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The People Nerd's Guide to

Successful Cross-Team Collaboration

Create better relationships, workflows, and deliverables by aligning user research with functions across your organization.

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INTRODUCTION

Collaboration requires communication

As user researchers, our goals are to ensure that our organization both understands its users and makes them a top priority.

One would think that these goals would be top of mind across the entire organization. Our users are the ones who ultimately pay for and utilize new products and features, so it's in the operation's best interest to put their needs first—right?

But here's the thing: every department has its own set of priorities.

Their goals include everything from creating the product roadmap and decreasing the number of bugs reported to hitting revenue numbers and expanding brand awareness.

With all of these initiatives moving at once, it's difficult to keep everyone aligned and heading in the same direction.

To ensure that the organization as a whole both understands the value of user research and uses our findings to the fullest, we have to communicate and lean into shared goals.

Creating partnerships with teams such as account management, product, executives, sales, and marketing not only makes for a more efficient workplace but also creates a more human-centered organization.

To do this, we have to:

① **Understand each team and their history with UXR**

② **Recognize their unique goals**

③ **Identify how to help one another**

④ **Create opportunities for collaboration**

⑤ **Establish a share-out cadence**

This eBook lays out step-by-step how to collaborate and make an impact with these internal teams. Let’s dive in.

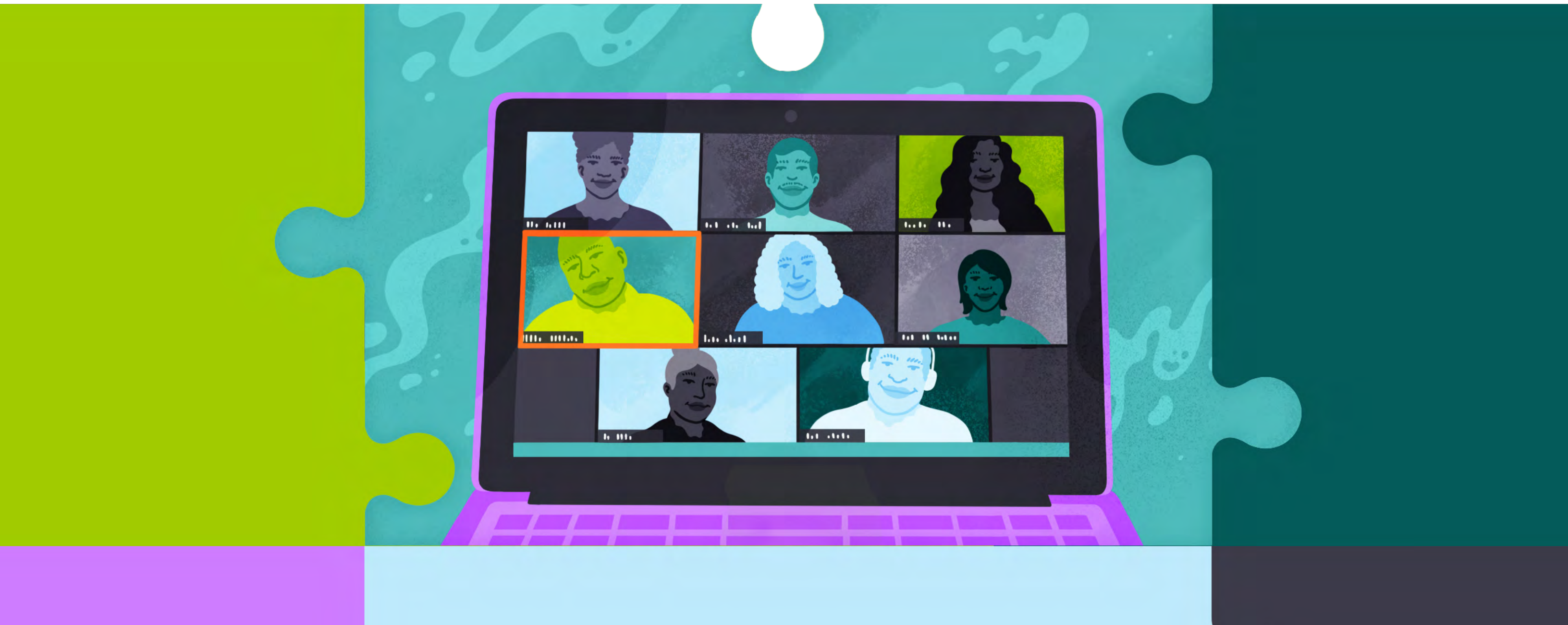
CHAPTER 1

Understanding team history of working with user research

Before we get into the nitty-gritty of working with different types of teams, these questions can act as a great opener no matter who you're working with.

