



The Modern Research Workflow

How AI will transform the way we research in 2027



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Introduction:

Everyone's doing research now

Most people conducting customer research today don't call themselves **"researchers."** They're product managers, designers, strategists, marketers, and anyone who is curious about the people they build for.

Fewer organizations have headcount dedicated to research alone. And as the line around who does research keeps moving, the workflow has to move with it. Unsurprisingly, the solution for this has been a continued reliance on AI.

Last year, AI's job in research workflows was narrow. You could trust it to draft a research plan so you weren't starting from zero and to speed up analysis after fieldwork was done. That's about it. Now, we have so many AI tools operating at scale, all in the pursuit of speeding up teams' ability to gain insights. AI-moderated interviews are the norm, synthetic personas stand in for feedback from real customers, and insights are delivered through MCP connectors.

And that's because AI has accelerated product development cycles too. The speed of building outpaces the time required to understand who we're building for. High-quality insights at development speed matters more than ever, and knowing what to build sooner based on evidence is critical. The teams doing it well treat customer understanding as a continuous system, and invest to make it readily available across more teams.

As research work spreads across the organization, the researchers who built the systems have seen their roles and responsibilities change. Across our conversations this year, researchers who built knowledge repositories and set up clear guardrails for gathering insights have become the system builders who leaders turn to first.

Last year's workflow was built for the researcher. The workflow of 2027 must work for everyone who touches research, from traditional researchers to the teams they empower.

In this report, you'll learn about:

The signals that will define research next

Emerging research methods moving into mainstream

The 7-stage workflow, updated for modern teams

Steps to get your team ready now

The signals that will define research next



SIGNAL 1

Insights need to come earlier, not just faster

SIGNAL 2

The interview is splitting into parts, not just staying in one channel

SIGNAL 3

Provable research impact is expected, not just optional

The signals that will define research next

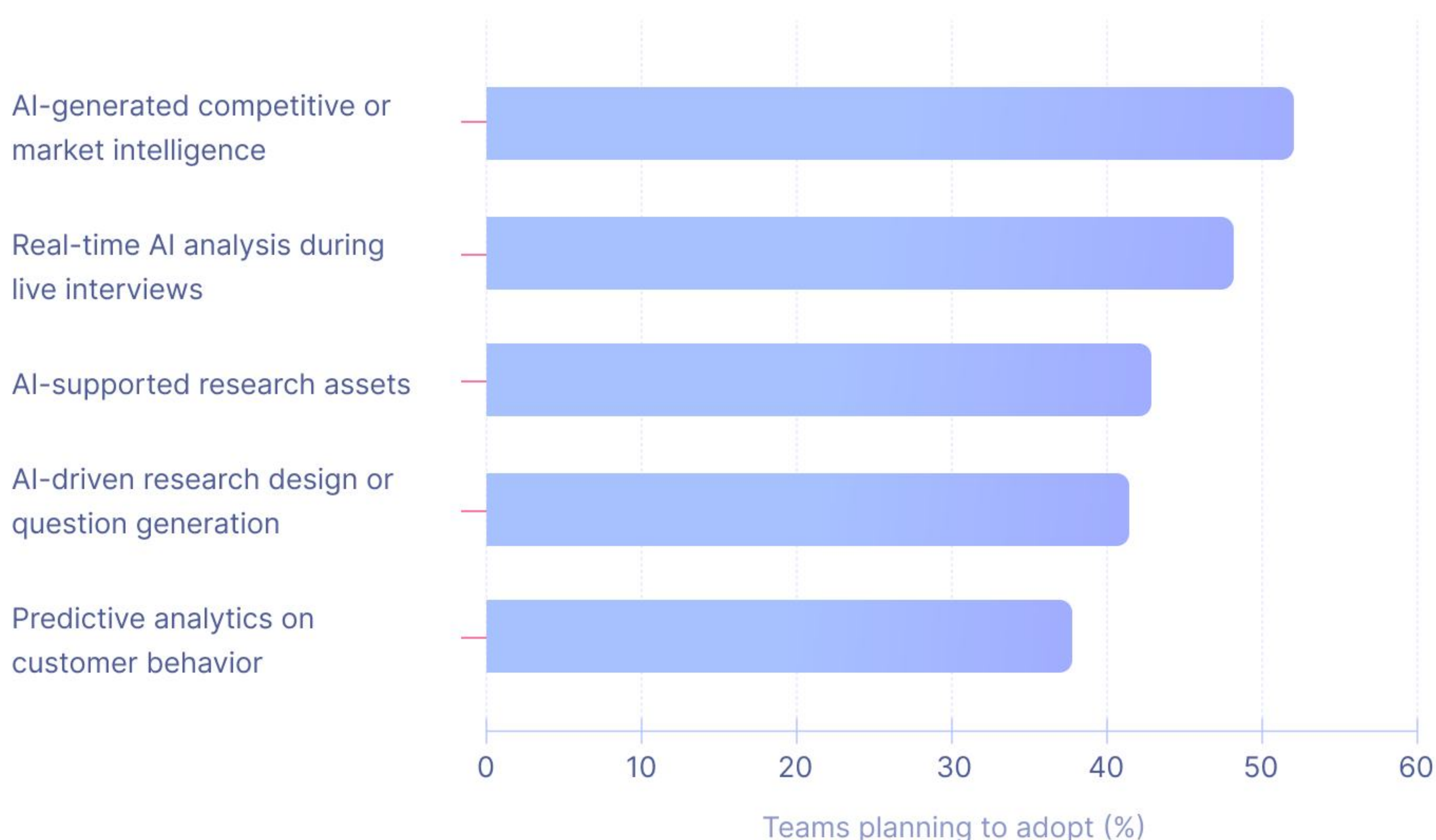
Earlier this year, we surveyed 309 leaders for our State of Modern Research 2026 report, and the following signals emerged. Some appeared in the published report, and some are new analyses we ran on the same data. But together, they demonstrate one big change: research is now a job the whole company does, all the time, built on shared workflows.

