



Making Experience Research Actionable

Turning Insights Into Decisions And
Decisions Into Better Experiences



Research



Evidence



Decision



Outcome

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Executive Summary

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This guide is about
closing that gap between
Research & Action



Most UX research doesn't fail because it was bad.

It fails because the conditions required to act on it were never built.

Teams can produce rigorous, well-crafted insights and still watch them disappear into shared drives, get skipped in roadmap conversations, or arrive too late to matter. The problem is rarely the quality of the research. It's the gap between insight and action — shaped by culture, relationships, process, and timing that most research teams are never taught to address systematically.

Making experience research actionable is built around three components:

A diagnosis of why research gets stuck, the Insight Activation Arc — a framework mapping the journey from research that sits unopened to research that drives strategy across 5 phases and 6 levers — and a practical toolkit of collaboration strategies, workshop formats, and advocacy-building guidance for doing the work phase by phase.

The organizations that get the most from their research investment are not always the ones with the largest teams or the most sophisticated tooling. They are the ones who have built the conditions that allow insight to travel from the moment it's discovered to the moment it's needed.

Introduction

Even with irrefutable evidence in hand, getting people to act on research recommendations is harder than it should be. Competing priorities, packed backlogs, and a dozen urgent fires mean that stakeholders — even well-intentioned ones — need more than just good data to change how they work. The barriers are real, and without a strategy for change to follow, they can be insurmountable.

This is a practical playbook for UX Researchers who are done waiting for their insights to speak for themselves — whether you're embedded in a product team, leading a research practice, or flying solo inside an organization that hasn't quite figured out what to do with you yet. By the end, you'll have a clear framework for diagnosing why your research isn't moving, and a set of concrete strategies for changing that. Plan for about a 60-minute read; the tools and templates

in the back half are designed to be used on the job, not just read once and shelved.

We'll walk through the most common barriers to research activation, ground them in the science of stakeholder dynamics, and introduce the Insight Activation Arc for building the kind of alignment that moves organizations forward. From there, we get tactical — activities and approaches you can put to work with stakeholders at every level. Jump to Section 3 if this problem is already well known to you, and you want to get straight to the framework; work through it front-to-back if you're still building the case internally.

There are no shortcuts here. Changing behavior — in others or in your culture — takes time, consistency, and relationship capital.

The Good News

The skills required are ones you already practice every day. Active listening, empathy, curiosity, and the ability to sit with ambiguity. You're already applying them in your conversations with users. This guide is about turning them on in your organization.



Why Good Research Goes Nowhere

Stop me if you've heard this one:

A Researcher, a Product Manager (PM), and an Engineering Lead head toward a bar. The Researcher stopped and documented it in a report. The other two were leveled by it.

Research rarely gets shelved because it was bad. Great insights go nowhere all the time. What drives research into action — or kills it — is how it gets communicated and how well it fits into business operations. You're navigating stakeholders with different roles, perspectives, attitudes, ways of working, and agendas — and processes built around established workflows, rituals, and deeply held expectations about how decisions get made. Because every organization is different, the specific friction points will vary. But certain patterns consistently halt good research from moving forward — and recognizing them is the first step to getting past them.

Barrier 01

Culture and Organizational Inertia

Organizational culture isn't what's written on the corporate intranet. Sometimes, it flies directly in the face of it. Culture is the unspoken agreements, the levels of approval required before anything moves, the *"this is just how we do things here"* that greets every new idea. Anyone who has spent time across Fortune 500 companies, scaling startups, or consultancies understands this distinction intuitively. Culture and organization — not technical limitations — are the core barriers to knowledge sharing⁽¹⁾. To this end, new knowledge management tooling may be necessary, but it won't be sufficient without a pre-existing culture that values putting knowledge to use.

Not all cultures need a full overhaul before progress is possible, and waiting for one is its own kind of inertia. Knowledge activation thrives in environments that encourage sharing ideas, foster collaboration across roles and experience levels, and provide a shared body of prior knowledge to build on⁽²⁾. These conditions can be cultivated within smaller communities inside a larger organization

even when the broader culture is slow to move. The implication for Researchers is important: the Researcher's role is not to make decisions but to inform, guide, recommend, and support those who do⁽³⁾. Working within that reality — rather than against it — is where real traction begins.

Acting like a change agent inside a resistant culture doesn't mean mounting a major campaign or strong-arming stakeholders into caring about research. It looks quieter than that. It's identifying the one Product Manager who already asks for

data before making decisions and making their life easier. It's showing up to the sprint review, not just to present findings but to understand what the team is trying to solve. It's framing insights in the language of the people in the room — business outcomes, delivery timelines, risk reduction — rather than the language of the research report. Culture shifts at the edges first, through small wins and trusted relationships, before it shifts at the center. Researchers who internalize this stop waiting for permission to be influential and start building the conditions for it.

Key questions you might be asking yourself



- Do people in this organization regularly cross disciplinary boundaries to ask questions, or does each team tend to stay in its lane?
- Where does decision making actually take place in my organization? Business leaders? Product teams?
- How far separated are the cultures of the local product tribes your team supports from the broader organization they are situated in?
- When new ways of working are proposed, do teams tend to engage with curiosity or find reasons to stick with what's familiar?
- Do senior leaders in your organization model the behaviors they say they want from teams?

Barrier 02

Stakeholder Relations Management



As if navigating organizational culture weren't enough, activating research insights also means managing a complex web of stakeholder personalities, disciplines, and competing priorities. Not all stakeholders are created equal, and treating them as if they are isn't just inefficient — it can stall the effort entirely.

Stakeholder theory identifies three attributes that determine how much attention a stakeholder deserves:

Their power to influence outcomes, the legitimacy of their claims, and the urgency of their demands⁽⁴⁾. In practice, this means a VP of Product who controls roadmap decisions requires a fundamentally different engagement strategy than a Developer who will eventually implement your recommendations.

Analyzing stakeholders requires diving into these differences. The Nielsen Norman Group applies Mendelow's Matrix to frame this dynamic visually along the axes of power and interest, helping Researchers prioritize where to invest relationship-building energy and how to engage each stakeholder type appropriately⁽⁵⁾. Layered on top of this is



If you don't put exactly what they're saying what you're looking for, it'll send you down random rabbit holes. So, I'm always hesitant of that [search].

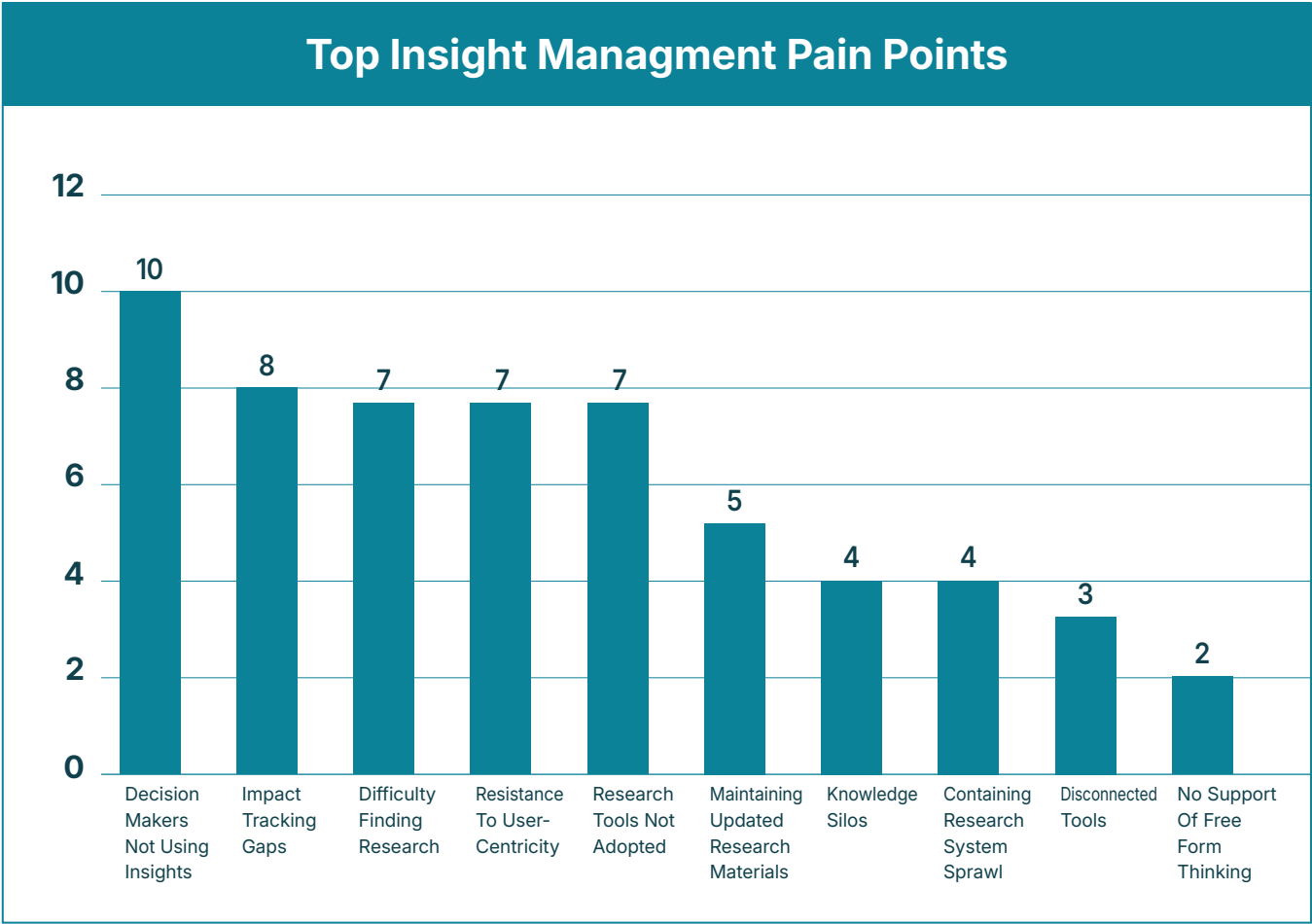
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the reality of organizational politics. Influence is earned week by week through trust — not granted by virtue of having done good research. Understanding your circles of control, influence, and concern clarifies where you can act directly, where you can apply pressure, and where you need to simply stay informed⁽⁶⁾.

The second dimension of this barrier is process. One of the most preventable mistakes Researchers make is failing to engage stakeholders throughout the

research process. Long-term knowledge impact necessitates a journey that starts with immediate outcomes such as tactical study completion, moves through intermediate outcomes and quality improvements, and ultimately reaches the decisions and policies that research should inform⁽⁷⁾. In other words, engagement

at the end isn't engagement at all — it's a ritual without substance. Stakeholders involved from the outset are significantly more likely to independently disseminate findings⁽⁸⁾ — effectively becoming advocates without being asked — and cultivate the kind of trust that turns passive recipients into engaged participants⁽⁹⁾.



Context: Study of research process pain points of 16 participants in the UX Research, UX Design, Research Ops, and UX Management space (2025).

