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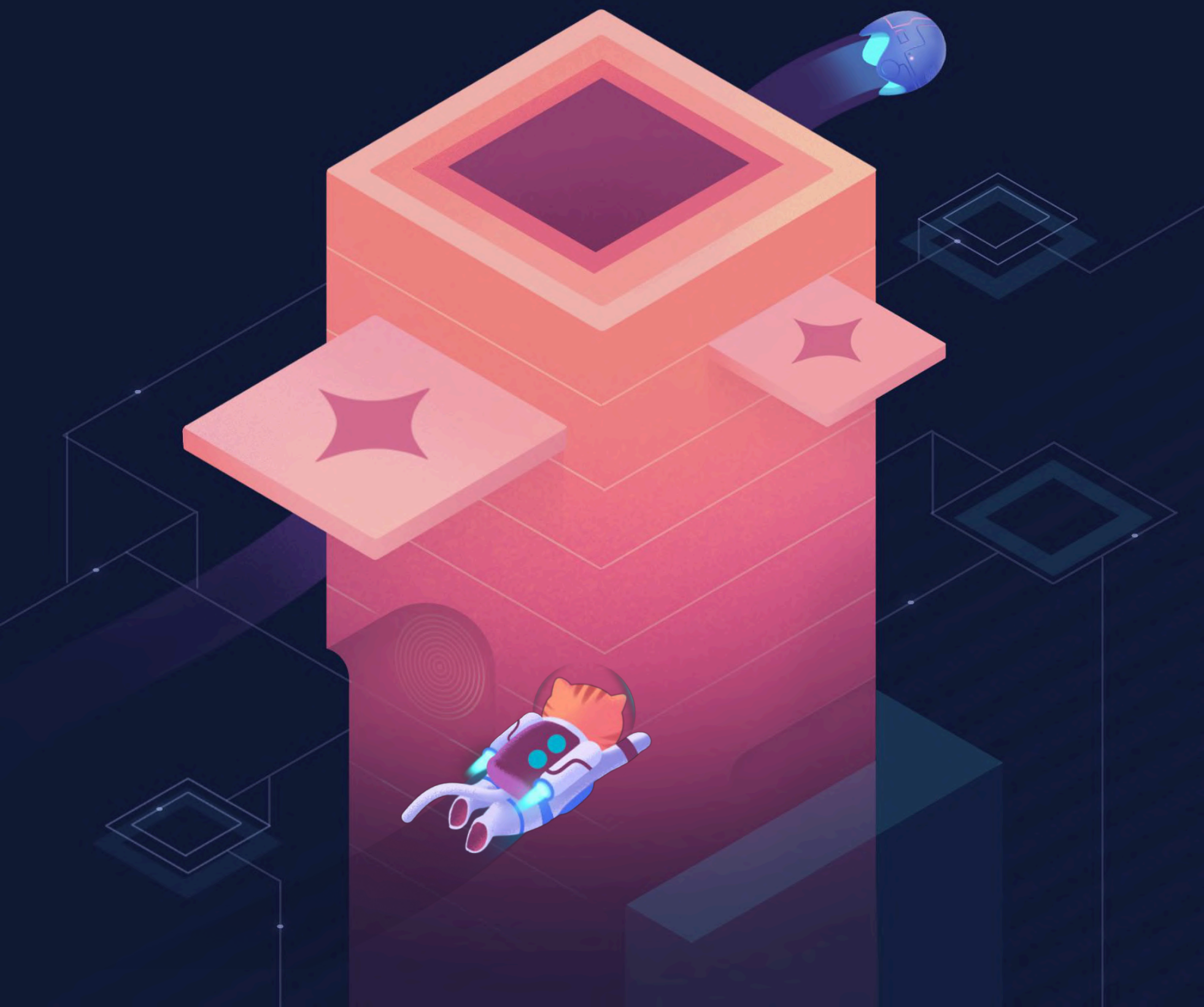
The Modern Research Workflow

How AI will transform the research tech stack in 2026



Executive summary

> **“AI isn’t replacing researchers. But it is changing what it means to be an efficient, high-impact one.”**
>
> **Maryam Maleki**
> Principal UX Researcher at Microsoft

The research landscape is at a crossroads. Either you adapt and become a high-impact data connector, or you risk being left behind. The days of siloed insights, slow manual processes, and reports that gather dust are over. Today’s most effective researchers are those who blend the speed and power of AI with the irreplaceable nuance of human judgment, transforming scattered feedback into real business outcomes.

But it’s not just about speed. Relying too much on automation risks eroding the very empathy and creativity that make research valuable. “The human in the loop is really important, especially for qualitative research that can be very subjective,” says Janelle Estes, Experience Design Platform Director and Faculty Lecturer at Bentley University.

The best teams don’t just automate — they orchestrate, using AI for repetitive tasks while reserving human effort for live interviews, creative synthesis, and stakeholder storytelling. This balance is what separates organizations that collect data from those that actually move the needle.

If you’re ready to break free from the hidden frictions of research, this report is your roadmap. Learn how to build a research tech stack that's efficient and future-ready.

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The role of research is changing
Shouldn't your tech stack follow suit?

