

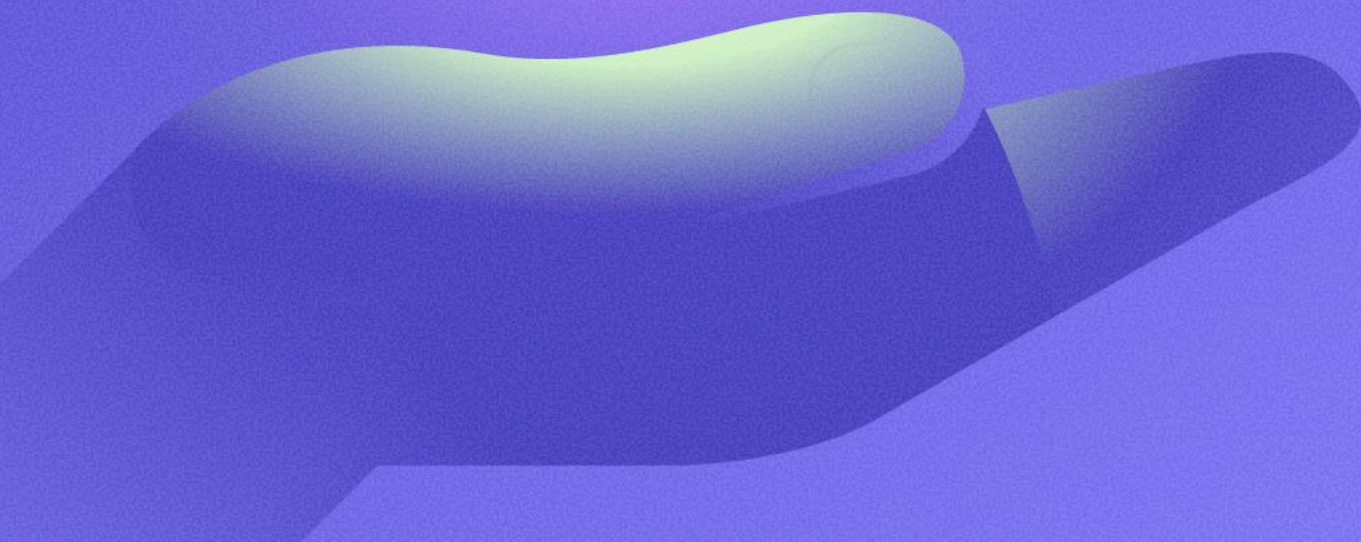
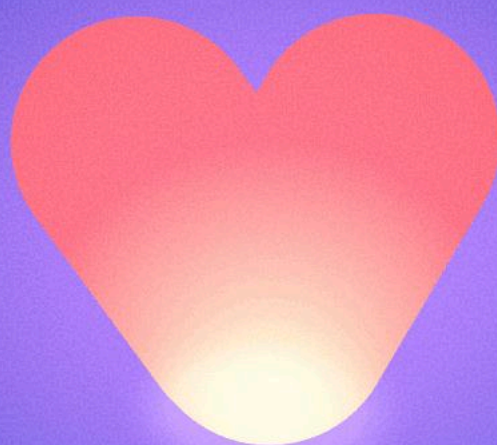
The Modern Research Series

# Building Research Influence Through Participation



**Mahad Bullo**

Senior Staff UX Researcher at Included Health



# Contents

<b>Introduction</b>	<b>03</b>
<b>Chapter 1</b>	
<b>Research is a team sport</b>	<b>04</b>
<b>Chapter 2</b>	
<b>Structure everything around the AI</b>	<b>09</b>
<b>Chapter 3</b>	
<b>A great interview is still key to great insights</b>	<b>13</b>
<b>Chapter 4</b>	
<b>The deck is not the deliverable</b>	<b>16</b>
<b>Chapter 5</b>	
<b>Research as infrastructure, not overhead</b>	<b>19</b>

## Introduction

# The Modern Research Series

The role of researchers is changing. For many, the pressure to evolve feels less like an opportunity than a survival imperative.

HeyMarvin works with great researchers every day. Most of them are solving the same problems: how to do rigorous work fast, how to build influence without becoming a bottleneck, and how to make research something the company can actually use.

**The Modern Research Series** exists to share how those researchers think and how they get the job done. The tools they use, the processes they follow. How they see the work, and what it takes to do it well when the job is changing fast.

