so we also had a paid written assignment before the full interview loop. We also had a business acumen interview which was more focused on strategic thinking. To reduce the length of the full interview loop, we also integrated the questions from the values interview into the other interviews, so each interviewer focused on a given value.

Remember that in addition to evaluating a candidate, they will be evaluating you as a potential manager, the people who work at the company, and the company. As such, consider the candidate's experience when designing the interview loop. Ensure that they will get to meet other members of the research team, cross-functional partners, meet with you as a manager, and have time to ask questions.

At Airtable our interview loops included data scientists, designers, product managers, and researchers. We would organize a coffee chat with the Research team. And the research manager and team would reach out to the candidate after the interview to ensure a positive candidate experience.

Borrow interview guides and processes from other functions

No need to reinvent the wheel. When designing the interview loop for UX Researchers at Airtable, we had interviews that focused on business acumen, collaboration and communication, product thinking, and research skill.

I modified the interview guides from the data insights team for the business acumen interview, and the design team for the collaboration and communication interview. I also recreated the interview guides for the product thinking and research skill interviews based on the same interviews I had designed at Meta.

Let your company values guide you

A lot of candidates, cross-functional partners, and members of the team would comment on how great the Research team was at Airtable—it had one of the highest employee engagement scores in the company. They would ask how we went about building such a great team.

First, we focused on our company values. We hired people who behaviorally demonstrated…

- Being action-oriented
- Thinking about the big picture
- Being company-oriented
- Having a growth mindset
- That they were humble, as well as being customer-obsessed
- Having research rigor

Second, great people want to work with others who are great. This is why it's essential to maintain a high bar. As the research team grew at Airtable, people joined the team from established tech giants and even chose to work at Airtable when receiving multiple offers, including high-paying offers from big tech companies, because of the research team and vision.

Key takeaways

Overall, building a research team requires thoughtful consideration of team structure, hiring practices, and alignment with company goals. By following these guidelines and adapting strategies as the team grows, organizations can establish a robust and effective research practice that drives innovation and customer-centric decision-making.

PART 3

How to Scale Your UXR Team for Maximum Impact

Picture this: you've built a small research practice and team. The research floodgates are open. Now it's time to scale your research organization to meet the demand.

In part one, I outlined the prerequisites to building a team, which included gaining management experience and building or identifying the need for a team. I then walked through the activities and decisions you'll need to make when starting to build a formidable research team in part two.

In this section, I'll guide you through different ways to scale a team, based on lessons learned from doing the same at Airtable and Instagram.

Expand your team

A research team is not just a team of researchers. Specializations exist within the discipline and a leadership team is crucial in order to scale.

Specialize

Product research is so much more than just UX Research.
A research team may also include:

1. Market research
2. Research democratization
3. Research operations
4. Survey research / Quantitative UX Research

1. Market Research

Market researchers use a similar research toolkit as UX researchers, although their partners are primarily in a marketing organization instead of the product organization. Market researchers are influencing go-to-market (GTM) decisions instead of product decisions, and they specialize in certain areas of study such as brand tracking.

Before hiring our first market researcher at Airtable, the UX research team or I initially supported research requests from the marketing team. As demand increased and as the team had specific needs, such as brand tracking, I hired an experienced market researcher who could execute research studies—and eventually build the market research function.

2. Research democratization

Before joining Airtable, cross-functional partners met with customers. This remained true once the research team was established. Designers conducted usability tests to determine if their design concepts were usable. Product managers sometimes met with users to inform feature prioritization, to name a few examples.

Yet, these cross-functional partners were not researchers and they sometimes didn't know where to start—or if they were drawing unbiased conclusions. As such, these cross-functional partners reached out to the research team for guidance, which became a distraction.

As such, we hired a research democratization specialist to help increase the effectiveness and efficiency of non-researchers gathering feedback from users. The specialist achieved this by consulting with non-researchers on the goals and approaching to solicit feedback, as well as reviewing materials and deliverables.

3. Research operations

While researchers are focused on conducting research to make marketing and product decisions, research ops play a critical role to improve the effectiveness and efficiency of how research is conducted.

A research operations specialist was our fourth addition to the research team at Airtable, even though they had been working with the team for several months in a part-time capacity as a recruiting coordinator.

The initial need for a research ops specialist was to support recruiting study participants, which is one of the most intensive parts of the research process. Having someone who is focused on the logistics of running a research study allows a researcher to focus on prepping materials, analysis, and reporting—to name a few examples. This all speeds up the research process.