It's important to understand other teams' previous experience with user research or any biases they hold.

The best way to learn this knowledge is by asking a lot of questions. So after you get to know the members of each team and their roles, we recommend setting up separate meetings to discuss user research.



Here are a few ways you can involve your stakeholders:

If I asked you to define user research, how would you explain it?

Through this question, you'll understand any knowledge gaps or biases the person may have about user research. With this information, you can help inform or educate your colleagues.

Have you ever worked with a user researcher before? If so, tell me about the experience.

By understanding how they have worked with user researchers in the past, you can uncover how you can best work together in the future.

How do you feel about user research?

This question can help you better understand their fears or anxieties surrounding user research, allowing you to brainstorm ways to counteract them.

Tell me what happened the last time you did user research.

By hearing about a previous project, you can gather colleagues' expectations, pain points, and needs when conducting a project.

How do you imagine user research helping you?

With this information, you tie it all together and plant the seed for working together. The answer to this question can give you specific action items to get started on facilitating your relationship.

Next, we'll go over different approaches for the respective teams you're working with.

CHAPTER 2

Working with product teams

Product managers, designers, and developers are the first line of roles you typically work with as a user researcher.

Fostering these relationships and collaborating with these colleagues is essential to creating a mature user research organization.

Lacking support from these teams can make it very difficult to integrate user research into the organization.

Recognize product teams' goals

To help these teams understand the value of user research, we need to first understand their goals and day-to-day activities.

By noting how research projects can partner with product initiatives, we can create deliverables that are the most valuable to them. This results in giving product a clear picture of where research directly pairs with their goals.

Product managers

Product managers sit between technology and the business. Aligning with their goals can help ensure that your research gets prioritized and used. Here are some common goals for product managers:

- Understanding what the right thing to build is
- Knowing how to create the right deliverable efficiently and effectively
- Measuring success against metrics aligned with the business goals and expected outcomes
- Bringing the team together to work on achieving the above

Designers

Having a working relationship with design is critical. When you work closely with designers, the user's experience directly improves. Here are a few goals that are essential to designers:

- Improve customer satisfaction of the product
- Enhance the usability of the product, through increased efficiency and effectiveness on the user's main tasks and goals
- Decreasing the number of bugs reported and the number of support tickets regarding the experience
- Additional goals depending on the team they are working on, such as increasing retention, customer lifetime value, or acquisition. (Ex. Decrease metrics such as bounce rate, exit rate, or account deletion; increase metrics such as click-through rate, or sign-up rate)

Developers

Developers can be hard to crack, but integrating them into research can help teams make more user-centric decisions. Also, understanding the developers' goals and making insights work toward those goals can get the team on your side. Some goals you can speak to are:

- Build something usable and enjoyable for customers
- Reduce the number of tickets and issues the customers encounter
- Deliver updates or new products on time
- Continuously enhance the current product

Often, your teams' goals become your own. Knowing what these teams are trying to achieve can help you track the impact of user research across an organization.

For instance, if a team focuses on acquiring new customers and you improve the user experience through research insights, you can use that goal to measure your influence. Of course, it's always important to sit with these teams to understand what they are trying to accomplish first.

Next, we'll explore how to ensure the relationship with product benefits everyone.

How to ensure a mutually beneficial relationship with product

By aligning with product's goals, you can create enriching partnerships. Understanding where you all can benefit ensures that you conduct integral research to help these teams make immediate decisions.

This symbiotic relationship can help the product move in the right direction and help you do the most impactful research.

