SCORECARD · SIMPLIFIED PREVIEW

The Research Operations Maturity Model

Six dimensions, forty-eight criteria, from ad hoc to institutional.

This is the simplified printable version of the instrument inside the kit. The full workbook computes every figure live from your evidence: dimension scores, the weighted profile and the headline figure. Use this page to see how the method thinks before you buy.

DIMENSION	WEIGHT	CRITERIA	SCORE 0–4	WEIGHTED
Strategy & planning	16%	8	—	—
Participant operations	17%	8	—	—
Tools & infrastructure	15%	8	—	—
Data governance & security	18%	8	—	—
Knowledge management	17%	8	—	—
Quality & enablement	17%	8	—	—
HEADLINE FIGURE	**100%**	**48**		**— / 100**

SCORE	BAND	WHAT IT MEANS FOR THE ENGAGEMENT
85-100	Institutional	Benchmark externally. The operation is a competitive asset.
70-84	Managed	Systematise the remaining gaps; publish the standards you already follow.
55-69	Defined	Practice exists but depends on individuals. Document and distribute it.
40-54	Emerging	Fragmented. Pick two dimensions and fix them properly before widening.
0-39	Ad hoc	The operation is person-dependent and a single departure from collapse.

The normalisation. Dimension score = (sum of criterion scores / (4 x criteria scored)) x 100. Overall maturity = weighted mean of the six dimensions. **The unevenness rule:** the overall level is reported alongside the spread between the highest and lowest dimension - a 3.4 average built from a 4.2 and a 1.9 is not a mature operation, it is a fragile one with good PR.

CRITERIA 1–48 OF 48

The 48 criteria

Score each 0–4. Write the evidence reference beside it.

ID	CRITERION	0	1	2	3	4	EVIDENCE REF
SP1	Research priorities are derived from the product roadmap, not from researcher interest	☐	☐	☐	☐	☐	
SP2	A rolling research plan exists with timelines and milestones	☐	☐	☐	☐	☐	
SP3	Roles and responsibilities are named for each study	☐	☐	☐	☐	☐	
SP4	Study intake has a defined request path and a triage rule	☐	☐	☐	☐	☐	
SP5	Research questions are written before methods are chosen	☐	☐	☐	☐	☐	
SP6	Capacity is planned against demand and visible to stakeholders	☐	☐	☐	☐	☐	
SP7	The decisions the research will inform are named in advance	☐	☐	☐	☐	☐	
SP8	Research debt is tracked alongside technical debt	☐	☐	☐	☐	☐	
PO1	A participant profile exists for each research stream	☐	☐	☐	☐	☐	
PO2	Screening surveys are versioned and validated against the target population	☐	☐	☐	☐	☐	
PO3	Recruitment sources are documented, with their known bias	☐	☐	☐	☐	☐	
PO4	Scheduling, reminders and no-show handling are systematised	☐	☐	☐	☐	☐	
PO5	Incentives are compliant, timely and consistently applied	☐	☐	☐	☐	☐	
PO6	Consent capture is recorded and retrievable per participant	☐	☐	☐	☐	☐	
PO7	A panel or database exists with consent status and last-contact date	☐	☐	☐	☐	☐	
PO8	Participant experience is treated as a design problem, not as admin	☐	☐	☐	☐	☐	
TI1	The tool stack is documented, with a named owner per tool	☐	☐	☐	☐	☐	
TI2	Tools are procured against a stated need, not accumulated	☐	☐	☐	☐	☐	
TI3	Survey, usability and analytics platforms are integrated where it saves work	☐	☐	☐	☐	☐	
TI4	Session recording and analysis storage is provisioned and access-controlled	☐	☐	☐	☐	☐	
TI5	Templates and study scaffolds exist for each method the team uses	☐	☐	☐	☐	☐	
TI6	Tool licences and access rights are audited annually	☐	☐	☐	☐	☐	
TI7	New tools are piloted before organisation-wide rollout	☐	☐	☐	☐	☐	
TI8	The stack supports the methods the organisation actually uses	☐	☐	☐	☐	☐	
DG1	A data classification scheme exists for research data	☐	☐	☐	☐	☐	
DG2	Storage locations are approved and documented	☐	☐	☐	☐	☐	
DG3	Retention and deletion schedules are defined and executed	☐	☐	☐	☐	☐	
DG4	Anonymisation is applied before data leaves the study boundary	☐	☐	☐	☐	☐	
DG5	Consent terms govern secondary use, and are enforced in practice	☐	☐	☐	☐	☐	

ID	CRITERION	0	1	2	3	4	EVIDENCE REF
DG6	Access is role-based and reviewed on a schedule	☐	☐	☐	☐	☐	
DG7	A lawful basis under GDPR or equivalent is recorded per study	☐	☐	☐	☐	☐	
DG8	A breach and incident process explicitly covers research data	☐	☐	☐	☐	☐	
KM1	A central repository exists and is the default destination for findings	☐	☐	☐	☐	☐	
KM2	Findings are tagged with a controlled vocabulary	☐	☐	☐	☐	☐	
KM3	Metadata makes studies findable by product, method, date and theme	☐	☐	☐	☐	☐	
KM4	Findings are written in an actionable format, not a transcript dump	☐	☐	☐	☐	☐	
KM5	Insight-sharing sessions run on a predictable cadence	☐	☐	☐	☐	☐	
KM6	Repository content is pruned and re-validated	☐	☐	☐	☐	☐	
KM7	Product decisions link back to the evidence that informed them	☐	☐	☐	☐	☐	
KM8	Repository usage is measured, not assumed	☐	☐	☐	☐	☐	
QE1	Study design follows a written protocol standard	☐	☐	☐	☐	☐	
QE2	Plans and deliverables are peer-reviewed before release	☐	☐	☐	☐	☐	
QE3	Checklists exist per method and are actually used	☐	☐	☐	☐	☐	
QE4	A feedback loop runs from study retrospective back into the standard	☐	☐	☐	☐	☐	
QE5	Onboarding exists for new researchers and for non-researchers doing research	☐	☐	☐	☐	☐	
QE6	Training covers method, ethics and tooling	☐	☐	☐	☐	☐	
QE7	A community of practice meets and has a charter	☐	☐	☐	☐	☐	
QE8	Research quality metrics are defined and reported	☐	☐	☐	☐	☐	

Score 0 = absent. 1 = ad hoc - it happens, but only because someone remembers. 2 = emerging - partially documented, inconsistently applied. 3 = defined - documented, followed, and reviewed. 4 = managed - measured, with an owner and a feedback loop. Every rating carries an evidence reference: a document, a repository query, a policy version.

METHOD & SOURCES

Every dimension and criterion in this instrument is derived from a published framework, standard or study. The kit documents the mapping so a reviewer can trace any score back to its source.

Philip Burgess	The 8 Pillars of UX ResearchOps - strategy and planning, recruitment and participant management, tools, data management and security, knowledge management, training, quality assurance, community and culture (2025)	uxresearchops.com
Kate Towsey	ResearchOps framework and the Research Operations Handbook - the operational foundations this model extends	katetowsey.com
Rally UXR	ReOps Maturity Matrix - the level-based framing used for the 0-4 scale	rallyuxr.com
ResearchOps Community	ReOps Playbook - community-sourced operating practice	researchops.community
European Union	Regulation (EU) 2016/679 (GDPR) - lawful basis, retention, anonymisation and data-subject rights	eur-lex.europa.eu
ESOMAR / ICC	International Code on Market, Opinion and Social Research and Data Analytics - consent and participant protection	esomar.org