### One researcher, 4X the impact

When Mahad Bullo, Senior Staff UX Researcher at Included Health, was left to rebuild the research function from scratch, scaling back wasn't an option.

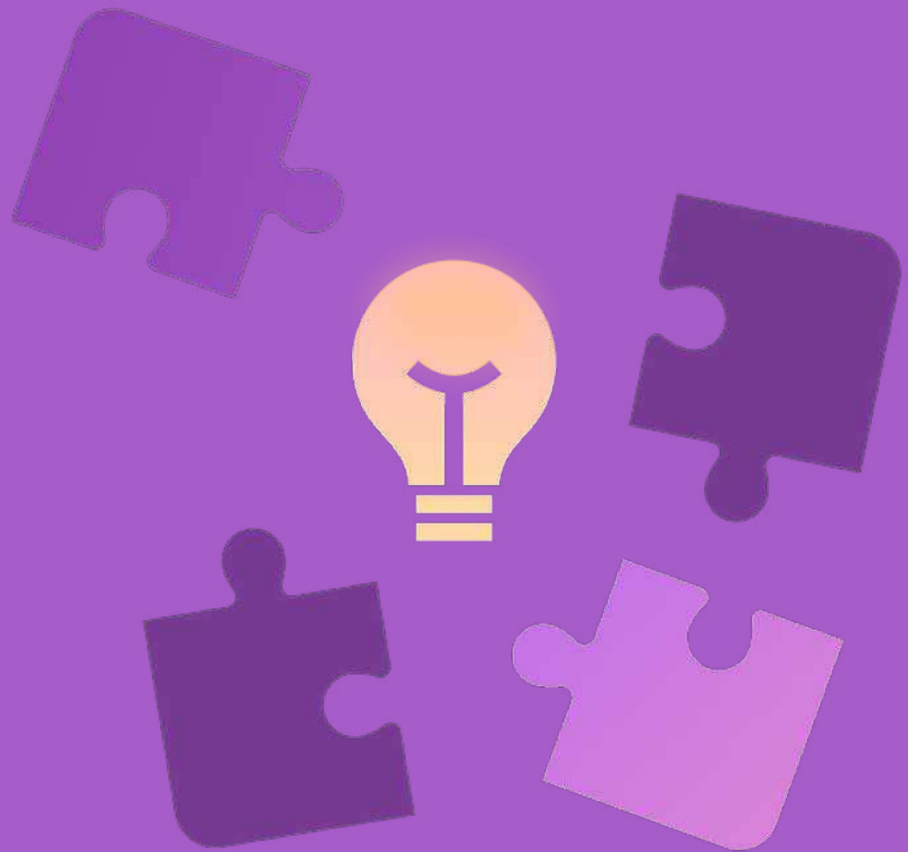
The result was a new research philosophy and four times the output on his own.

He found a new answer to the pressure every researcher eventually faces: organizations move faster than studies can close. By the time a months-long research effort wraps, the decisions it was meant to inform have already been made. Staying relevant means closing that gap.

This isn't a story about doing more with less. It's a story about thinking differently.

## Chapter 1

# Research is a team sport



## Make the process the product

Most researchers know the feeling. You've spent weeks on a study. The methodology was rigorous, the insights are compelling. You walk into the readout meeting with your deck of 50 slides, all beautifully crafted. Then you watch people nod politely and move on with their days.

Mahad has a name for this pattern. He calls it "operating like the Wizard of Oz." You disappear into the research process, do your thing, then reappear with something extraordinary and expect everyone to act on it. The problem is that the people in the room were never part of it. The reveal lands flat because the journey was invisible to them.

“

**Research works best when you're not hidden away somewhere doing your thing and then coming back with this amazing thing. People are always going to be more receptive to your insights if they felt like they were part of the journey.**

"Research works best when you're not hidden away somewhere doing your thing and then coming back with this amazing thing," he says. "People are always going to be more receptive to your insights if they felt like they were part of the journey."

## Influence through participation

The shift Mahad made was deceptively simple. He stopped treating research as something you deliver and started treating it as something people experience.

"I realized the best way to build influence is through participation," he says. "I make sure all the key stakeholders in the business can participate, watch sessions, and ask questions. So by the time the insights come out, they are already invested in those insights becoming a reality as much as I am."

## Opening up the playing field

Doing this at scale, especially when most stakeholders can't clear their calendars for every session, requires the right infrastructure. For Mahad, HeyMarvin is the platform that makes that level of participation possible.