Exact Phrasing: Which of these insight management problems afflict your team the most? (Top 3). [Multiple Choice]

The final dimension of this barrier is timing. Researcher timelines are driven by rigor: recruiting, running sessions, synthesizing, and producing something defensible all take time. Stakeholder timelines are driven by roadmap cycles, sprint reviews, budget conversations, and the quarterly pressure to ship. These two clocks rarely run in sync; when they don't, even excellent research gets shelved, not because it was unwanted but because it was too late. The practical implication is that Researchers must understand the

decision calendar as well as they understand their methodology, working backward from when a decision will be made rather than forward from a study kickoff.

George Bernard Shaw observed, "*The single biggest problem in communication is the illusion that it has taken place.*"

Delivering a research report is not communication. Building the relationships and follow-through that move insights into decisions — that is.

Key questions you might be asking yourself



- Which stakeholders seek out research proactively, and which only engage when directly asked?
- Who has the most influence over whether research gets acted on? How strong is your relationship with that person?
- At what point in your process do stakeholders typically first engage with research — at the beginning, during, or after?
- Do other teams trust the research being produced? Which ones trust your team and its results the most? Are there any that are actively skeptical of it?
- What processes and timeframes do the roles you collaborate with uphold most rigidly?

Barrier 03

The Missing Link To Business Outcomes



Many studies serve the immediate needs of the teams that commissioned them. That much is understood. What's less understood and more costly is the assumption that, because a product drives business outcomes, any research in service of that product does as well. Without explicitly defining the connection, that assumption can quietly erode the team's standing with each subsequent study.

Business outcomes are not actions. They are achievements. They define the direction an organization is headed, shape incentives, and set the bar for what counts as progress. They are qualified by measurable results over time, not by the volume of work produced in pursuit of them. A usability study that surfaces friction in a checkout flow is valuable. A usability study that connects that friction to cart abandonment rates, revenue loss, and a strategic priority to improve conversion is indispensable. The difference between the two isn't the quality of the research — it's the deliberateness of the connection.

This distinction matters because it changes how research is received. Researchers who frame findings in business terms alongside usability terms carry significantly more weight in roadmap decisions⁽¹⁰⁾. Aligning research to business goals repositions the function from a service that teams request when convenient to a strategic input that informs where the organization goes next⁽¹¹⁾. Researchers who understand this shift from order takers to strategic partners are the ones translating customer knowledge into a decision-making asset.

Measurement alone isn't enough. It must be strategic and tied into a broader story you are telling. Mapping research impact to goals rather than simply to KPIs forces a more intentional selection of the metrics that matter: the few that demonstrate the greatest contribution, rather than the many that merely demonstrate activity⁽¹²⁾. Without a considered approach to how research connects to broader business outcomes, research activation will always be limited.

The practical implication is straightforward. Before a study begins, the question shouldn't only be *"what do we need to learn?"* It should also be *"what decision does this inform, and what business outcome does that decision serve?"* Answering that second question up front

doesn't constrain the research — it sharpens it and gives every insight a place to land when the report is delivered.

If any of these patterns feel familiar, you're not alone — and you're not stuck. The Insight Activation Arc was built specifically for this starting point.

Key questions you might be asking yourself

- Can you name the top two or three business objectives your organization is actively pursuing this year?
- Does the research completed to satisfy various team's requests also satisfy the broader business agenda of the organization? How do you know?
- What sorts of things do you measure in your research? Is there anything others are asking you to measure? Why?
- Is the research unit able to interact with those setting the business strategy and defining the business objectives?
- Could you draw a direct line between your last three studies and a specific business decision or outcome?



Case Study

When The Conversations Stopped, So Did Everything Else



A product team within a large technical infrastructure company had built a portfolio worth protecting:

Years of successful launches built on a foundation where design, engineering, and product management were genuinely in sync. Anchored by a UX research leader who had spent years cultivating trust with customers, that connection was respected as one of the most important parts of their software development process.

Then the research leader retired. Several re-orgs followed, bringing new engineering and product team members with different working styles and cultural expectations. Without the relationships that had held things together, the seams started to show. Development began by building what it thought was important rather than confirming with customers. Product pushed UX toward output, focusing on new UI designs, faster cycles, and feeding development; there was a lot less asking whether any of it was the right thing to build. Leadership didn't provide the support needed to ask harder questions

as leadership shifted its focus toward revenue at the expense of innovation. Furthermore, there was no senior UX voice to push back. Customers, sensing the shift, quietly stopped participating.

By year three, the damage was visible. The development team hadn't shipped anything. Infighting had stalled the work. The team had drifted from Awareness (*explained in the following section*) into something much more hostile. Everyone was protecting their own territory; nobody was rowing in the same direction.

The turn came from some outside help. UX leadership elsewhere in the organization centralized all UX personnel and brought in several experienced leaders who could rebuild what had eroded. The UX team stopped waiting for permission. They started picking up the pieces of what had been lost, working closely with sales teams on new customer introductions. Trust had to be rebuilt with both customers and stakeholders — and the effort didn't go unnoticed.

What followed wasn't a dramatic turnaround. It was methodical. Cross-functional workshops facilitated by UX at the business unit level started to surface something the team hadn't seen clearly before: their flagship product didn't have a home of its own for customers, and much of the rest of the portfolio had been quietly ignored. With a reinvigorated leadership steadily becoming aware of the problem, they gave a path for the UX team to leverage their customer-centered expertise. Co-created customer journey workshops, conducted with actual users for the first time in years, revealed portfolio-level gaps that the product in question was positioned to fill. Research didn't save the product. It helped stakeholders find a better question to answer.

Ultimately, the product was absorbed into a larger initiative aligned with the organization's actual business objectives. Two years later, it shipped. It had finally become a flagship part of the portfolio. The teams now work on a level we

describe later as Participation. Product Managers, UX, and Engineers now participate in the research that shapes the product.

There are two takeaways here. First, complacency at any level can erode goodwill and trust with stakeholders, users, and customers. It took one retirement and reorganization for years of successful product development to slide into neutral. Second, research will not necessarily prevent failure, but the absence of research removes the mechanism by which teams find their way back. When the relationships eroded and the listening stopped, the team lost its ability to course-correct. While a process or the right tool can elevate the work you do, advancement and maturity require people to build relationships and trust. The answer, in the end, was people. Senior leaders who finally realized what UX could do, and a UX team willing to do the unglamorous work of rebuilding trust one conversation at a time.



The Insight Activation Arc

Good research is table stakes. What determines whether it moves is everything around it: the relationships you've built with stakeholders, the processes your teams already have in motion, the cultural frame through which insights are interpreted, and the data everyone can access. These are the conditions that determine whether research moves forward with stakeholders or stalls.

The Insight Activation Arc maps the journey an organization takes from research that sits in a cloud folder gathering digital dust to research that shapes strategy. It starts from the barriers described in the previous section and traces a path through **five phases**: **Awareness → Alignment → Participation → Championship → Integration**.

Each phase describes what the relationship between Researchers and stakeholders looks like in practice, the conditions required to advance, and what becomes possible when those conditions are met. Running through each phase are **6 levers** that shape the experience of every stage: **Relationships, Communication, Process, Culture, Data, and Timing**.

Before diving into the Arc, it's worth acknowledging that some environments aren't ready for it — where Researcher-stakeholder relationships are actively combative rather than simply underdeveloped. If that's where you are, this framework isn't your first step. A deeper, more arbitrated approach may be a necessary first step, as discussed elsewhere^{(13),(14),(15),(16)}.

For everyone else, the Arc starts here.



Five stages that transform research into organizational action

Phase 01

Awareness



Awareness is the starting point for a functional Researcher-stakeholder relationship. Stakeholders know who Researchers are, have a general sense of what they do and why it matters, and will accept insights when they're shared. What they won't do is go looking for them. Research findings don't show up in tickets, roadmap discussions, or sprint planning. This isn't because stakeholders are hostile to the idea, but because the assumption is that anything relevant has already been filtered downstream, usually through design. Often, it hasn't.

This phase maps roughly to the Storming stage of Tuckman's Stages of Group Development. The team is functional, tensions are manageable, but the collaboration hasn't yet found its rhythm. Communication is tribal: each discipline speaks fluently within its own lane and assumes the language will translate across them without much effort. It doesn't. Researchers present findings in research terms; product teams receive them through a product lens; Designers and Developers filter them through different build lenses. Everyone walks away from the same readout having heard something slightly different.

The deeper issue at this phase is one of cognitive ownership. Teams spend months building a mental model of a problem, forming an understanding and perspective through their own work and decisions. A finding they had no part in producing doesn't naturally fit the picture they've already built. Thus, a research report delivered at the end of that process doesn't update the model so much as sit next to it. The insight feels foreign, not because it's unwelcome, but because the stakeholder had no hand in shaping it. Involving stakeholders earlier in the research process, even in limited ways, measurably increases the likelihood that findings get taken up and acted on⁽¹⁷⁾.

The levers at this phase tell a consistent story. Relationships are cordial but shallow. They are functional enough to get work done, not yet strong enough to survive real disagreement. Data is heavily siloed, with access often gated behind approval processes that position Researchers as gatekeepers rather than collaborators. Processes are optimized within disciplines, reactive by nature, and vulnerable to wherever the next fire is coming from. Timing is driven by local priorities rather than shared ones. Research gets brought in too late, given too little time to conduct, and lands after the decisions it was meant to inform have already been made.

Awareness is a starting point, not a ceiling. Advancing from awareness requires two things:

A regular cadence of interaction that isn't tied to a specific project, and a shared

plan for what happens to insights once they're received. Without the first, relationships stay transactional. Without the second, even well-received research goes nowhere.

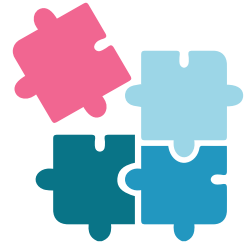
What to look out for in this phase



- Research findings are acknowledged in readouts but never referenced again in tickets, planning sessions, or roadmap decisions
- Stakeholders who are friendly and receptive but don't follow through on customer insights
- Each discipline operating in its own vocabulary — researchers talking about methods, product talking about features, engineering talking about implementation — with little translation between them
- Data and tooling access that requires formal requests, approvals, or significant lag time
- Research being scoped and scheduled around team convenience rather than decision timelines
- Assumptions by stakeholders and researchers alike that design is translating research into product decisions when in practice that handoff is incomplete or inconsistent

Phase 02

Alignment



Alignment is where things start to feel more functional and, consequently, where teams often make the mistake of thinking they've arrived. Stakeholders have begun building discovery research into their workflows. They know who to ask when a user question comes up, and there's a general sense that research has a place in the process.

What hasn't changed yet is where that place is:

Research still flows from the research side into the stakeholder side. The over-the-wall effect is alive and well. Teams are cooperating; they aren't yet collaborating.

In Tuckman's terms, this is the Norming phase. The group has found its rhythm, roles are clearer, and any friction left over from the Awareness phase has largely settled into defined expectations.

Processes have formed around points of interaction:

Product Managers groom backlogs with the team, Designers run design demos, and Researchers hold readouts. These rituals work well enough on the happy path. When something falls



We struggle with scattered files, slow insights, and hard to share findings. A single system to organize data and highlight key patterns would solve this.

