

UX RESEARCH TEAM

Operating Playbook

*Team mission, working agreements, and AI governance built
and facilitated as UX Research Manager*

Sourced from a Q1 2026 team planning & working-agreement workshop

About this document

This playbook compiles the operating system I designed and facilitated for our UX Research team: our mission and strategic pillars, the rituals and working agreements that keep a distributed team aligned, our stakeholder management model, and the AI governance framework I built to give the team clear, durable guardrails for using AI responsibly in research work.

Content has been reorganized and lightly edited from raw workshop output for readability. Company name, internal codenames, and specific colleague/vendor names have been generalized into functional descriptions so this can be shared publicly (e.g., in a portfolio or case study).

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1. Team Mission, Vision & Values

As UX Research Manager, I led a workshop to codify why our team exists, who we serve, and how we want to operate — the foundation everything else in this playbook builds on.

1.1 Mission Overview

The UX Research team's mission centers on guiding decision-making through rigorous research methodology, serving as subject matter experts on users and personas, and uniquely positioning the organization to solve problems by deeply understanding user needs before proposing solutions. The team helps the company “look before they leap” while breaking down organizational silos.

Core Pillars

The team operates through three interconnected pillars — Understanding, Advocacy, and Influence — working together to achieve a “bigger stake at the table” within the organization.

Understanding

The foundation of the team's work rests on methodological rigor and continuous primary research. Key strategies include:

- Listening first and asking questions to understand internal user-related questions across product, design, and other teams
- Conducting constant primary research to gather user data
- Becoming SMEs on customer personas and archetypes
- Understanding problem spaces before providing solutions
- Pushing product teams to build tools that meet users where they are by mapping user journeys and workflows
- Rooting research in market fit and future tech directions

Advocacy

The team advocates for evidence-based decision-making by:

- Supporting user needs over wants and preventing feature creep
- Creating unique products tailored to actual user bases rather than copying competitors
- Challenging internal biases with data-driven insights
- Reminding stakeholders of key insights and data when needed
- Presenting research findings to stakeholders and the broader company
- Making recommendations rooted in deep research methodology
- Standing firm on data to push back when necessary

Influence

Building influence through visibility and cross-functional relationships:

- Establishing relationships with teams like Marketing and Customer Success
- Tracking metrics before and after UXR-informed changes
- Supporting recommendations with prioritization rankings and quantitative data
- Conducting internal surveys to understand UXR impact
- Tracking tech debt saved due to UXR influence
- Ensuring findings spread beyond immediate stakeholders — “when one person hears our findings they carry that knowledge with them to rooms we aren't in”
- Bringing the right people together and generating insights that spark discussion

Team Goals

- Drive business decisions through research results
- Maintain continued company-wide visibility
- Establish positive optics demonstrating strong recommendations
- Develop horizontal collaboration across the organization

The team's internal research-repository initiative will support these objectives by enhancing the team's capabilities and impact.

1.2 Team Vision & Strategic Approach

Core Purpose

The research team exists to give users a voice in product development and ensure the company builds the right solutions for customers, not just more features. By addressing root issues rather than symptoms, the team helps the organization understand and plan for future user needs while reducing risk and increasing confidence in decision-making.

Problem Statement

The team solves the challenge of understanding who the company's users are, what they need, how to build solutions effectively, and what they'll need next. They serve as subject matter experts who aggregate knowledge across the company and provide direction from the customer's point of view.

Target Audience

The primary heroes are end users — developers and practitioners whose workflows need to be deeply understood and optimized. The team also supports internal stakeholders, particularly product managers, by providing research insights that inform impactful decisions.