When you're founding a team and there is an overwhelming number of research requests, it can be tempting to focus on hiring researchers. But research operations are a catalyst.

While the initial impetus for research ops may be participant recruitment, the role expands to so much more over time. For example, at Airtable our research operations specialist built a system to automatically distribute and manage the completion of research participation agreements. This reduced hours of manual work per study.

They also onboarded an incentive platform at no cost to Airtable. This also saved hours of manual work per study and provided participants with a greater selection of incentives. In turn, the improved incentives increased participation rates. Don't forget that there also are other roles within research operations, such as a research librarian and research program manager.

4. Survey research / Quantitative UX research

In part two of this series, we recommend hiring generalists when first building a team. However, as the team grows and the demand for research increases, you may have more specific research needs. A common research need is survey research or quantitative UX research.

When I joined Airtable, I partnered with the marketing operations lead to revamp the company's Net Promoter Score (NPS) survey, which we expanded to include UX metrics, such as customer satisfaction (CSAT).

We relaunched the survey in January 2021 and also began the search for a quantitative UX researcher who would be focused on creating a holistic user attitudes program: analyzing and reporting on the data quarterly, as well as conducting ad-hoc quantitative research.

While the first UX researchers we hired were generalists who had experience with a variety of qualitative research methodologies, for this role we needed a specialist for this role who had skills with statistics and survey design. This would increase the capabilities of the research team—as well as allow researchers on the team to learn from others' expertise.

> *The ideal team size for a manager is five to eight direct reports. A manager should have no fewer than two direct reports—and even then, they should have headcount for team growth.*

Build a leadership team

It's impossible to lead and manage a team by yourself. You need a strong leadership team in order to scale. One of the most critical and difficult roles to hire when scaling a research team is a manager.

Meta had a guideline that another manager should be hired when a manager has eight direct reports. In practice, you have to start a lot earlier because it can take a long time to find the right candidate for your team. For example, we opened our first manager for the Airtable UX Research team in May 2021, and didn't hire until January 2022.

Managers have varying levels of experience and it may be possible to transition people from the individual contributor (IC) to the manager track. In my opinion, the first manager you hire should have prior management experience. You'll likely want them to manage a sizable portion of the existing team, allowing you to scale. There's also a learning curve and inherent risk of transitioning someone to the manager track without manager peers to support them.

As you scale though, not all managers need prior people management experience. For some of our smaller teams and specializations, we sought experienced researchers who could transition into people management and play the role of a player-coach—do the work and manage others. However, we did look for some of the prerequisites discussed in the first article.

The ideal team size for a manager is five to eight direct reports. A manager should have no fewer than two direct reports—and even then, they should have headcount for team growth. Furthermore, a manager should have no more than 12 direct reports. At that point, it becomes difficult to effectively partner with direct reports and cross-functional partners due to a lack of time and context switching.

Towards the end of 2022, at Airtable we had…

- Having research rigor Two UX research managers who managed the core (five direct reports) and growth (four direct reports) product pillars
- Another UX research manager who managed a smaller team (two direct reports) within the core product pillar, a market research manager (two direct reports), and a research operations and programs manager (two direct reports).

With this structure in place, we had specialist leaders who had cross-functional partners and the ability to scale their teams and the research practice at Airtable.

Break down organizational silos

When UX researchers are embedded in product teams and market researchers work with their functional partners in marketing, they work in organizational silos. Yet research questions are not all siloed to a given function or team. In my experience, often the most impactful and strategic research happens at the boundaries of organizational silos, as cross-functional partners are not focused there.

The CEO and other C-Level executives at Airtable approached me with research questions that spanned the company. When the team was small, I either took on these research studies, pulled my team together, or worked with a research vendor.

Regardless of the approach, this work would take a significant amount of time. As such, we hired a principal researcher to focus on these complex, large research projects. This included competitive research and jobs-to-be-done research, to name a few examples. Given the experience and expertise of this hire, they also provided invaluable mentorship to the entire team and even cross-functional partners.

The research and insights teams at Airtable also created primers to enable everyone within the company to make customer-centeric, data-driven decisions during planning. A primer, also known as a planning primer, is a synthesis of insights and opportunities related to company priorities that are an input to planning. It can be used to help teams understand the market, identify opportunities, and develop strategies.