How user research can help product managers

- Align research projects with their goals, so that your research helps them improve relevant metrics
- Allow them to quickly request research through simple processes, such as an intake form
- Create a research roadmap that matches up with their upcoming roadmap
- Surface relevant research to the team through research summaries or build an easily accessible research repository
- Submit deliverables (such as customer personas, journey maps, and reports) that help product managers make more informed decisions on what to focus on next

How user research can help designers

- Be the "voice of the customer" during design critiques to keep users top of mind
- Brainstorm how to improve the experience after getting feedback from a current design or prototype
- Consistently provide feedback from users on designs or prototypes, whether that's from quantitative data, qualitative data, or sourcing data from an app or product reviews
- Surface relevant research through research summaries or build an easily accessible research repository
- Make deliverables (such as customer personas, journey maps, and reports) that help designers create user-centric designs/prototypes

How user research can help developers

- Surface relevant research through research summaries that help developers build with the user in mind
- Invite developers to research sessions, so they get direct exposure to users
- Be the "voice of the customer" when developers scope which work to prioritize, and help them determine the impact of their work

Be sure to check with both teams as there may be additional organization-specific ways user research can be helpful.

How product managers, designers, and developers can help user researchers

These teams are highly involved in what gets built and how it looks and feels, so getting support from them is a top priority. They can be useful to user research in the following ways:

- Help prioritize the product roadmap through data on customers' needs and issues
- Understand business goals to align research projects at a strategic level
- Prioritize different groups of customers to start speaking with—especially helpful when you're just starting at a company
- Ensure products get feedback from users to measure impact across the organization

Next, we'll discuss different study types that enable these initiatives.

Best studies for product collaboration

You're likely to work with product teams more frequently than other departments in your organization. Since these teams tend to have shared goals, helping out one role generally enables the others.

Here are some studies to use when working with product managers, designers, and developers:

- **1:1 interviews** – to validate the most common pain points and putting them into the upcoming roadmap
- **Concept testing** – to give direction on product validation before building
- **Journey map interviews** – to create a playbook that details which roles are acting in different phases of your customer journey
- **Surveys** – to help validate user struggles and common pain points they're facing
- **Improvement surveys** – to help determine which feature to focus on next
- **Usability testing** – to gauge flows that are difficult for users and come up often during customer conversations, or comparative usability testing to compare designs
- **Concept testing** – to understand how it's changed over time, such as the System Usability Scale
- **Customer satisfaction surveys** – to help validate user struggles and common pain points they're facing
- **Card sorting and tree testing** – to help structure the information architecture of a product
- **Heuristic evaluations** – to ensure prototypes or designs are not violating any common principles

Once you've conducted research, it's important to figure out productive ways to share that information.

How to share findings with product

The number of meetings might be complex if you're a solo user researcher, but ideally, you should meet with product as often as possible. The best way to share is to stay visible and repeatedly bring up relevant insights.

Bi-weekly catch-ups

It's beneficial to meet frequently (i.e. bi-weekly) with product managers and designers to discuss research in progress and upcoming research. In this meeting, you can discuss any blockers or time issues, and review respective roadmaps.

Research roadmap and backlog

Having a research roadmap and backlog to share consistently with teams can also be a useful tool. This document keeps everyone up-to-date on what's happening and anything coming up. It helps to ensure continual alignment between research and product roadmaps.

Share-outs

Providing share-outs to respective teams whenever a research project ends can also keep product teams up to speed. If the project spans multiple teams, try a wider share-out for everyone and create catered research summaries. A share-out may include communications with project summaries, presentations, and documentation.

Regular updates

Aside from more formal share-outs, sending regular updates to product teams during ongoing research can also keep everyone informed. Regular updates are especially useful because they can bring up any product aspects that need immediate changes.

Video and audio clips

Including an audio or video clip in any presentation, report, or update can give these teams a better understanding of your project's impact. By sharing a few minutes of clips, your colleagues can get a better understanding of the audience and the themes surrounding your data. Software like Loom can be helpful for this.

Deliverables

Creating personas, journey maps, and other typical deliverables help product teams stay focused and informed. These deliverables contain a lot of detail that teams can use to make decisions on many different projects.

Teaming up with designers, product managers, and developers greatly enhances your work and ensures you are conducting the most impactful research for your respective teams. Additionally, with overlapping goals, you can start to measure the impact of research across your organization, proving the value of user research.

CHAPTER 3

Collaborating with account management

Account managers often have long-standing relationships with customers and understand the issues they face on a daily basis. Collaborating with account management goes hand-in-hand with UX goals to improve the customer experience.

Recognize their goals

UX research is a powerful way to unearth goals that drive usage. The same practices are critical for teammates and collaborators.

Account managers are the perfect team for applying UX principles, as they often have a clear goals-to-workflow relationship.