Current Strategic Approach

- Partner with the company to drive product roadmaps and business decisions
- Inform product and design decisions through rigorous, ethical research
- Function as advisors for strategic decisions, participating in ideation rather than solution validation

- Operate as a centralized hub-and-spoke model with cross-functional research capabilities
- Address user pain points while maintaining big-picture strategic thinking

Five-Year Vision

The team aspires to evolve from classical user insights to ML-based user models, ultimately creating “digital twins” that can simulate and predict user behavior. Key future-state goals include:

- **Advanced Capabilities:** Move toward user agentic pipelines and ML-powered behavioral prediction
- **Strategic Integration:** Remain centralized while becoming a standard, ingrained part of the product development lifecycle
- **Enhanced Influence:** Stakeholders proactively engage the team during ideation stages, ensuring research is never an afterthought
- **Deep User Understanding:** Achieve comprehensive user knowledge that lets the team emulate user behavior for decision-making
- **Seamless Integration:** Ensure the product is well-integrated into user workflows

Guiding Principles

- Maintain high-quality, ethical, and rigorous research standards
- Keep strategy top of mind while addressing immediate user needs
- Increase understanding of developers and practitioners
- Take on cross-functional research projects needed for strategic company decisions
- Continue building confidence in organizational decision-making through data-driven insights

1.3 Team Values

Core Guiding Principles

The team has identified a set of foundational values centered on being mavericks and innovators while maintaining a psychologically safe environment. The overarching aspiration is to be the “most badass team there is” — a group that kicks ass while operating with integrity and purpose.

Essential Values

- **Respect** — Creating an environment where everyone feels valued
- **Openness** — Fostering transparency and open collaboration
- **Honesty** — Maintaining candid communication and ethical standards
- **Empathy** — Operating with no ego and genuine understanding
- **Optimism** — Maintaining a positive, motivational outlook

Desired Team Atmosphere

The team envisions a work environment that balances professionalism with approachability — being “professional but still cool.” Key atmospheric elements include:

- Safe space for critical thinking, risk-taking, and candid/honest feedback
- Motivational and fun — making work enjoyable while maintaining high standards
- Seamless collaboration where team members can finish each other's thoughts yet maintain independent ideas
- Supportive dynamics that empower and inspire one another

Working Together

- Collaboration — Open and autonomous working styles that complement each other
- Leadership — Demonstrating strong leadership while remaining team-oriented
- Balance — Maintaining healthy equilibrium between work and personal life
- Recognition — Extending praise and ensuring everyone feels valued

Growth & Development

- Ability to grow — Creating opportunities for team members to expand their capabilities
- Curiosity — Encouraging continuous learning and exploration
- Growth mindset — Viewing challenges as opportunities for development

This team stands for creating an exceptional environment where innovation thrives within a psychologically safe space — balancing high performance with mutual support, professional excellence with genuine connection, and individual autonomy with seamless collaboration, all while having fun and growing together.

2. H1 Retrospective & H2 Strategic Roadmap

Each half, I run a structured retro with the team to capture wins, name friction honestly, and translate both into a concrete set of goals for the next half — the process behind the roadmap below.

H1 Highlights

The UX Research team made significant progress in H1, particularly in community engagement and establishing company-wide user archetypes and personas. The team successfully moved away from “deli ticket” reactive research toward becoming strategic experts that the company seeks out for advice and recommendations. Key accomplishments included establishing team foundations (working agreements, Confluence pages), developing a UXR onboarding process, and increasing generative research requests.

The team benefited from stronger cross-team collaboration and being included earlier in the product development lifecycle. As manager, I helped establish the team charter and defined how the research team works together. Additional wins included access to admin participants for interviews and discovering new AI tooling for presentation creation.

Challenges Faced

Several challenges emerged during H1. The team struggled with engagement during shareouts, with limited discussion beyond direct questions. Product teams often moved faster than research capacity allowed, resulting in late involvement or exclusion. The team had insufficient access to customer calls and had not yet established strong connections with Customer Success.

Additional pain points included teams not understanding when heuristic evaluations are needed due to “vibe coding” approaches, and the need for better internal-dynamics reflection around enablement initiatives.

Areas for Improvement

The team identified critical areas requiring attention in H2. These include improving admin recruitment and panel management, better socializing and following up on completed studies, and being brought in early enough to establish research foundations before teams advance. The team needs to develop strategies for holding ground when other teams aren't ready but demand immediate results.