Foster healthy growth

When I was at Instagram, the director of growth once said to me, “I don’t want growth. I want healthy growth.” It’s easy to grow something—also known as growth hacking—but it may not last. Healthy growth is sustainable

Manage ratios

In part two of this playbook, I explained how ratios with other functions could be used to gauge team size. Ratios can also play a crucial role in managing sustainable growth. When faced with the task of hiring a certain number of individuals within a specific year, it’s advisable to expedite the hiring process. This enables a timely onboarding process and contributes toward the company’s objectives. However, it’s important to maintain a consistent pace of hiring across all functions.

At Airtable, we placed emphasis on prioritizing the roles we intended to hire each quarter. This approach helped us determine the appropriate speed for our hiring process, establish the recruiting team’s priorities, and ensured alignment with our financial planning models. If other teams don’t meet or exceed their hiring goals, you may have to adjust yours accordingly.

Reevaluate your team composition

The structure you choose to begin with is not the structure you have to use forever. In fact, it will very likely need to change when scaling a team.

UX researchers at Airtable were initially aligned with a product area, working with a product team based on company priorities and research impact (i.e., the hybrid model). As we hired and had more UX researchers than product areas, we switched to UX researchers working with a dedicated product team (i.e., embedded model), providing clear ownership.

As the company grew and product teams became more specialized, product teams were asked to conduct more evaluative testing. It wasn’t aligned with our vision to have UX researchers focused on more strategic research. As such, we transitioned back to the hybrid model, partnering UX researchers with product leads within product areas.

Conduct retros

Most companies I have worked at have had a biannual employee voice survey. This is an effective tool to understand the health of your team.

Once the employee voice survey results were released, I walked the entire team through the results highlighting areas of strength and opportunity. Transparency is key.

I then hosted a retrospective (aka retro) with the team, which involved an anonymous “start, stop, keep” exercise. We generated ideas as to what we should start doing, stop doing, and keep doing.

The team then voted on up to three ideas per category. My leadership team then reviewed the ideas and voted forming an action plan that would be codified in our team Objectives and Key Results (OKRs) or updated processes. During the next employee voice survey, we evaluated if we had improved.

Build psychological safety

Psychological safety is a sense of trust and acceptance within a team where people feel comfortable being themselves and sharing their ideas, even if they might be wrong. The research team at Airtable commented on how psychological safety was a strength of the team.

> *“Building a culture of trust can be a powerful way to improve performance.”*
>
> Paul Zak, Professor of Economic Sciences

<IC NAME/> : <MGR NAME/>

<Date/>

- How are you feeling?
  Use the mood meter to help identify how you are feeling.
  - ...
- Discussion topics & questions:
  Add topics to be discussed and questions to be answered during the 1:1.
  - ...
- Pre-read
  The pre-read is optional but encouraged. It lets you and your manager focus on you and have strategic vs. tactical discussions.
  - What impact did you have last week?
    Impact is not what you did, but rather the result of what you did e.g., decisions made. It is not an expectation that you have an impact each week.
    - ...
  - What did you learn last week?
    Beyond the impact you have, reflect on how you are developing and growing.
    - ...
  - What went well last week? Why?
    It is through reflecting on what went well that we can identify patterns and look for ways to replicate these successes.
    - ...
  - What could have gone better last week? Why?
    It is through reflecting on what could have gone better we can identify patterns and look for ways to improve.
    - ...
  - How can I help you?
    A crucial role of a manager is to unblock their direct reports so they can make progress.
    - ...
  - Feedback & Recognition
    Performance review cycles should not be the only forum people get feedback & recognition. We want to create a culture where we can openly communicate. Be bold! Be open! Aim to give one piece of feedback or recognition each week.
    - For <IC NAME/>
      - ...
    - For <MGR NAME/>
      - ...

During manager 1:1s, managers would:

- Focus on how people were feeling – Our feelings have an impact on how we show up and perform at work
- Reflect on the work – What impact it had, lessons learned, what went well, and what could have gone better
- Provide support – Ensure nobody felt stuck or like they were alone
- Provide feedback – Identify opportunities for improvement and also celebrate and recognize successes. We also ensured this was not a one-way conversation. Direct reports were actively encouraged to provide their manager with feedback.

Team Meeting Notes

<Date/>

Kudos & Recognition

Celebrate and thank members of the team for their contributions and work.

- ...

Top-of-mind

Leadership updates.

- ...

Announcements & Reminders

Actions items, events, etc...

- ...

Roundtable

Updates from each member of the team.

