

# Bringing UX to your organization

Emily Ryan

September 2015

# The agenda (aka “the plan”)

1. Collect underpants

2. ?

3. PROFIT

**In all seriousness, there's a lot to cover.  
We're going to get through it...**

**Who's this person talking?**

**Emily Ryan:** Not the first time at the rodeo. I've been a:

Graphic designer  
Front-end developer  
e-Commerce guru  
Database designer  
Backend developer

Information architect  
Flash wizard  
User researcher  
Project lead

**...it's not that I'm old.  
Like Jimi Hendrix, I'm just experienced.**



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**What is UX?**

# What you might hear: “Design is...”

Pretty.

Intuitive.

Sexy.

Cool.

From Apple.

From Europe.

From Japan.

From a person with tattoos.

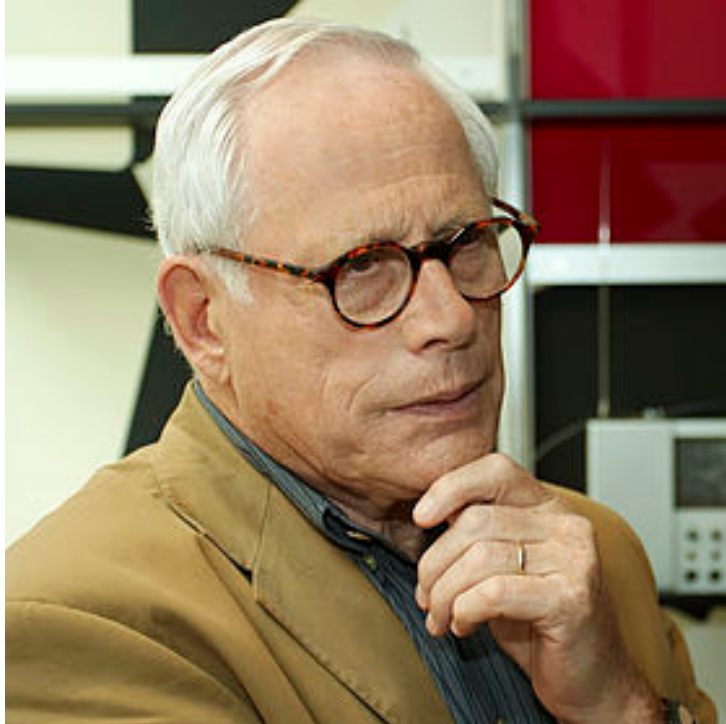
From someone that knows Photoshop™.

Has “wow-factor”.

You know it when you see it.

**...these are not helpful.**

# Dieter on what is good design



## Dieter Rams

Ten Principles of “Good Design”.

The work and principles of Dieter Rams, the chief designer at Braun from 1961 until 1995, have influenced **Johnny Ive’s** work as Apple’s senior vice president of Industrial Design at Apple Inc. and many others.

# Dieter: "Good design..."

Is innovative	Makes a product useful	Is aesthetic	Makes a product understandable	Is unobtrusive
Is honest	Is long-lasting	Is thorough down to the last detail	Is environmentally friendly	Is as little design as possible

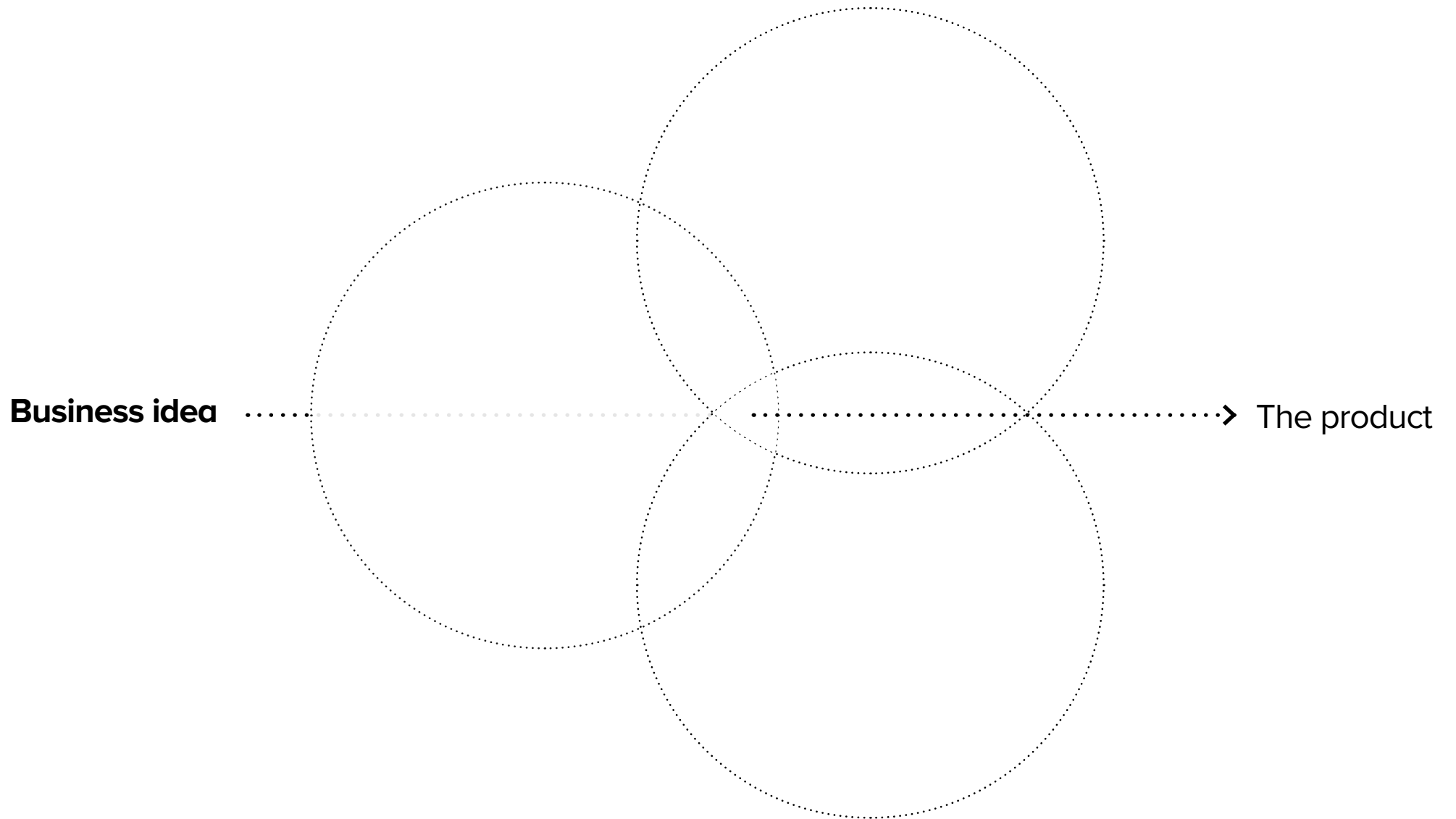
Emily: "...leads to good **U**ser **eX**periences."