Other improvement areas include enhancing internal cross-team knowledge sharing, conducting more research-team strategy sessions, developing deeper understanding of acquisition workflows, and leveraging leadership support for gaining “a seat at the table.”

H2 Goals & Strategic Objectives

Looking toward December 2026, the team aims to achieve company-wide recognition as a strategic partner. Key goals include extending admin/user panels, tracking recommendation implementation,

becoming experts on merger flows, and establishing partnerships with Customer Success, Sales, and Professional Services.

The team plans to invest in new capabilities including quantifying impact and risk reduction, collaborating with the Data Science team on mixed-methods research, developing UX benchmarking practices, and exploring agentic AI workflows for research organization. Priority focus areas include getting ahead of the roadmap, improving PM partnerships, and being brought in before ideas solidify.

3. Operating Rhythms — Ways of Working

The working agreements below are the rituals and norms I facilitated the team through defining together — covering communication, decision-making, conflict, accountability, and coverage.

3.1 Communication & Feedback Framework

Communication Principles

The team operates on core values of leading with clarity, kindness, respect, and curiosity. Members commit to speaking up with courage when issues arise, avoiding bottling up concerns, and treating each other as family while maintaining professionalism. A “No Ego” theme guides all interactions, with trust that team members will raise concerns directly rather than making assumptions or fabricating stories.

Tactical Communication Methods

Primary channels:

- Slack for asynchronous communication and quick questions
- Weekly Insights Review meetings for broader discussion
- Weekly UXR Sync sessions for research exchange and working sessions
- Slack Canvases for collaborative thinking
- Slack Channel Agendas for topic tracking

Escalation path: “If it can be a message, let it be” — start with Slack first. For longer questions or complex topics, use Slack huddles or ad-hoc Zoom meetings. If something can be misunderstood in writing, schedule a one-off meeting. Scheduled working sessions address collaborative projects requiring dedicated time.

Feedback Practices

Two categories of feedback exist: business working relationships (strategy, presentations, reports) and personal relationships (interpersonal dynamics).

Giving feedback:

- Lead with evidence and connect back to business strategy and research questions
- Be direct but kind; delivery should avoid rudeness while maintaining clarity
- Highlight strong points first
- Make requests rather than complaints
- Provide feedback in context through quick huddles rather than delayed meetings
- Commit to 5–10 minutes of dedicated time when requested
- Respect the person's ideas without pushing preferred outcomes
- Tag specific people for work/report reviews

Receiving feedback:

- Accept feedback with grace and poise
- Respond in ways that work best for you
- Don't make assumptions based on facial expressions
- Ask questions to understand different viewpoints
- Recognize that accepting feedback is ultimately optional

Quality Gates

- At least one team member reviews anything going to stakeholders
- At least one person reviews study protocols (screeners, guides, tasks) before pilots
- Comments on reports for small, specific feedback
- Determine public-facing access levels before leaving document comments

Documentation Approaches

Team members share ideas through various formats: quick informal doc-dumps for fast thoughts, small working prototypes for interactive concepts, and written documents for formal proposals and frameworks. The team emphasizes taking time to develop well-thought-out ideas while providing space for outside-the-box thinking.

3.2 Team Decision-Making & Alignment

Core Philosophy

The team approaches decision-making with a focus on what's best for the collective, balancing data-driven insights with empathy. The foundation rests on creating an environment where open discussion occurs without fear, maintaining thick skin to recognize that disagreement is professional, not personal.

Communication Practices

Effective listening forms the cornerstone of the team's alignment process. Members prioritize listening to understand rather than respond, ensuring they listen first unless no one is speaking. The team emphasizes asking thoughtful questions and waiting patiently for responses. When needed, they embrace the pause and put decisions on hold for thinking time, reconvening after reflection.

Analytical Framework

Decision-making incorporates structured analysis through pro/con evaluations and weighing both short- and long-term benefits. The team connects decisions back to business strategy whenever possible, ensuring alignment with broader organizational goals. They defer to subject matter experts and refer to working agreements as guiding principles.