Account managers

A few major KPIs for account managers are:

- Retain current customers and reduce any churn
- Keep customers satisfied by the product's offerings, increasing customer lifetime value
- Identify new sales opportunities through upsells or adjacent products
- Increase organic growth and acquisition of customers through references or referrals

Customer support

Customer support KPIs can vary depending on the organization and product, so it's essential to speak with the team to understand their goals. Here are a few examples of common customer support KPIs:

- Retain current customers and reduce churn
- Increase customer satisfaction by helping customers effectively and efficiently
- Reduce customer wait time
- Decrease the cost of customer support
- Create thorough help documentation that minimizes the number of customer support calls and emails

Customer support and account managers actually have similar goals to user researchers, such as customer satisfaction, customer lifetime value, and increasing retention and acquisition—making it critical to align with these colleagues.

Next, we discuss how you can create a beneficial relationship with account management and customer support for the best results possible.

How to ensure a mutually beneficial relationship with account management

Since account managers, customer support, and user researchers have overlapping goals, it has the makings for an excellent partnership.

Here are some ways to create a reciprocal relationship with these teams:

How user research can help account managers

There are a few ways you can help account managers in their day-to-day:

- **Facilitate communication**: Set up a backlog or voting system to act as a facilitator between the product and account management teams. This ensures that the most common feature requests from customers get prioritized on the product roadmap.
- **Create personas**: Presenting customer personas to the account management team can help them structure conversations with clients. If account managers know a particular pain point that's recurring, you can work to create a playbook for them to manage it more easily.
- **Add product roadmap updates**: Product roadmap updates can help keep account managers in the loop and help them respond to complaints and feature requests.
- **Teach them how to ask customers, "Why"**: This will empower account managers to dig deeper for reasons behind feature requests to understand the "why" and better prioritize future features.

How user research can help customer support

Customer support and user researchers both deeply care about customers and satisfaction. Here are some ways you can help this team:

- **Prioritize solutions**: Monitor the most common complaints to bring to the product roadmap and prioritize solutions
- **Check in on FAQ answers**: Conduct user research on help documentation or FAQ pages to ensure it's the best experience.
- **Deal with bad user experiences**: Help reduce customer support emails and calls by dealing with bugs and bad user experiences as quickly as possible.

As I mentioned, always check with both teams as there may be organization-specific ways user research can help teams at your company.

How account managers and customer support can help user researchers

Account managers and customer support talk to clients every day, making them experts on users' needs and pain points. Here are some ways they can be a resource:

- **Sharing pain points**: Understanding the pain points of the users through the most common complaints and tickets.
- **Identifying pressing customer needs**: Helping to prioritize the product roadmap through data on customers' needs and issues.
- **Narrowing down next participants**: Creating proto-personas of users you want to speak to next, giving a baseline of what to expect from the users.
- **Identifying new audiences**: Prioritizing the different groups of customers you should start speaking with. This is especially helpful when you are just starting out at a company.
- **Validating trends**: Giving insights via calls, emails or chats, that help you cross-validate trends from qualitative sessions.
- **Sharing user knowledge**: Cultivating a general understanding of the types of customers we have, as well as their goals, needs, and pain points.

Figuring out the best studies to use is the next step.

Best studies to collaborate on

Once you've figured out team goals and the best ways to communicate, consider which studies are great to work on with account managers and customer support.

Below, we've pulled together some of the most popular methods.

Account managers

There are a few ways you can help account managers in their day-to-day:

- **1:1 interviews**: Meet with the account team to understand their needs and pain points and integrate them into the roadmap.
- **Journey map interviews**: Design these to create a playbook that details which roles act in different phases of the customer journey.
- **Surveys**: Create a survey that helps validate common user pain points.
- **Usability testing**: Research flows that seem to be difficult to users, or that come up frequently during customer conversations.
- **Customer satisfaction surveys**: Design these to research customer satisfaction over time, such as the System Usability Scale.

Customer support

Customer support and user researchers both deeply care about customers and satisfaction. Here are some ways you can help this team:

- **Content testing**: There are a few varieties of content testing researchers can help with, such as highlighter tests, cloze tests, and recall-based tests.
- **Card sorting and tree testing**: Help with documentation or FAQ sections on a website.
- **1:1 interviews**: Meet with customers to validate the most common pain points and add them to the upcoming roadmap.
- **Usability testing**: Run projects to better understand flows that seem to be difficult to users, specifically the top ticket complaints.