**Where does UX live in the product lifecycle?**

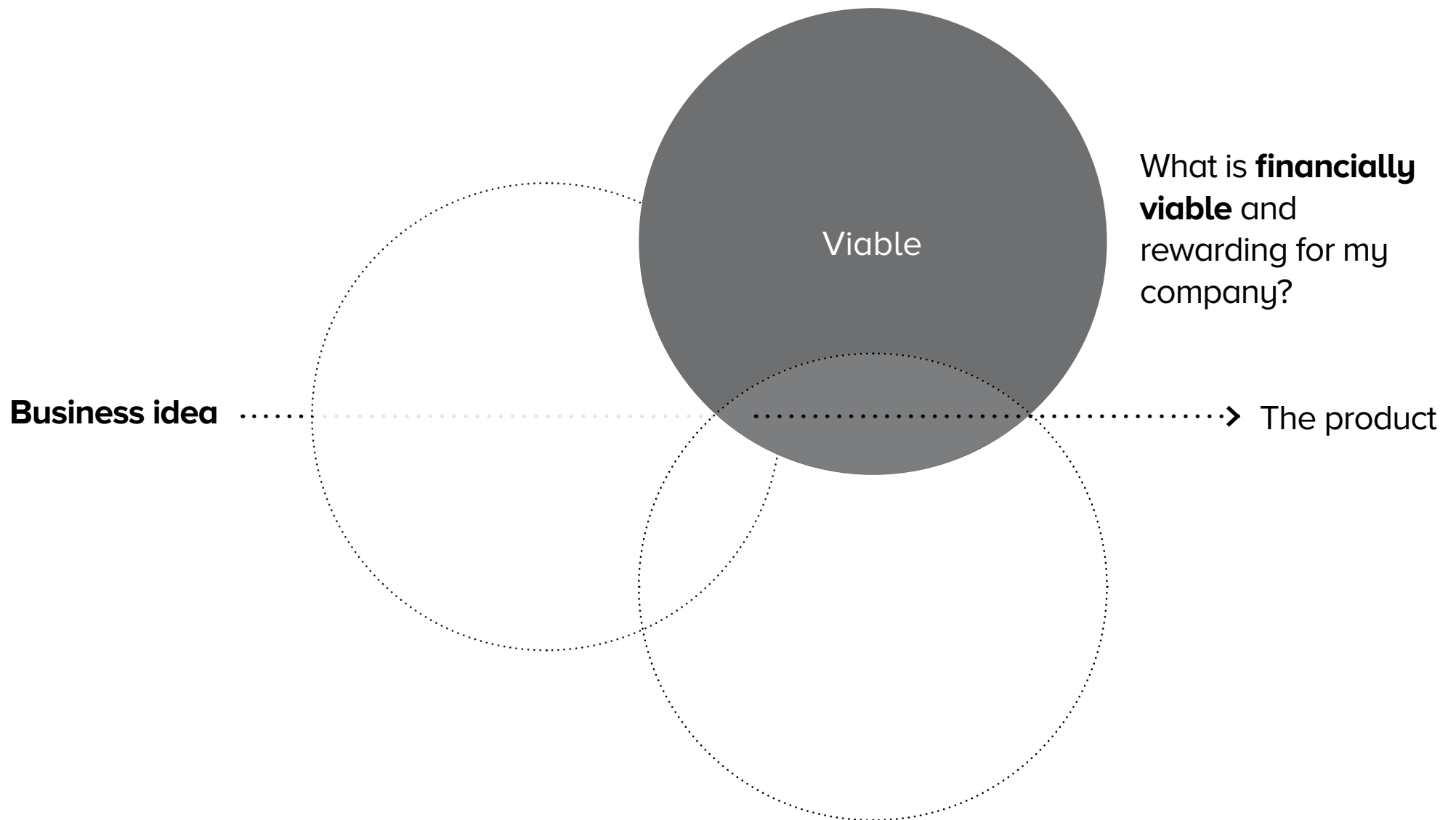
**Business idea**

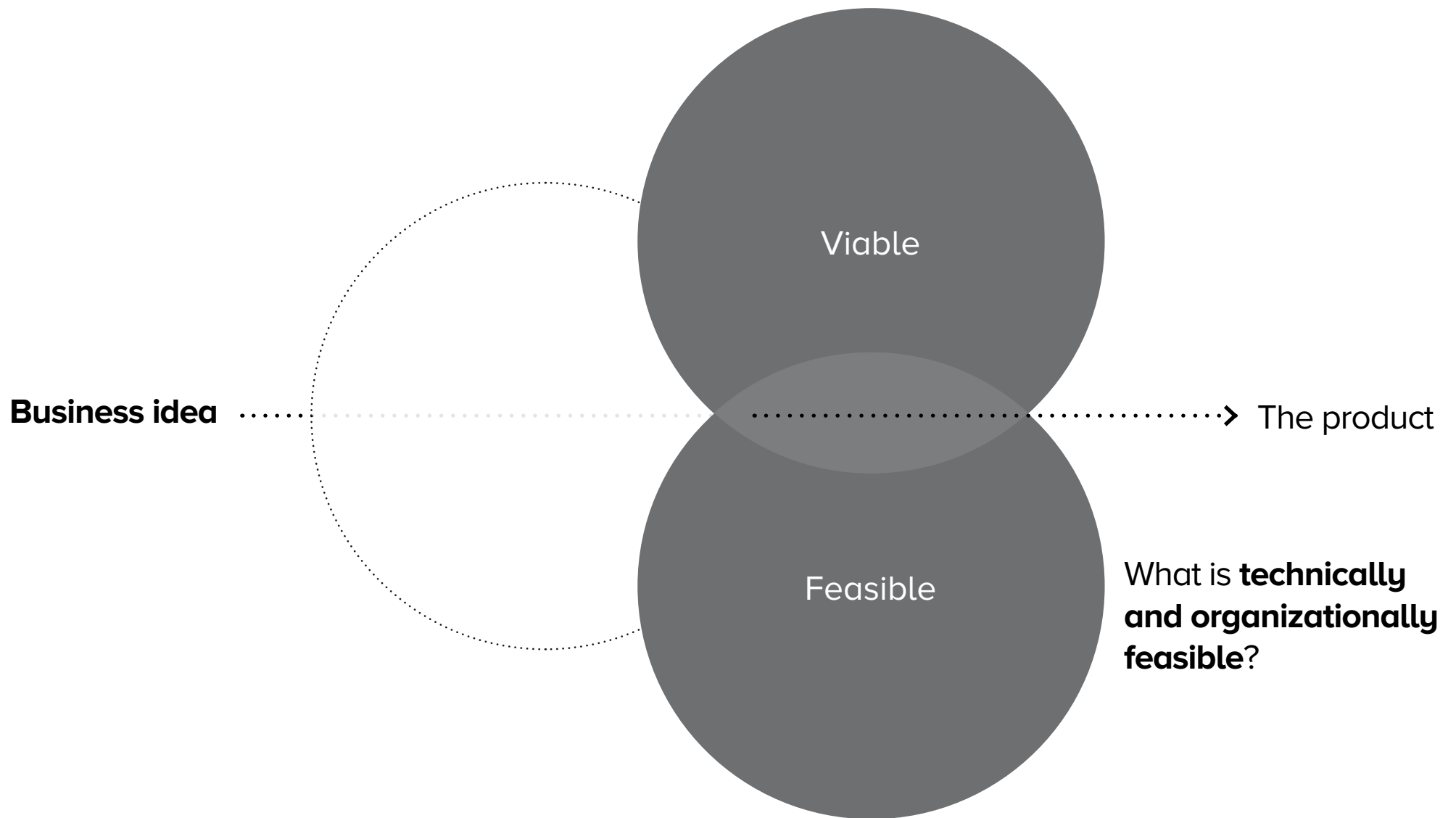
The product

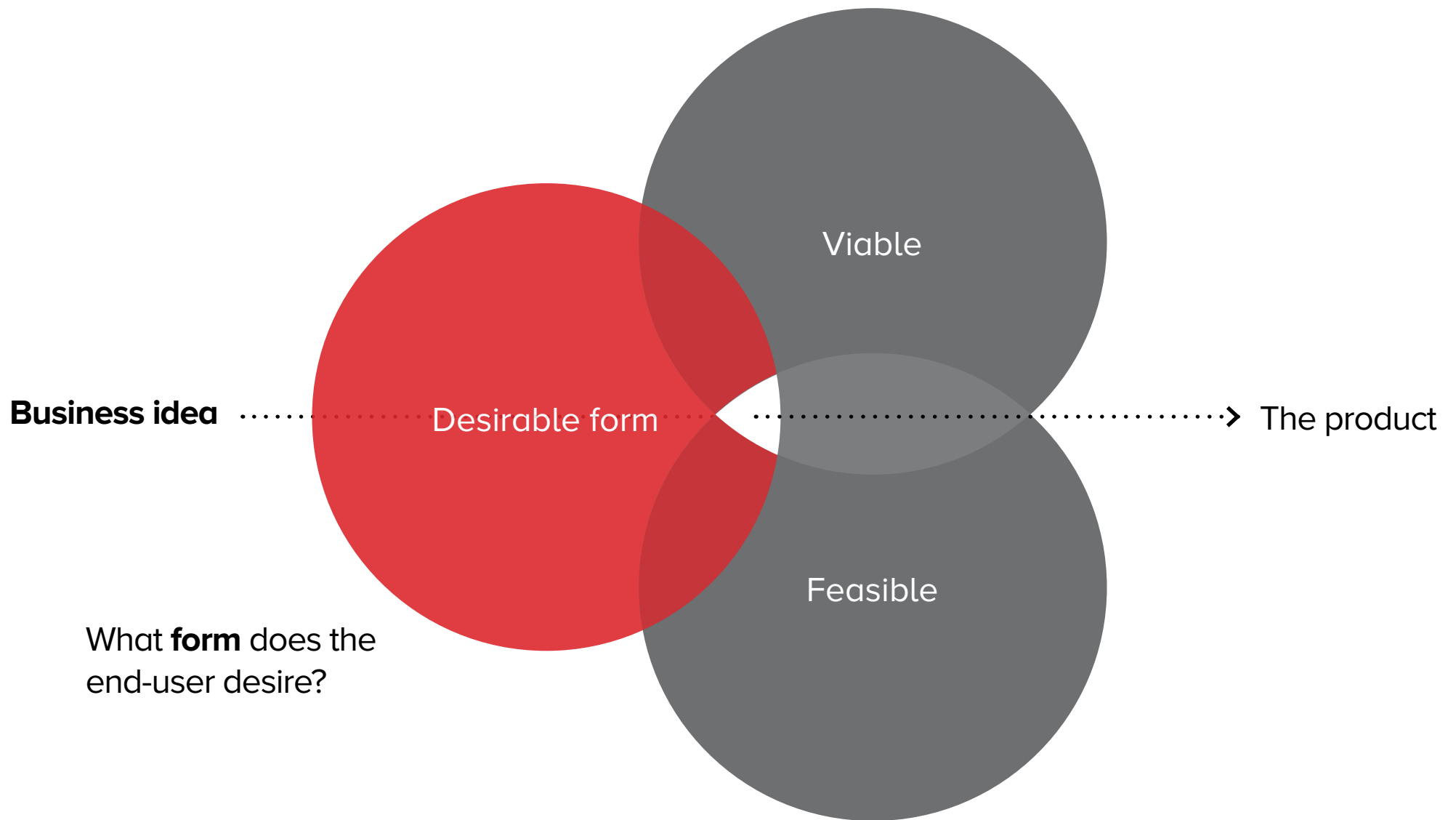


*"Often our hardest job is to remove remove remove."*

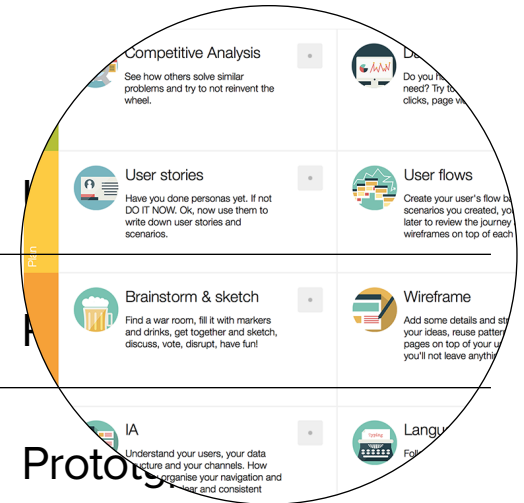
*—Ronan & Erwan Bouroullec*







Looks better online...