We hear it every day: The world is changing rapidly. Product iterations are faster. Design options are cheaper.

And to stay relevant, researchers have to rethink the way they work.

"AI isn't replacing researchers. But it is changing what it means to be an efficient, high-impact one," Maryam Maleki, Principal UX Researcher at Microsoft, shared in an article titled, How I Use AI in My UX Research Workflow — Without Losing My Mind (or My Craft).

You can no longer risk being seen only as a data collector. You are a data *connector,* armed with customer knowledge and investigative skills that are critical to solving your company's biggest challenges.

We interviewed research experts across various roles and industries to understand exactly what you need to build a modern research tech stack. In this report, you'll find:

- The ideal research workflow based on best practices
- How AI solves real problems (as long as you hold its hand)
- The 5 hidden frictions holding researchers back
- Ways modern tools will help you achieve better insights, faster

Panel of experts

Janelle Estes
Experience Design Platform Director & Faculty Lecturer at Bentley University

Morgan (Mullen) Koufos
Lead UX Researcher at User Interviews

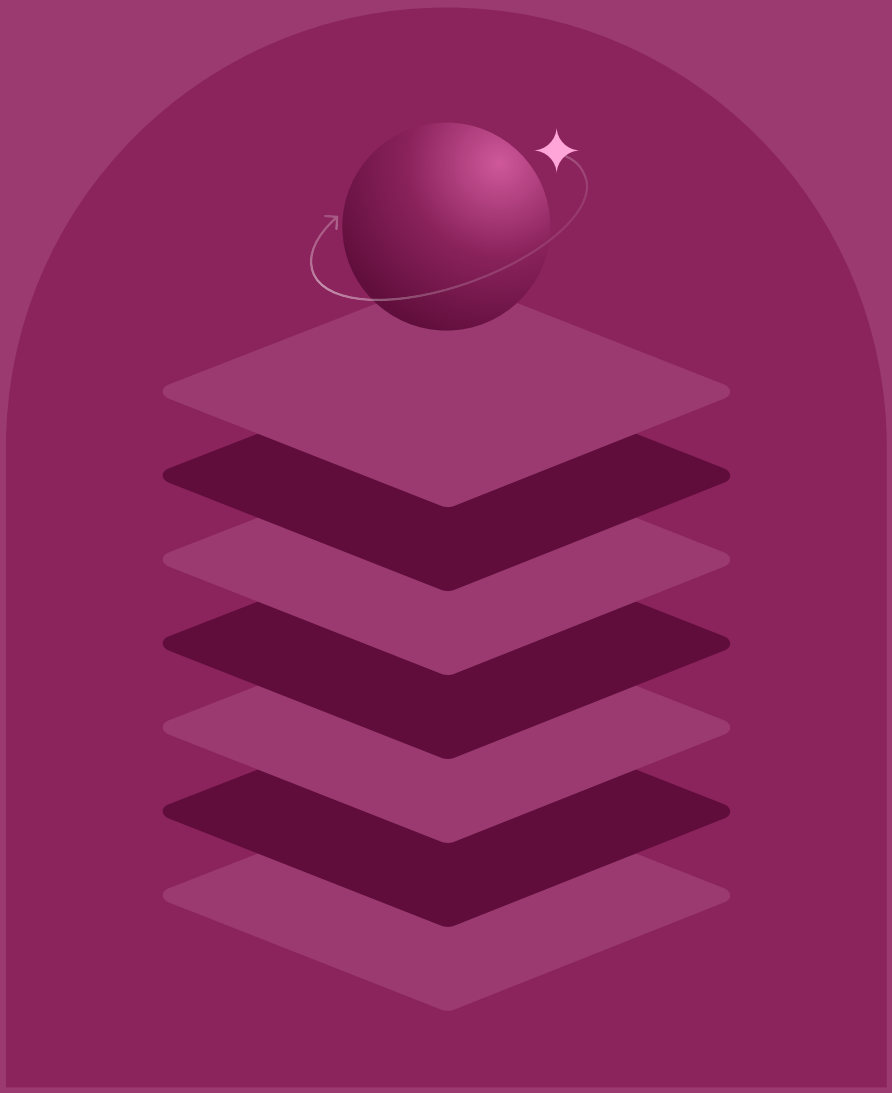
Oren Friedman
CEO & Co-Founder at Rally

Connor Joyce
Senior User Researcher at Microsoft

Dan Lemmon
Research Manager at The Social Agency

Lauren Nitta
Director of Pricing Strategy & Market Research at Netwrix Corporation