After this, you'll work on sharing findings with teams in the most effective way.

How to share findings with account teams

Product team meetings are a great time to share findings with account managers and customer support teams. The key is keeping these teams in the loop so they can in turn keep the customers updated, especially with the product roadmap.

Bi-weekly catch-ups with the product team

These meetings consist of the most common complaints, tickets, and pain points that have come up for customers. Ask teams to bring some evidence of the problem and some reasoning behind it.

During these meetings, each account and customer support colleague presents the top issues they've encountered, then the product team discusses how to address the next steps. From there, following steps could be doing additional research to validate and better understand the problem. Plus, the product team can quickly fix a bug or low-hanging fruit issue without much solution brainstorming.

Share-outs

It's helpful to update account management and customer support once a month on any research recently completed. If there was a project of particular importance to either of these teams, it's beneficial to update them before the general sharing meeting. A share-out may include communications with project summaries, presentations, and documentation.

Workshops

Before working on a customer journey, service blueprint, or persona creation, sit down with these teams for a workshop. Here, they can share everything they know about the user and you can incorporate these deliverables into a prototype that's later validated in a research project.

Meeting regularity/syncing

Meet bi-weekly with both account managers and customer support to gather information such as top complaints and recurring tickets. During this time, you can update them on any relevant changes to the product or progress on particular projects.

Asking for participants

Since account managers have great working relationships with customers, ask them to reach out to clients for user research interviews. Keeping a running list of clients ensures you don't overwhelm the same participants too often. Leveraging account managers' relationships is also a great place to start with creating a participant panel.

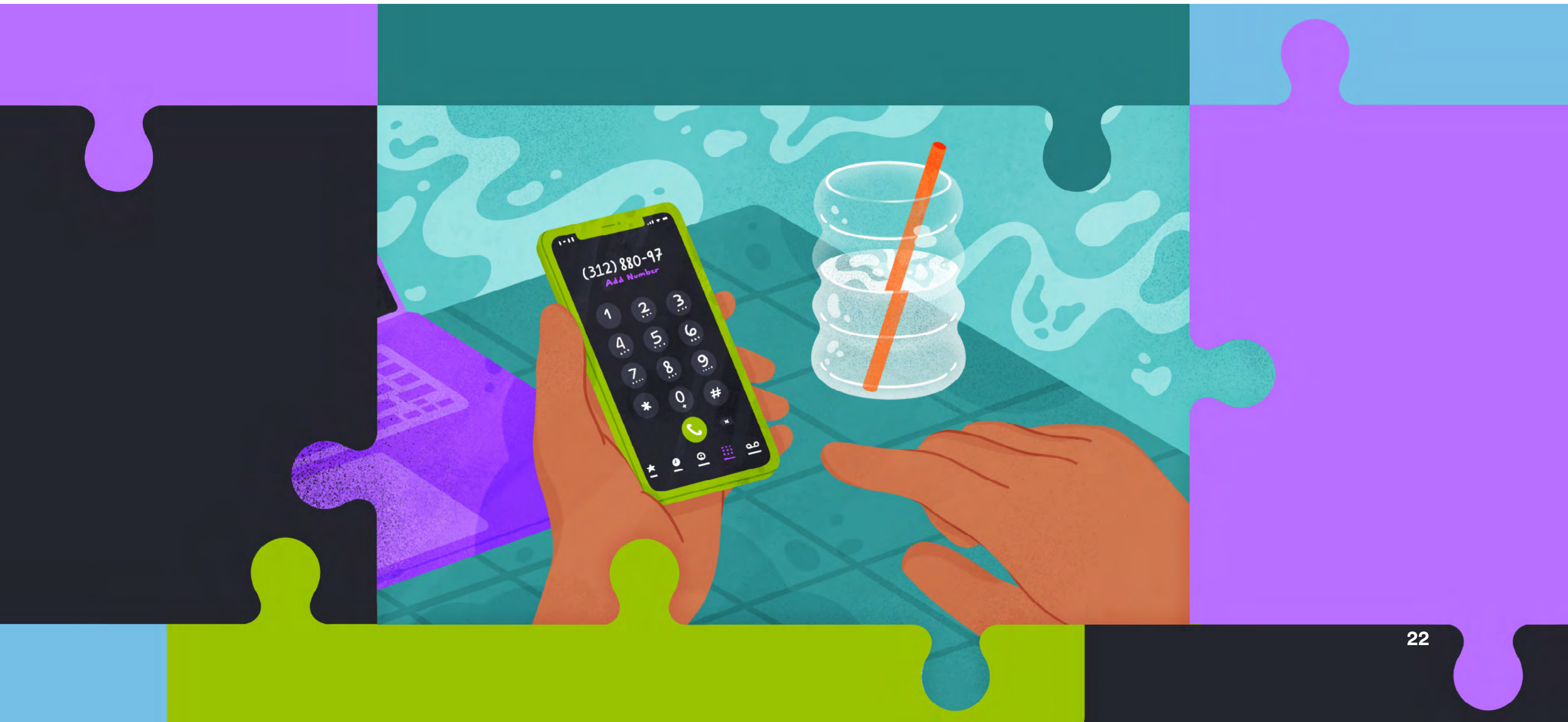
When working with customer support and account management, you grow the organization's holistic knowledge of users. Teaming up with these departments solidifies your practice and ensures that you focus on the right customers and prioritize the most critical problems.