<Name/>

- How are you feeling?
  Use the mood meter to help identify and share how you are feeling.
- Focus:
  What is your primary focus this week that the rest of the team should know about?
- Help:
  What can others on the team do to help you?
- Fun fact:
  What personal or professional updates do you wish to share?

Discussion topics & questions

Updates from the team.

- ...

During our team meetings, we…

- Took time to celebrate and thank each other, recognizing each others' contributions
- Provided updates from leadership, so the team were aware of what was happening across the company
- Focused on how each other was feeling
- Shared fun facts, building stronger connections among the team
- Provided a space for discussion

Some of the overarching principles to create a psychologically safe environment, included:

- A focus on people (and thereby wellbeing)
- Being transparent and providing open communication
- Celebrating and supporting people's growth

Set up rhythms and rituals

Document how you work

When the team is small your rhythms and rituals will be intimate knowledge, but as the team grows, this approach will break down. This usually happens when you start hiring managers and specialists, because there are new information sources, as well as varied processes. As such, you and your leadership team will need to document your processes.

For example, every researcher at Airtable created a research roadmap each quarter, which defined research studies and how they mapped to company and product objectives. This was a standardized process. As such, I created a step-by-step guide for research roadmapping. This document was useful for existing and new team members outlining actions and expectations.

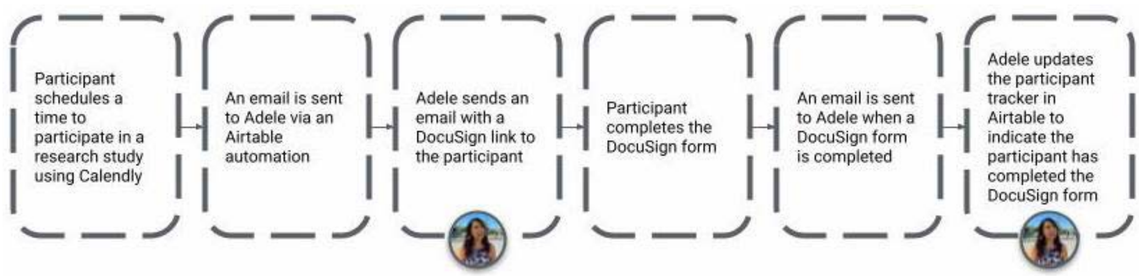
We also used Airtable, which managed our research workflow to remind researchers when to take certain actions—such as sharing a study in the Insights Slack channel and adding it to the research repository when completing a study—so they didn't have to remember every action.

Documentation does not have to be just for your team. I also created a research manifesto/vision that stated that the research team's primary focus was strategic research. This was also a valuable resource for our cross-functional partners, setting expectations for what the research team did and did not do.

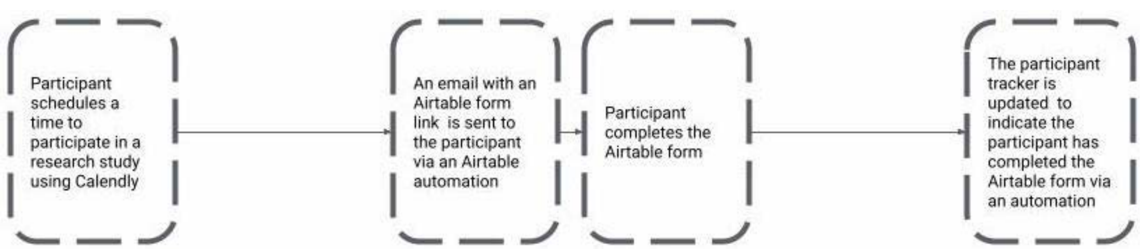
Create new and improve existing processes

Identifying ways to make people more effective and efficient is another way to scale a team. Work smarter, not harder.

Airtable had one research operations specialist supporting 14 researchers. This resulted in an unsustainable workload. Unfortunately, we did not have the headcount to hire another person, so we focused on ways to reduce workload. One opportunity we identified was to automate the dissemination and management of research participation agreements, which was one of the most time-intensive processes.



There were a number of steps to send a research participation agreement form and record it as complete. The key insight we had was: what if we removed the need to use DocuSign and used an Airtable form instead? This would allow us to automate the entire process using Airtable Automations.



Airtable's research operations specialist worked with the legal team to replace the DocuSign form with an Airtable form, and we worked together to create an Airtable Automation. The improved process was simpler and faster, and reduced the reliance on a third-party tool. It reduced costs for the company and didn't require any research operations interaction.