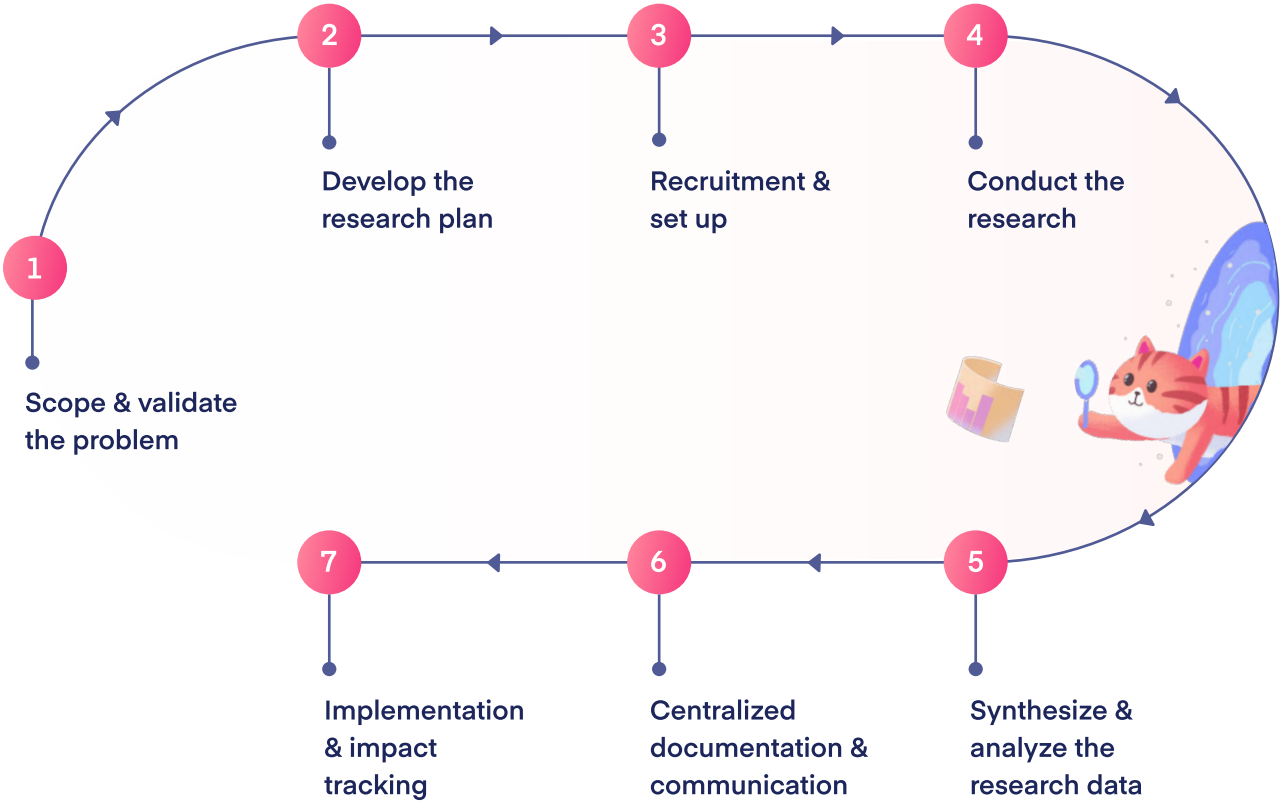
The 7 stages of an ideal research workflow



The 7 stages of an ideal research workflow

As technology evolves, our experts have transformed their workflows for greater efficiency.

Everyone's approach is unique, but we developed the ideal workflow inspired by their best practices — one that's effective, impactful, and easy to replicate.



1. Scope & validate the problem

Our experts shared that they often begin with a stakeholder call to reveal the reason behind the research question. “The number one thing I try to understand is not just the research question, but why is it even being asked?” says Connor Joyce, Senior User Researcher at Microsoft. He calls this the “sniff test.” Sometimes, the people asking for research may have their own agenda. Other times, the problem is bigger than the research. By sniffing out why the question is being asked, researchers can avoid spending months on a research project with amazing insights that don’t get used because the people executing it are incentivized to do the exact opposite. Or someone in executive leadership doesn’t think the problem is important. “Before I even launch into something, I try to understand, ‘Is this an area I should play in?’” Joyce explains.

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> **Connor Joyce**
> Senior User Researcher at Microsoft

2. Develop the research plan

Researchers say they collaborate closely with stakeholders to define goals, select methods, and determine feasibility based on timelines. During this phase, researchers may decide they don’t need to conduct a full-scale project, says Lauren Nitta, Director of Pricing Strategy & Market Research, at Netwrix Corporation. Sometimes, a few interviews or quick evidence is enough to give the team confidence to act. Even better, they may already have the insights stakeholders need sitting in their research repository. Many researchers use flexible templates to organize objectives, audiences, and methodologies for their research plan.

When creating research materials, researchers align closely with the project plan and timeline. They often check in with stakeholders or leadership to ensure buy-in. Some teams now use AI tools to accelerate this step, significantly cutting down the time spent on drafts and revisions.

“No one likes starting with a blank slate,” Estes says. She adds that AI can help you get to a starting point faster, but you still need someone with knowledge and expertise to spot when something is off.

"I think of AI as a thought partner," Estes says. "Oftentimes, what it will present back to me will be different than what I was expecting, which will then get me to think differently and also ask more questions. It's more collaborative for me."