CHAPTER 4

Aligning with Sales and Marketing

Working with product and tech teams is a very natural step for user researchers. You start to understand their timings, rhythms, what information they need, and which questions to ask them.

Working with sales and marketing can be a completely new experience for some researchers. Rather than convincing them to partner with you on research or conduct their own, successful collaboration with these teams comes down to identifying what you can learn from one another and where to fill in the gaps of knowledge.



Recognize their goals

As researchers, we are taught to empathize with users. That empathy should also extend to our colleagues. By understanding what teams are doing and empathizing with their goals, we can unlock the potential of a more holistic appreciation of our users.

Sales

The sales team's primary goal is to get more revenue and profit for the organization. This team is striving to increase the number of new customers and upsells or cross-sells. They typically have a set target per month or quarter of sales they're trying to hit.

Marketing

The goals of the marketing team encompass brand awareness, competition in the industry, and consumer or market behavior trends. The team prioritizes getting more customers engaged with the product and increasing growth and market share.

Keep in mind every organization is unique, so it's best to sit down with these teams directly and ask them about their goals, targets, and what they're doing on a day-to-day basis. After understanding their role, you can dive into how user research will positively impact them.

How to ensure a mutually beneficial relationship with sales and marketing

Sales is often about balancing quantity with quality: Sending 1,000, not-so-good emails compared to 50 high-quality targeted ones.

Like account management, sales professionals' goals are a delicate balance of scale, speed, and skill. Time is always of the essence, but that hunger for conversion offers a collaborative space for UXRs.

How user research can help sales

There are a few ways user research can help the sales team:

- **Create personas**: Create or assist with buyer personas to help the team better speak to certain user groups.
- **Create a customer journey**: Make a customer journey map that highlights what to communicate in different phases, so they feel comfortable talking through the end-to-end journey with potential clients or customers. Sales often speaks to this in terms of the "funnel".
- **Relaying common user pain points**: Keep sales up-to-date with pain points gives them notes to speak to during pitches.
- **Teach them how to ask customers, "Why?"**: Teach the team how to probe on questions to get deeper information they can use later.

A quick tip: Putting information like the customer roles, journey maps, and common pain points into a small playbook can make it easy for sales to access key collateral at a moment's notice. This may help them make the sale.

How user research can help marketing

Market research and user research often have significant overlap as both teams care deeply about customers and their respective behaviors.

Here are some ways user research can help the marketing team:

- **Customer personas**: Personas can help the marketing team better understand our users from a product standpoint, making the content strategy more holistic.
- **Usability testing**: Marketing may get stuck on how to structure certain pages on a website. User research can help identify the best information architecture to help them decide on the most effective and efficient design.
- **Content testing**: Build out a project to see how their content is resonating with users.
- **Share reviews or insights**: Pass along feedback from interviews that impact brand awareness and acquisition.

A quick tip: Remember to always check with both teams as there may be organization-specific ways user research can help teams at your company.