Signal 1

Insights need to come earlier, not just faster

Last year, AI sped up analysis after the fieldwork was done. Teams now want (and expect) intelligence to arrive earlier, before and during the work, rather than after it.

When we asked which AI capabilities teams plan to adopt over the next year and beyond, the pattern was unmistakable:



Every capability on that list pulls insights earlier into the workflow. The earlier insights arrive, the more likely they shape a decision. And a system that updates continuously makes that possible. Teams get direct access to evidence instead of routing every question through someone else.

This level of access to customer feedback wasn't historically available. Humans couldn't possibly synthesize hundreds of interviews in days, let alone share out clear guidance.

For Alexis McNutt Unis, Customer Research Lead at OnePay, faster synthesis only pays off if you know where to spend the extra time. She spends it protecting the parts that need depth.

"We should be very intentional about what parts we want fast and what parts require us to take that same amount of time," she said. "Tooling is that speed-up part. I use it to speed up all the headaches of logistics... so that you can slow down and talk to a customer, and hear and see them."

"I use [tooling] to speed up all the headaches of logistics... so that you can slow down and talk to a customer, and hear and see them."



Alexis McNutt Unis

Customer Research Lead at OnePay

Signal 2

The interview is splitting into parts, not just staying in one channel

A traditional research interview used to do several jobs at once: gather data, build rapport, read emotion, probe for depth. Now that single conversation is splitting into parts. AI handles volume, humans handle depth.

Our survey data shows 30% of respondents now regularly run AI-moderated interviews, more than moderated usability testing (22%) and slightly more than traditional depth interviews (25%).

That same shift is expanding what counts as research in the first place. Once AI can process volume at scale, teams stop limiting "research" to scheduled conversations. Our survey shows:

- **29%** of respondents regularly analyze sales call recordings
- **28%** mine support tickets and customer service conversations
- **28%** conduct AI-assisted research without any primary data collection
- **27%** run social listening programs

Customers are already talking to you in spaces that weren't previously considered research channels. Modern teams treat those conversations as research data. The more ground AI covers, the more room humans have to focus where they matter most: judgment.

Owen Sanderson of IA Collaborative framed the shift like this:

"Judgment's expensive," he said. "So let's let the AI do what it's great at, which is synthesis and processing and operational execution, but let's keep the researcher in the judgment position."

Signal 3

Proving research impact is now table stakes, not a nice-to-have

In our survey, we asked respondents to rank five priorities for the next 12 months. "Improved measuring research impact and ROI" came out resoundingly on top, ranked first by **85%** of respondents. "Increasing headcount and budget" came in last.

The top priority for 2027 is proving that the research you already have changes outcomes. Most organizations still can't do this well.

Only **47%** have established KPIs for research impact. The teams that do usually track a few things: whether research influenced a specific decision, how many teams or people that decision touched, time saved compared to the old process, and a satisfaction rating from the stakeholders who acted on the research. Our research showed only about a third of organizations track whether research informed a decision without also tracking whether that decision worked.

Mahad Bullo, Senior Staff UX researcher at Included Health, treats speed and accountability as two sides of the same discipline. "Research needs to move at the speed of the business," he says. "You're going to be judged by the amount of things your research changes."

The numbers behind the signals

85%

ranked "improved measuring research impact and ROI" as their #1 priority for the next 12 months

52%

of teams plan to adopt AI-generated competitive or market intelligence in the next 1–2 years

48%

plan to adopt real-time AI analysis during live interviews

30%

of respondents already run AI-moderated interviews, more than traditional depth interviews (25%)

Emerging research methods moving into the mainstream



MCP
connectors

AI-moderated
interviews

AI
personas

Predictive,
continuous signals

Fully autonomous
agents for research

Emerging research trends moving into mainstream

In both our survey data and conversations with industry experts this year, these once edge-case methods for understanding customers are now climbing to the top.

AI-moderated interviews

Our survey showed 30% of respondents already run AI-moderated sessions regularly. It's no wonder, since it's the first method in decades that enables free-flowing conversations at scale. AI interviewers reach broader audience pools, around the clock, and across languages.

Many leaders describe AI moderation as a natural fit within a broader toolkit for collecting customer feedback.

"It's a way for me, for example, to scale myself, scale my time," said Maryam Maleki of Microsoft. "If I were to run eight sessions of, let's say, an ethnographic observation on our tool, I can now quickly do 15. So that's one benefit — I don't have to be there. But it can also be more than that. You can have the AI moderator dig deeper into the topics you are interested in. It feels a lot more natural than people just talking into the void because there's back and forth."