> **"I think of AI as a thought partner."**
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> **Janelle Estes**
> Experience Design Platform Director and
> Faculty Lecturer at Bentley University

3. Recruitment & set up

Everyone we talked to knows that recruiting participants is one of the most difficult parts of the workflow. Without a dedicated tool, researchers must manually:

- **Decide who they need to reach**
- **Choose outreach channels (such as email or in-product messaging)**
- **Plan incentives**
- **Set up calendar invites**
- **Send reminder emails**

Each step is time-consuming and must be tailored to the population you're recruiting, such as doctors, HR managers, or truck drivers. "There's a whole world of different audiences out there that companies are building solutions for," says Oren Friedman, CEO at Rally. "The recruitment process that you use to engage with any of those audiences is going to be dramatically different because you want to create the right experience for that individual." Tools that provide a flexible framework can help you choose the right participants, manage the entire process without unnecessary overhead, and involve key stakeholders where relevant.

4. Conduct the research

And finally, here we are — time to research! This phase involves conducting interviews, surveys, and other data collection methods determined earlier in the workflow. For qualitative research, fieldwork can last from weeks to months, depending on the project, complexity, and audience.

Our experts noted that strong interviewing skills — like knowing when to probe or how to build rapport — make a major difference in the depth and quality of insights during the research stage.

"There is a special sauce in making a connection with someone," Nitta says. "There's a difference between surface-level interviews and answers that is really going to drive your business forward."

5. Synthesize & analyze the research data

To surface key insights from their data, many researchers use a blend of traditional and AI-supported methods. Some start with manual tagging and theming, then leverage AI tools to speed up pattern recognition, sentiment analysis, and synthesis.

Before switching to modern analysis tools, The Social Agency's Research Manager Dan Lemmon used to create a new Word document for every interview. Then, he'd put together an Excel document with a matrix, mapping out each respondent's answer so he could identify key themes across the data set.

"No one wants to flick through 20 different Word documents to try and write a report," he says. "Just being able to synthesize such a large amount of data, of qualitative data as well, that often doesn't fit neatly in a box. That's been a game changer."

6. Centralized documentation & communication

Many researchers store their findings in a centralized repository, with a mix of reports, executive summaries, and quick highlights. The researchers in our panel said easy access to past work is crucial for avoiding repeat research and integrating others into the process.

For instance, if a project manager is tasked with screener development, they can search the tag "screener" in the repository. By doing so, they'll surface hundreds of notes with sample questions. If it's an AI-powered repository, they can also ask AI to help them curate the right list of questions by asking: "Based on all of the files tagged 'screener,' what are the 10 most important questions I should ask [x audience] if I'm trying to determine [x issue]?"

Many of the researchers in our panel said internal communication of their insights often doesn't get enough attention, but it's critical for getting buy-in and driving action. They use tools to help surface key takeaways, draft summaries, and create personalized updates for executives or key stakeholders. Many said they still rely on human judgment to shape the final message and delivery. "If you convey the value of what you're doing along with the insights to a broad audience, that not only uplevels your organization, but it uplevels your career," Nitta explains.

7. Implementation & impact tracking

Our panel of experts noted that turning insights into action often requires working with other teams to co-develop plans. Some researchers support the implementation of their research insights directly.

“I’ll partner with teams as needed to carry out action items, but at a certain point, they become pretty self-sufficient in carrying stuff forward,” says Morgan (Mullen) Koufos, Lead UX Researcher at User Interviews. After she meets with the teams charged with implementation, Koufos uses Asana to trigger reminders to check in on progress at one-month, three-month, six-month, and even 12-month cadences.

To show value, our experts said it’s essential to have a structured process for tracking and sharing outcomes. They collect quantitative and qualitative feedback from stakeholders and report findings in quarterly leadership meetings with links to impact summaries or live dashboards.

Although many teams are using technology to monitor their impact, Koufos says she uses a simple Google Sheet to track:

- Main artifact
- Action items and outcomes
- Impact duration
- Which teams were impacted (including number of employees)
- Satisfaction rating from key stakeholders

She also documents specific outcomes, whether they were internal (strategy guidance) or external (customer-facing), and aligns them with business and strategic goals.

“Research teams now are being asked to prove the actual impact in quantitative ways, if you can,” Koufos says. “This impact log paired with a quarterly presentation with our CPO is my way of doing this.”

Easy ways to communicate the value of your research

Don't just email out findings. Collaborate with stakeholders so your research becomes a critical part of achieving your org's goals. Here's how our experts do it:

Create Messaging

Put takeaways and summaries in the best format for each group (e.g., slide decks with images and quotes for go-to-market teams vs. longer-form documents for the product side).

Send Calendar Invites

Schedule meetings with each group.

Distribute Materials

Send out materials 2-3 days before the conversation. If people are pressed for time, ask them to just read the summary at the top before the meeting.

Answer Questions

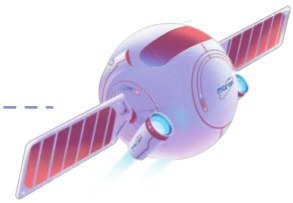
Conduct a live Q&A with a Miro board up so people can add their own questions.

Summarize Findings

Begin the meeting with a 20-minute recap of the insights.