# The process extends beyond just design...

<b>Research</b>	Competitive Analysis	Data analysis	
<b>Planning</b>	User Stories	User Flows	
<b>Exploration</b>	Brainstorming	Wireframing	
<b>Communication</b>	IA	Language	Accessibility
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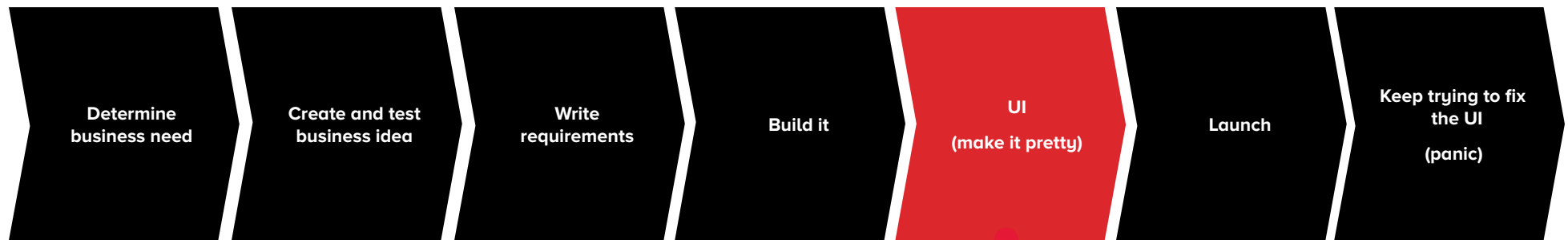
"Design needs to be plugged into human behavior. Design dissolves in behavior."

— Naoto Fukasawa

**Where does it fit into product development?**



# Typical technology product development process

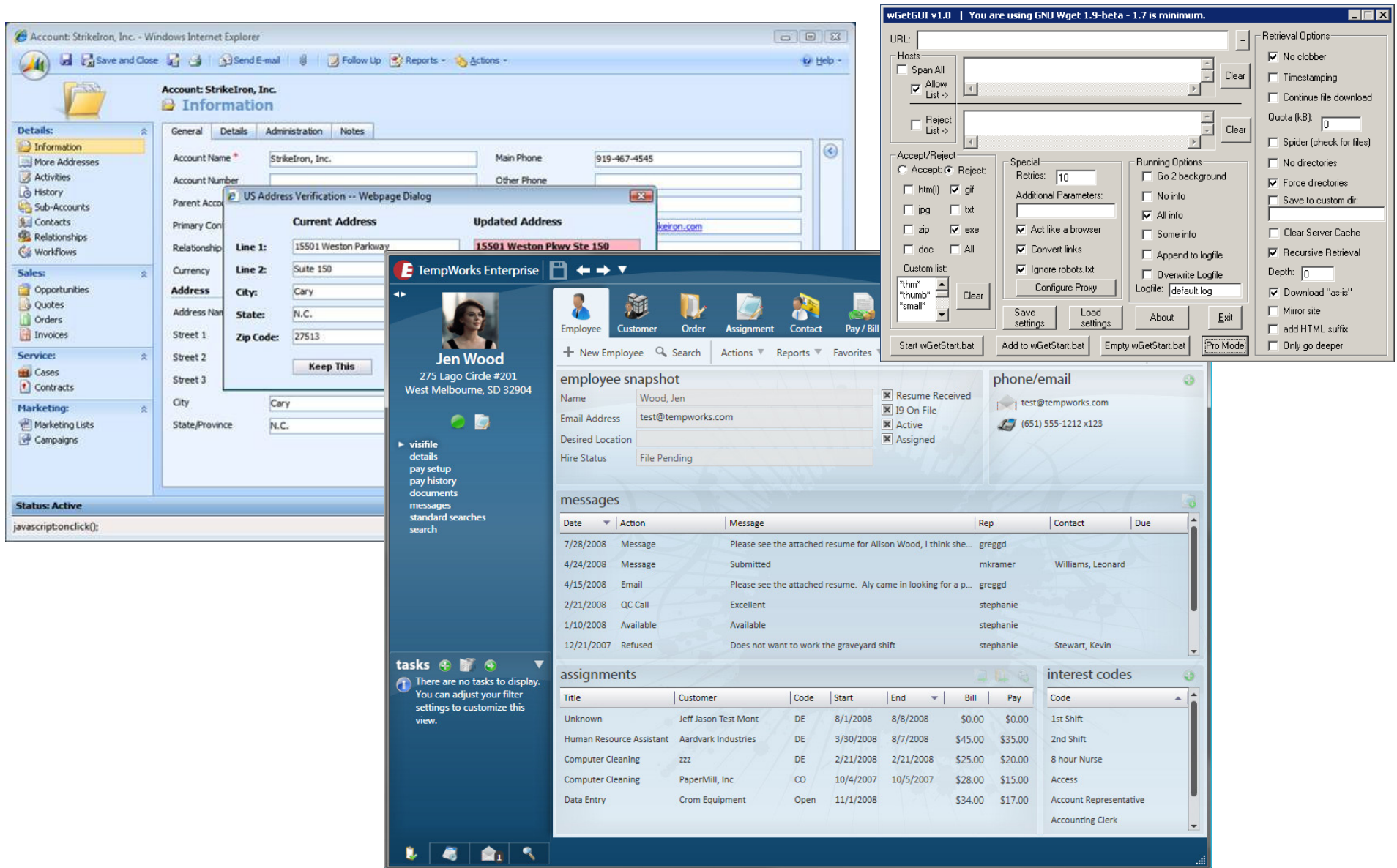


By this point, it's too late

*"It's art if can't be explained. It's fashion if no one asks for an explanation. It's design if it doesn't need explanation."*

—Wouter Stokkel

# Here are the usual results



... let's talk about fixing this. But first, we must step back.