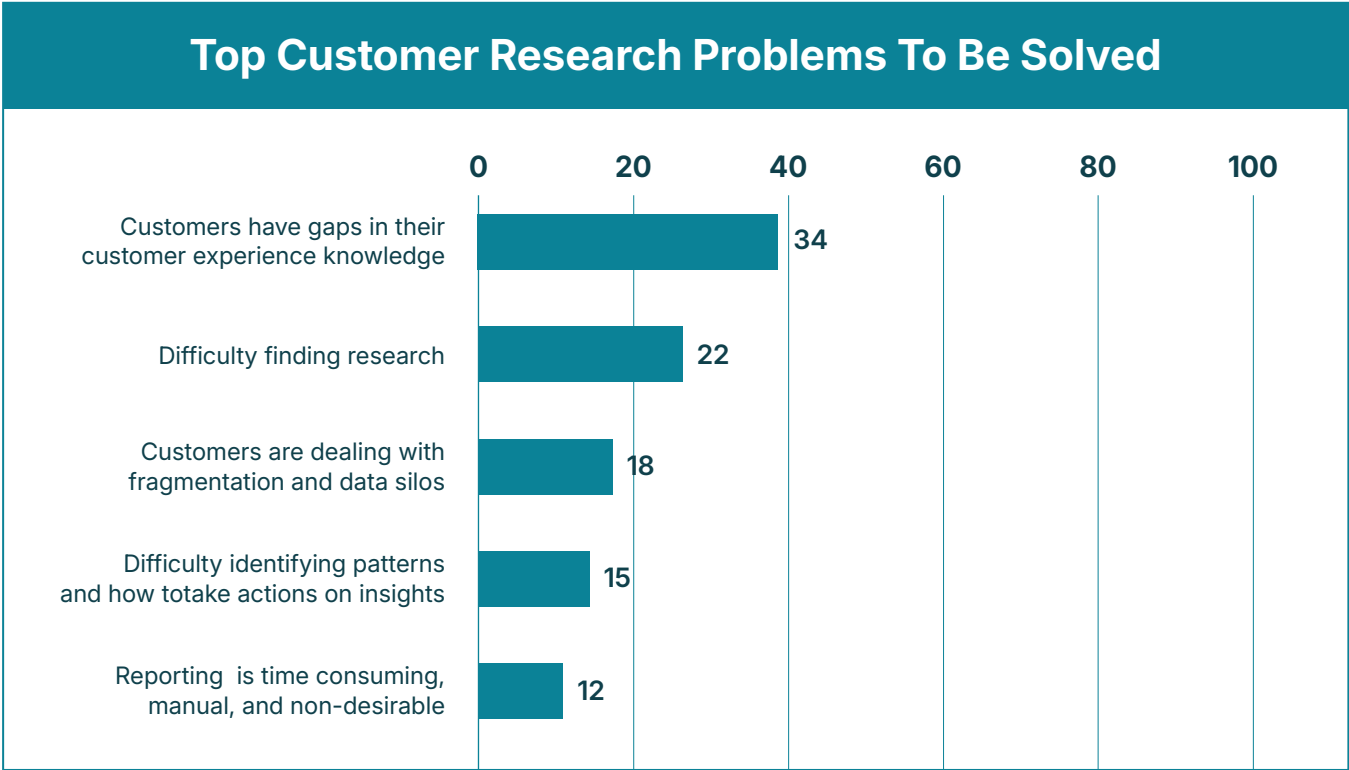
**Business Leader,
Mid-Size Software Company**

outside the script, such as an unexpected finding, a timeline conflict, or a question nobody knows how to answer, teams tend to flounder. The process is linear, and linear processes are brittle.

The defining characteristic of this phase is that everyone is still operating from their own mental model of the user. Product Managers maintain priorities based on what they believe the market needs. Researchers translate briefs into study designs. Designers expect answers

to their specific questions. Developers expect stable, solved designs ready to build. Each discipline has a picture of the user, and those pictures don't often get compared. This is also where premature solutioning takes hold. Teams are now cooperative enough to engage, but still tend to jump to answers before the problem is fully understood⁽¹⁸⁾. Research timing suffers as a result. Studies are scoped too narrowly, run too quickly, and delivered into a process that has already moved on to execution.

The levers at this phase reflect an organization in transition. Relationships have become cooperative, and there is a collective sense that everyone is working toward the same goal, even if the paths haven't converged. Communication happens regularly and across disciplines, but it remains ritualistic. When the established scripts don't have a response, conversations stall. Data is still siloed, but teams at least know what to expect and generally how to navigate the access process. Culture continues



Context: Study of research value of 112 participants split into 13 in the UX Research, UX Design space and 99 stakeholders from product, engineering, sales, marketing, etc. (2025).

Exact Phrasing: Can you please elaborate on what customer research problems you are trying to solve?
[Free Response]

to open up somewhat, but Psychological Safety hasn't fully taken root. People engage within defined lanes and rarely put themselves out there beyond them. Timing is more visible than it was at Awareness, but each group is still pacing itself independently. Research, product, and engineering are generally aware of each other's schedules, but they aren't yet fully synchronized.

Moving on from Alignment necessitates a certain curiosity. Stakeholders must wonder what's inside that black box and want to understand what's behind those customer insights, not just the

surface-level summary. Researchers, too, must want to be involved in what follows the research report and be willing to engage in regular discussions about design and technical execution as the voice of the user. That curiosity is what makes the next phase possible — when stakeholders start stepping into each other's worlds: attending a research session, participating in a design thinking exercise, joining a roadmap discussion. More openness, more points of connection, and a growing willingness to sit in the problem space before rushing toward solutions.



What to look out for in this phase



- Collaborative processes being put in place, but they lack an understanding whether they are producing better decisions
- Research being used primarily to validate directions already chosen rather than to explore the problem space before a direction is set
- Product teams generating feature ideas or design solutions before the user problem is fully understood
- Conversations that work smoothly in scheduled ceremonies but stall when something falls outside the established script
- Everyone having a slightly different mental model of who the user is and what they need
- Research arriving too late to influence the decisions it was designed to inform, despite everyone's best intentions

Phase 03



Participation

Participation is where the walls start to come down. Not demolished, but lowered. Stakeholders are no longer just receiving research; they are stepping into it. Engineers sit in on research sessions. Designers join synthesis workshops. Researchers, in turn, attend roadmap planning and design reviews. This is still observer territory for most. Most participants act as a fly-on-the-wall, where meaningful participation doesn't require full immersion. What it requires is presence, and presence alone begins to shift mental models. A Developer who has sat through two research sessions will never think about users the same way again.

The data bear this out:

When stakeholders participate in research, they are twice as likely to use the findings as those who don't⁽¹⁹⁾. Presence compounds.

In this phase, teams begin moving from a “how-to-build” mentality to a “how-to-solve” mentality:

From output- to outcome-centric thinking. This doesn't happen uniformly or all at

once. Product Managers are still largely the owners of prioritization decisions, driven more by capacity than genuine problem-solving. Researchers are still largely told what to investigate rather than consulting on what's worth investigating. But, the questions being asked are starting to change. Healthy disagreements become possible in a way they weren't in earlier phases. Researchers participate more in the post-research lifecycle, better positioned to track what happens to their findings and redirect future efforts accordingly.

As boundaries between disciplines erode, the educational burden at this phase falls heavily on those doing the inviting. Inviting a Product Manager into a research session is straightforward. Helping them understand what to look for, how to take notes, and how to avoid leading participants when asking questions takes time and patience. Stakeholders entering into a research process need support and should not be expected to be immediately fluent in research protocol.

The levers reflect those of a shifting organizational culture. Relationships are stronger, and trust is building, though each person still largely owns their own piece of the puzzle. Research is still viewed as a commodity; it's more respected than in earlier phases, but not yet fully integrated into how problems get framed. Communication has become more fluid: regular cadences remain in place, but ad hoc conversations across disciplines become more frequent. People are beginning to pick up each other's terminology and translate it into their own frame of reference. Data access is opening, though sharing is still reactive rather than proactive.

Teams begin to sense other team member's timing and cadence better:

A Product Manager can now see that if they want an answer in time for development, the Researcher needs a viable runway to get those answers — one that still leaves time for design. The dependencies are becoming visible even if the coordination isn't yet seamless.

The remaining gap is organizational rather than local. The immediate team is more in sync than it has ever been. But, senior leadership engages with research primarily through formal touchpoints (i.e., a quarterly readout, a strategy review), and the broader organization may still be largely unaware of what research is producing. The local progress hasn't propagated outward yet.

Advancing from Participation requires something more than curiosity and presence. It requires genuine empathy for each other and Psychological Safety (***read more about Psychological Safety in 20)***, where people have space to make mistakes and still feel supported. It requires team members to develop enough fluency in adjacent domains to speak up on behalf of areas they don't own. The signal that Championship is within reach is when an Engineer pushes back in a planning meeting on behalf of a user need they observed in a session 3 months ago.

What to look out for in this phase



- Stakeholders observing research sessions passively without the context to know what to look for
- The educational burden of onboarding stakeholders into research falling entirely on the researcher, with no shared infrastructure to support it
- Research being respected and well-received at the team level while remaining invisible to the broader organization, including by senior leadership
- Sharing of data and insights that still happens only when someone asks rather than proactively as a default
- A gap between the researcher's post-study involvement and what actually happens to findings once they leave the research team's hands

Phase 04

Championship



Championship is the cultivation of support and expectation emerging outside of one's lane. While champions can be cultivated, a more enduring form of championship is one in which the organization shifts without anyone orchestrating it. A Designer pushes back in a sprint planning meeting on behalf of a user need. A Product Manager cites research unprompted in a leadership review. An Engineer asks whether anyone has spoken with customers about a proposed feature before it is scoped. Nobody asked them to do any of this. They did it because the user's perspective has become part of their mental model.

These champions are driven by something more durable:

Genuine conviction, built through sustained exposure, trust, and Psychological Safety. Intrinsically motivated champions don't need to be maintained. They will self-perpetuate.

In this phase, a team is transitioning into

the penultimate stage of Tuckman's model, Performing. The team has stopped defending the boundaries of its own discipline and started finding ways to contribute to a shared outcome. The *"we're all in this together"* feeling that formed tentatively at Alignment has matured into something real and operational. Teams understand the *"why"* behind what they're building, not just the *"what."* Responsibilities are shared even where ownership remains distinct. A Product Manager still owns prioritization, but that prioritization now reflects varied perspectives rather than a single mental model of the market. Democratization of research becomes genuinely possible at this phase as participation gives way to champions who understand research well enough to maintain its rigor and scale its reach. The whole is starting to exceed the sum of its parts.

The levers reflect an organization now in mid-stride. Relationships are genuinely

supportive. People are invested in each other's success, not just their own deliverables. Communication at this phase is driven by expertise rather than hierarchy. People reach across disciplines because they know who knows what, and they've learned to trust what they find there. Everyone's processes have developed enough flexibility for allies to actively push back on decisions that ignore evidence. Culture is strong and research-focused, with champions reinforcing the value of evidence in decisions even in rooms Researchers don't occupy. Data access has broadened significantly as champions normalize the expectation that relevant research should be available to anyone who needs it.