Group Brainstorm

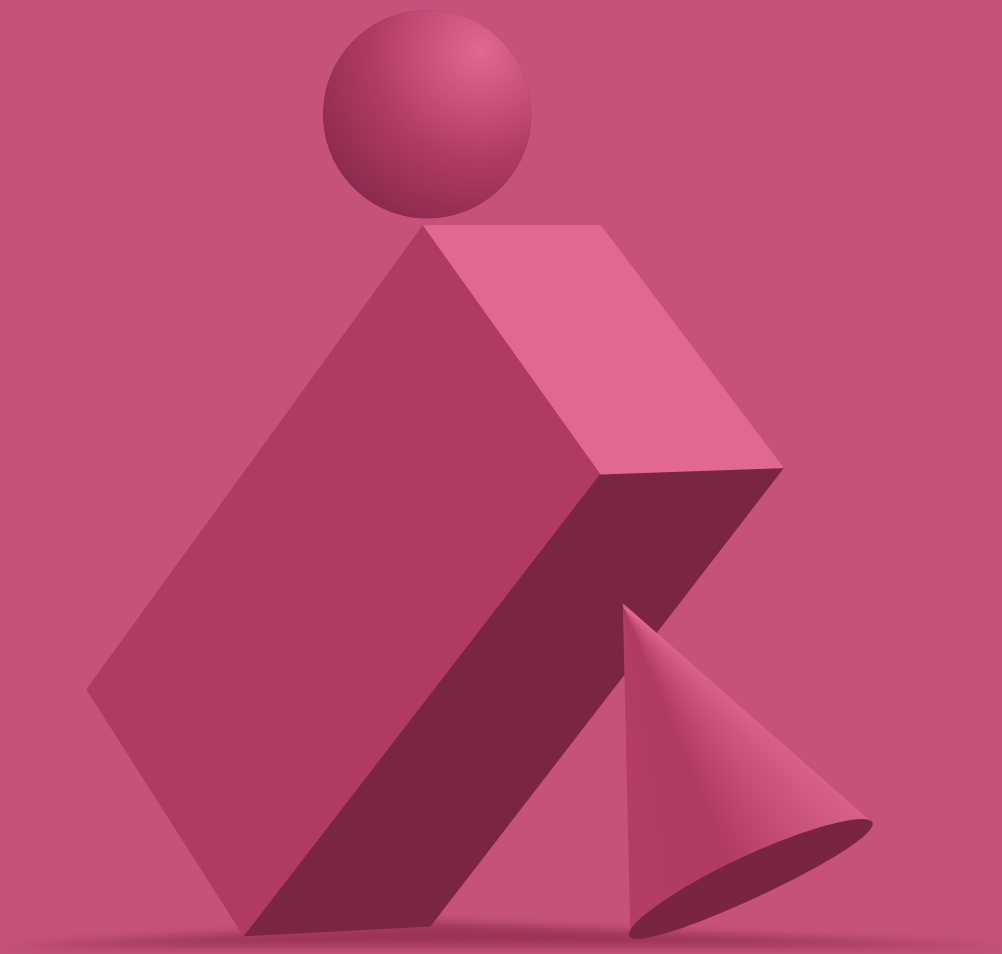
Give everyone 15 minutes to jot down their favorite ideas or where they feel uncertain. At a high level, brainstorm how some of the top ideas might be accomplished.



Schedule Smaller Departmental Meetings

Meet with each department to create an action plan for the insights that tie back to business goals.

The hidden frictions holding researchers back



The hidden frictions holding researchers back

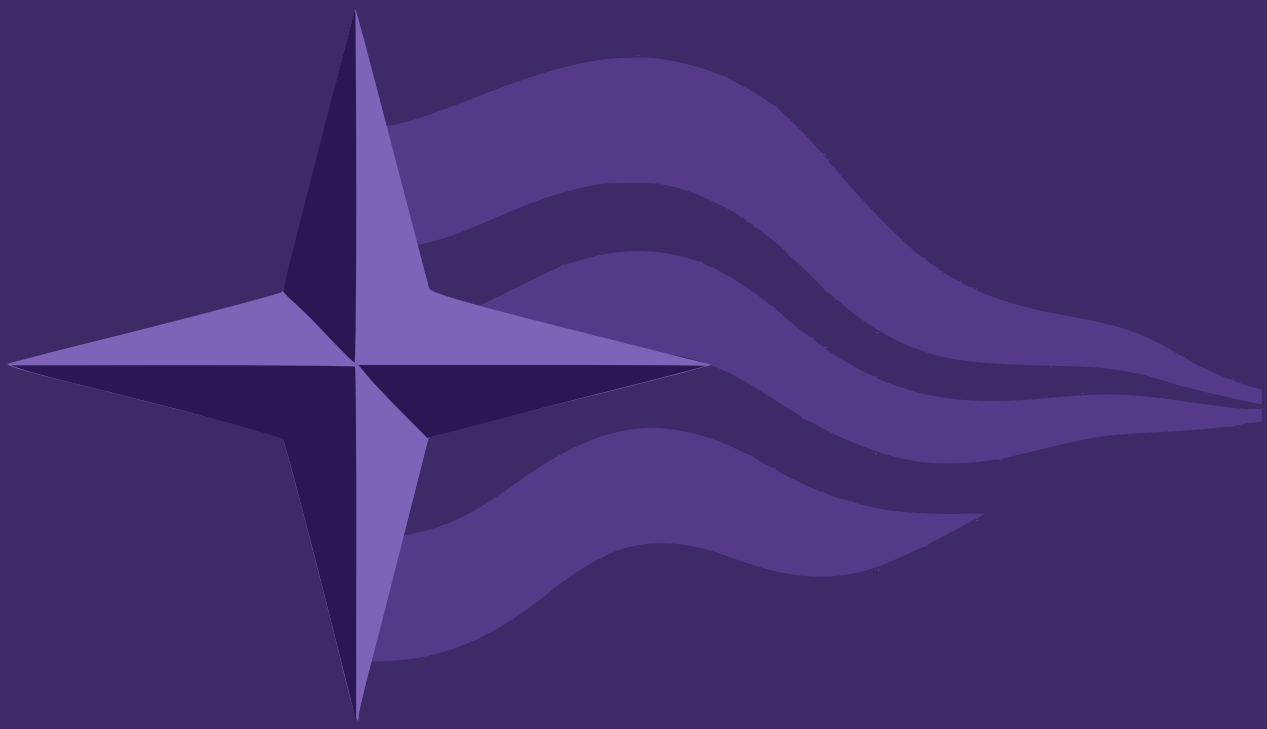
In their daily operations, researchers find some steps still take longer than they should (like the interview process), even with the right technology. Other critical steps just aren't happening at all. For instance, 91% of research organizations don't track work results (i.e., what was learned and how it was acted upon), according to research from Nielsen Norman Group. Once the research is done, it loses value because no one measured or shared the results. This makes it tough to justify resource allocation for future projects. It also prevents researchers from demonstrating the impact and value they bring to the greater organization.