*"Designers shooting for usable is like a chef shooting for edible."*

—Aaron Walter

**Who are you?**

**Your organization is:**

product-centric

service-centric

both

**...it matters until it doesn't because *UX is everywhere.***

Product-centric

**Buyers vs.  
Users**

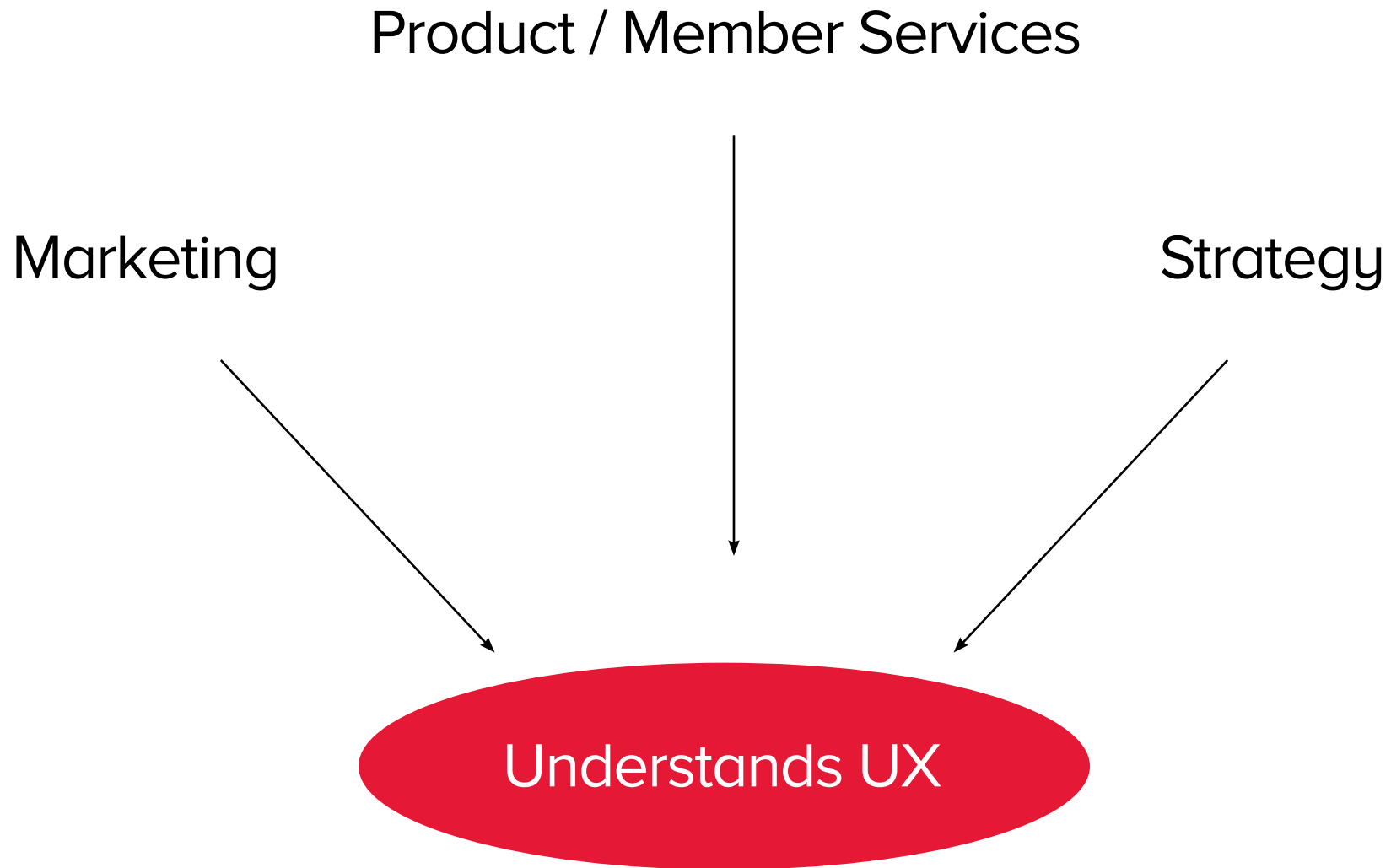
-or-

Service-centric

**Membership vs.  
Individuals**

**What's more important is to ask,  
"Who are we designing for?" and "Who OWNS UX?"**

# UX can fall under several departments



# Key roles in UX

## User Experience Designer (UXD)

- Must talk directly to users
- Creates concepts/wireframes
- Starts the process
- Connects design & dev

## Visual Designer (VD)

- Might talk directly to users
- Provides “fit & finish”
- Aligns product-brand
- Creates the VD system

## Front-end Developer (FED)

- Unlikely to talk directly to users
- Builds products / services
- Develops with BE dev

All are required - how they are pulled together is up to you. Rule of thumb:

**New product:** 1 UXD, 1/2 VD, 1-n FEDs

**Mature product:** UXD can cover 1-2 products

**Lots of roles = high investment.  
What about outsourcing?**

# Outsourcing vs. Hiring

## **When to outsource a role:**

- When you can only hire one / partial team
- You need a VD (or a short-term FED)

## **When to outsource everything:**

- When you need far more wide ranging experience than you could afford if you were to hire a full team
- When it's a brand new market/area that is unfamiliar to the company (external ux can be wonderful in getting past internal bias)
- Time is tight and you don't have enough time to do the hiring
- Your organization is in transition or merging and multiple products need to come together under two different teams (aka, you need someone to run interference)

# Hiring the best

So you don't have to plan for the worst

## Asking for a ...

- Visual designer means getting an artist
- UXD means getting an architect
- FED means getting an engineer

## Request a ...

- Portfolio
- Research / concepts / wireframes / studies
- Second engineer to “talk their language”

**Whatever you do, make sure your compensation is commensurate and competitive.**



# Introducing UX to the Org

- Groups that have existed a LONG time in your org may not understand the value
- UX introduces its own process and you're asking your dev to adapt to a new process – new is always scary.
- “We’ve always done it this way... why do we need UX? We do [ fill in the blank ] good enough already”
- This doesn’t happen overnight – it takes time so often groups will perceive extra time/work but not see immediate ROI and assume UX is at fault



# Integration is key

## Waterfall

- UX needs to be well ahead of dev
- UX is smoother when there is time
- UX may struggle to “right the ship” if the design doesn’t meet good user expectations

## Agile

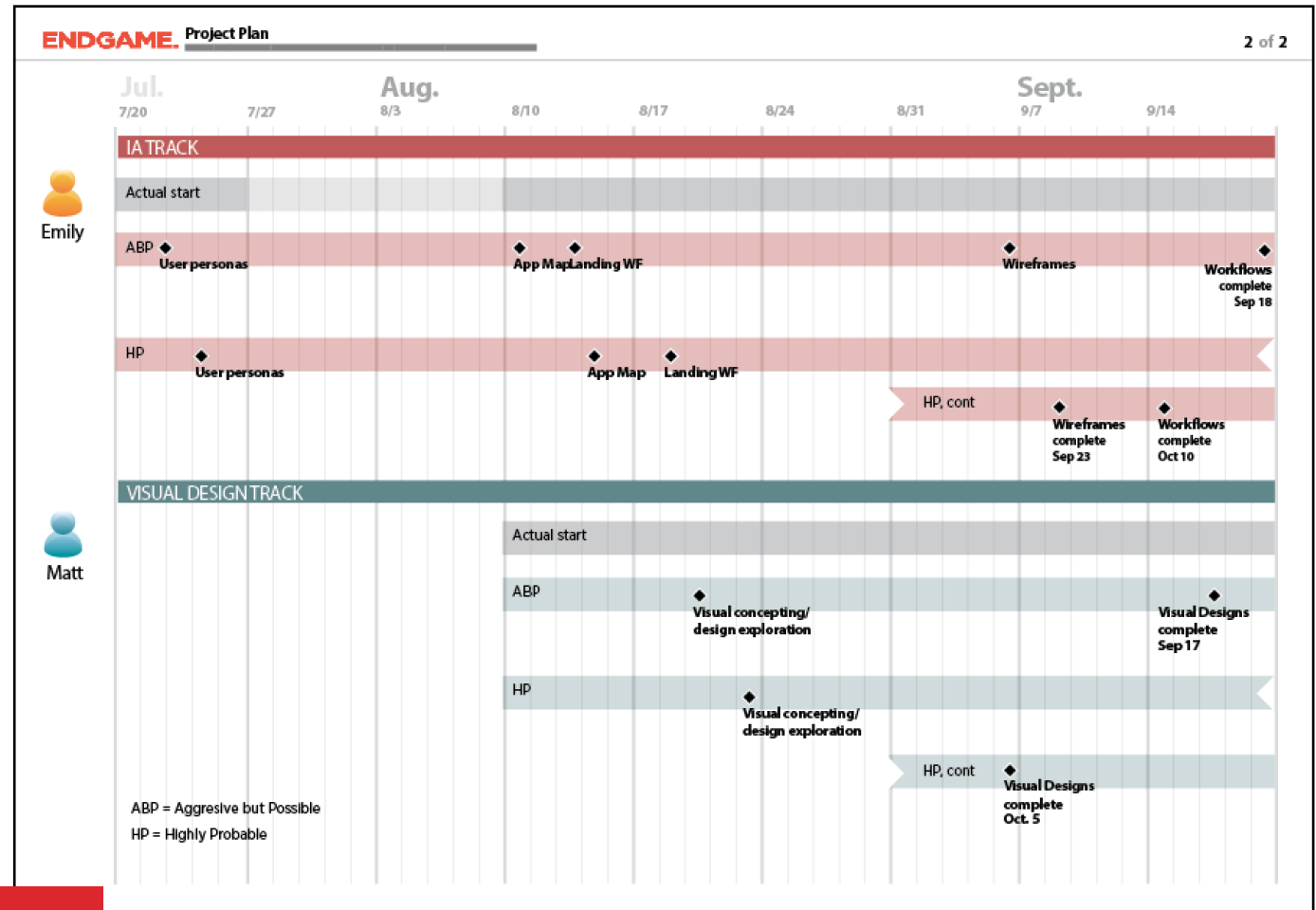
- UX may be more piecemeal
- UX must be highly organized to handle cycle iterations due to staying ahead of dev
- UX can easily become the bottleneck due to continual user feedback loops

# Producing the Plan

Or how I learned to stop worrying and love the UX team

## Should include...

- Roles
- Steps for UX
- Timelines
- Estimates
- Deliverables



*"Of course, the whole point of a Doomsday Machine is lost, if you \*keep\* it a \*secret\*! Why didn't you tell the world?"*

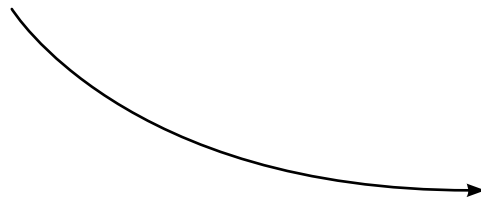
Find this at [www.uxiseverywhere.com/resources](http://www.uxiseverywhere.com/resources)




