MCP connectors

MCP is one of the newest, fastest-moving trends in research, and unlike most buzzwords, it's actually changing how work gets done. Where research once lived in a siloed report or repository, MCP now enables instant, direct access to that knowledge, right from the tools teams already work in.

That speed isn't just for the rest of the org; it changes how researchers themselves work too. With customer knowledge always within reach, researchers can move through their own process faster, checking their thinking against real data as they go instead of after the fact.

Martin Garcia, staff UX researcher at NinjaTrader, has felt that shift firsthand, "It was a method for me to catch myself and find errors in my own work. And from there, it just spirals — where in my workflow do I have an opportunity to finesse a little more time out of it?" He also pointed out, "It's a big help not having to context switch as often by jumping between tools."

When research knowledge is instantly accessible, both the organization and the researchers doing the work move faster, together.

"It's a big help not having to context switch as often by jumping between tools."



Martin Garcia

Staff UX Researcher at NinjaTrader

There's also a quieter benefit: participants can be more candid with an AI interviewer than a human one, without the social pressure of being judged in the room. AI-moderated interviews sit in a middle ground between a survey and a human interview; they're richer than the former, lighter than the latter. Cost is part of the appeal too, since AI-moderated interviews often run far cheaper than human-moderated ones.

AI personas

AI personas, or "synthetic users," are AI-generated profiles built to stand in for real people. The strongest versions draw on your own customer research, instead of leaning on a generic model's best guess. The promise: teams interview them, test positioning against them, or ask them to complete a task, all without scheduling a single real conversation.

Skepticism has grown right alongside adoption, and for good reason. Researchers question whether a synthetic user can faithfully represent a real one: personas built from limited or narrow data tend to flatten toward the average, missing the edge cases and minority behaviors that make real customers unpredictable in the first place.

Some teams are already building around that concern. At OnePay, for example, the research team has been building an internal tool that lets colleagues have a conversation with a composite of the company's customers, assembled from their own research data rather than a generic model's guess.

Predictive, continuous signals

Teams want to surface patterns continuously across product, customer, sales, and market intelligence, catching blind spots outside their own team's view. And they want a system that points out trends before anyone's even asked the question.

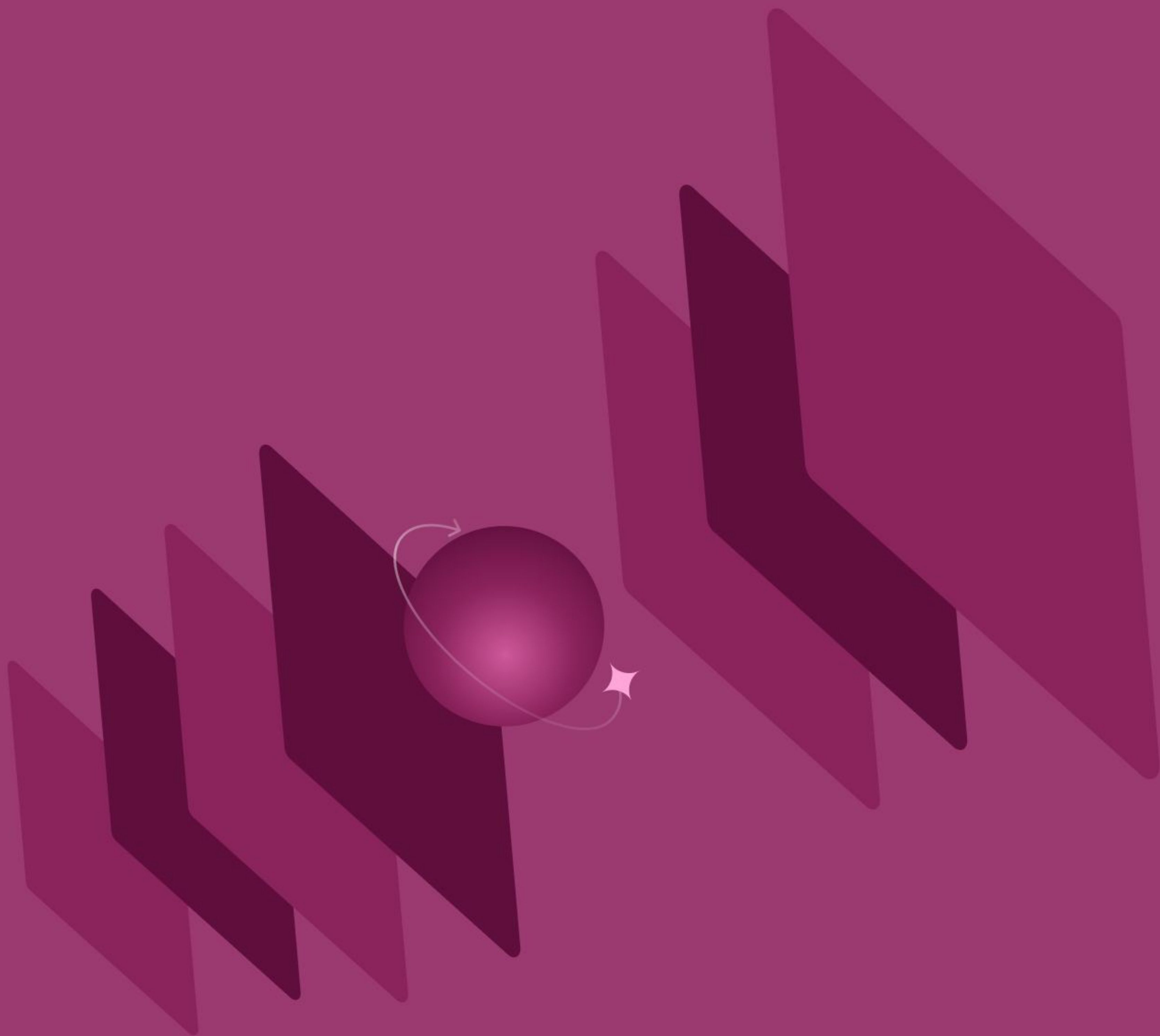
But that only works on top of a living, connected evidence base, like an active repository. That's why organizations with an active repository are more than three times as likely to see significant AI time savings, the reward for getting the foundation right. That same foundation is also the on-ramp to what's next: agents that don't just watch the data, but act on it.