It is important to note that processes can break down at scale, so it is crucial to reevaluate processes and how they can be improved.

Define OKRs

Objectives and Key Results (OKRs) are an effective goal-setting and leadership tool. They communicate what a team wants to accomplish and what milestones need to be met in order to accomplish it. OKRs also promote accountability and ownership, allowing a team (such as research) to show how they contribute to the company's goals.

Each quarter, research OKRs at Airtable focused on three areas:

- Strategic initiatives and projects
- Process and tooling improvements
- Team development and initiatives

For example, automating the dissemination and management of research participation agreements is an example of a process and tooling improvement key result.

Onboard new tools to expand your capabilities

New tools can increase the number of tools in your research toolkits, and allow you to conduct research at scale.

For example, at Uber, we worked with dscout to understand the everyday eating habits of hundreds of people across the US. At Airtable, we onboarded another tool to be able to conduct unmoderated concept tests. Such tools allowed us to conduct research studies in parallel.

Uber used dscout for longitudinal research to support a major product launch, reducing rework and increasing org-wide alignment.

SEE WHAT THEY DID

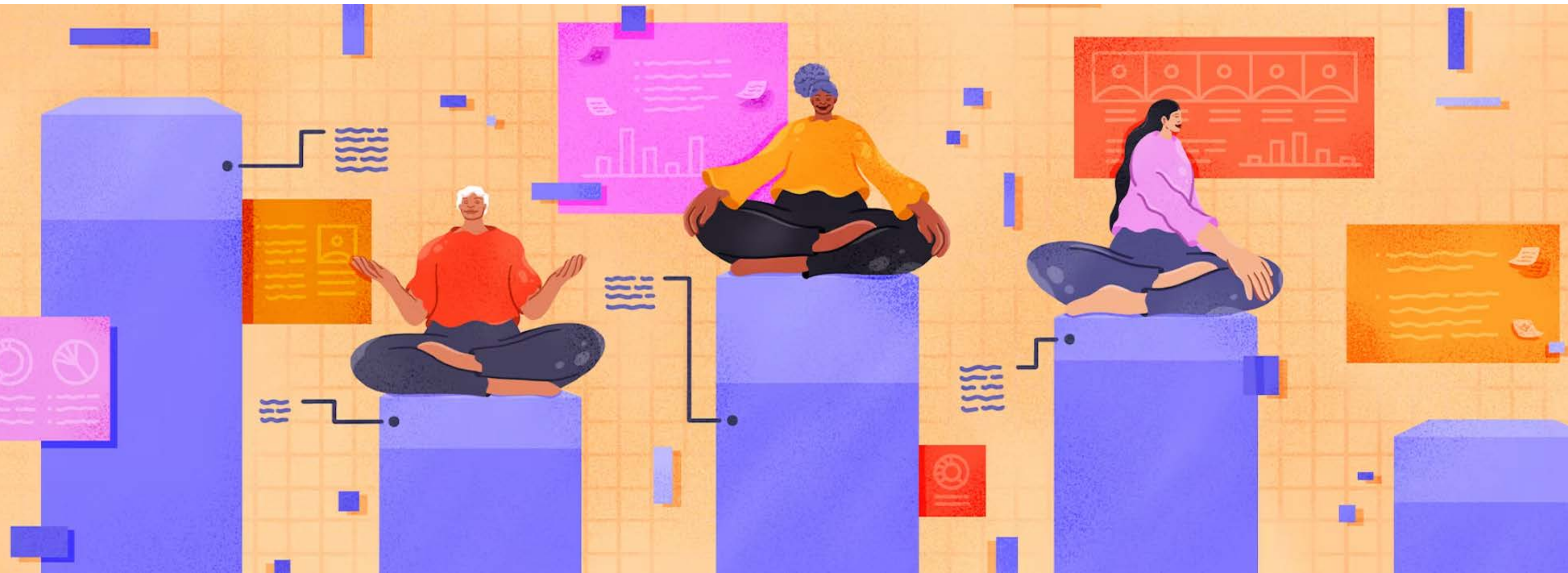
CONCLUSION

Parting thoughts

Scaling a research team requires expanding the scope of the impact and work of the team, nurturing healthy growth, and establishing the rhythms and rituals for your team. These are not one-and-done activities.

As a research leader, you need to constantly evaluate the needs of the organization and best position your team to meet those needs. And at times, it may not be the case that you need to scale—you may be required to cut back.

Regardless of how you need to adjust your team, we hope that this playbook has highlighted how to get started.



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