Openness & Flexibility

Team members demonstrate intellectual humility by accepting they can be wrong and remaining open to others' ideas being superior without taking it personally. They actively embrace perspectives that differ from their own, providing space for all sides and angles to be heard and considered.

Resolution Methods

When consensus proves challenging, the team employs several approaches: seeking third or additional opinions when gridlocked, utilizing voting mechanisms, and escalating to the manager when necessary. They weigh options before reaching consensus and engage in constructive pushback, maintaining a culture of healthy debate without fighting.

Team Dynamics

The environment encourages embracing ideas different from one's own while maintaining professional discourse. Members engage in constructive pushback and open debate, always circling back to the central question: what's best for the team? This collective focus ensures decisions serve the group's interests rather than individual preferences.

3.3 Conflict Resolution Framework

Overview

This framework outlines key strategies and best practices for effectively confronting and resolving workplace conflicts, emphasizing direct communication, active listening, and mutual commitment to finding solutions.

Communication Strategies

Timing and method: Choose the right moment to address conflicts, allowing for a cool-off period when emotions run high. Prioritize direct, verbal communication over written exchanges when possible, while remaining flexible to re-evaluate strategies based on the situation.

Lead with curiosity: Approach conflicts with genuine interest in understanding different perspectives rather than jumping to conclusions. Provide space to hear all sides before forming judgments or responding.

Active Listening & Understanding

Effective conflict resolution requires stepping back and truly listening to all parties involved. Walk through each person's perspective to identify common ground, even if it extends beyond work-related topics. This approach helps reframe issues within a business context and removes personal elements that may cloud judgment.

Personal Accountability

Self-reflection: Engage in honest self-introspection to analyze where you may have contributed to the conflict. Accept fault when appropriate and demonstrate willingness to learn from the situation.

Verbal acknowledgment: Explicitly verbalize what you did wrong and articulate how you will improve going forward. Being willing to apologize when necessary shows maturity and commitment to resolution.

Solution-Oriented Approach

Remain dedicated to working toward a solution with an open mindset. Establish clear expectations about what a successful resolution looks like before proceeding. Demonstrate willingness to compromise while ensuring the conflict is fully resolved rather than temporarily suppressed.

Supportive Measures

External mediation: Consider involving a neutral third party (such as the manager) when conflicts become too complex or emotionally charged to resolve independently.

Relationship building: Schedule informal, unrelated-to-work social time to strengthen interpersonal connections and build trust among team members.

Principles to Uphold

Avoid stonewalling and gaslighting behaviors that prevent honest dialogue. Maintain openness to resolving issues while finding common ground with others, even when it requires patience and persistence.

3.4 Team Accountability Framework

Core Philosophy

The team operates under the principle of “One UXR” (1UXR), emphasizing that every problem belongs to the entire team. Accountability is built on mutual trust, where speaking up and sharing opinions is not just welcomed but expected. The team embraces a “circle of trust” where mistakes are viewed as learning opportunities rather than failures.

Communication Standards

Team members are expected to communicate early and often, asking questions without hesitation and seeking help when needed. Everyone must speak up in meetings and be prepared to be called out when necessary. Honesty and openness are paramount, especially when mistakes occur. The team maintains a united front externally while fostering transparent internal dialogue.

Quality & Peer Review

Quality work requires collaboration. Team members must seek feedback on artifacts before sharing them with stakeholders, conduct gut checks on output, and review each other's work. The team supports researchers during user calls and ensures no “trap” options are presented. When work is rushed, this should be explicitly noted in feedback requests.

Feedback Culture

The team embraces the principle that “feedback is a gift.” Members are expected to develop thick skin and avoid taking feedback personally. Trust means trusting others to speak up and share their

opinions openly. The team actively monitors appropriate AI usage and calls out concerns when necessary.

Professional Expectations

Following four core rules, team members must:

1. Get work done
2. Deliver quality work
3. Show up to meetings
4. Participate actively in meetings

Additional expectations include punctuality, covering for colleagues during leave and holidays, and staying open to continuous learning and growth.