"Research is a team sport," Mahad says. "HeyMarvin is the best playing field for the team, because everybody feels like they can get into it."

The keyword: everybody. Other tools make collaboration technically possible. HeyMarvin makes it frictionless enough that people actually do it. They can watch a live session. They can read the insight report afterwards. They can search the recordings themselves. No license is required to be a note-taker or a viewer, so all they have to do is show up.

"HeyMarvin is the number one engine of research influence," Mahad says. "Because it allows you to bring the entire team into the research."

Not everyone can be in every session, but everyone can feel connected to what's happening. That connection is what builds trust in the research and in the researcher.

“

**HeyMarvin is the number one engine of research influence. Because it allows you to bring the entire team into the research.**

## From research team to research enabler

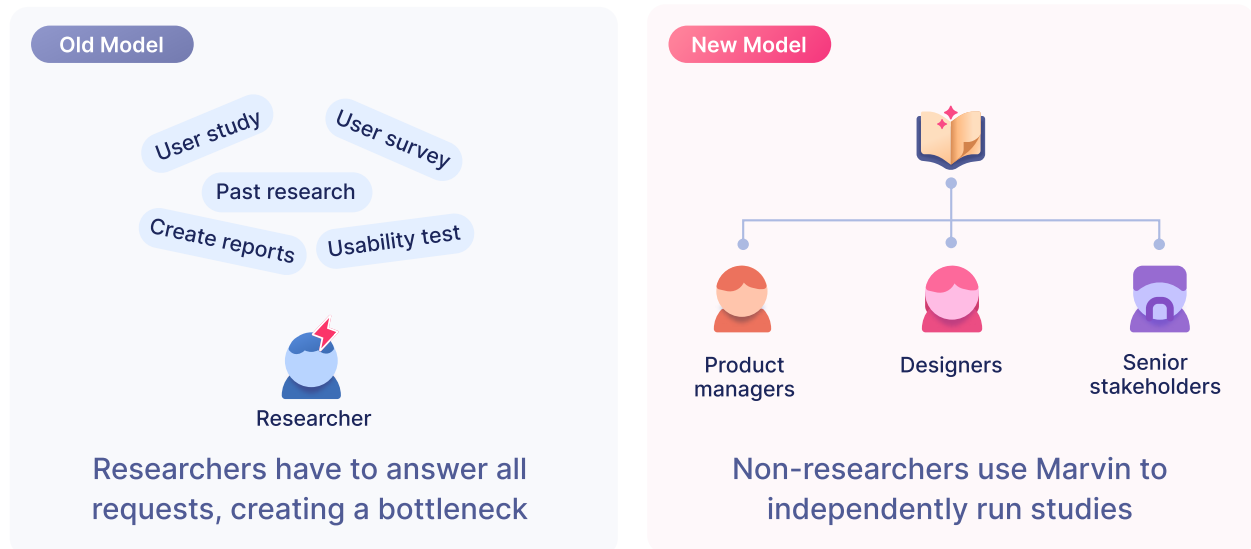
Overall, the shift Mahad has achieved at Included Health requires a fundamental rethinking of the research team's priorities.

In the old model, the research team does research, and everyone else waits for the readout. In the new model, the research team enables research. They build the infrastructure, set the standards, and create the conditions for others to participate.

“

HeyMarvin has really helped us make research accessible to everybody. That's the dream of researchers who've been working in this field for the past decade, and it's starting to come to life.

The measure of success shifts, too. Mahad looks for changes in behavior: teams pulling insights themselves, decisions moving faster because the research was already there. Across clinical, product, care, marketing, and client success, Included Health ran over 400 research conversations in a single year, and the reach has only grown since.



"HeyMarvin has really helped us make research accessible to everybody," Mahad says. "That's the dream of researchers who've been working in this field for the past decade, and it's starting to come to life."

## Proving the model live

Mahad had the opportunity to demo his research program at an all-hands. Rather than prepare a polished presentation, he challenged himself to showcase just how quickly his colleagues can get answers on their own.

"This is a really cool use of HeyMarvin," he says. "People always ask me, 'What do you know about X, Y, or Z?' So I time box it. I give myself an hour to use all the AI tools to build knowledge of that body of research. This would've been impossible before."