# Producing the Plan, con't

## Keep in mind:

- It will likely change
- Its just a starting point - be flexible

As lead UXD, you are an advocate for the user AND for the process



Research	 <b>Competitive Analysis</b> See how others solve similar problems and try to not reinvent the wheel.	 <b>Data analysis</b> Do you have all the useful data you need? Try to have a look at funnels, clicks, page views, performances...	 <b>User feedback</b> Always speak with Customer Care team! Don't have one? Check your old surveys or videos, what your customer says? What do they actually do?
Plan	 <b>User stories</b> Have you done personas yet. If not DO IT NOW. Ok, now use them to write down user stories and scenarios.	 <b>User flows</b> Create your user's flow based on the scenarios you created, you can use it later to review the journey and create wireframes on top of each step.	 <b>Red routes</b> Define red routes for your product and you'll be able to identify, prioritise and eliminate any usability obstacles on key user journeys.
Explore	 <b>Brainstorm &amp; sketch</b> Find a war room, fill it with markers and drinks, get together and sketch, discuss, vote, disrupt, have fun!	 <b>Wireframe</b> Add some details and structure to your ideas, reuse patterns and create pages on top of your user flows so you'll not leave anything behind.	 <b>Prototype</b> You can start creating paper prototypes and continuously iterate to more functional ones. Use sketches, HTML pages or static images, then just get some people and test.
Communicate	 <b>IA</b> Understand your users, your data structure and your channels. How can you organise your navigation and content in a clear and consistent way?	 <b>Language</b> Follow your brand personality, keep in mind users' culture and language, the context of your product and make sure they understand you.	 <b>Accessibility</b> You don't need to add extra functionality or to duplicate any content. The key is simply to assess the requirements of those with different skills and limited devices.
Create	 <b>UI elements</b> Reuse elements and patterns, follow your style guidelines, don't have one? Create your guidelines. Start small, then create pages.	 <b>Gestures</b> So you've have a swipe slider? Tell me more about pinch, drag, zoom, rotate, shake, six-inch smartphones, left handed people, mouseover, kinect, motion detection...	 <b>Responsiveness</b> Can I see it on my mobile? Oh wait, what about my smart-watch which work as a remote for my 50" TV. Bonus: remember cross device experience.
Give feedback	 <b>Waiting times</b> If your users have to wait ages for the page to load, at least show them a loader, if take longer why don't you try something more entertaining?	 <b>Errors</b> Be clear and specific on what and where user's error is. I mean, your error, because if it's your fault you should say it.	 <b>Completed actions</b> Give immediate and clear feedback of successful user's actions. Do not always wait for server response, trust your server once in a while!
Finalise	 <b>Finalise layout</b> It's time to let your design shine, make it in the right way, don't stop with the first solution, always ask "is this the best you can do?"	 <b>Use of images and icons</b> Use of icons and images is strongly influenced by context, culture and layout that you use. Like icons, test your images, small changes can bring huge improvements.	 <b>Font &amp; colours hierarchy</b> Use colours and font sizes properly, try to follow your guidelines and keep it simple. The best visual hierarchies lead users to take the action confidently.
Delight	 <b>Micro copy</b> Every word is important, and a bit of personality will help your brand.	 <b>Micro interactions</b> Trigger, rules, feedback, loop. Details make the product. Bonus: Ever heard about easter eggs?	 <b>Transitions</b> Motion shouldn't be only beautiful, it have to builds meaning about the spatial relationships, functionality, and intention of the system.
Analyse	 <b>KPI Setup</b> What you want to achieve? What are your goals? Write down how you define success and failure and check if you have everything you need to collect the data.	 <b>AB Test plan</b> Plan your AB test ahead and, if you can, plan a short roadmap of improvements. Your goal is not just improving KPIs, but learning something.	 <b>Test</b> UX lab, survey, sessions recording... test, observe and fix, test, observer and fix...

Find this at [www.uxiseverywhere.com/resources](http://www.uxiseverywhere.com/resources)

*"In the absence of detailed information we all work from assumptions ... we tend to design for ourselves, not for other people."*

*—Richard Rubenstein and Harry Hersh*

# Preparing for detours

Because even the best laid plans sometimes fall apart

Give in when:

- Something is preferred but not required
- Something gets pushed to top priority in the next iteration
- Something isn't feasible (hopefully this isn't standard fare)
- Something is so far on the edge it's falling off the plate

Fight when:

- Removing the feature would break the flow/process/app
- It's a “no-brainer” aka “so easy a UXD could code it”
- Your research tells you it's non-negotiable (\*)

(\*) Non-negotiable means an overwhelming majority need it



# TUX vs STUX

Tactical UX and Strategic UX

## Tactical

- In the product cycle
- Iterative in nature / day-to-day UX
- Required of all UX teams

## Strategic

- Includes aspects like user research, product planning with PM, strategy sessions etc.
- Happens over the long-term



**This is why you hired UX!**

# So, how did we do?!

Assessing the success of the UX team

## Methods:

- Qualitative: User interviews/testing
- Quantitative: Mixpanel, Google Analytics

~~*“I know it when I see it”*~~

Whatever you do, it means:

1. Create goals
2. Implement analytics
3. Analyze results
4. Correct problems
5. Repeat

## Understand why there are problems:

Desirability/feasibility/viability = balanced?

Realistic timelines?

What can UX do to help?

# Growing the team

## REMEMBER THE FORMULA?

All are required - how they are pulled together is up to you. Rule of thumb:

**New product:** 1 UXD, 1/2 VD, 1-n FEDs

**Mature product:** UXD can cover 1-2 products

1. Adding more bodies doesn't always make things go faster
2. Balance your jr. and sr. people. The newer a product is, the more senior the role should be
3. Consider "swarming" on larger/more complex projects when time allows
4. Unsure? UXD is continual, FED is continual, VD is stop-and-start.



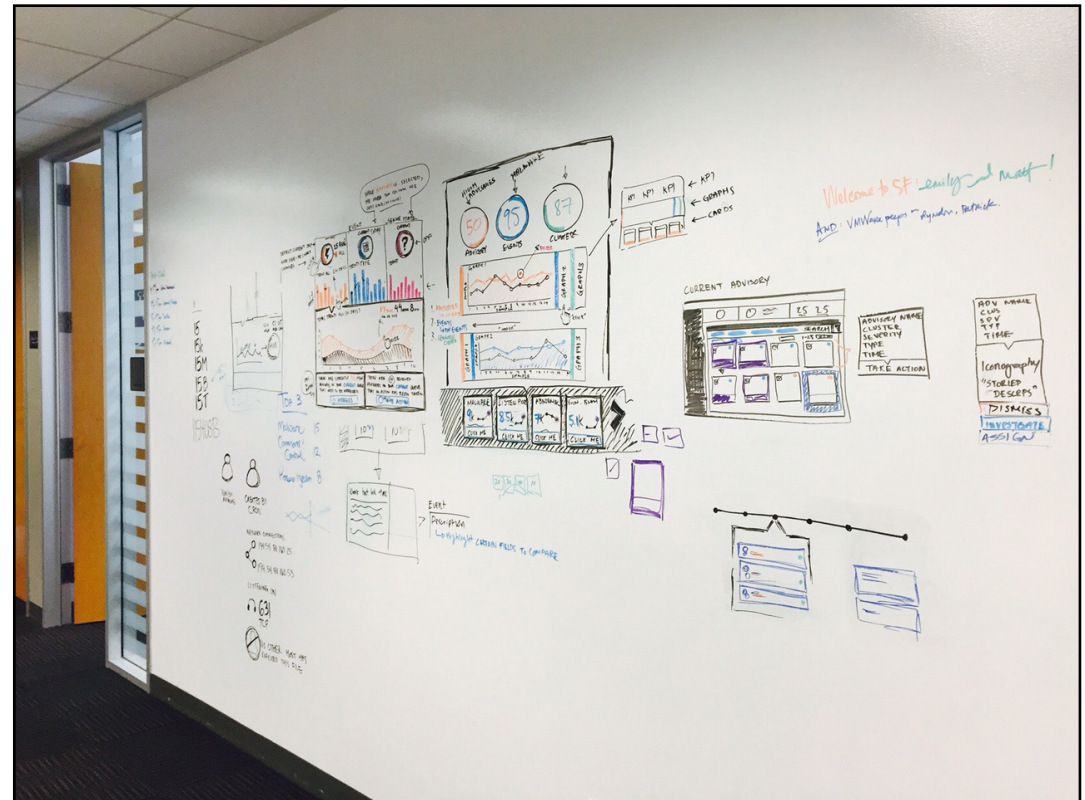
**Tip: Consider creating a visual design system to help free up UX resources during crunch times.**



# Growing the processes

Continue to:

- Socialize your work (psssst: whiteboards are amazing for this)
- Report regular progress / trends - show those numbers
- Invite “non-typical” to collaborative/ brainstorming sessions



*“Making the simple complicated is commonplace; making the complicated simple, awesomely simple, that’s creativity.”*

—Charles Mingus

# Exit strategies

You've got to know when to hold 'em and know when to fold 'em

## UX designers

- When you really want to try something new particularly in a new field or with a new user segment / new form factor
- Work stagnates / your work isn't getting utilized