How sales can help user research

The sales team has a wide breadth of knowledge that can be useful to user researchers:

- **Understanding potential customers**: By listening to sales calls, you can learn about potential customers' pain points, needs, and goals. This perspective opens up the door to a whole new set of personas, journey maps, and expands your insights beyond your current user base.
- **Assessing leads**: Sales can help you understand who is reaching out to your organization and why. You can then bring this information back to the product team to enhance your roadmap and include some of the missing key features.
- **Reviewing the sales journey**: Learning about the process of the sales journey can help you create an all-encompassing user journey or even a service blueprint. These deliverables can help the entire organization optimize internally, helping teams reach their goals faster.

How marketing can help user research

Market research and user research often have significant overlap as both teams care deeply about customers and their respective behaviors.

Here are some ways user research can help the marketing team:

- **Customer personas**: Combining user and market personas can lead to a super-persona that provides a lot of decision-making power. Multiple personas can help the organization understand human goals and pain points, perceptions, and product-market fit.
- **Data analysis**: Often when we segment data, it's through arbitrary demographics such as age, income, or location. While these demographics may be beneficial, there are many other ways to segment audiences. Talking with market research teams can help you slice and dice data in a new way to bring new insights to light.
- **Teaming up during an interview session**: Sometimes a user researcher and market researcher can hop into the same session. For example, during a study to understand perception and usability, a market researcher can take the first 45 minutes to gauge perceptions by letting participants describe the concept and explain their attitudes toward the brand. Afterward, user research can conduct a usability test allowing both teams to share notes and insights.

Next, we'll go over the types of studies that work well for marketing and sales.

Best studies to collaborate on

Here are a few studies that work best with the sales and marketing teams:

Sales

- **1:1 interviews**: Conduct interview sessions with the most common roles the sales team speaks with. Interviews can help sales understand the needs and pain points behind the initial calls, and potentially create buyer personas.
- **Journey map interviews**: Create a playbook that details who sales will be talking to in particular phases of the buying journey.

Marketing

There are a few ways user research can help the sales team:

- **Content testing**: Marketing can be helpful with projects such as highlighter tests, cloze tests, and recall-based tests.
- **Card sorting and tree testing**: These types of projects can help marketing understand how to best structure and design a website.
- **1:1 interviews**: Sessions focused on brand awareness and perception can be extremely useful to this team.
- **Large-scale surveys**: Incorporate branding questions (when relevant) into any of your large-scale surveys.

After you've conducted your studies, it's time to share with the team.

How to share findings

Not all teams will need the same regularity of meetings and insight sharing as product and tech teams usually do. When it comes to the marketing and sales team, here is how you may like to interact with them:

Share-outs

Sit down with the marketing and sales team once a month to review the most important insights for their respective teams. A share-out may include communications with project summaries, presentations, and documentation. One great approach: select the more relevant insights for the teams, so you're not overwhelming them with information that doesn't apply to their goals.

Workshops

As soon as you complete any customer journey, service blueprint, or persona work, sit down with these teams for a workshop. During this time, they share everything they know about the customer. You can use that information to build a prototype of these deliverables to later validate.

Meeting regularity/syncing

Consider syncing with marketing about once every two weeks, especially since there can be cross-over in the type of research you do. This bi-weekly sync can help ensure you're sharing insights and not doubling up on certain research projects. Meet with sales once a month during the share-out, but always keep an open channel in between meetings.

Overall, the more people you involve in your user research practice the better.
You can provide more assistance to your organization and have a deeper understanding of the users.

Start with small steps. First, understand how your colleagues feel about user research. Then, once you learn how you can help them, start building a plan to collaborate!

CHAPTER 4

Syncing with Executive Teams

One critical thing to keep in mind when working with executive teams—they have a lot on their plates and they're overseeing a variety of teams and goals.

The key to successfully collaborate with this group is to make sure your shareouts highlight only the most important themes, avoid getting stuck in the details, and come to meetings ready to ask specific questions to ensure your research

Recognize their goals

The goals of leadership and executive teams vary wildly across products and organizations. There is no one-size-fits-all way to describe these goals.

Instead, you'll need to work as a detective to understand the goals of leadership and executive teams and do some user research. A good first step is asking them questions about the organization's goals and initiatives.

A few example questions to ask:

- What is the company's strategic direction in the next six months, 12 months, and three years?
- What are the high-level company goals in the next year?
- Where would you like to see the company grow in the next year?
- What innovations could you imagine in the next one to three years?
- What would you like to see the teams accomplish in the next six months, 12 months, and three years?