In one hour, he used Ask AI to uncover key insights, populated a discussion guide, generated a custom persona, ran a jobs-to-be-done analysis, built an affinity map, and produced a set of deep research queries. Then he presented it live, and the response was immediate. Everyone (including doctors on the clinical leadership team) wanted access to more insights.

For Mahad, the positive feedback was a proof point for his participation model. When the infrastructure is right, anyone can get the answers they need — no researcher required.

Chapter 2

# Structure everything around the AI



## One question before everything else

Most researchers set up a project the way they set up a filing cabinet. They think about what the study is, what it's called, and where it belongs.

Instead, Mahad organizes everything around a single question: how do I optimize for AI? That question drives every structural decision he makes, from project structure to tagging systems. Good structure doesn't just keep things organized. Get the foundation right before a single session takes place, and AI becomes meaningfully more effective across everything that comes after.

## Distinguishing project type

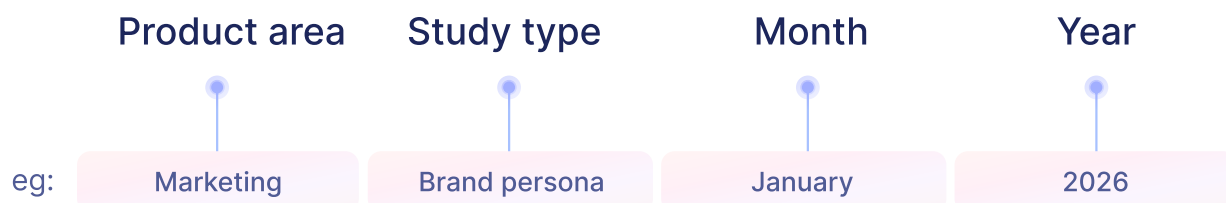
Another important question Mahad asks at the start of a project: is this discrete or continuous? A discrete project has a start and an end, focusing on a specific research question within a defined scope. A continuous project keeps collecting data over time.

The distinction matters for AI. When data stays consolidated in one continuous project, HeyMarvin can work across all of it. It can find patterns, track changes over time, and surface what shifted between quarters in ways it simply can't across fragmented projects.

**Walk the Floor**, Mahad's flagship longitudinal research program at Included Health, is the clearest example. It's tied directly to one of Included Health's core OKRs: keeping the quality of member experience high across every touchpoint in the cycle. The team runs quarterly sessions evaluating Included Health's core digital experience, and every round goes into the same project. Keeping it consolidated means HeyMarvin's AI can work across the full history of the program, surfacing how the member experience has shifted quarter over quarter.

## Name it right from the start

Mahad's naming convention is simple, incorporating four distinct pieces of data in each file name:



Building that organization in from the beginning means far fewer headaches later. Consistent naming makes projects findable for both humans and for HeyMarvin's AI when surfacing research across projects.

When 15 collaborators are creating projects, the naming convention is what makes anything findable. Maybe a team member returns from leave and needs five studies related to visits. Or an engineer asks a researcher to share everything they know about a certain service line. Without consistent naming, neither search is going to get very far without significant manual work.

## The project overview isn't optional

Before data starts coming in, Mahad fills in the project overview with research goals, study context, key questions, and relevant background.

This matters because the project overview is a key data source for the AI to read. When anyone on the team asks HeyMarvin to draft a discussion guide, it pulls from the project overview to understand what the research is trying to accomplish. The more complete the overview, the better the first draft, and the less time the team spends on edits.

"You do your research planning in the project overview," Mahad says. "And then you can actually work on your discussion guide within HeyMarvin from there. Everything lives in the same place and builds on each other."

## Tag before the data arrives

Next up, Mahad builds in his tagging system before a single piece of data arrives.

Once data is in, it's easy to miss things. Labels get applied inconsistently, tagging gets skipped as teams shift their focus to the next session. If the structure is already there, with labels defined, descriptions written, and taxonomy agreed on, tagging becomes a checkpoint rather than a decision.

"If you can do all of that before you start conducting your research, you're going to have an easier time," he says. "It's going to make it a lot easier to isolate certain types of data, group it for analysis, and parse specific parts for HeyMarvin to work with."

Mahad particularly relies on label descriptions. HeyMarvin uses those descriptions as cues to understand what a label means, auto-label notes, or to match content to the right category. A label called "Feature Request" with no description is guesswork. The same label with a clear explanation of what counts gives the AI something real to work with.

## Research ops is a must

None of the above works without someone responsible for keeping it clean. Research ops is a required function. Mahad is unambiguous about this.