To understand why this happens, we asked our experts to identify their biggest workflow friction points and how to solve for them.

Hidden Friction	Why It Happens	How To Fix It
Research silos & fragmented data	Customer insights and research functions (such as UX, CX, market, and data science) are fragmented across departments. There is limited or no knowledge-sharing because each team uses preferred tools and methods, leading to duplicative efforts.	**Use centralized customer feedback repositories and integrated platforms to unify data. Encourage cross-functional communication (e.g., synthesis sessions) and create blended teams to share learnings and reduce redundancy.**
Research is too slow for product development	Planning, recruitment, and reporting are time-consuming, and traditional workflows can't keep pace with agile product teams.	**Use AI to draft research plans, automate recruitment/ scheduling, and generate quick-turn summaries. Empower non-researchers with lightweight, self-serve tools and support from Research Ops.**

Hidden Friction	Why It Happens	How To Fix It
Insights aren't actionable or discoverable	Insights are buried in reports or shared at the wrong time. Stakeholders are overloaded, misaligned, or not incentivized to engage with research.	**Use tech to deliver insights via dynamic dashboards or targeted updates. Train researchers in storytelling and embed them in product teams to improve timing, alignment, and influence.**
Over-reliance on AI reduces empathy & quality	Automating too much (e.g., interviews, analysis) risks losing human nuance, creativity, and connection with users.	**Use AI for repetitive tasks, but reserve human effort for empathy-driven activities like live interviews and creative synthesis. Adopt a "human-in-the-loop" model to maintain quality and ethics.**
Bottlenecks with participant recruitment & panel management	Recruitment is resource-intensive, slow, and inconsistent — especially for niche or high-level participants.	**Automate outreach, scheduling, and incentive management using recruitment platforms. Assign Research Ops or managed services to handle logistics, freeing researchers to focus on insights.**

How AI is transforming the research tech stack



How AI is transforming the research tech stack

One of the biggest misconceptions about AI is that its main function is to expedite simple tasks. That's just scratching the surface, Estes says:

"There are so many opportunities. A lot of people have been saying, 'Oh, AI just expedites, or it just makes things faster. More efficient.' Yes. It can also help you see things differently and even reframe things in new ways."

The process for writing interview questions and scripts is one such scenario.

"The place where we are using AI right now that's working really well is getting a jump start on a script or a screener," Koufos says. "You still have to refine the questions, but you're not starting from the blank page."

Since screeners determine who qualifies for a study, even subtle word choice can introduce bias. AI tools help craft neutral, inclusive questions and can assist in drafting interview scripts that avoid leading language and preserve the integrity of your insights.

Objectivity is also important in analysis and identifying key takeaways, which are areas where AI can play a role.

"In some ways, having the technology actually removes some of our own biases because we might be looking for certain things," Estes says. "Nobody does a research project without having their own hypothesis."