The fragility, however, is also real. The success of this phase belies its weakness. If a key Researcher leaves, a critical ally moves to another team, or a champion gets promoted out of day-to-day product work, the organization can quickly lose significant ground.

Further, pressure mounts:

As research becomes more valued, demand for it grows faster than current capacity can deliver it. The system starts to strain under the weight of its own progress. What looks like a ceiling of what's possible for a research-first organization is actually a signal — the organization has outgrown what people-powered championship alone can sustain.

Timing remains one of the final hurdles. The organization is more aware of what's happening around it, but coordination still relies on a chain of communication that introduces lag and distortion. Champions help, but human networks alone cannot reliably ensure the right research informs the right decision at the right time; that requires something more structural.

Advancing to Integration means moving from people-dependent championship to system-supported co-ownership. The goal is not to replace champions but to build the infrastructure that makes their work self-reinforcing and resilient to change.

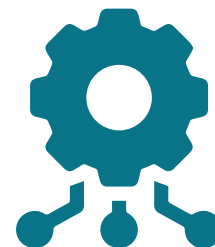
What to look out for in this phase



- Key champions who carry disproportionate weight such that if they leave, move teams, or get promoted out of day-to-day work organizational progress can erode quickly
- Research demand growing faster than the team's capacity to deliver, creating a bottleneck that frustrates the very stakeholders who have become most engaged
- Coordination that still relies on individual relationships and informal communication chains, introducing lag and distortion as the organization grows
- Champions who advocate effectively within their own teams but haven't yet influenced the broader organizational systems or processes
- The organization operating well when the right people are in the room and struggling when they aren't

Phase 05

Integration



Integration is where the Arc completes — not because the work is done, but because the work has become self-sustaining.

Research becomes the blueprint for how the organization operates. Citations appear in tickets and roadmaps not because a champion insisted on it, but because that is simply how decisions get documented. Discovery happens upstream, staying responsive to where the business is heading well before the need becomes urgent. While 79% of organizations include research during design, only 48% do so in the definition phase, which is exactly when the most strategic decisions are made⁽²¹⁾. The costly rework that plagues earlier phases becomes less frequent. Organizations in the Integration phase have pushed or been pushed upstream. Research isn't answering yesterday's question; it is preparing the organization for tomorrow's decision.

This phase is signified by its co-ownership of outcomes. While in the Championship phase, Researchers and stakeholders are



We are trying to better understand which customer needs or problems should be prioritized, so we can focus our product development and resources on the most impactful opportunities.

**Project Manager,
Mid-Size Hardware Company**

invested in each other's success, in the Integration phase, they are jointly accountable for the outcome. A failed product decision is not a research failure or a product failure; it's a shared failure. That shared accountability changes how decisions get made. Prioritization reflects not just capacity or political weight but a genuine understanding of what the evidence supports and what it doesn't. Decision-makers actively seek out the right research not to validate what's been decided, but to sharpen the question they're trying to answer.

This is the phase in which the Researcher's role completes its transformation. The practitioner who once fought for a seat at the table is now a strategic advisor helping leadership ask better questions before the table is even set. Researchers build best practices that enable discovery research to scale from the few to the many. ResearchOps, often stalled in earlier phases by larger cross-functional process problems, finally gains the traction it needs. Practitioners in that function find willing partners across disciplines, and together they architect the infrastructure that makes the whole system resilient to personnel changes, demand spikes, and organizational growth.

The levers at this phase reflect a system rather than a collection of individuals. Relationships are built on mutual trust and accountability. Conflict and disagreement happen, but everyone understands they are in service of the best outcome for users and the long-term viability of the business. Communication is less ritualistic and more anticipatory, where people surface problems and opportunities before they become crises, trusting each other to engage rather than waiting for a formal

touchpoint. Process is flexible and resilient, adapting to change without losing its orientation toward the end goal. Culture is one of mutual respect and genuine learning. Data is open and accessible by default, with tooling that supports a just-in-time model of insight delivery. Timing works because the system is designed for it. Shared tooling, defined cadences, and an accumulating body of institutional knowledge mean the gap between a question emerging and an answer being available narrows to the point where research and decision-making move together.

Integration is not a permanent condition. Even when the day-to-day becomes the most seamless and responsive, organizations that reach this phase still face the usual organizational pressures to change. It requires regular reinvention as the organization grows, markets shift, and new people and competitors emerge. The difference is that the system is resilient enough to absorb those pressures without regressing significantly. The infrastructure holds even when the individuals change. That is the final proof of Integration: the work outlasts the people who built it.

What to look out for in this phase

- Complacency — organizations that reach Integration can mistake systemic health for permanence and stop investing in the conditions that produced it
- New hires and organizational growth that outpaces the onboarding infrastructure, diluting the shared culture and practices that Integration depends on
- Market or strategic shifts that require research to pivot upstream into new domains faster than the existing system can adapt
- ResearchOps infrastructure that becomes rigid over time — optimized for how the organization worked rather than how it's evolving
- Senior leadership transitions that change the strategic relationship with research, requiring the function to re-earn its seat at the table with a new audience
- The gap between what the system can deliver and what the organization now expects widening as ambitions grow faster than capacity



Assessment

The Insight Activation Arc Assessment



Most organizations don't sit cleanly in a single phase. A team might have Championship-level relationships with one product group and Awareness-level dynamics with another. The Arc is not a report card — it's a diagnostic. The checklist that follows is designed to help you identify where your most important stakeholder relationships currently sit, where the biggest leverage points are, and where to focus first.

Instructions:

How to complete the Assessment

- 1 Rate the framework**
Assess your team or organization against the Insight Activation Arc.
- 2 Choose stakeholder groups**
Identify the key groups you would like to assess
- 3 Use separate sheets**
Use another sheet when assessing more than three groups.
- 4 Score each lever**
Select the level from 0 to 5 applies to each group across all six levers.

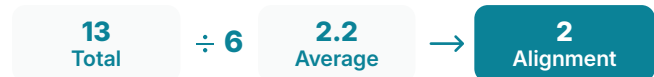
Scoring and interpreting results:

Add the totals for each group and the overall number of points. Average each total by dividing by the number of levers (6), then interpret the rounded average on the rubric.

Example: Product management:

- Relationships = ④
- Communication = ②
- Process = ③
- Culture = ①
- Data / Tooling = ①
- Timing = ②

Calculation:



Large differences between Relationships and Culture or Data/tooling indicate a need for more support in actions than words. Pay attention to lever imbalances as much as overall scores. A high relationship score alongside low data and process scores signals good will without infrastructure.

If you then add this overall score to 15 for engineering, 22 for design, and 13 for leadership, the combined average is 2.7 → rounded to 3: Participation.

Once you've identified where each stakeholder group sits, the following section provides strategies to rebalance the levers and gain ground to advance to higher phases of insight activation.

Lever 01



Relationships

Hostile:

Contentious and potentially hostile. They are actively holding back or sabotaging research work.

1

Awareness:

Cordial but shallow. Teams work alongside each other without meaningful investment in each other's success. When tension arises, it tends to linger.

2

Alignment:

Cooperative. Everyone shares a sense of working toward the same goal, though paths haven't converged. Disagreements are managed but tend to resurface.

3

Participation:

Trust is building. Team members show up in each other's spaces, though ownership is by discipline. Stronger but still defined by role boundaries.

4

Championship:

Supportive and actively endorsing. Team members are invested in each other's success, not just their own deliverables. Conflict happens but is navigated with enough trust to remain productive.

5

Integration:

Built on mutual trust and shared accountability. Disagreement is understood to be in the service of the best outcome. Researchers and senior leadership form a strategic partnership.

6



Communication

Hostile:

Either doesn't happen or requires a senior leader to force a conversation. Communication at this level is very transactional.

1

Awareness:

Tribal with each discipline speaking fluently within separate lanes. Little effort is made to translate across boundaries. Everyone walks away from a discussion having heard something slightly different.

2

Alignment:

Happens regularly. However, across disciplines, it remains ritualistic through a series of hand-offs. When conversations fall outside established scripts, they tend to stall.

3

Participation:

Regular cadences plus ad hoc conversations across disciplines. Team members begin to pick up each other's terminology, though genuine understanding of each other's world remains limited.

4

Championship:

Driven by expertise rather than hierarchy. Team members reach across disciplines because they trust what others know within their domain. They can represent perspectives outside their own discipline with reasonable accuracy.

5

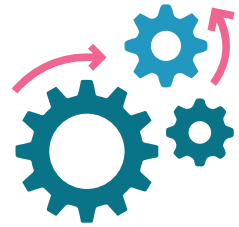
Integration:

Less ritualistic and more anticipatory. Team members surface problems and opportunities before they become crises, trusting each other to engage rather than waiting for a scheduled touchpoint.

6

Lever 03

Process



Hostile:

No meaningful interaction. Exists in isolation. Research has no defined role in how decisions get made.

1

Awareness:

Optimized within disciplines; reactive by nature. Teams respond to whoever is making the most noise. ResearchOps is constrained by broader cross-team problems.

2

Alignment:

Defined points of interaction — backlog grooming, demos, research readouts. Productive on the happy path but brittle when something unscripted happens.

3

Participation:

Disciplines are inviting each other into their ceremonies. Engineers sit in on research sessions; Researchers join roadmap planning. Lanes exist, but the doors are open.

4

Championship:

Proactive participation. Allies actively help push back on decisions that ignore evidence. Research is no longer a handoff — it is a stakeholder in decision-making.

5

Integration:

Flexible and resilient, adapting to change without losing orientation toward the end goal. ResearchOps finds willing partners across disciplines to shape the shared infrastructure.

6

Lever 04

Culture



Hostile:

Stagnant toxicity. Finger-pointing, blame, and reluctance to take risks. Team members who propose/introduce change are reproached and isolated.

1

Awareness:

Open-minded in principle, but in practice is limited. Team members keep their heads down and engage within defined lanes. Reluctance to putting yourself out there remains.

2

Alignment:

Teams are opening up, but the shift hasn't fully taken root. Genuine interest and engagement across established boundaries, but often don't yet know how to begin. Lack of empathy.

3

Participation:

Shifting as people step into each other's worlds. The observer dynamic is opening minds without fully merging them yet. Mental models are beginning to blend at the edges. Cross-disciplinary invitations are made and accepted.

4

Championship:

Strong and research-focused. Champions reinforce the value of evidence in decisions, even in rooms Researchers don't occupy. The system is working, but it's held together by team members rather than infrastructure.

5

Integration:

Built on mutual respect. The organization operates as a true learning organization where user-centricity is assumed, not argued for.

6

Lever 05

Data & Tooling



Hostile:

Access is blocked off. Team members will not share data or tooling with other disciplines or make it prohibitively difficult to access.

1

Awareness:

Heavily siloed. Access is gated behind approval processes that are slow and burdensome. Researchers appear to be gatekeepers rather than collaborators, whether intended or not.

2

Alignment:

Shared but restricted. Teams know what to expect and how to navigate the access process. Friction hasn't gone away.

3

Participation:

Sharing is expanded, giving team members access to participate, though it is still controlled rather than open. Teams share when asked rather than by default.