Fully autonomous agents for research

Signals tell you what's happening. The next evolution puts an agent in the loop, one that doesn't just watch the data, but acts on it: scoping a question, pulling from the evidence base, drafting a plan, and returning a first cut for a human to direct. It's early, and we'd caution against betting on a fully autonomous research workflow this year. But the teams with a connected foundation for their customer knowledge today are the ones who'll be able to use it first when it matures. The method, whether new or traditional, is only as good as the data under it.

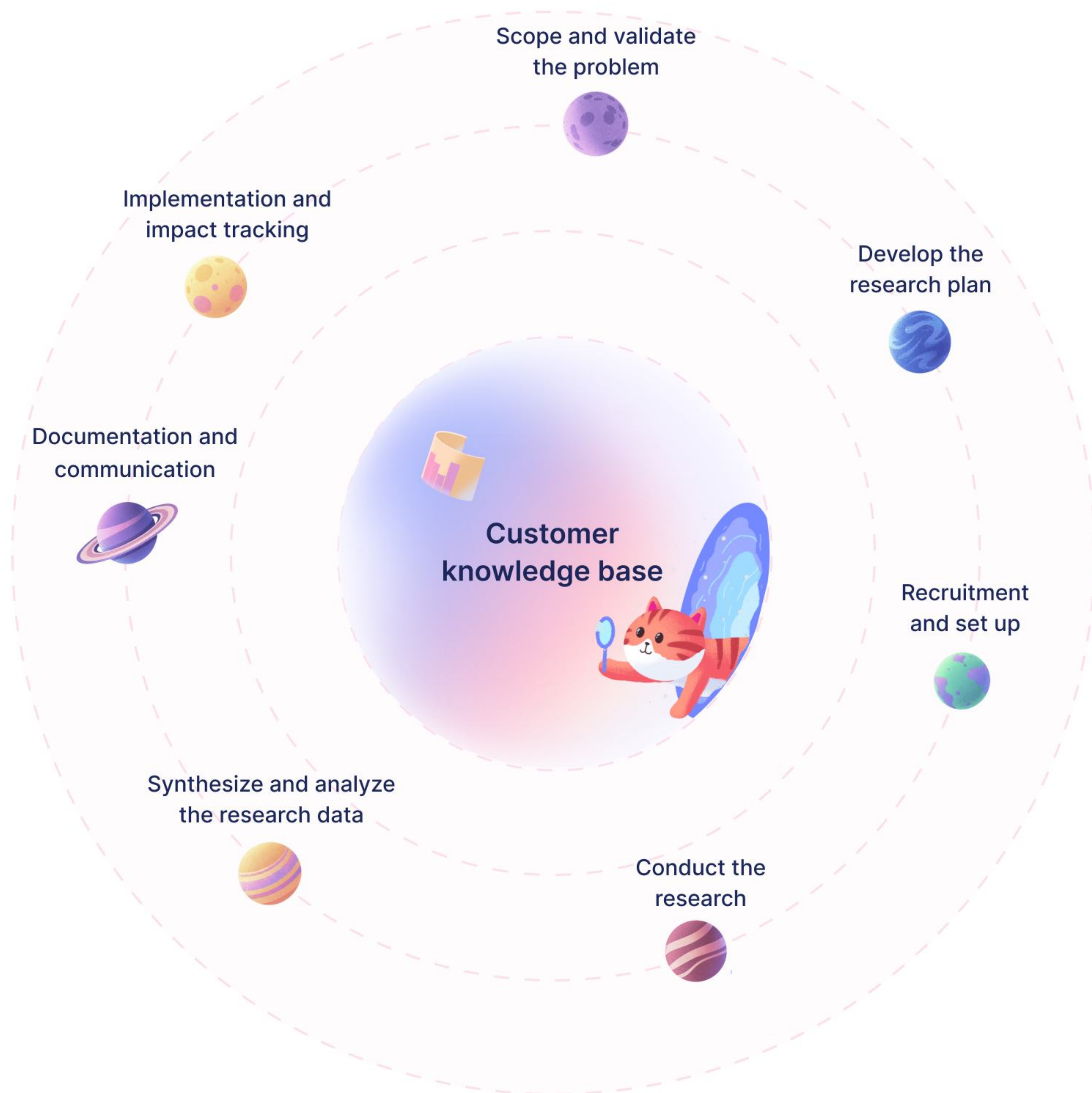
The 7 stages of modern research

A 2027 update

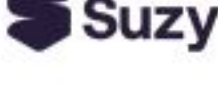


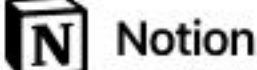
The 7 stages of modern research | A 2027 update

The seven stages of last year's workflow haven't changed, but the process certainly has. Work used to move from stage to stage, all in a line. Now, AI is ubiquitous in the workflow, so every stage orbits around everything your organization knows about its customers.