Team Unity

The team's strength lies in mutual support. Members share responsibility for representing the team and supporting one another through challenges. The guiding principle is clear: everyone's problem is the team's problem. This collective accountability ensures the team can “show up and show out” consistently while maintaining high standards of work and collaboration.

3.5 Team Support Tactics (Coverage & Continuity)

Emergency Response Protocol

The team has established clear procedures for handling emergencies and unexpected absences. When an emergency arises, team members should alert the manager immediately and communicate their situation to the extent they feel comfortable, including which projects need support, relevant timelines, and when tasks are due. The team emphasizes that requesting help is not a burden — teammates want to support each other during difficult times.

A key principle is to distinguish between time-dependent urgent items and tasks that can be postponed. For example, the team can easily cover interviews while the absent member completes analysis upon return.

Documentation & Knowledge Sharing

To enable seamless coverage, the team commits to maintaining comprehensive documentation:

- Keep all working materials in shared drives
- Maintain detailed research plans
- Update calendars regularly
- Keep Jira current with deadlines and key stakeholders
- Update materials consistently
- Think proactively: “What if I had an emergency tomorrow?” and ensure plans are easy for someone else to pick up

Before covering for a colleague, team members should review relevant materials including participant videos, scripts, and other study documentation.

Ongoing Communication & Collaboration

The team holds weekly Insights Review meetings with short round-robin updates to stay informed about each other's studies and understand how their work connects. Team members check in with each other regularly and remain conscious of study interdependencies. To strengthen collaboration, the team will:

- Add at least one team member to projects in the recruitment & scheduling platform
- Include an “alternate” person to studies in that platform
- Consider implementing a pairing concept

Team Culture & Values

The team prioritizes mental health and family, encouraging members to step away from work when needed. The guiding principle is “Work will be here tomorrow.” The team is committed to providing a psychologically safe space where members feel comfortable seeking and offering support. As one team member shared, during their emergency, having a colleague proactively take over interviews without requiring them to ask was invaluable — demonstrating the kind of direct, supportive action the team values.

4. Stakeholder Management Framework

Stakeholder Philosophy

The UXR team operates on a collaborative peer model. PMs and Designers are viewed as collaborative partners rather than supervisors. While the team depends on and works with various stakeholders, they push back against the notion of “working for” PM or Engineering teams. Instead, the relationship is one of partnership where PMs and Designers help right-size research and participate throughout every stage of the process, including reviewing reports.

Stakeholder Categories

Immediate stakeholders are involved throughout the research cycle:

- UXR teammates
- Design partners
- Product Managers
- Engineering teams

Broad stakeholders are included primarily in readouts and formal communications:

- Executive leadership / VPs of Product
- PM Directors
- Marketing (buyer personas)
- New Product Introduction / Program Management
- Customer Success & support teams
- Professional Services and Docs team

Collaboration Methods

Research process integration:

- Research request forms for intake
- Hypothesis generation sessions
- Kick-off and check-in meetings
- Office hours for accessibility
- Interview streams/rooms for observation
- Documentation through Confluence or Google Docs

Communication channels:

- UXR-based Slack channels (preferred over email)
- Slack DMs and group messages
- Temporary channels for specific projects
- Calendar invites for sync meetings

- Small group data/insight sharing

Engagement Cadence

Active involvement:

- More frequent meetings during active work streams
- Check-in points throughout research phases
- Recurring syncs with immediate stakeholders

Senior / adjacent involvement:

- Senior level: monthly/quarterly when not directly involved
- Peer-level: monthly/quarterly when working adjacently

Key principle: Stakeholders prefer hearing from the team than not at all. It's often more effective to gather multiple stakeholders together for diverse perspectives rather than repeating the same conversation.

Support & Visibility

As manager, I provide direct assistance with stakeholder management and prioritization as needed. The team maintains visibility through reminders about research office hours, insights meetings, and showcases. Documentation and alignment happen both synchronously and asynchronously, with emphasis on accessibility and transparency throughout the research process.