## VD designers

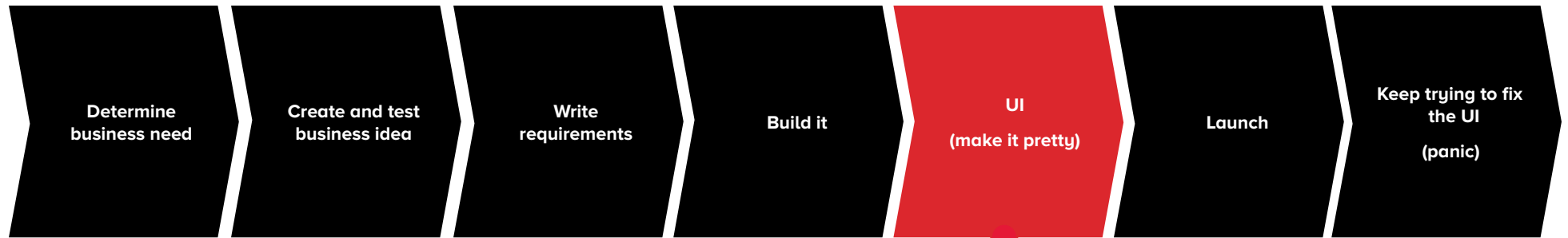
- Desire to expand portfolio, design for new problems / form factors
- Work is “done” – ie, no new design needed that cannot be solved with design system or existing assets

## FEDs

- Desire to try new technologies / new form factor
- Desire to work with specific people / company / developers
- Work becomes a grind / dull

**Ok, so after all that, what does success look like?**

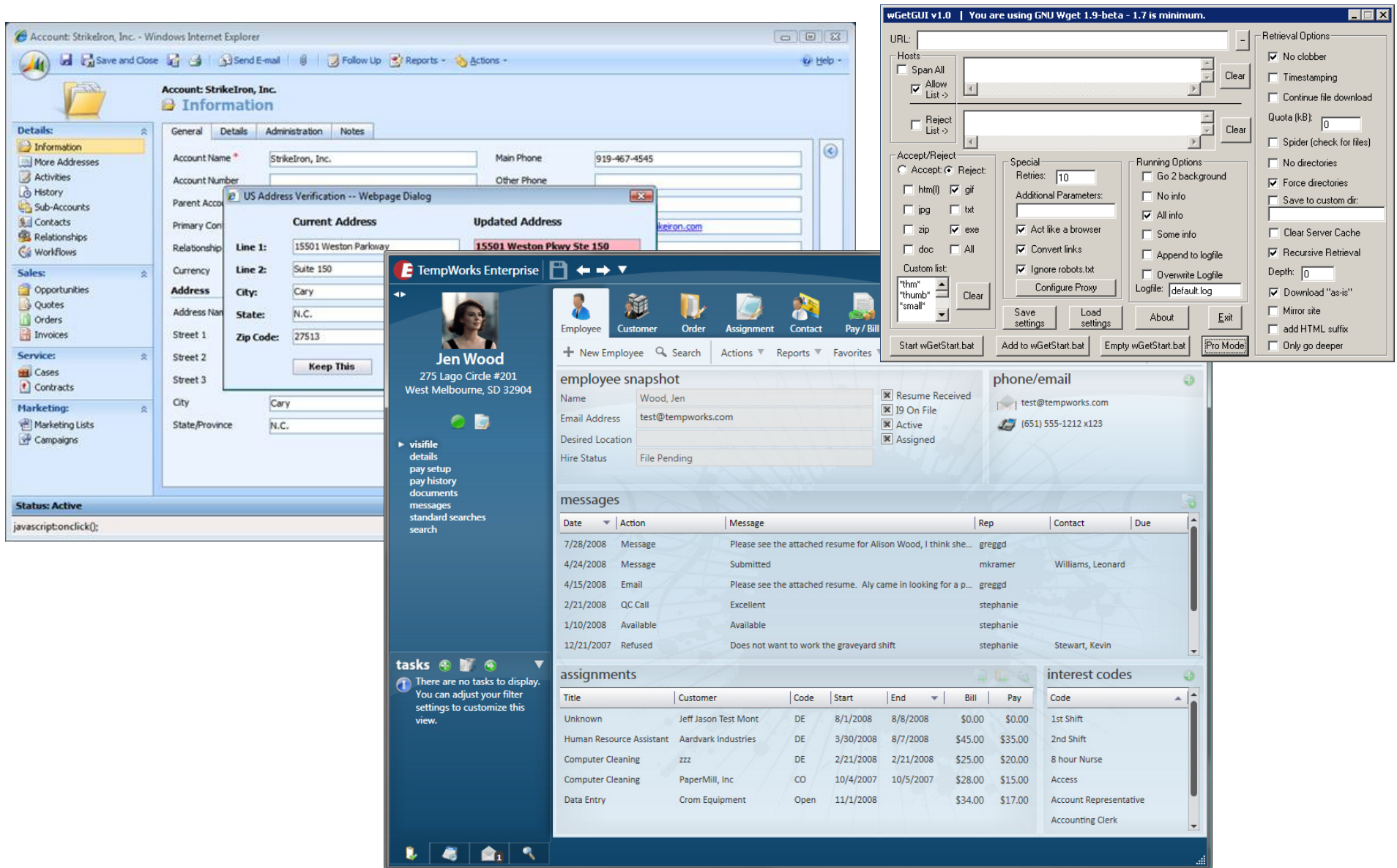
# Typical technology product development process



By this point, it's too late

Remember this..?!

# Here are the usual results

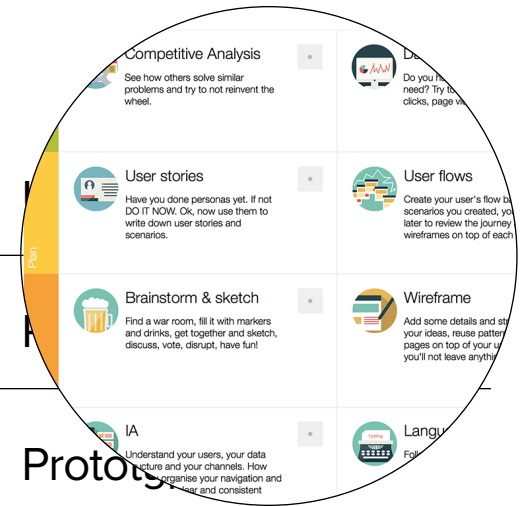


... and this ...

"Good design keeps the user happy, the manufacturer in the black and the aesthete unoffended."

—Raymond Loewy

Looks better online...



# The process extends beyond just design...

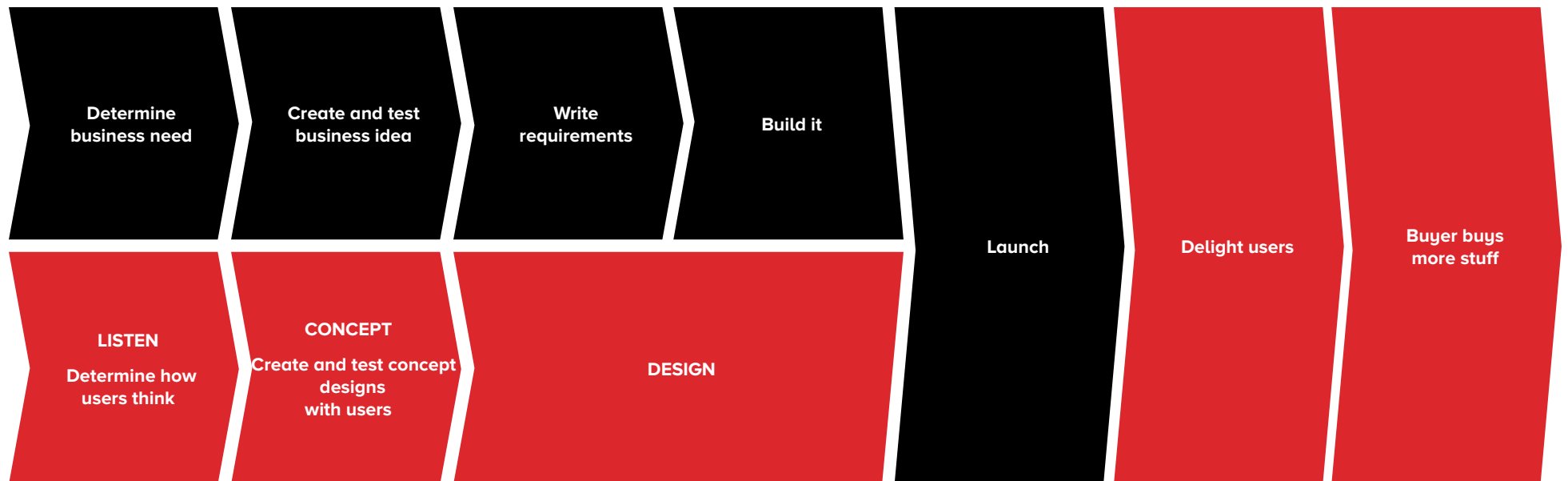
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...and this..?!

"It's simple, until you make it complicated..."