4

Championship:

Access has broadened significantly. Champions normalize the expectation that relevant research should be available to anyone who needs it. Access is broader, but distribution remains informal.

5

Integration:

Open and accessible by default. Tooling supports a just-in-time model of insight delivery. Citations to research are included across all decision-making and work-tracking platforms.

6

Lever 06

Timing



Hostile:

Little awareness or care toward what drives other teams' timelines. Decisions are willfully made without considering the time needed to ask research questions.

1

Awareness:

Driven by local priorities. Research is brought in too late and given too little time. Some awareness of what other teams' need, but decisions are driven by the next fire to put out.

2

Alignment:

Each group still paces itself independently. Research, product, and engineering set rigid timelines for each other and depend on each other. They aren't yet genuinely synchronized.

3

Participation:

Dependencies are visible. A Product Manager can now see that if they want an answer in time for development, the Researcher needs a viable runway. Coordination is improving, but not yet seamless.

4

Championship:

Champions actively coordinate across teams, but timing still relies on individual effort. Lag and distortion creep in over time.

5

Integration:

Shared tooling, defined cadences, and an accumulating body of institutional knowledge mean the gap between a question emerging and an answer being available narrows to the point where research and decision-making anticipate each other.

6

Assessment Form

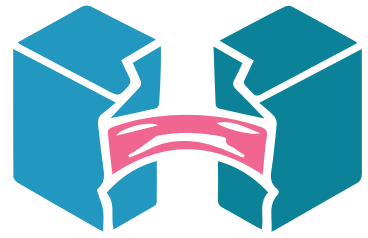
Take 5 minutes to rate how each stakeholder group performs in this phase

Activation Area	Stakeholder 1	Stakeholder 2	Stakeholder 3	Overall
	Group:_____	Group:_____	Group:_____	
Relationships				
Communication				
Process				
Culture				
Data/Tooling				
Timing				
Overall				
Average				
Phase				

NOTES: _____

Case Study

The Product That Almost Wasn't



A UX leader at a centralized team within a hospitality business unit of a large tech company received a request from a Product Manager to prioritize a set of feature enhancements for a product that the UX team had no hand in building. The UX leader evaluated the request, reviewed the product, and consulted with the broader leadership team. Their response was measured but firm: they would not prioritize the feature work unless the engagement also included foundational research, accessibility improvements, and a redesign of the overall experience. The PM refused.

The decision wasn't about principle for its own sake. The UX leadership team had enough work on their plate and no interest in being associated with something that needed a full redesign, especially when they would be fighting the product team along the way. If they were going to be involved, it would be on terms that gave the work a real chance.

Two months later, the PM returned. The product had been released internally, a senior executive had seen it, and the reaction was not kind. The executive made clear that the product team needed

to have a different conversation with UX. This time, the PM agreed to the terms. A proposal led by the UX team — including executive sponsorship, dedicated investment, and a tight 6-month timeline — was approved.

What started as a part-time commitment from 1 Designer grew quickly. At its peak, the engagement included 14 Researchers, Designers, Architects, and Front-end Developers, alongside 3 new Full-stack Developers on the product team who were embedded directly with the UX team. The boundaries between product, engineering, and the UX team began to blur. The research team led the way. Two large-scale generative studies established what the product needed to be. A series of rapid usability studies — 10 in total over 3 months — continuously nudged design and development decisions in the right direction. While research was underway, Designers and Front-end Developers built a design system tailored specifically to the product's unique context. UX Architects grafted the user flow inside it. Front-end Developers implemented it alongside the back-end team. UX Architects inspected the construction and ensured it met the desired higher standard.

The product and executive stakeholders were skeptical at first. Research and design running in parallel with development felt risky. This was a total shift in Process and Timing. What they saw instead was synchronization. The work moving in lockstep rather than in sequence, each discipline informing the next without waiting for a handoff. Furthermore, a regular weekly cadence of Communication ensured everyone knew what to expect and what parts of the process needed a push. In 3 months, the entire redesign, including the original feature requests, was delivered with working front-end components.

The product launched on time. It went from being a source of embarrassment to a showpiece at investor day. It was sold to several restaurant chains before the Covid-19 shutdowns changed the industry overnight — a circumstance no amount of good research could have anticipated.

good research could have anticipated. Nonetheless, the outcome that outlasted the product itself was the working model it proved. Those early skeptics became some of the team's most vocal champions. The engagement became a template for how other business units across the organization worked with UX. This elevated the centralized team's standing and built Championship-level relationships that extended well beyond a single product.

The takeaway isn't that UX should hold feature requests hostage. It's that knowing when to hold a boundary — and being able to articulate why — is one of the most important things a research team can do. The UX team didn't win because they were right. They won because they were ready when the moment came, and because they delivered something that made the case better than any argument could have.



From Diagnosis To Action: Preparing Your Team For Insight Activation

Few teams will score perfectly across every lever — and that's exactly the point. You are likely to need to use some tactics for change to advance your ability to activate insights. The levers that make up the Insight Activation Arc — Relationships, Communication, Process, Culture, Data, and Timing — point directly at where to focus. Not every tactic will be equally relevant to every situation. A team scoring low on Culture needs different interventions than one scoring low on Timing. As you work through this section, keep your assessment results in front of

you and prioritize the approaches that map to your lowest-scoring levers with your highest-priority stakeholder groups.

The section covers 4 areas:

A translation guide for making research legible to each discipline; role-specific collaboration strategies, including how to handle common objections; workshop formats for building alignment across teams; and a roadmap for building the kind of research advocacy network that moves an organization from Participation toward Championship.

One Last Word of Advice

Don't try to advance too quickly. Use the phases as waypoints. This gives stakeholders time to move with you rather than being left behind, which should keep the pace for change manageable without too many variables in play at once.



The Research Translation Guide



Research that resonates with a Designer lands differently than research that resonates with a Product Manager. The findings aren't different, but each discipline is listening for something specific. Getting fluent in those differences is one of the highest-leverage ways you can bolster your communication with other stakeholders.

What designers care about:

Designers are solving spatial and behavioral problems. They want to know how users work through an interface — not how they say they would, but how they do. Research that speaks to interaction patterns grounded in real user behavior and how users scan and prioritize that informs visual hierarchy will land. Clips, quotes, and contextual observation give Designers something that elevates them past design theory alone: evidence of which principles actually matter for your users in your specific context.

What developers and technical staff care about:

Developers are solving engineering problems



Research findings and recommendations are shared, but there's a gap in ensuring everyone is informed and aligned.

**UX Designer,
Mid-Size Financial Company**

under constraints. They want to know which problems are worth solving and in what order. Research that surfaces edge cases breaking the happy path, estimates the performance impact of user behavior patterns, and helps prioritize implementation based on actual pain severity speaks their language. The specific value research offers here is distinguishing between what's technically broken and what functions correctly but creates friction that users will pay for in time, confusion, or abandonment.

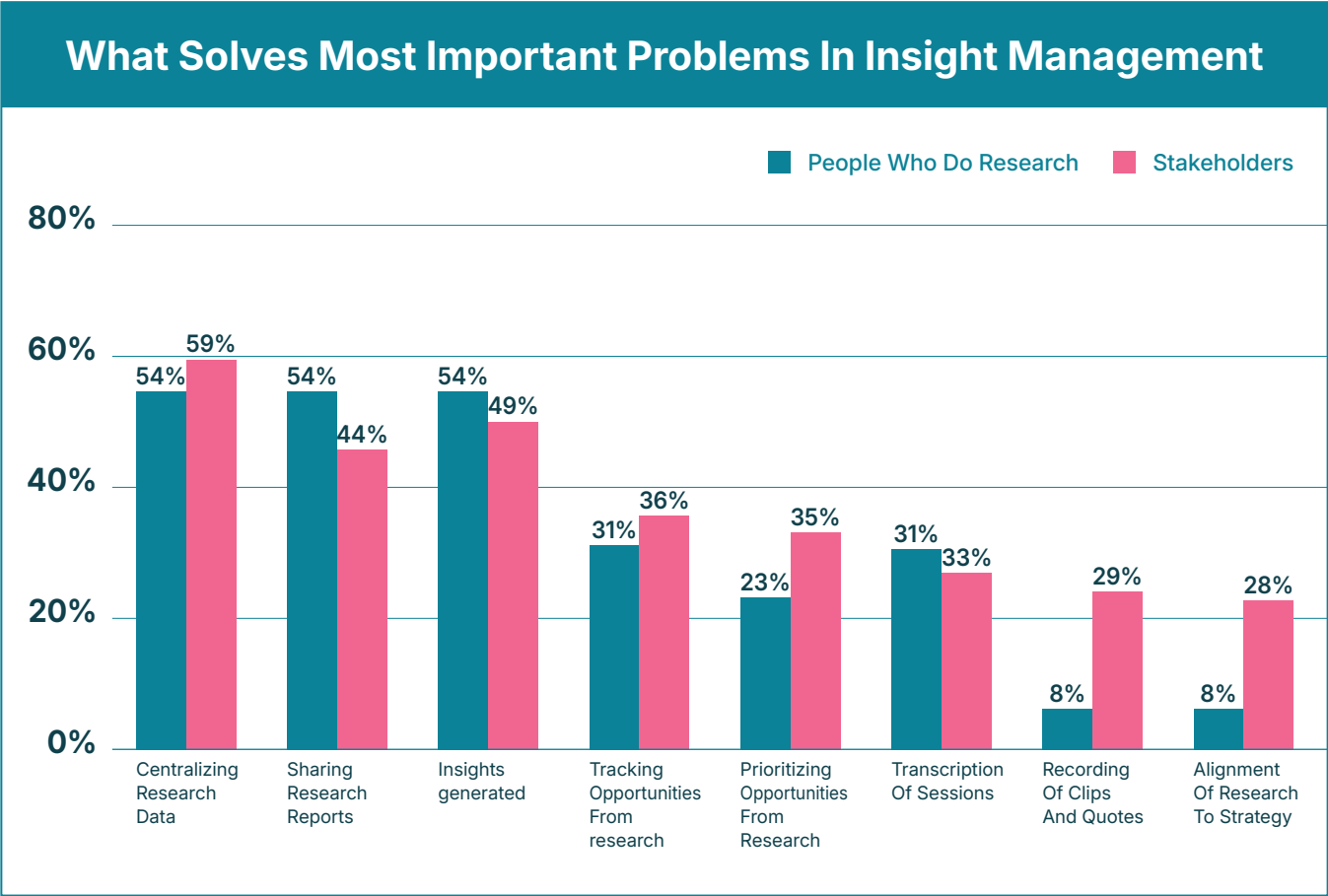
What product managers care about:

Product Managers are making bets. They want evidence that reduces the risk of being wrong. Research that helps estimate the significance of an opportunity, surfaces competitive differentiation through unmet user needs, and gives insight into problem- solution fit before significant

resources are invested directly supports how PMs think about their job.

The framing that tends to land best:

Research isn't an impediment to decision-making; it improves the quality of the bets being placed.



Context: Study of research value of 112 participants split into 13 in the UX Research, UX Design space and 99 stakeholders from product, engineering, sales, marketing, etc. (2025).