Research Stage	Before AI	After AI	Tools To Consider
Scope & validate the problem	• Relied on manual stakeholder discussions and intuition • Hard to validate assumptions quickly	• Analyze existing data • Validates assumptions faster • Spots trends	marvin, glean, Notion, Jira, SharePoint
Develop the research plan	• Plans required heavy manual input • Multiple revision rounds • Manually referencing past projects • Guides, surveys, and scripts created by hand with risk of bias	• Drafts plans • Suggests methods and timelines from past work • Iterates faster • Drafts/refines materials • Suggests improvements • Checks for bias & completeness	marvin, ChatGPT, Gemini, Claude, Microsoft 365, dscout

Research Stage	Before AI	After AI	Tools To Consider
Recruitment & set up	• Recruiting and scheduling was manual, slow, and prone to errors • Took up too much time for researchers	• Streamlines recruitment • Automates scheduling • Finds and screens participants faster	user interviews, Ethnio, UserTesting, Respondent, Rally
Conduct the research	• Manual note-taking, transcription, and setup • Researchers handled everything live	• Automates transcription, note-taking, and some session tasks • Frees researchers so they're fully engaged	marvin, dscout, maze, qualtrics XM, UserTesting, Sprig, SurveyMonkey
Synthesize & analyze the research data	• Time-consuming manual coding • Risk of missing insights or bias • Junior researchers did repetitive work	• Rapidly codes and thematizes data • Surfaces insights • Reduces bias • Spots hidden trends and themes	marvin, miro, Dovetail, Grain, condens
Centralized documentation & communication	• Syntheses and reports developed manually • Often slow • Inconsistently formatted • Reports and artifacts scattered • Hard to search and reuse • Knowledge often lost	• Generates summaries, visualizations, and reports quickly • Makes insights more accessible • Centralizes all documentation and customer knowledge • Enables fast search and sharing • Improves accessibility and shareability	marvin, AXIOS HQ, slack, ClickUp, Microsoft Teams

Research Stage	Before AI	After AI	Tools To Consider
Implementation & impact tracking	• Action items discussed and tracked manually • Hard to tie research to business actions • Follow-up was unstructured, ad-hoc, and difficult to systematize	• Identifies actionable insights • Suggests next steps • Simplifies sharing with teams • Automates reminders, impact tracking, and follow-up with stakeholders	marvin, fullstory, Confluence, productboard, asana

Modern tools can help you test a hypothesis and iterate with real customers in real-world conditions. Instead of waiting for lengthy research cycles, teams can quickly test, learn, and adapt with a fast, iterative approach to research.

For example, maybe you want to understand why certain parts of your company's buyer journey have high drop-off rates. You could interview customers from a specific segment, generate hypotheses based on team experience, and quickly test changes in real-world conditions.

Once the interviews are complete, you can use AI to surface key themes quickly. Without modern technology, a researcher needs to do this step manually by reviewing content, creating tags and notes, and labeling insights to make them findable.

Now, AI can help identify the sentiment. By automating thematic analysis, researchers can surface insight in minutes, not weeks.

"You get the initial themes started more quickly," Koufos says. "It's literally saving me days of work."

Faster, more comprehensive theming can also lead to quicker response times to stakeholders' requests.

For instance, Nitta talks out her learnings with an AI chatbot. Then, she'll ask the platform to synthesize her thoughts and say, "Turn this into an executive summary for XYZ audience." *(We may or may not have used a similar strategy for the executive summary in this report.)*

As many of you already know, integrating AI into your research workflow may have some drawbacks.

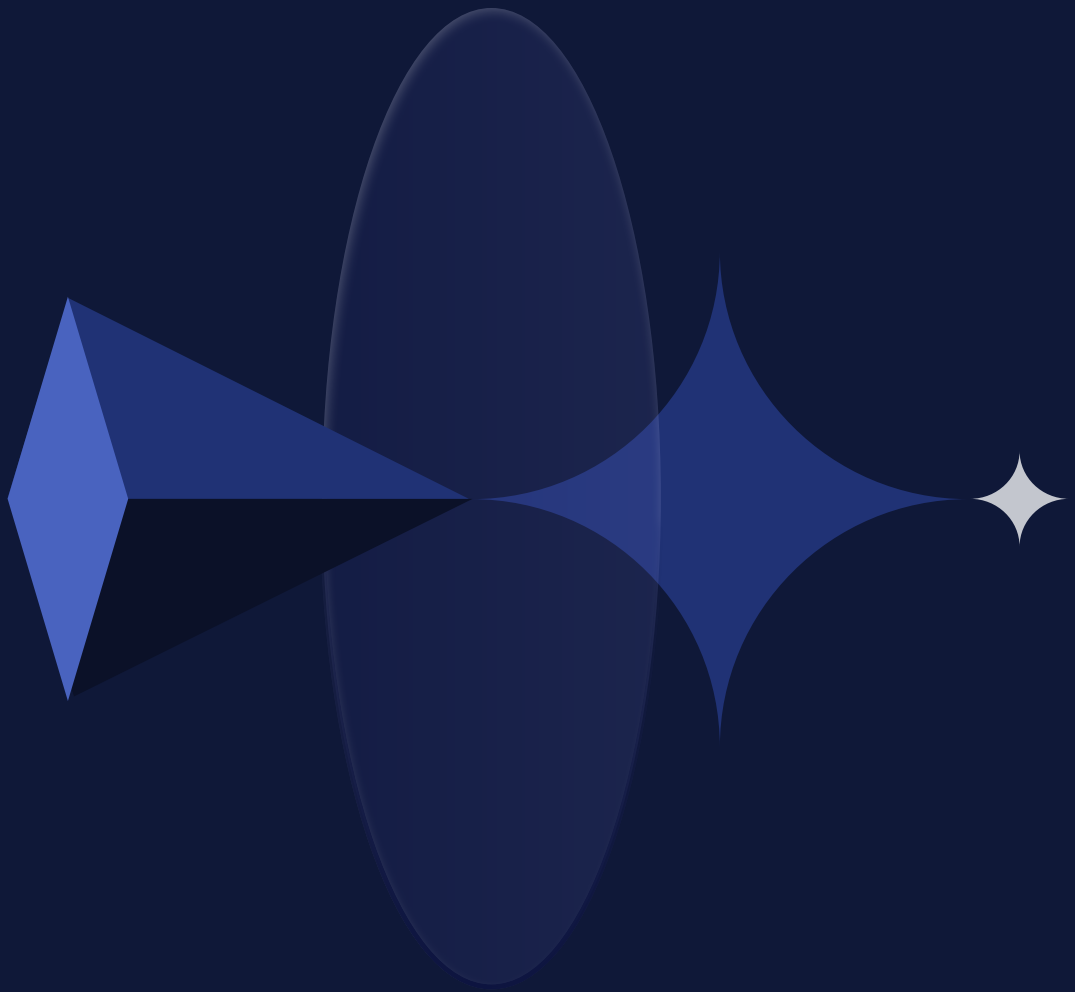
AI struggles with broader, generative research topics where deep context and nuanced understanding are required. According to another Nielsen Norman Group report, "AI is stochastic — it can choose to pay attention to certain things but disregard others."