5. Tools & Technology Stack

The comprehensive toolkit used by the UX Research team across every stage of the workflow, from planning to reporting.

Research Development Tools

Planning & prototyping: Google Docs for research plans and protocol creation, Figma for prototypes and design mockups, and Miro for visual scoping and brainstorming.

Data collection: A dedicated recruitment & scheduling platform serves as a central hub for scheduling, recruitment, moderation, payouts, and tagging. Google Sheets handles interview notes and data collection, while a survey platform is used for large-scale external surveys.

Data analysis: Jupyter/PythonAnywhere for coding and analysis, Google Sheets for hypothesis evaluation and theme identification, and Miro for affinity mapping and user journey mapping. Claude assists with finding interview quotes, though verification is required due to hallucination risk.

Recruitment: User interview panels through our recruitment & scheduling platform, with a customer-data platform used for user-audience creation.

Collaboration & Communication

Team collaboration: Miro facilitates brainstorming and larger collaborative work, while Figma enables design review and commenting. Slack serves as the primary communication platform, complemented by Loom for shared videos.

Documentation storage: A private Google Drive houses raw artifacts and working materials, while a shared UXR Google Drive contains collaborative documents for stakeholder engagement.

Research Visibility & Communication

Internal communication: Multiple Slack channels for research insights and support. Claude generates Slack summaries for interviews and report announcements.

Documentation: Confluence serves as the polished, external-facing platform for the report library, team information, and “how to work with us” content. A dedicated internal research repository is in progress.

Administrative & Tracking Tools

Project management: Jira for weekly ticket updates and stakeholder communication; a dedicated OKR-tracking tool for goal tracking.

HR & finance: An HR platform for org charts, PTO, and payroll; an equity-management platform for stock allocation; an expense-management platform for reimbursements.

Desk research: Product-telemetry and product-feedback platforms, user click-data tools (currently underutilized), and call-transcript tools for customer notes.

Outstanding Questions

The team is continuously evaluating the appropriate use cases for Confluence versus Google Docs and identifying potential workflow gaps — an ongoing part of keeping the operating model current.

6. AI Governance & Practice

One of the things I'm proudest of building this half: a clear, practical framework for how the team uses AI in research — grounded enough to prevent misuse, but not so rigid it blocks legitimate productivity gains. It has three layers: team guidelines, an operational practices framework, and my own point of view on where this is headed.

6.1 Team AI Guidelines

Overview

This framework summarizes the team's approach to using AI (primarily Claude) in UX research work, establishing guidelines for appropriate use, limitations, and accountability measures.

How We Use AI

Claude serves as a research assistant and tool for various tasks:

- Creating engaging Slack messages and interview summaries
- Cleaning up writing and restructuring reports for clear storytelling
- Generating templated documents (Confluence pages, summaries)
- Compiling ideas into succinct summaries
- Relieving cognitive load to focus on big-picture thinking
- Brainstorming and serving as a sounding board
- Simplifying complex technical explanations
- Extracting hypotheses and research questions from kickoff transcripts
- Planning and organizing work

AI Limitations & What Humans Do Better

Claude's key weaknesses:

- Cannot conduct in-person interviews or read body language/voice tone nuances
- Lacks context from meetings, Confluence docs, and cross-workstream information
- Fails to cleanly connect to business strategy
- Cannot build complete end-to-end research projects or reports from transcripts alone
- Struggles making sound connections across research lanes
- Doesn't understand scope of recommendations
- Has tendency to fabricate quotes (must double-check)
- Acts as a “yes man” — overly complimentary without critical pushback

Human strengths:

- Understanding emotions and body language

- Applying weights to findings (frequency $\neq$ importance)
- Acting as strategic advisors who synthesize massive context
- Seeing the forest while Claude sees the trees
- Attending conferences and real-world engagement

Non-Negotiables (Big No-Nos)

- Using Claude without reviewing output before sharing
- Letting AI findings replace direct user feedback
- Relying heavily on AI when rushed
- Allowing AI insights that aren't grounded in actual work (hallucinations)