The 7 stages of modern research | A 2027 update

Workflow stage	Last year	Where we're heading	Tools to consider	
Scope and validate the problem	AI analyzes existing data to pressure-test assumptions faster.	Predictive signals flag emerging problems before stakeholders ask.	  	  
Develop the research plan	AI drafts plans, discussion guides, templates, and screeners so no one starts from a blank page.	AI designs studies from your repository and past work. Humans edit for context, bias, and judgment.	  	  
Recruitment and set up	Platforms automate outreach and scheduling, but recruitment remains one of the most resource-intensive steps.	Hybrid panels emerge. Synthetic personas are being piloted for early passes. Humans stay reserved for the conversations that matter.	  	  
Conduct the research	AI handles transcription and note-taking so interviewers stay engaged.	AI moderation scales interview volume across languages and time zones. Humans step in for the conversations that need rapport.	    	    
Synthesize and analyze	AI automatically tags data, surfaces themes, and summarizes key insights.	Synthesis runs to surface insights continuously across every channel, including sales calls, support tickets, and social listening.	  	  

Workflow stage	Last year	Where we're heading	Tools to consider
Documentation and communication	A centralized repository makes insights searchable and shareable.	Insights show up inside the tools where decisions happen through MCP. The knowledge repository becomes an always-on answer engine instead of a separate archive.	     
Implementation and impact tracking	Reminders, impact logs, and quarterly reporting are still very manual.	Outcome tracking is built into the workflow, and ROI reporting is delivered automatically as part of the readout.	     

Inside the 7-stage modern research workflow

1. Scope and validate the problem

2027 SHIFT

Predictive signals flag emerging patterns before a stakeholder raises them.

Before they sit down with stakeholders, researchers now run an AI-assisted pass through existing tickets, past studies, and sales call themes. The new question gets tested against existing knowledge before anyone commits to a study.

The judgment call at the center of this stage hasn't changed, though. Someone still has to consider, "Why are we asking this?" and "Why do we need it now?" AI surfaces patterns, but a person still has to decide whether leadership is ready to act on it.

This stage is also where predictive signals are starting to show up. Teams want problems flagged before a stakeholder asks the question at all. Scoping is shifting from a pull to a push. It's becoming something the evidence base does continuously, not something that starts from zero each time.

2. Develop the research plan

2027 SHIFT

AI now drafts full study designs, pulled straight from your team's past work.

Nobody has to start from a blank page anymore. AI drafts a first version of a plan or discussion guide, pulled from the team's past work. Today, the researcher's job is to edit the plan, catch bias in questions, and decide whether they need to collect more data or not.

This stage is also where "direction versus depth" becomes a key decision. Not every question needs a full study. Sometimes talking to a few customers or uncovering insights already in your repository are enough to give a team confidence to act. That only works if the repository is active. Teams that keep theirs alive reference existing research in major decisions far more often than teams that let it go stagnant.

AI-drafted plans still carry whatever bias was baked into the prompt or the training data. Teams that skip a dedicated review step may end up with insights nobody trusts.

3. Recruitment and set up

2027 SHIFT

Hybrid panels combine a fast synthetic pass with real participants when it counts.

Recruitment is still the hardest stage of the research workflow, and there's no single right answer to when and how much AI should be involved. How much a team leans on a synthetic panel versus real participants is a judgment call, shaped by what the team has the resources to do and what the study actually needs.

That's because every audience is different, and so is every recruitment approach.

"There's a whole world of different audiences out there that companies are building solutions for," Oren Friedman, CEO at Rally, told us last year. "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."

The smartest teams are running experiments. They're running a fast synthetic pass at scale to surface the riskiest questions and sharpest disagreements, then bringing in real participants to answer and settle them.

4. Conduct the research

2027 SHIFT

AI is changing how research gets done, across every method.

This stage is where all your interviews, surveys, and other data collection happens, and AI is potentially helpful with all methods. For instance, always-on research through live intercepts captures feedback continuously as customers use the product. And you completely skip the scheduling or language logistics a live study usually requires.

Project-based research is where AI shows up in the most varied ways. Some interviews are fully AI-moderated, running without a researcher present. Others are human-led with AI assisting on transcription and follow-up prompts. Mixed-method studies achieve quantitative scale alongside qualitative depth by pairing a structured survey with AI-moderated interviews.

In strategic, foundational research, predictive signals can flag what's worth asking before anyone raises it, and agentic tools can scope a study and return a first cut. But across every method, one thing hasn't changed. Knowing when to dig deeper, question a result, or steer the study in a different direction still needs a person in the loop.

5. Synthesize and analyze

2027 SHIFT

Synthesis now runs continuously across every channel your customers already deliver feedback.

Synthesis used to belong to the researcher alone. Now, with the right tools, a product manager can pull themes out of support tickets. A designer can scan session recordings for friction points. Leaders can ask questions in plain language and get evidence-backed answers. AI lowered the barrier to entry so that pattern recognition, theming, and sentiment analysis no longer require a research background.