Estes likens using AI tools to hiring an outside consultant.

"We have more of the context of the environment, the industry, the company, the players," Estes says. "When that consultant comes in, their report either lands or it doesn't based on whether or not the context has been integrated."

For that reason (and many more), there's still a strong need for human oversight when introducing AI into your workflow.

Finding a balance between human and artificial intelligence



> **“I do think the human in the loop is really important, especially for qualitative research that can be very subjective.”**
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> Experience Design Platform Director and
> Faculty Lecturer at Bentley University

In her “Glass Box Law” theory, strategic design leader Maria Papaleo identified a critical gap in AI and design: a lack of transparency and trust in the results.

Users and stakeholders would ask: “How can I trust the AI’s output? How do I know it’s right?” AI systems should be as transparent as possible so users understand how decisions are made — like they’re looking through a glass box.

Researchers have their own set of concerns about AI. Some worry that there’s an overreliance on the technology. They’re concerned that the next generation won’t have the skills to build things from scratch.

The truth is that AI is meant to be a sparring partner, not a replacement for original thought.

It requires your expert (and human!) input to produce the right output.

That means the role of researcher might be shifting — but it’s certainly not fading away.

Remember, researchers have a new value proposition in the workplace: to connect data to the right next steps.

That requires you to give AI tools clear, thoughtful direction to surface the real story — and spot the flaws in the output.

For many teams, this shift will require training in skills you never needed before, such as AI prompting.

“What I found with my team was that we had to learn how to iterate on prompts to get the quality of output we wanted,” Nitta says. “It was a new skill we had to develop.”

AI needs a lot of back-and-forth feedback to get to the right output.

That requires your guidance as well.

Estes emphasizes that professionals need to have the “knowledge and expertise to know when something that has been suggested is either good, bad, or needs to be improved.”

She builds this into her teaching by having students create their own work, compare it to AI-generated outputs, and critically assess what needs to be fixed.

As AI continues to evolve, researchers have the opportunity to choose when to integrate the technology into their workflow and when it's not the right call. Not all researchers agree on the use cases for AI.

For instance, one researcher said their client uses synthetic personas to represent their customers. Using data from past interviews, they can ask the personas a question to receive real-time feedback on things like new product features. The researcher loved the idea, but her colleague did not.

Certain teams of researchers have started using AI to lead interviews simultaneously. This enables researchers to collect and analyze far more data in less time.

Meanwhile, other researchers feel that good interviews require human connection, which AI cannot fully replicate.

"There's something about the human connection that I think is really important to show to your customers," Koufos says. "It shows you really value them, that you're taking the time to listen to them directly."

Each researcher has to make their own decisions based on their unique goals and workflows. And they must be willing to re-examine it as technology evolves and we uncover new methodologies.

After all, isn't curiosity the heart of good research?

How Marvin can help you solve real-world problems faster

Marvin is transforming how research is conducted, organized, analyzed, and shared with everyone — not just the researchers.

Responsible AI at Scale

Microsoft Aether used Marvin to analyze 80+ hours of interviews and synthesized 2,000 notes to create a Responsible AI Maturity Model, engaging 7x more participants than before.

Product Innovation

Field Nation's team saved 20+ hours by switching to Marvin's research repository, allowing them to incorporate insights into designs and product decisions more efficiently.

Accessibility Improvements

Xcel Energy used Marvin to tag usability issues, map them to WCAG criteria, and share video evidence with developers, reducing confusion and speeding up fixes.

Churn Reduction

Wave's sole researcher used Marvin to create churn reports and track improvements, reducing report creation time from 10 days to 4 hours.

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Marvin automatically turns scattered feedback into searchable, shareable insights available in the critical moments when business decisions are made.

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