WORKFLOW · SAMPLE ENGAGEMENT

Week 1 to Week 5, *start to signed-off.*

A single engagement, scoped and delivered using only the files in the kit.

This is the engagement shape the toolkit is built around: a five-week research operations assessment, scoped and delivered using only the files in the toolkit. Each phase names the artefacts you produce and what the stakeholder actually sees.

01 Scope

Week 1 · Five working days

Agree what the operation is for before measuring how well it does it.

WHAT YOU DO
— Interviews with research, product and legal stakeholders
— Demand and capacity baseline agreed
— Method inventory - what the team actually runs
— Proposal and assessment plan issued

WHAT YOU PRODUCE
— Signed proposal
— Demand baseline
— Method inventory

CLIENT EXPERIENCE The head of research sees the demand-capacity gap quantified in week one.

02 Evidence gathering

Weeks 2-3 · Ten working days

Collect artefacts, not opinions. If it is not written down, it does not score.

WHAT YOU DO
— Repository and tagging audit
— Panel health and consent records reviewed
— Tool stack and licence audit
— Retention and anonymisation practice tested against policy

WHAT YOU PRODUCE
— Evidence pack
— Panel health report
— Tool redundancy map

CLIENT EXPERIENCE The team sees which of its practices exist only in someone's memory.

03 Scoring & synthesis

Week 4 · Five working days

Score the six dimensions and find the constraint.

WHAT YOU DO
— Forty-eight criteria scored with evidence references
— Level assigned per dimension
— Radar plotted - the uneven shape is the finding
— Findings ranked by downstream cost

WHAT YOU PRODUCE
— Maturity profile
— Level per dimension
— Ranked findings register

CLIENT EXPERIENCE Leadership sees one chart and the two dimensions holding everything else back.

04 Delivery

Week 5 · Five working days

Leave behind an operating model, not a report.

WHAT YOU DO
— Readout to research, product and legal
— Repository and taxonomy migration plan agreed
— Governance and retention policy adopted
— Quarterly operating cadence set

WHAT YOU PRODUCE
— Assessment report - 9 pages
— Migration plan
— Adopted policy pack

CLIENT EXPERIENCE The organisation sees an operating model with owners and dates.

WHAT THE ENGAGEMENT ASSUMES

— Access to the real artefact, not a summary. Half of these criteria cannot be scored from a slide.

— One decision-maker who can sign the statement of work inside a week. A good audit dies in procurement.

— Evidence captured as you go, not reconstructed afterwards. A rating without a reference is provisional.

— A single readout slot booked on day one, before the fieldwork begins.