Exact Phrasing: Which of these capabilities have the best likelihood to solve customer research problems you and your team are facing? (Select All That Apply) [Multiple Choice]

The jargon decoder:

Researchers love precision. Teammates love clarity. Occasionally, you need to gloss over precision to get to clarity. Here are the terms most likely to cause glazed eyes. Translate them into a language that keeps conversations moving.

	Researchers Say	Stakeholders Hear	Try This Instead
Mental Models	"This doesn't align with user's mental models."	"Here comes the academic abstraction. What does it mean?"	"Users expect this to work differently based on how they've learned to use similar things. When it doesn't, they get confused and make mistakes."
Cognitive Load	"This increases cognitive load."	"You're calling our users stupid."	"Every extra step or confusing element uses up the mental energy users have available to figure out your interface."
Usability VS. User Experience	"The usability is fine, but the UX is poor."	"I thought these meant the same thing."	"You can have a functional product people hate using, or a delightful product that doesn't work well. Both kill adoption."
Qualitative VS. Quantitative	"We need qual before quant."	"Our Researcher always wants to avoid working with real data."	"Quantitative data tells you what's broken. Qualitative tells you why and potentially how to fix it."

	Researchers Say	Stakeholders Hear	Try This Instead
Statistical Significance	"This isn't statistically significant."	"The results are obviously different. Why are they obstructing this?"	"The difference you're seeing could easily be a random chance rather than a real pattern."
Confirmation Bias	"You can't ask that; we need to avoid confirmation bias."	"The Researcher never trusts us to ask a simple question."	"Everyone — Researchers included — naturally notices information that confirms what they already believe. Structured methods exist precisely to catch that."
Sample Size And Recruitment	"Our sample isn't representative of our users."	"Our Researchers are always making excuses for slow progress."	"Our participants may not reflect our actual users. This may lead to features that seem validated but fail with real customers."
Behavioral VS. Attitudinal Data	"What users say and what they do are different things."	"So... they don't trust users to tell the truth?"	"People are unreliable narrators of their own behavior. Watching what they do reveals more than asking what they would do."

Arc Mapping: The translation guide primarily addresses the Communication lever — specifically the tribal communication dynamic that defines the Awareness and Alignment phases. Improvements in this area can help transition stakeholders to the Participation and even Championship phases. Fluency in each role's language is also foundational to the Relationships lever. Teams that can't communicate across disciplines can't build trust across them.

Strategies

Role-Specific Collaboration Strategies



Regardless of the relationship you have with any stakeholder group, there is always room for improvement. Helping them understand the value and effort to achieve their own goals is the foundation for building a place for discovery research. What follows is guidance for collaborating with each discipline on their terms.

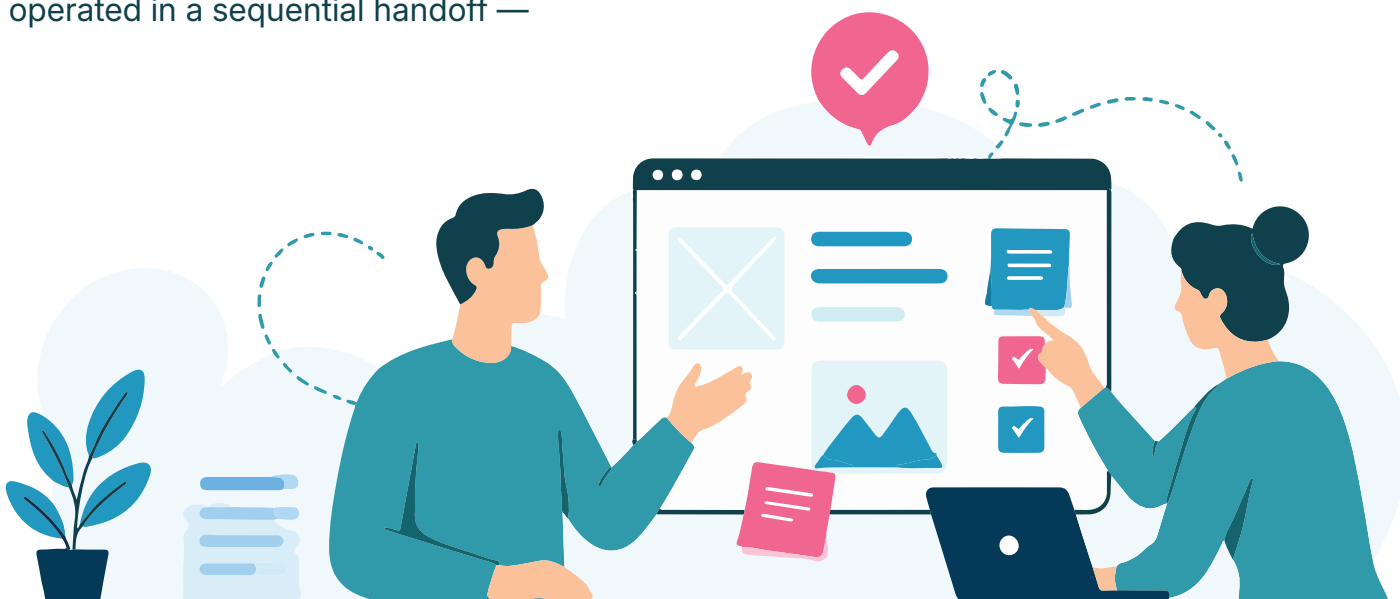
Working with designers:

Designers are natural allies. They are often the closest to the user's problem and the most receptive to evidence that improves their work. The challenge is that design and research have historically operated in a sequential handoff —

search informs a brief, Designers execute against it — which positions research as an upstream input rather than an ongoing collaborator.

SHIFT DESIGNERS IN THIS PROCESS:

Move from delivering insights to Designers toward doing discovery with them. When a Researcher and Designer build test scenarios together, the Designer has cognitive ownership of the findings before the report is even written. When that happens, the insights you present fit neatly inside the mental model they are building for the design.



Tactics That Work

1. Design decision documentation:

Create shared templates that allow Designers to note which research insights influenced specific design choices. This embeds research into the design artifact itself rather than treating it as a separate deliverable.

2. Prototype testing partnerships:

Researchers and Designers build test scenarios and facilitate user sessions together. Invite them into the later stages of synthesis. Joint observation creates shared understanding without requiring a presentation to transfer it.

3. Insight availability in design tools:

Embed research findings directly in design files where subtle decisions are being made. Referencing a relevant finding in Figma is more likely to influence a decision than a report in a shared drive.

Handling Common Objections

1. *"I already know what good design looks like."*

→ "Yes, and research shows you which design elements actually work for our specific users. The principles are yours. Let us help identify which ones apply best in these circumstances."

2. *"Research findings are too abstract; I need specific interface guidance."*

→ "Let's build design principles together directly from user behavior patterns. Something you can apply across projects, not just this one."

3. *"User testing always comes too late in the design process."*

→ "What if we tested especially controversial concepts before we invested time in high-fidelity mockups? The earlier we test, the cheaper the correction."

WORKING WITH DEVELOPERS AND TECHNICAL STAFF:

Developers are pragmatists. They are working within real constraints: technical debt, architecture decisions, and sprint commitments. They need to know that research recommendations are feasible and worth the effort. Research that ignores those constraints may be dismissed as out of touch or not high enough of a priority. When they are bought in, they can often be some of your most vocal allies — and who doesn't want an ally who is last to touch the product as it's built?

Help align Developers to understand where they are shifting their complexity. Are they optimizing for architectural elegance at the cost of an interface flow that users understand? Are they favoring performance and responsiveness over what the user is trying to accomplish? Are they making assumptions because no one gave them the details they needed? The real trick is to get them to **"ask questions"** on the user's behalf and push back on half-baked feature requests.



Tactics That Work

1. Technical user stories:

Operationalize findings as specific implementation requirements or recommendations. You are the translation layer. Don't assume it happens automatically. ***"Users frequently fail to recover from error state X"*** translates more directly into development work than ***"4/5 users had issues with the error handling experience."***

2. Opportunity priority ranking:

Use research to prioritize which features and bugs may have the biggest impact on user success. Developers have limited time; research helps them spend it where it matters.

3. Ticket-level insight annotation:

Connect research findings directly to development tickets through tools like Jira. When a Developer opens a ticket and sees the user evidence behind it, the work has context it otherwise wouldn't. Keep these summaries brief.

Handling Common Objections

1. ***"We don't have time to implement research recommendations."***

→ "I appreciate the time crunch you're under. But time spent doing the right thing now will save you days or weeks of rework later. To start, let's identify the 2 or 3 changes with the highest user impact and lowest implementation cost."

2. ***"Research recommendations would require major refactoring."***

→ "That's a good point. Let's reach out to our Product Manager, figure out the cost-benefit of each, and decide where this refactoring work could place on the roadmap. For now, are there any of these high-impact changes that work within your current architecture?"

3. ***"Users adapt to interfaces eventually anyway."***

→ "Some might. Let's find out together how much that adaptation is costing us in customer churn and support volume before we assume it's acceptable. I'm willing to put this on hold if you are correct."

WORKING WITH PRODUCT MANAGERS:

Aligning with Product Managers is critical for the success of your research activation efforts. They control prioritization, which means they control whether research ever translates into action. They are also under the most pressure: conflicting agendas, timelines, and budgets that slip almost immediately, and the push to deliver a valuable offering in the end. In many ways, unlocking successful collaboration with Product Managers can unlock the team as a whole.

PMs crave the type of insight that helps them identify risky wrong bets. While busy, many see the value of talking with users and building insights that help them de-risk their work. The issue that many

Researchers may run into is that they often see it as their responsibility to meet with customers / users. It's easy to get into a turf war with them, but by aligning your work and showing how you can help each other, you can quickly fast-track the relationship to Participation.

The trick to working with PMs is getting involved with roadmap planning before priorities are set, not after. Research delivered in response to a roadmap is, at best, validating decisions already made and, at worst, arriving too late to matter. Research that arrives before the roadmap helps surface problems that may lie ahead, informs discussions before design or development begins, and gives the team a clearer view of what's coming.



Tactics That Work

1. Sprint planning preparation:

Conduct a literature review of existing research ahead of backlog grooming. Surfacing relevant existing insights before new priorities are set is faster than conducting new research and more influential than presenting findings after decisions are made.

2. Opportunity ranking:

Build a shared prioritization framework that weights user problem severity, business impact, and technical feasibility. Research provides the user with severity input that the existing framework may be missing.

3. Impact reporting:

Track and report on how research-informed decisions perform against key metrics over time. A PM who can point to a decision they made on the basis of research evidence and show the outcome is a PM who will keep asking for research.

Handling Common Objections

1. *"Research is slowing down our release train."*

→ "Research prevents us from shipping the wrong thing. The rework cost of a feature that fails in the market is invariably higher than the cost of the research that would have caught it. If we can get the research team well enough ahead of the rest of the team, insights should arrive in plenty of time for the rest of the team to address."

2. *"Our customers look to us to be experts in this domain. We shouldn't appear to be asking them about this as if we don't know it already?"*

→ "Domain knowledge is a critical part of this process; you are correct. Even within a domain you know deeply, each customer brings different needs, expectations, and workarounds. That's exactly the gap research fills."