How user research and executives can help one another

Getting buy-in from your leadership and executive teams can lead to unblocking and successful user research practices across the organization. Oftentimes, when you include these teams in your research practice, you can help shape the future and strategy of an organization.

Of course, this takes time, but continuously looping leadership and executive teams into research and speaking to their goals will slowly allow you to become part of these conversations.

How executives can help user research

- **Sharing company strategy**: Discussing the strategic direction of the company so UX can align strategic research with these topics
- **Audience prioritization**: Helping you narrow down and understand which customers to focus on to make the most impact
- **Evangelists**: Advocating for user research to the rest of the organization and helping to cultivate a user-centric mindset
- **Organizational alignment**: Aligning teams on the importance of conducting user research and mandating ideas like “exposure hours” if stakeholders are not involved in user research
- **Confirming user research goals**: Reviewing user research OKRs/goals to align them with the broader company strategy

How executives can help user research

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Once you're aligned on how to help each other, it's time to decide on the best studies to conduct.

Best studies to collaborate on

It’s unlikely that you will be directly working with or involving the leadership and executive teams in your research. However, here are some studies that most impact these teams:

- **1:1 interviews**: Talk with the highest revenue-generating (or whatever your most important KPI is) users to give insights into their needs and pain points and improve the product experience
- **Service blueprints**: Create blueprints that show what users are doing and where or how the company supports them (or doesn’t!)
- **Surveys**: Help validate common pain points and struggles that users have to show quantitative data that backs up qualitative data
- **Research projects that align with the strategic direction**: Ask the big questions these teams have about users. This is why it is essential to speak with these teams to understand what questions they have.

Once you’re aligned on how to help each other, it’s time to decide on the best studies to conduct.

How to share findings

There are very particular ways to engage with executive and leadership teams. It's often difficult to get these colleagues in the same room simultaneously, so it's essential to use their time effectively. Hint: It certainly isn't reading through an hour-long report.

A few ways to effectively share findings with executive and leadership teams:

Quarterly research reviews

Make a large share-out that highlights the key themes you uncovered in the past quarter. Inviting executive and leadership teams to this meeting can be optional, but it will ensure they have a pulse on the quarter's research trends.

Strategic project share-outs

After completing a research project that aligns with the company's strategic direction or answers a strategic research question, set up a 30-minute meeting with these teams.

During this meeting, go over the top three key themes you found during the research project. You can also create insights that directly answer any relevant strategic research questions and list them out in this way.

Once you've shared these insights, it's a good time to discuss:

- The recommended next steps for the appropriate teams
- A timeline
- Any blockers to the next steps

Executive summaries in reports

When creating a report, it is beneficial to create an executive summary. This summary highlights the top three insights you found in the study with a short explanation and links to video or audio clips.

This summary should inform the executive and leadership teams of the most critical insights in five minutes, including links to access any further data should they want to dive deeper.

Assumption workshops

Assumption workshops are beneficial to run with critical stakeholders like leadership nd executive teams. In these workshops, you learn what these colleagues assume about users and also about product teams.

Running this workshop when you first begin at a company can help you see what these teams think they know about users' needs, goals, and pain points. You can also squeeze in the other conversations mentioned above into this workshop.

Monthly research newsletter

Send a monthly research newsletter to the entire company and update them on any projects or key trends from research. You can also share this with the executive and leadership teams, which provides an easy way to reach out to you with any questions.

Meeting regularity/syncing

Meeting quarterly with the leadership and executive teams is a good cadence to understand any changes to strategic direction, OKRs, or questions that have come up. During this time, you can update them on any relevant changes to the product, or progress on projects they might be interested in.

Regularly meeting with and looping in executive/leadership teams can genuinely help you forge a path to a mature user research organization. When you align with these teams, you can impact strategy on a whole new level, making user research integral to high-level decision-making.

Although it takes time to integrate with leadership and executive teams, it's gratifying to see them using your insights to make company-wide and innovative decisions.

CONCLUSION

Parting thoughts

A UXR's superpower is translating data into empathy via an insight. This often requires finding an overlap between stakeholder goals and user needs.

The same practices that can create delightful, fan-generating experiences can help UXRs collaborate more effectively—and enjoyably!—with colleagues.

Inventorying workflows, assessing overlaps in needs, and aligning on shared goals are all critical in delivering for our colleagues and users.

These also have the effect of educating teammates about UX's role and benefits, which might socialize the practices more widely throughout an organization.

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