Accountability & Best Practices

- Human in the loop always required
- Reports must be read by author AND a second human
- Always verify accuracy against transcripts and original references
- Document “how we used AI” in methods sections
- Connect to each other's work within reports
- Set clear expectations when prompting Claude (“set the stage”)
- Develop standardized prompts for consistency

Next Steps

- Establish Shared Skills protocols for team use
- Conduct side-by-side comparison: 100% AI-generated vs. human-led study
- Host Lunch & Learn sessions on AI usage
- Create a showcase presenting the continued need for human researchers
- Explore cross-team topic identification using AI
- Build enablement skills to democratize evaluative research
- Develop reusable templates and skills

Core philosophy: AI is a TOOL, not a solution, that enhances but never replaces human judgment in research.

6.2 AI Practices Framework — Guardrails & Gray Zones

A companion, more granular framework I put together mapping exactly where AI earns its place in our workflow, where it's off-limits entirely, and where we knowingly accept trade-offs.

Where AI Earns Its Place

AI earns its place in our workflow at the edges of research — where volume, speed, or synthesis load would otherwise slow us down or cut quality.

- Transcript processing — generating first-pass summaries, extracting quotes, identifying surface-level themes across sessions
- Draft scaffolding — creating starting structures for screeners, discussion guides, and reports that a researcher then owns and rewrites
- Desk research acceleration — gathering competitive landscape context, background on industries or roles, or quick literature scans before primary research
- Tagging and categorization — applying a researcher-defined coding framework to large sets of responses or notes
- Notetaking assistance — capturing session notes in real time so researchers can stay present in the interview
- Communication drafts — first passes on stakeholder updates, research summaries, or insight narratives that the researcher then refines

The common thread: AI does drafts, not decisions.

How We Do NOT Use AI

These are places where AI touches the research but shouldn't steer it.

- We don't let AI write our research questions. Problem framing and question design require researcher judgment about what matters, what's biased, and what we actually need to learn.
- We don't feed raw participant data into consumer AI tools without confirming data-handling compliance. Participant confidentiality is non-negotiable.
- We don't use AI-generated themes as final findings. AI surfaces patterns; researchers validate, challenge, and interpret them.
- We don't skip synthesis to go straight to AI output. Synthesis is where insight lives. AI output without researcher sense-making is just summarization, not research.
- We don't use AI to write participant-facing materials without human review. Consent forms, survey language, and briefing docs must be reviewed for clarity, tone, and accuracy before they reach participants.

What We Tolerate

These are the gray zones we accept as trade-offs, with eyes open.

- AI getting things wrong in early drafts — we expect inaccuracies and treat all AI output as a hypothesis, not a fact
- Inconsistent AI quality across tools and tasks — outputs vary; researchers calibrate expectations per use case
- AI flattening nuance in transcript summaries — we tolerate this at the summary stage, knowing deeper reading follows
- Using AI for efficiency even when the output isn't great — sometimes “good enough to react to” is faster than starting from scratch, as long as the researcher rewrites meaningfully

- Experimentation — researchers trying new AI tools or workflows, with the understanding that learnings get shared with the team

What Is a Big NO NO

These are hard stops — not judgment calls.

- Using AI output as participant quotes. Never. If it didn't come from a participant's mouth or keyboard, it's not a quote.
- Fabricating or inflating findings. AI can hallucinate patterns. Presenting AI-generated “themes” you haven't validated against the data is research fraud.
- Uploading identifiable participant data to non-approved AI tools. Names, companies, job titles, recordings — these require explicit data-handling review before any AI touches them.
- Letting AI write the “so what.” The insight and recommendation layer belongs to the researcher. A stakeholder reading a report deserves a human's judgment, not an LLM's.
- Replacing participant contact with AI-simulated users. AI personas and synthetic users are not research. They do not substitute for talking to real people.

How We Hold Each Other Accountable

Accountability here is about transparency, not surveillance.