"Whenever possible, research ops should be involved in structuring every project," he says. "You will need someone to enforce the naming conventions, and go in monthly on continuous projects and check that labels are applied correctly."

"You must designate somebody to be that cleanup person," he continues. "They need to clean up these files, make sure they're adhering to naming conventions. If we have over 100 people using HeyMarvin, how are they all going to know what the naming convention is?"

The AI is only as good as the architecture underneath it. Build with intention, and HeyMarvin becomes exponentially more useful. Let it erode, and you'll spend your time on problems the system was designed to solve.

"It's always going to be better when we can enforce rules in configuration and in the tooling," he says.

## Chapter 3

# A great interview is still key to great insights



## A great session starts with you

The structure is in place, the project is set up, the discussion guide is built. Now comes the part HeyMarvin can't do on its own.

"HeyMarvin cannot enforce a good interview," Mahad says. "That part is still on you."

Not even the best AI tooling can compensate for a poorly run session. The technology will always work best when the researcher does too.

For his sessions, Mahad uses three layers at once: an interviewer, a human note-taker, and HeyMarvin's auto-notes. The human note-taker captures judgment and context the auto-notes may miss, while the auto-notes capture everything the human is too busy to write down. Together, they give you a richer record than any single source produces alone.

The discussion guide has one more job beyond structuring the conversation. It tells HeyMarvin what to look for across every file in the project, whether you asked the question or not. That means writing out questions you may never ask in a live session.

"I intentionally tell my team, 'I want you to ask questions that you know you're going to ask and questions that you know you're not going to ask, but that are important,'" Mahad says. "Because HeyMarvin can index that."

He suggests writing out all questions you may have about your research, even if you don't end up asking them during the live interviews. HeyMarvin may find answers hidden in the data for you anyway.

## Don't wait on synthesis to socialize learning

Most teams save synthesis for later, but Mahad treats the first hour after a session as the most important part of the process.

Within hours of finishing an interview, he publishes a focused report while the conversation is still fresh. HeyMarvin's AI pulls out the key takeaways from that session and pushes them to the relevant Slack channel so everyone in the organization immediately understands the impact. This keeps stakeholders connected to the research as it happens rather than making them wait for a final readout, and it builds the layered insight structure that makes later synthesis faster.

For Mahad, the in-the-moment share is both an efficiency move and an extension of the participation model from Chapter 1. When stakeholders see insights land in real time, they feel connected to the research journey, not just the destination.

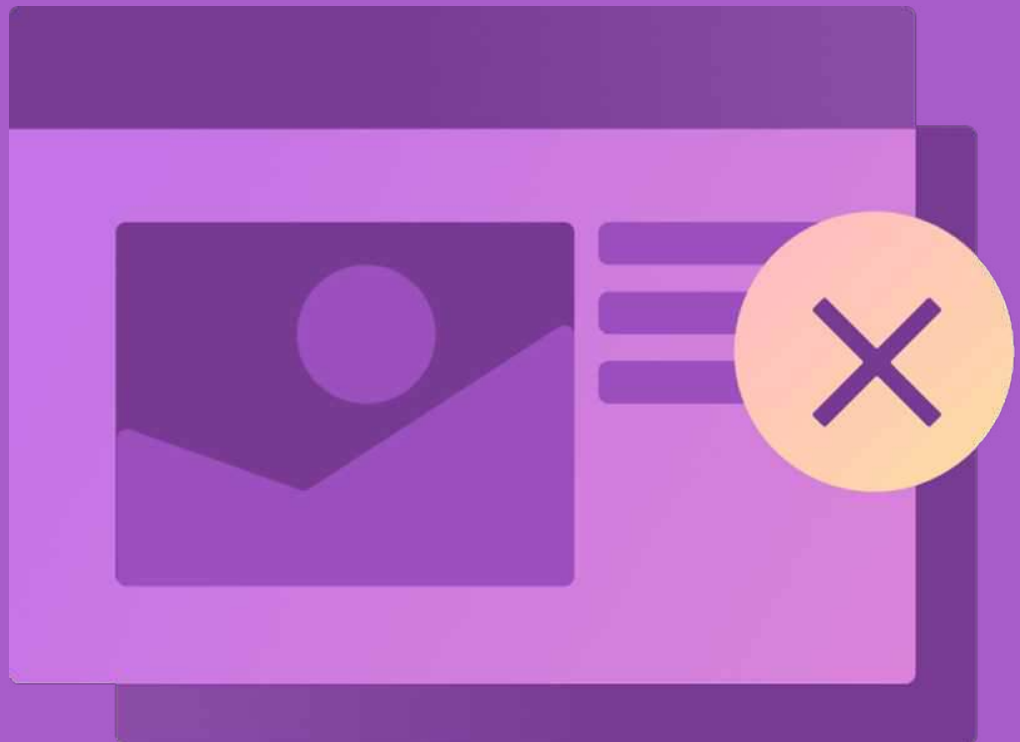
"HeyMarvin's insight function actually speaks to the biggest criticism of research, which is that we spend too much time doing synthesis. This way, the insights are surfaced in quick bite-sized chunks that are shareable, and execs love them," he says.