Synthesis is also faster and more constant than it used to be. What took weeks now runs in minutes, often continuously, pulling in important signals from sales calls, support tickets, and social listening alongside any interviews still in flight.

But, speed and access don't guarantee accuracy. AI synthesizes by frequency, and the best findings often live on the fringes.

"Sometimes the things that are infrequent lead to the most salient 'aha' moments in research. I worry with AI that if we're just focused on frequency, we're going to miss some of the nuance," Owen said.

Someone still has to check whether a pattern is meaningful or just the loudest thing in the dataset.

"Sometimes the things that are infrequent lead to the most salient 'aha' moments in research. I worry with AI that if we're just focused on frequency, we're going to miss some of the nuance."



Owen Sanderson

Senior Director of Research & Design Strategy at IA Collaborative

6. Documentation and communication

2027 SHIFT

The repository becomes an answer engine that pushes answers to Slack, Figma, and other tools where teams already work.

Every piece of research you've ever run should still work for you, if relevant. That's why most modern teams rely on a centralized and active repository with easy, searchable access to customer insights.

The data backs this up. Organizations with an active knowledge repository reference research in major decisions 25% more often than those without one, and they're four times as likely to reference it in almost every decision. Fewer than half of all organizations have one active today.

The bar for documentation has moved past just storing it somewhere. An active repository is a living system that learns as it adds information, and becomes a brain for multi-player AI usage. Most stakeholders never log into a research tool, and they never will. Business insights have to travel to their preferred workflows instead, continuously and automatically.

"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," Mahad said.

This means centering your research workflow as company infrastructure. Mahad built a self-serve insights system at Included Health that cut analysis time by 2–4x for the whole organization. And at OnePay, every new hire gets viewer access to customer insights in the company's repository from day one, through an internal tool the team built on the Marvin MCP.

“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.”



Mahad Bullo

Senior Staff UX Researcher at Included Health

7. Implementation and impact tracking

2027 SHIFT

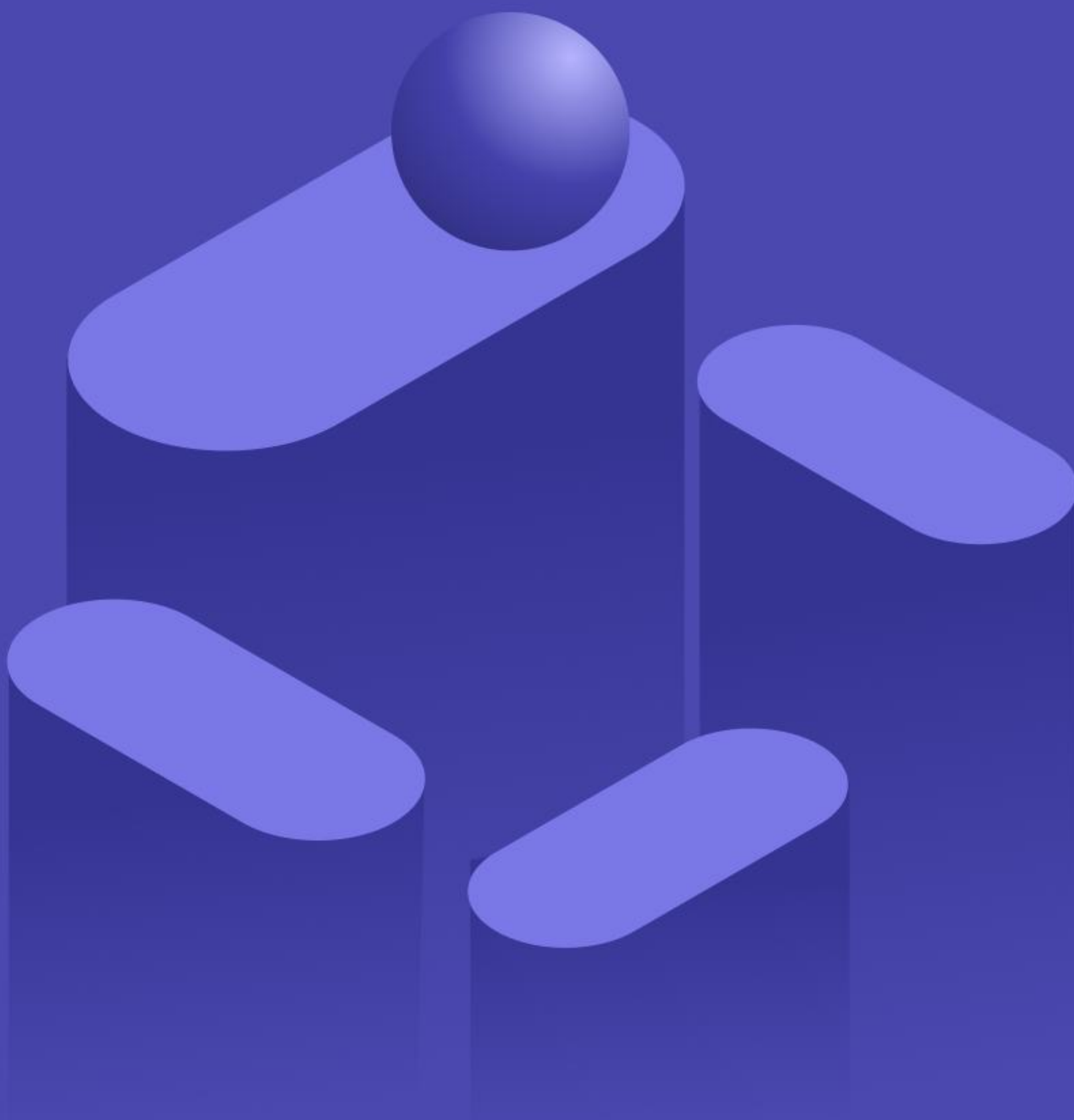
Tracking the impact of your insights now runs inside the workflow, and can connect to more of the business.