3. *"Customers want new features, not user research."*

→ "The insights we build from user research help us create products that users want and address their needs. Features that miss that mark add complexity without value - and without research, we're guessing which type we're building."

WORKING WITH SENIOR LEADERS:

Directors, VPs, and C-suite executives are not typically involved in the day-to-day work of product development. It is often invisible to them. They set direction, allocate resources, and make the calls that determine whether research ever gets the organizational support it needs to scale. This challenge makes detailed research findings feel irrelevant to their decision-making... at least at first glance. A VP of Product doesn't need to know that 5 out of 8 participants struggled with a specific onboarding step. They need to know what that struggle is costing the business and what the path forward looks like.

Resonating with senior leaders requires building trust and framing research in a way that positions it as a strategic partner. A senior leader who understands the strategic value of research will remove the organizational barriers that Researchers at every other level constantly work around: budget constraints, access issues, cross-team friction, and the cultural inertia that slows change. A single executive champion can potentially do more for research activation than years of bottom-up relationship building.

The trick is earning that relationship on their terms before asking for anything of your own.

Tactics That Work

1. Executive research briefings:

Develop a cadence for sharing high-level research summaries with senior leaders. Frame the summaries in their language: business impact, risk reduction, competitive implication, and strategic direction. Keep it short and focused.

Handling Common Objections

1. *"We already know our customers — we talk to them constantly."*

→ "Sales conversations and support interactions are valuable, but they capture what customers say when they want something. Research captures how they use the product without that incentive. Both are needed to grow market share and keep customers happy."

Tactics That Work

2. Strategic research roadmaps:

Share a forward-looking view of what research is planned, what decisions it will inform, and how it connects to organizational priorities. This positions research as a strategic function rather than a reactive service and gives leaders visibility into the work before it's done.

3. Outcome tracking:

Build a simple record of decisions informed by research and how they performed. Don't wait to be asked. Building this link from a research finding to a business outcome makes the value of your research much more concrete.

4. Invite selective participation:

After some initial trust building and once a project has direct strategic relevance, invite senior leaders to observe a session or attend a readout. Firsthand exposure to user behavior is more persuasive than any summary of it.

Handling Common Objections

2. "We don't have the budget for a formal research program."

→ "The most expensive research is learning what happens on live products. Most of what I'm proposing can run lean — small samples, fast cycles, embedded into existing workflows rather than bolted on as a separate function."

3. "Show me the ROI."

→ "Let me pilot a small study and show you the value of research. It will take about X days to run the study, cost about \$X in participant incentives, and require a bit of time from the product teams to contribute. I can show you the before and after of an insight that led to product enhancements we would have previously missed."

Arc Mapping: These collaboration guides primarily address issues in Relationships. Objections are most common in the Awareness and Alignment phases — they signal where trust hasn't yet formed. Building on that trust from earlier phases, the tactics will help you advance to Participation in these relationships. The tactics will also allow you to advance your Process and Timing levers. They help you establish cadences and provide a shared understanding of timelines across teams.

Advancing to the latter phases of the Arc requires support and championship from Product Managers and Senior Leadership. That may require culture shifts in how the organization operates. However, trustworthy Relationships, resilient Processes, and better anticipation of key business decisions you build along the way create the pressure that changes it. The culture shifts because of the work you do



Workshop Toolkit

When a team is misaligned on the value of research, or when a new project is starting without a shared understanding of what's known and unknown, a workshop can do in two hours what individual conversations might take weeks to accomplish. They are powerful tools in your arsenal toward building collaboration muscles, focusing all stakeholders on shared problems, and achieving buy-in to the research process. Find the right moment to introduce workshops into your broader engagement. Overdone, they can create the very resistance you're trying to avoid.

This section presumes you have some experience facilitating workshops with stakeholders. Several practitioners have written about workshop facilitation in UX contexts; they're worth a look if you need a refresher or more grounding in the practice^{(22),(23),(24)}.

The 3 formats that follow are designed for different moments in the research activation journey. In each, 6-10 participants work best for discussion, with enough

voices in the room, plus 1 or more facilitators. If you're newer at facilitating, 3-6 is a better place to start.

HOPES AND FEARS:

This workshop surfaces how people experience research before it hardens into resistance.

When to use it:

- At the start of a project
- When launching new research processes
- When tension around research is present but unspoken

Duration: 60-90 Minutes

Materials:

Whiteboard — Physical or
Digital — Sticky Notes, Markers, Timer

How to run it:

Open with 4 columns on your whiteboard

- Hopes for Research Outcomes
- Fears About Conducting Research
- Current Reality
- Next Steps

Frame the session as alignment, not judgment. Every hope and fear on the board is valid.

Have participants write individually without discussion; focus on hopes and fears first. Silence during this phase matters — it prevents groupthink from shaping what people are willing to say.

[Time: About 10 Minutes]

For hopes, get participants thinking about how research might help them. How might they use research? How might they think differently as a result? What gaps or pains do they have that research can address?

For fears, get them focused on the pains they feel right now. Problems with participating? Concerns about research output delivery? Have they had negative experiences with research on previous teams?

Cluster hopes first, then fears. Let themes emerge from the group rather than naming them yourself. Common hope themes may include: Better user outcomes, clearer decisions, and reduced rework. Common fear themes may include: slowing down delivery, research that arrives too late to matter, and findings that get ignored anyway.

[Time: 15-20 Minutes]

Map out your current reality. What's actually working? What isn't? Try to distinguish which fears are founded and being addressed by your team, versus fears that haven't happened yet but feel real. Connect hopes to the wins your teams are experiencing now.

[Time: 10-20 Minutes]

Finally, identify 2-3 specific changes your team wishes to make. Address the highest-priority fears that create headwinds for your collaboration, and the high-priority hopes that help you advance through the framework. Assign owners and timelines before the room empties.

[Time: 15-35 Minutes]

Facilitation Note:

Let people voice fears without immediately solving them.

Resistance that gets heard is far more likely to shift than resistance that gets argued out of the room.

Arc Mapping:

Hopes and Fears directly addresses the Culture lever — specifically the Psychological Safety gap that characterizes the Awareness and Alignment phases. It is also a Relationships intervention, creating space for honest conversation that cordial but shallow working relationships rarely produce. Most useful for teams scoring 2 or less on Culture.

ASSUMPTION MAPPING:

This workshop makes implicit assumptions explicit and prioritizes which ones are worth testing.

When to use it:

- Before starting a new project
- When teams are making decisions based on beliefs they haven't examined

Duration: 1.5 - 2.5 Hours

Materials:

Whiteboard — Physical or
Digital — Sticky Notes, Markers, Timer,
Problem Statement, or Project Brief

How to run it:

Begin with problem alignment. This is a facilitated discussion to ensure everyone agrees on the core challenge. Come prepared with a set of 2-3 probing questions to kick start the discussion. Ensure everyone has had an opportunity to speak on the topic. Misalignment here will surface in the assumption brainstorm and is better resolved before rather than during.

[Time: 10-20 Minutes]

Next, give each participant time to write assumptions about users, solutions, and constraints. The prompt that tends to generate the most useful material: ***"What would have to be true for this to work?"***

Focus on beliefs that could be wrong and would matter if they were.

[Time: 15-25 Minutes]

As a group, assess each assumption on two dimensions: 1) How confident are we that this is true (i.e., knowledge)? And, 2) if this assumption is wrong, how much would it hurt (i.e., risk)? Create a 2x2 grid with Confidence on one axis and Risk on the other, and have participants place their assumptions accordingly.

[Time: 5-10 Minutes, if necessary, consider a break here]

Work through the board together, grouping similar assumptions and discussing whether the group agrees on where each sits. The quadrant that demands immediate attention: low knowledge, high risk. These are the assumptions your team is most likely to build on and most likely to be wrong about. Everything else can be ranked accordingly.

[Time: 40-50 Minutes]

Close with a research plan for the high-priority 3-5 assumptions. Define the specific questions that need to be answered, discuss the fastest way to test them, and create a timeline before leaving the room. Let the Researchers in the room lead this phase — it's where their expertise is most directly useful.

[Time: 15-35 minutes]

Facilitation Note:

Assumptions tend to cluster at the extremes — people either express total confidence or total uncertainty. Push for specificity. **"How confident are we, exactly?"** is a more useful question than "Are we confident?"

Arc Mapping:

Assumption Mapping can be potentially helpful with assumptions that address any of the levers. It maps most clearly with Communication. Teams that score below 3 in Communication often make these very kinds of assumptions. Understanding each other's assumptions is a reliable path toward advancing Communication into the Championship phase and beyond. This workshop may also help uncover certain Data & Tooling breakdowns if data and information are not being openly shared with each other.



HOW MIGHT WE: FROM INSIGHT TO IMPLEMENTATION

This workshop bridges the gap between what was learned and what gets built.

When to use it:

- When the team has research findings but is struggling to translate them into actionable next steps

Duration: 4-8 Hours

Materials:

Whiteboard — Physical or
Digital — Sticky Notes, Markers, Timer,
Research Insights Summarized in Advance

How to run it:

Before the session, Researchers, in coordination with the facilitator, need to pick a theme. This match can be made by aligning with a product team's planning themes/goals, the larger organization's business objectives, or activities being worked on by design and development teams. Researchers will come prepared to discuss the top 3-5 insights in that space.

Approach this workshop iteratively, work on 1 insight at a time. Begin with an insight review to present 3-5 key findings

and ensure everyone understands the user problems it represents. Do not proceed until the room has shared understanding. Disagreement at this stage is productive in setting the groundwork for addressing the problem.

[Time: 10-30 Minutes]

On a shared board, transform the insight into How Might We (HMW) questions. Participants will spend solo time generating HMW questions on individual sticky notes — 1 question per note. Draw out the link between the problems identified in the research and what the product team could do to address it. Framing matters: HMW questions open solution space rather than closing it. "How might we help users recover from errors more confidently?" is more generative than "How do we fix the error state?"

[Time: 10-20 Minutes]

Have participants group these HMW questions for any overlaps or duplicates.

[Time: 5-10 Minutes]

Run rapid ideation — have the team write stickies on how the product could be used to address these issues. Encourage quantity over quality initially. Wild ideas often contain the seed of viable ones.

[Time: About 3-5 Minutes Per Question]

Cluster solutions, then do a quick viability check across three dimensions: technical complexity, design complexity, and business impact. This is where cross-functional participation from the team pays off. Close with 2-3 solutions to prototype or test and clear owners for next steps.

[Time: 10-20 Minutes]

Iterate through your other insights and make sure the team has ample opportunity for breaks and to check in with their other responsibilities.

Facilitation Note:

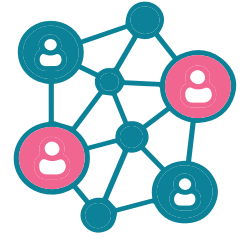
Keep Designers, Developers, and PMs involved in both ideation and feasibility. The different sections aren't meant for one stakeholder group to do the work; it's a collective effort.