- Label AI-assisted work. When sharing drafts or outputs with teammates, note where AI was involved. “AI first pass — needs review” is a normal and respected designation.
- Don't present AI summaries as read data. If you're citing a theme in a readout, you should be able to point to the source quotes — not just the AI summary.
- Peer review on high-stakes deliverables. Any research that informs major product or business decisions gets a second set of eyes.

6.3 Perspective: Evolving With AI Rather Than Against It

The following is a personal reflection I wrote for the team on what it means to build a durable research career in an AI-saturated industry — shared here as a point of view on staff-level impact, not a formal team policy.

This is the right question to be asking — and the fact that you're asking it proactively is itself part of the answer.

Reframe the Threat Correctly

The risk isn't that AI replaces researchers. The risk is that organizations mistake AI output for research — and stop investing in the real thing. That's a procurement failure, not a capability one. Your job is to make that mistake expensive and visible, not to compete with AI on its own terms.

AI is fast, cheap, and always available. You are not trying to win that race. You are trying to make clear it's the wrong race.

Become the Person Who Knows What AI Gets Wrong

Every team will eventually have an AI-assisted research process. The question is whether anyone in the room can tell when it's lying to them. That person should be you.

- Learn how LLMs hallucinate in qualitative synthesis specifically
- Build fluency with AI tools so you can critique them credibly, not just philosophically
- When AI gets something wrong — and it will — document it, name it, and use it to illustrate why interpretation requires a human

Being the informed skeptic is more durable than being the AI enthusiast or the AI resister.

Move Up the Stack

AI is very good at tasks. It is bad at problems. Move toward problems.

Tasks AI can absorb: Note-taking, transcription, first-pass coding, report drafting, screener writing.

Problems that require you:

- Deciding what to study and why
- Challenging the framing a PM brings you
- Knowing which finding will land with which stakeholder
- Understanding what the data almost says but doesn't quite
- Making the ethical call when something feels off
- Translating uncertainty into something an organization can act on

The more you operate at the problem and judgment layer, the less substitutable you are.

Own the Research Infrastructure AI Can't Build Itself

AI needs inputs. Someone has to design the study, recruit the right participants, build the relationships with customers, maintain the repository, and know which prior research is still relevant. That's you.

Invest in:

- Participant relationships and research panels — AI can't call someone back
- Institutional memory — knowing the history of what's been tried and why it failed
- Research operations — the infrastructure that makes good research possible at scale
- Cross-functional trust — being the person product, engineering, and go-to-market actually want in the room

None of that is automatable because none of it is just information processing. It's relationship and judgment built over time.

Make Your Reasoning Visible

AI produces outputs. Researchers produce reasoning. The difference is legible only if you show your work.

Write up not just what you found but how you got there — what you expected, what surprised you, what you ruled out and why. When stakeholders can see the thinking, they understand what they'd lose if they skipped it.

This is also how you demonstrate staff-level impact: not just insights, but the epistemological scaffolding that makes insights trustworthy.

Get Ahead of the Synthetic-User Conversation

Someone in your organization will eventually propose using AI personas or synthetic users to “replace” some research. Prepare for this now.

Your response shouldn't be “that's wrong.” It should be: “Here's exactly what that gets you, and here's what it misses, and here's how to use it responsibly within a real research program.”

That posture — neither defensive nor credulous — positions you as the expert on when AI is appropriate in research, which is a more powerful role than gatekeeper.

The Honest Version of Keeping Your Job

The researchers who thrive in the AI era will be the ones who:

5. Use AI fluently — so they can do more with less and never look like they're resisting progress
6. Articulate clearly what AI cannot do in research — not as a complaint, but as a precise professional claim
7. Operate at the layer where judgment matters — framing, interpretation, ethics, stakeholder influence
8. Build the infrastructure that organizations need to do research well at scale
9. Stay curious about real people in a way that doesn't erode — because that curiosity is the core of what makes research research

The researchers at risk are the ones who either fully delegate to AI and lose the ability to critique it, or fully resist it and look like they're standing in the way of progress. The sustainable position is neither — it's fluency plus judgment, held together by a clear point of view on where the line sits and why.