This is where insights turn into action, and where most teams still struggle. Turning a finding into a decision means partnering with other teams to carry it forward.

What's changed is how that follow-through gets tracked, and how far it can reach. Instead of reconstructing an impact story manually at quarter-end, outcome tracking is now built into the workflow: automated check-ins, a running log of what shipped and what it affected, live dashboards ready for the next leadership meeting. And it doesn't have to stop there. A connected repository can plug into revenue data from the CRM, adoption data from the product, or performance data from marketing. With the additional context, it can surface connections between a finding and result, which most teams aren't yet thinking to look for.

While most organizations don't have this in place yet, the teams that do, treat impact tracking as a job. A frequent readout paired with a running log, measured against established KPIs, does more for a research team's standing than any single study can.

Steps to get your team ready



Step 1

Fix your foundation first

Step 2

Pilot deliberately and measure against a human baseline

Step 3

Write your human-in-the-loop rules down before your competitors do

Step 4

Report impact like it's your job, because it is

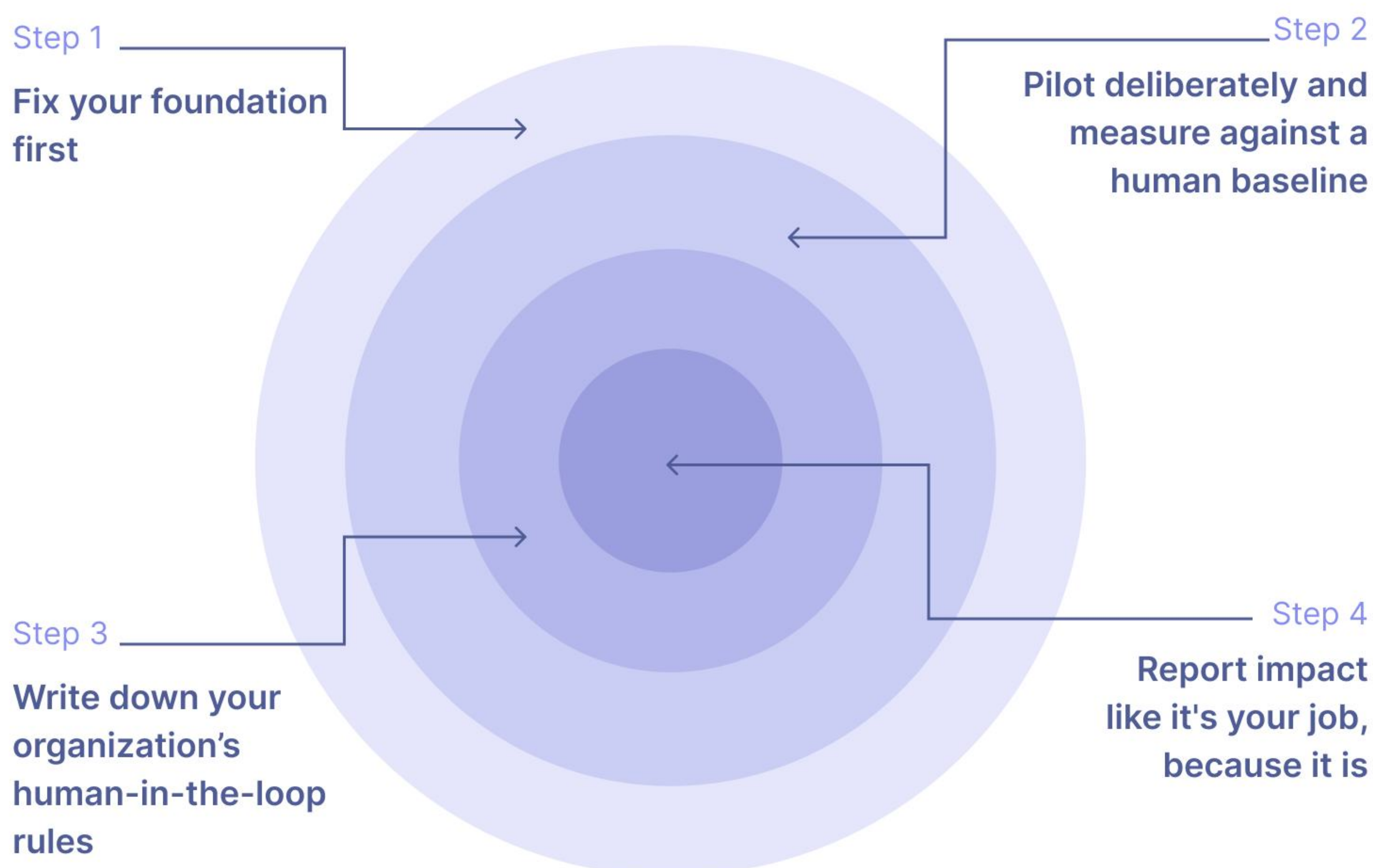
Steps to get your team ready

Everyone's doing research now, and that's good news for the modern researcher.