“

**HeyMarvin's insight function actually speaks to the biggest criticism of research, which is that we spend too much time doing a synthesis. This way, the insights are surfaced in quick bite-sized chunks that are shareable, and execs love them.**

## Chapter 4

# The deck is not the deliverable



## Get the insights out fast

“Research needs to move at the speed of the business,” Mahad says. “That’s what this is all about.”

For Mahad, the format of a research deliverable is a strategic decision. Insight reports get published within hours and land directly in the channels where leaders are making decisions. Meanwhile, decks take days to build, get presented once, and live buried in a shared drive most people won't revisit.

“Your primary research output should be HeyMarvin insight reports because they're more likely to be read, and you can get them out faster than doing a research readout. I don't really do decks anymore,” Mahad says. “It’s a waste of my time. I only do a deck for my biggest projects.”

## The layered insight model



Mahad’s approach to generating the insight he needs has three layers, each designed to keep research moving at the pace Included Health makes decisions.

The first layer is the per-interview insight, published within hours of a session ending. This is the focused report from Chapter 3, incorporating key takeaways pulled with HeyMarvin’s AI and pushed to Slack. This keeps the research visible and stakeholders connected to the project as it unfolds.

The second layer is the thematic insight. Once enough sessions have accumulated, Mahad surfaces the patterns across them: what is showing up consistently, what is shifting, what demands attention. HeyMarvin does the heavy lifting on the analysis; Mahad shapes the framing.

The third layer is the summary report, produced when the project closes. By the time Mahad writes it, most of the thinking has already been done and a lot of information is already out to the teams. The per-interview and thematic insights have been building toward it the whole time.

"This approach sends throughput through the roof because the barrier to pulling and sharing the insights you need when you need them has just been completely removed," he says.

Each layer is shareable on its own, while still building toward the next. The result is a continuous stream of insights rather than a single high-stakes delivery at the end.

## Getting leadership involved

Many research teams wait to be asked. Mahad designs his insight distribution so stakeholders come looking for it.

Insight reports go into Slack channels where the relevant teams already live. They link back to HeyMarvin, so anyone who wants to go deeper can. Over time, the people who matter most stop waiting to be briefed and start checking in on their own — even senior leadership.

"Our senior leaders love research, and they have been some of my biggest supporters," Mahad says. "You know what they do with the insight reports? They read every single one."