Arc Mapping:

How Might We directly addresses the output-to-outcome shift that characterizes the Participation phase. It is a Process and Relationships intervention — getting disciplines to solve problems together rather than hand work across boundaries. Most useful for teams scoring at least 2 on Process and Relationships levers who are ready to move toward Participation and Championship.



Building Your Research Advocacy Network



Scaling a research practice eventually hits a wall that best practices alone can't move. What propels you past it is a network of research advocates who carry the work forward without being asked. The tactics in the previous sections work at the individual and team level. This section is about building something that outlasts any single project or relationship.

Identifying your allies:

Start with the people who are already partway there. Look for colleagues who ask questions about user behavior in meetings without being prompted, reference past research when making arguments, express genuine frustration with decisions made on assumptions, or show curiosity about user feedback, especially when it contradicts their instincts.

These are your early adopters. Invest in them first. A Researcher who makes one champion's work measurably better has done more for research activation than one who delivers 10 presentations to skeptical audiences.

Build out a Stakeholder Relationship Management (SRM) document. Take a second and list out people in your organization, whether within your immediate team or across the broader organization. These could be peers, managers, or even senior leadership. Aim for 3-5 initially.

Finding aligned goals:

The most durable advocates aren't necessarily the people you've persuaded. They're people whose existing goals research happens to fulfill.

For example, think of an Engineering Director who doesn't touch code, but can't stand the amount of rework and wasted efforts his teams put in. If you can demonstrate the value of research in avoiding that waste, you can turn them into a champion for you and your team. The job is to find that alignment and make it explicit.

You're not changing anyone's priorities. You're showing them how research supports their existing priorities.

For all the people you listed above, list out 2 or 3 goals you know they have from conversations and what you've heard. Focus on ones where there's the most overlap with what research offers.

Relationship building and persuasion:

Building champions up requires patience and the application of what you've learned. Lead with expertise. Offer insights at moments that matter to them — not to demonstrate your value, but to deliver it. The goal is to make this feel like a natural extension of the work, not a campaign. If you're constantly having to sell the value of research to someone, they're probably not ready to be a champion yet.

Your ultimate goal here is to give them what they will need to promote the research. Give them access to research insights, best practices, and even tooling. Make sure they know what you and users need and how they can serve them from their perspective.

Remember, you will need to demonstrate that you are their ally as well by helping to advance your shared goals. Showing your understanding and advocacy for design principles, technical constraints, the market, and the domain goes a long way in establishing the reciprocity necessary for championship by others of your research.

Lastly, celebrate their wins with you. Make them proud to be associated with the work. People repeat behaviors that earn them credit.

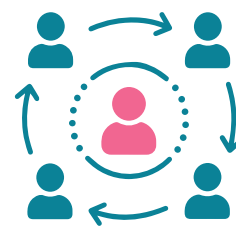
In your SRM document, track your lever's progress with each of them. How have you engaged with them? Have you made them aware and given them access to the relevant research and tooling they will need? Have they been given access to training and resources on best practices for doing research at your organization? Do you have a cadence of check-ins with them? The overhead is modest compared to what it tells you about where your influence is actually growing.

Arc Mapping:

This guide specifically supports the transition from the Participation to the Championship phase. Identifying allies and finding aligned goals are Relationships interventions. At Participation, Researchers have opened the doors to cross-disciplinary involvement. At Championship, stakeholders are walking through those doors on their own. The bridge between those two phases is a coalition built on one relationship at a time, with enough critical mass for the behavior to become self-reinforcing. Beyond Relationships, Data/Tooling, and providing access and training to use these are important in this allyship. The SRM document itself is a great step in this direction.

Scaling & Integration

Scaling Influence — Achieving Integration



Individual relationships are where advocacy starts. Systems are where it scales. Once you have early adopters, the work shifts from converting individuals to embedding research into the processes those individuals use.

To scale, you need to change this system:



Create templates others can reuse.

Have an accessible folder/microsite with NDAs, releases, study guides, and other guides and tools you use to effectively create and record your user research.



Build a central best practices hub.

In a similar location, capture tested question libraries, a taxonomy of patterns found in past studies, and scoring rubrics to identify strong insights. Anything that may help new Researchers do better research in your organization.



Create a repository.

Distributed teams will need a central location to record and find existing research.



Run short training sessions.

Help teams build the muscles to properly conduct research sessions and interpret findings independently.



Build a community of practice.

Start a Slack community or a regularly scheduled meeting for peer Researchers and others looking to get started. Share key relevant insights and best practices.



Conduct leadership touch points.

Create a report that allows leadership to see what was done, what its impact was, what's next on the research roadmap, and where they can aid in the process of building high-quality research insights to use in decision-making.

Sound familiar? It should;

these are the same practices advocated for by Researchers working to democratize discovery at scale⁽²⁵⁾⁽²⁶⁾. The trick for Integration to work is having people who are bought in already. If you don't yet have champions in place, many of these systems will struggle to take hold. The signal that you're approaching Integration is when the champions you've built along the way start doing this work without you. When a Product Manager runs a literature review before a planning session because it has become their habit rather than your request, the coalition is self-sustaining.

Arc Mapping:

At this point, we're referring to the transition from Championship to Integration. In particular, these refer specifically to Process, Data & Tooling, and Communication. This is about what you are sharing, when you are sharing it, and how it is being communicated. It is also about ensuring that both research and stakeholder processes are built to align with one another. If you do not have a 4 in these areas of the assessment, this will feel like an uphill battle.



Takeaway



Final Pro Tips

1

MAKE IT EASY TO SAY YES:

Offer specific, small commitments rather than broad culture change. Ask them to listen in, rather than contribute to a user session. Provide templates and frameworks that reduce workload rather than adding to it. Show up to their meetings rather than asking them to come to yours. The path of least resistance should run through research, not around it.

2

MEASURE WHAT MATTERS TO THEM:

Track the metrics they already care about: conversion rates, support volume, development time, and feature adoption. Connect research activities to improvements in those numbers. An impact story that speaks to a PM's KPIs will travel further than one that speaks to research quality.

3

BE PATIENT BUT PERSISTENT:

Culture change is slow and nonlinear. Some people will not be convinced regardless of the evidence, and that is not a failure worth dwelling on. Start small, win over the biggest supporters one at a time, and give them a way to succeed through research. Focus on consistent small wins, celebrate the early adopters, and let peer influence do the compounding work. The Researcher who makes 5 colleagues' work measurably better will eventually have more influence than the one who spent the same energy arguing with skeptics.

Case Study

Building Something That Outlasts the Builder

A large financial institution had built what most organizations only aspire to:

A centralized UX team serving virtually every business unit across the organization, with research playing a key role. Investment was real, leadership support was present, and the function had earned its place at the table over years of consistent, credible work.

Then the leader who had built most of this retired.

Slowly, pockets of the business began shipping products without sufficient research, creating quality problems that the broader function couldn't always catch in time. Design and research weren't communicating as well as they should have been. The connection between research and development ran almost entirely through design — a single point of failure that left insights vulnerable to getting lost before they reached implementation. Despite their early success, the race hadn't been won yet.



In Championship-phase organizations, the work is held together by people as much as systems. Lose the right person, and the conditions that took years to build can erode faster than anyone anticipates. Their retirement wasn't a crisis. But it was the kind of moment that revealed how well the system was structured.

What arrived next was fortunate. A new leader arrived from outside the organization, not as a designated fix for the UX function specifically, but with a clear vision for what research could be at the institutional level and the credibility to act on it across business-unit boundaries.

The approach first required some introspection. Strategic stakeholder interviews with internal partners surfaced how research was perceived across the organization. Where was it valued? Where was it misunderstood? Where were the gaps widest between disciplines? The findings shaped everything that followed.

Research Operations grew into a functional unit rather than a support role. Democratization was given structure — dedicated people, defined guardrails, clear roles for who conducts what kind of research, and under what conditions. Research techniques were mapped to different phases of the discovery process, each with its own set of best practices, so that any Researcher, anywhere in the organization, could work from the same foundation. New Researchers onboarded faster because the knowledge that had previously lived in the heads of senior practitioners was now encoded in systems anyone could access.

The most significant outcome was structural. A problem-solving framework that positioned research strategically was embedded directly into product planning. It became more than just a reference

document that teams could consult; it was integrated into how the organization decided what to build and when. Research wasn't informing decisions after the fact. It was shaping the questions that would be asked before the process began. Participation in design and development of research grew. Communication across disciplines improved. The function that had once depended on a single leader's relationships and vision became something the organization had internalized.

The takeaway from this story isn't that great leadership solves everything. The new leader didn't build the conditions for Integration from scratch. They systematized what Championship had already proven possible, and, in doing so, made it resilient for the next transition. The work outlasted the builder because someone made sure it would.



Conclusion



The Work Begins Here

Research that never leaves the slide deck. Insights that arrive after the decision has already been made. Stakeholders who nod during a readout and move on unchanged. This is the default state for too many organizations, and it persists not because the research was bad, but because the conditions required to act on it were never built in the first place. As Jennifer Bowie⁽²⁷⁾ puts it, ***“Actual impact occurs when research stops being an operational function and becomes a cultural one.”***

The Insight Activation Arc gives you a map of those conditions. It tells you where you are, what the next phase looks like, and which levers to pull to get there. It shows how being frustrated by a culture of complacency, building your first advocacy network, and watching a decade of work finally become a strategic function are all on the same journey, just at different points along the way.

The most important thing this guide asks of you is patience with the process and honesty about where you are. Skipping phases doesn't advance you faster; it erodes the foundation beneath you. The Awareness-phase team that tries to implement Integration-level systems will find that the systems fall flat because the

people and trust required to sustain them don't yet exist. Progress here is sequential because it has to be. Process follows relationships. Championship follows trust. Fully integrated workflows follow an organization poised to adopt it.

What you can do today, regardless of where you are on the Arc, is get honest about your place in it. Which relationships are cordial but shallow? Which processes are brittle? Where is your timing with other teams perpetually off? The assessment exists to answer those questions, but the more important habit is developing the kind of organizational self-awareness that makes the answers visible before you need to look for them.

From that awareness comes a different kind of engagement. Less pushing, more listening. Less presenting findings, more asking questions that help stakeholders articulate their needs. Less inviting people to participate in your process, more seeking to understand theirs first. This is empathy applied inward, toward the people whose buy-in you need. The Researchers who move fastest through the Arc may not be the most technically skilled. They are the most curious about the humans on the other side of the table.

The Researchers who move organizations forward are not the ones who wait for permission to be strategic. They are the ones who build the conditions for strategy — one relationship, one conversation, one well-placed insight at a time. That work is slow and is rarely celebrated in the moment. But it compounds. And when it

does, it produces something no presentation ever could: an organization that doesn't need to be convinced that research matters, because it can't imagine doing business without it.

**That is what Integration looks like.
And it starts here.**

Putting The Arc Into Practice

The Insight Activation Arc gives you a framework for understanding where you are and what to do next.

Xperius is built to make that work systematic. Connect research to decisions through Evidence Chains, Impact Tracking, and Stakeholder Workflow Integration, so the progress you build doesn't depend on memory, manual effort, or the right person being in the room.



Let's Connect:
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