—Jason Fried

# My proposal

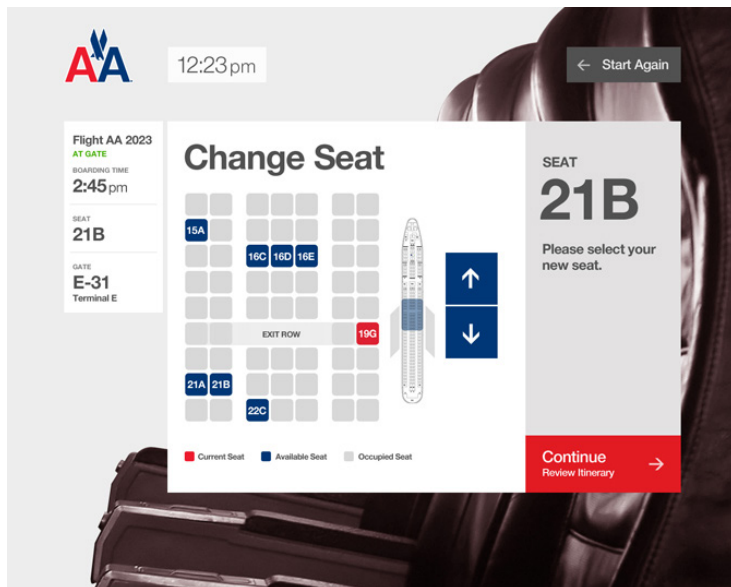
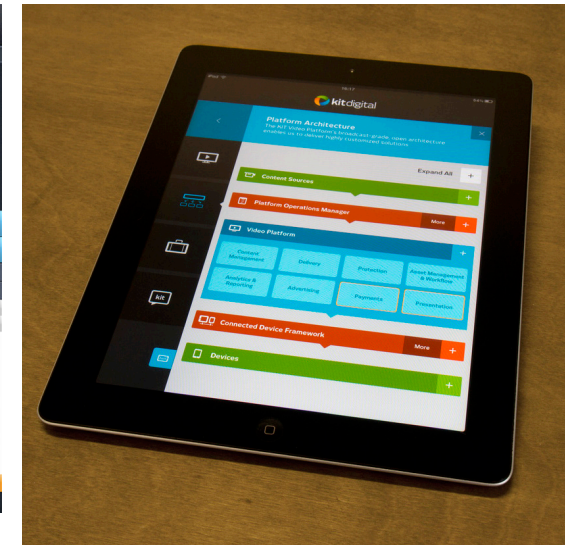
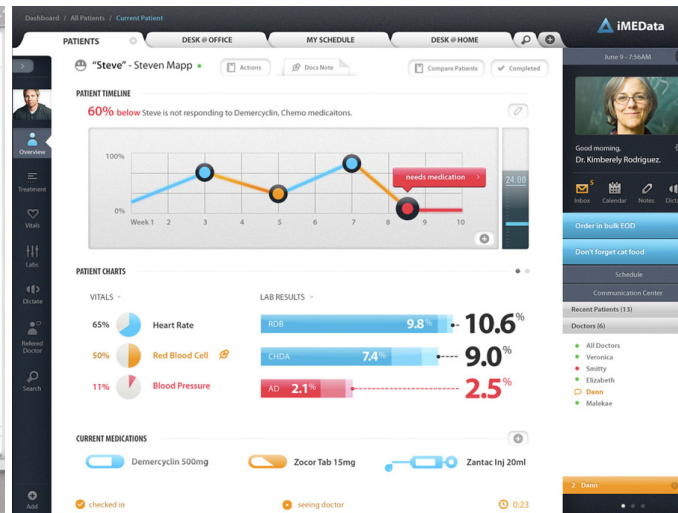
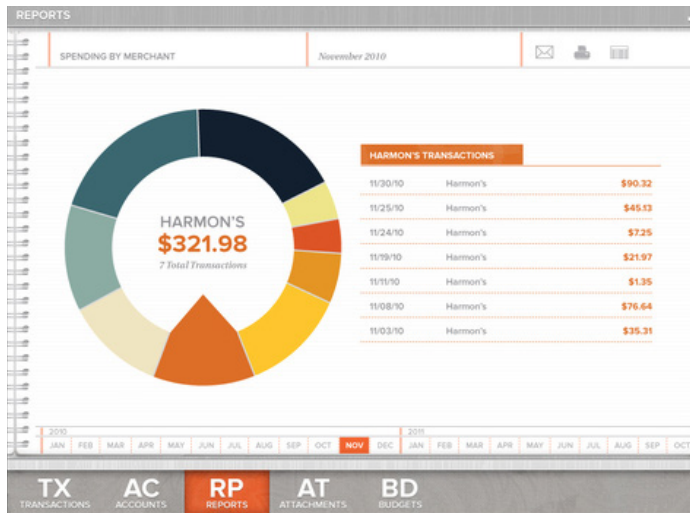


*"Customers can't always tell you what they want. But they can always tell you what's wrong."*

— Carly Fiona



# And here is what you get doing it this way...



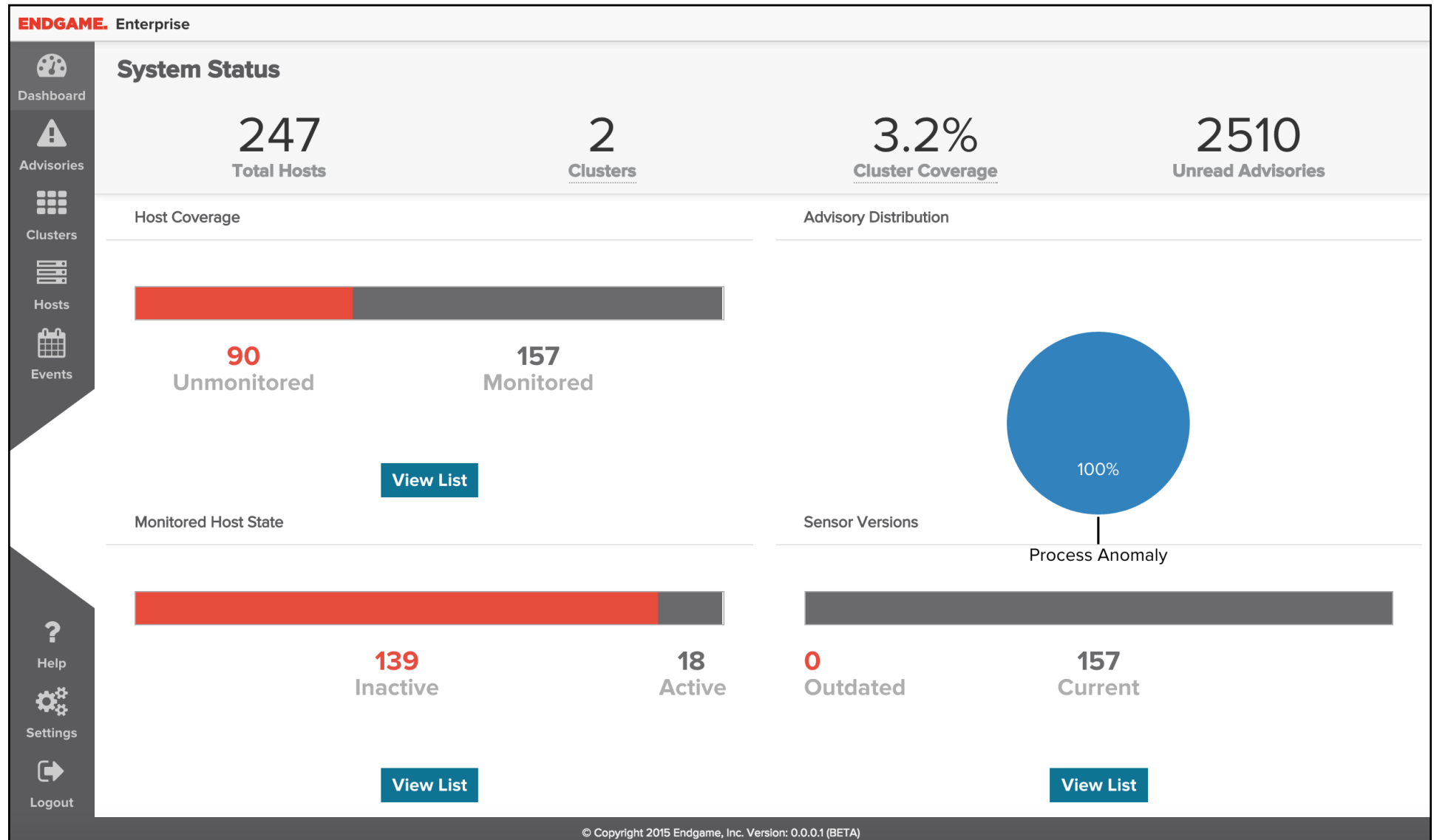
"Make everything as simple as possible, but not simpler."

—Albert Einstein



# In 6 months, we are seeing results at Endgame

From this...