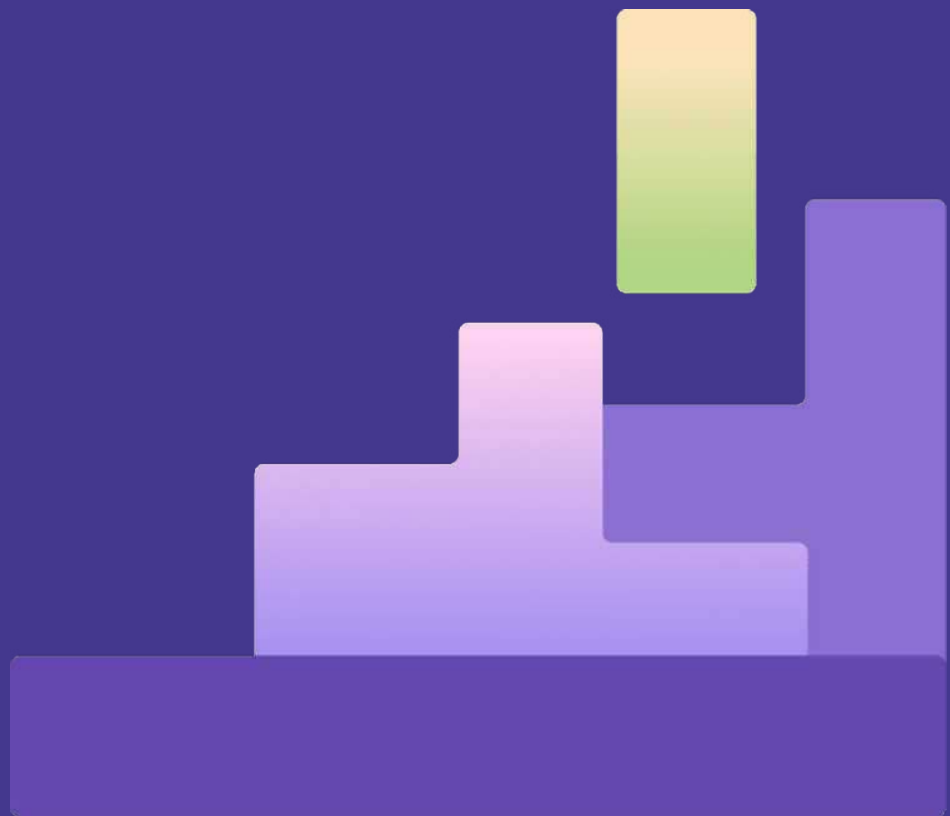
The insight report is how you extend an invitation to the people who were never in the room. When research only reaches the people already paying attention, it loses its leverage. Other teams will still make decisions with or without it. Mahad's workflow changes that, giving everyone at Included Health access to the research they need, exactly when they need it.

“

**Our senior leaders love research, and they have been one of my biggest supporters. You know what they do with the insight reports? They read every single one.**

## Chapter 5

# Research as infrastructure, not overhead



## Reframing the cost conversation

When Mahad brought HeyMarvin to his finance team, he led with the math, not the features. The entire research stack revamp came with an investment, but it also offered significantly more functionality than their previous solutions. More importantly, HeyMarvin opened up access to customer insights to the whole company. Mahad saw that as an efficiency, not an expense.

Reframing spending as company infrastructure rather than team overhead changed the conversation entirely. HeyMarvin currently serves clinical teams, product teams, marketing, care, and client success at Included Health. When hundreds of research conversations happen in a single year at a company of that size, the value extends well beyond the research budget it sits in.

## What the infrastructure buys you

The clearest proof came recently when Mahad realized the sheer scale of data he can now analyze. By connecting HeyMarvin's MCP server to other tools, Mahad combined a 14,000-response survey with 40 interviews, ran quantitative and qualitative analysis across both, and generated actionable insights at scale.

"The member app team is using the results to change the roadmap," Mahad says. "The data showed that the types of intents coming into the website were quite different from what we were intuiting. I couldn't have done that even a few months ago."

That result is what earns research its seat at the table. And it's why Mahad makes the case for HeyMarvin as indispensable.

"I could never contemplate getting rid of HeyMarvin," Mahad says. "The other tools in our stack are commodified. I could go to a dozen other tools tomorrow. But I couldn't replace HeyMarvin. Our experience is that the AI performs probably four times better and is more useful than any other tool in the research space. The difference is trust, usefulness, and dexterity — you can use and trust HeyMarvin in so many different ways."

"If I weren't around tomorrow, I want us to have the best insights infrastructure of any company in our space," he says. "That is what I am building toward."

## The infrastructure you leave behind

Today at Included Health, clinical teams, product teams, marketing, care, and client success can all find the research they need, ask the questions they have, and make better decisions without waiting for a readout. That is what the new model looks like in practice.

"I want us to be at a point where research is just part of how this company thinks and moves," Mahad says. "Not something the research team does. Something everybody does."

“

I want us to be at a point where research is just part of how this company thinks and moves. Not something the research team does. Something *everybody* does.



# Your AI-native customer insights platform for the whole team

HeyMarvin brings scattered knowledge into a living system that gets smarter over time, and makes insights easy to discover, share, and put into action.

## Loved by the world's leading organizations

 Microsoft	 SIMON & KUCHER	 vistaprint.	 REWE GROUP
 ENTERTAINMENT PARTNERS	 HONDA	 Lattice	 SONOS
 MORNINGSTAR	 BEST BUY	 CRITEO	 nrg

Want to learn more about how other modern research teams move at the speed of the business?

[Try it for free](#) today or

[Book a demo](#)