When research spreads across every function, people need someone who knows how to ask the right question, catch bias before it skews a study, and turn scattered signals into a decision worth acting on. Building that judgment and the intelligence systems everyone else leans on is how you go from running studies to leading the room.

“There's still a huge place in the world for research, and it's not going away,” said Nate Wearin, co-founder and head of research and design at Fuego UX. “There are tons of really meaty problems in understanding people, and then communicating what you learn back to the teams building the product, who may already believe they understand what their users need.”

With AI, products ship faster than ever. Understanding the people you're building it for is still the hard part — which makes it your advantage. Here's how to lead your organization in that direction:



Step 1 | Fix your foundation first.

Every AI workflow performs better on top of an active repository, and what makes one active isn't luck, it's the details. A taxonomy that map to how your org asks questions, permissions that let people in without creating chaos, memory that carries context across sessions, MCP connections that put the repository where people already work, and a prompt library so nobody starts from a blank page.



How Marvin helps

Marvin's knowledge repository is built to be the always-on foundation these other AI workflows sit on, with MCP connectors bringing it into the tools your team already works in.

Step 2 | Pilot deliberately and measure against a human baseline.

Right now, most teams adopt AI the opposite way, reaching for several tools at once and seeing what sticks. Almost no one runs a structured pilot with human control. That's the opportunity. Pick the one workflow closest to a decision your organization already struggles with. Run it against how a person would have done the same task, and keep what earns its place. A measured pilot gives you something the scattered approach never does: proof.



How Marvin helps

Marvin's AI Moderated Interviews and Live Intercept let you run an AI-moderated arm of a study alongside your human interviews, so you can compare what each approach surfaces before deciding where to scale AI further.

Step 3 | Write down your organization's human-in-the-loop rules.

In all our conversations this year, we found almost no one who has written down explicit rules for which studies AI can moderate, which outputs need human verification, and which calls demand a researcher's signature. Everyone agrees the judgment matters. Almost no one has codified it.

A one-page standard beats a hundred ad hoc debates, and the teams that write theirs first will set the bar everyone else adopts. This is increasingly the work of Research Ops, the function that owns the templates, tagging, access, and standards that keep quality consistent as more non-researchers do the work.



How Marvin helps

Once your team has written the rules, Marvin gives you a place to apply them, controlling who can run an AI-moderated study, what needs review, and what ships straight to the repository.

Step 4 | Report impact like it's your job, because it is.

Impact measurement was ranked as the top priority in our survey. The trouble is the how. Some tie research to specific product decisions or faster time to market, which works. Others lean on anecdotal success stories or admit they struggle to demonstrate value at all. Decisions and outcomes are the real markers of impact. The teams that measure their influence in the business's own language are the ones that keep their seat when budgets tighten.



How Marvin helps

Marvin turns impact tracking from a quarter-end scramble into a running log. This infrastructure helped financial services company [Wave HQ](#) generate a report that used to take 10 days in just 4 hours.

“[With Marvin] I can spend two days and get all of the reports done for the month. Great. Now we have the rest of the month to do a ton of other stuff too.”



Josh Litwin

Senior Manager, Research and Insights, at Wave HQ

Conclusion

Despite leadership's enthusiasm to “listen to your customers,” most customer insights never reach the people who could act on them.

But as research becomes something the whole organization does, not just the research team, the evidence base becomes the foundation everyone relies on. Good judgment, wherever it lives, is what keeps a fast answer from becoming a wrong assumption.

The role of research is evolving. The organizations that come out ahead won't just run the best studies, they'll invest in the workflow that lets everyone do research: judgment built in at every stage, an evidence base that's always-on, and insight wired into the tools people already use.

Build that, and the distance between insight and action closes from both sides. That's not a smaller job than research used to be, it's a bigger one.

About the methodology

This report draws on the full dataset from *The State of Modern Research 2026*, a survey of 309 researchers, research consumers, and leaders conducted by Marvin in April 2026. Some figures in this report were published in that report; others reflect additional analysis of the same underlying survey dataset conducted specifically for this report. Respondents span 15+ industries, and nearly half work at companies with more than 1,000 employees. Forward-looking figures come from survey questions about planned adoption over the next one to two years. Quotes come from customer interviews and Marvin's 2026 Expert Event Series. We used Marvin to analyze the data and surface patterns across role seniority, research infrastructure, and AI adoption that informed the findings in this report.



About Marvin

Marvin is an AI-native customer insights platform that turns scattered knowledge into a living system that gets smarter over time, and makes insights easy to discover, share, and put into action. With centralized knowledge, built-in research guardrails, and enterprise-ready security, Marvin makes it easy for any team to ask a question and get an answer grounded in cited evidence. Teams at the world's most loved companies and brands use Marvin to understand their customers and make better decisions faster. Trusted by companies like Microsoft, Included Health, Best Buy, and NRG Energy, and backed by leading AI investors including Sam Altman and Fuel Capital, Marvin is redefining how businesses use research to accelerate ideas. For more information, visit HeyMarvin.com.

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See how Marvin helps research teams build modern workflows to drive better decisions.

[Book a demo](#)