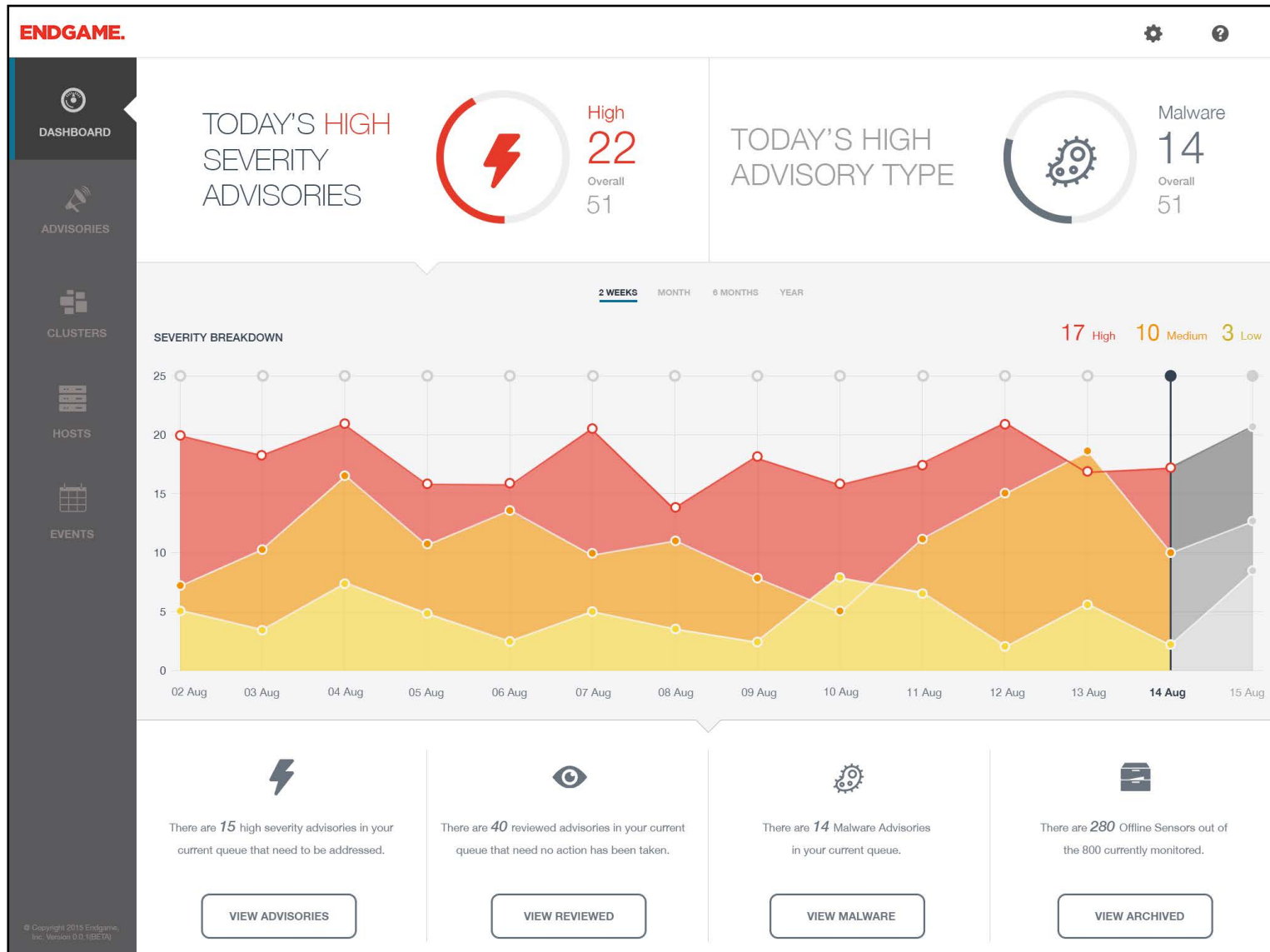


“Design must seduce, shape, and more importantly, evoke an emotional response.”

—April Greiman

# In 6 months, we are seeing results at Endgame

To this...



*"Problems with visual design can turn users off so quickly that they never discover all the smart choices you made with navigation or interaction design."*

—Jesse James Garrett

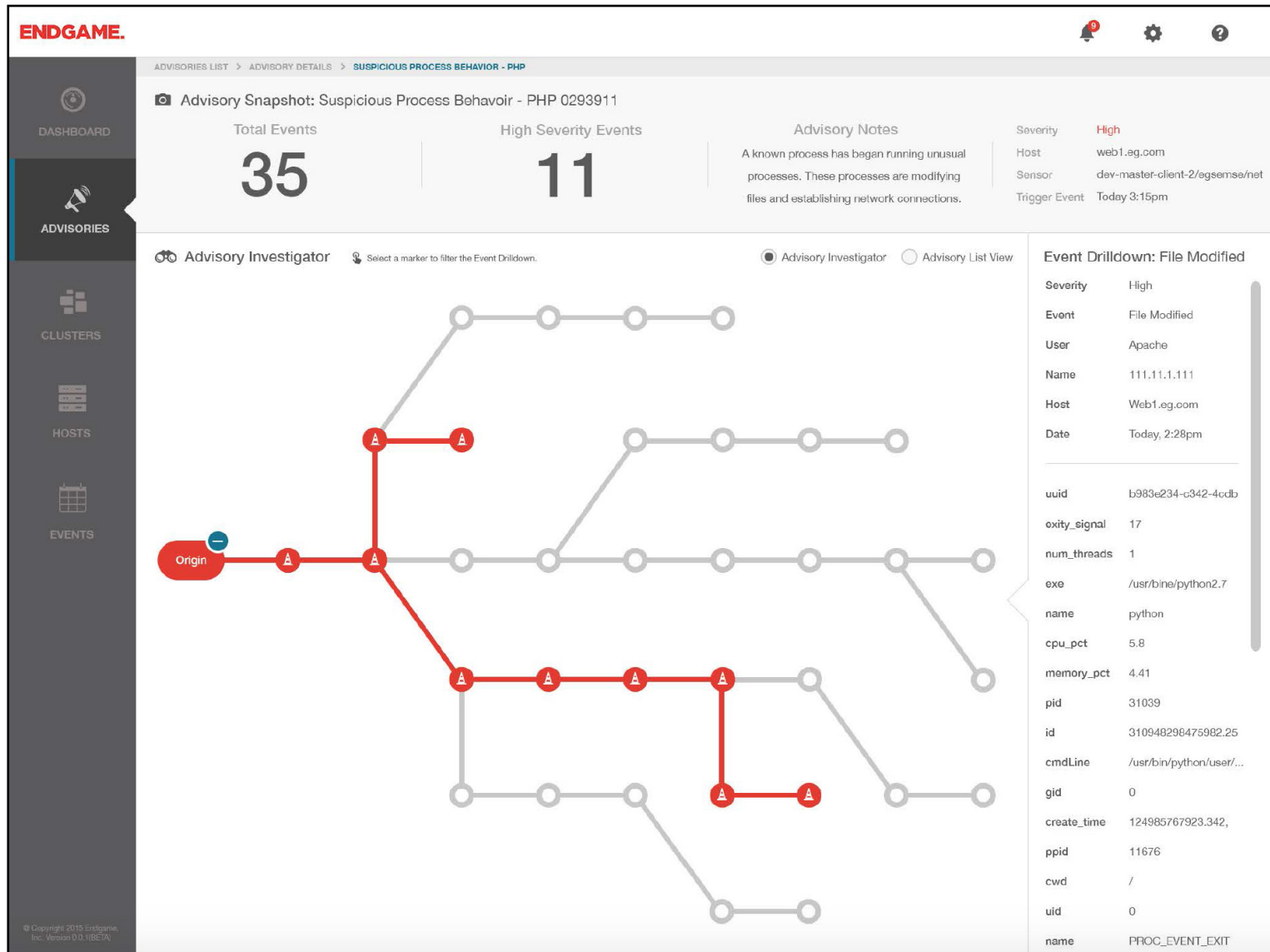
# From this...



—Blaise Pascal

# In 6 months, we are seeing results at Endgame

To this...



*"The details are not the details. They make the design."*

—Charles Eames

# In 6 months, we are seeing results at Endgame

From this...

ENDGAME. Enterprise

Dashboard

Advisories

Clusters

Hosts

Events

Help

Settings

Logout

Type

Hosts

Start Date

End Date

Type: Process Anomaly

Search

Advisories

Abnormal process behavior (25368)

dev-cassandra-3.egsense.net - 5:27:04 pm, Jun 28th

Summary: An anomaly was detected.

Executable: salt-minion Group: uuid Event Type: fork Msg ID: 74381a7d-00f1-493c-b3e6-8fc4b4b36a8f PID: 25368 Timestamp: 1435437470.423097 Command: unknown GID: 0 Comm: salt-minion Team: endgame PPID: 25367 Sensor: 31b51403-1571-4e83-8852-83452b4eb671 CWD: / Md5: unknown UID: 0

Event	Related Events Sensor	Occurred
Abnormal process behavior (25368)	dev-cassandra-3.egsense.net	9:26:51 pm, Jun 28th

Abnormal process behavior (11310)

dev-cassandra-1.egsense.net - 5:26:10 pm, Jun 28th

Abnormal process behavior (27963)

dev-keymaster.egsense.net - 5:19:08 pm, Jun 28th

Abnormal process behavior (27839)

dev-keymaster.egsense.net - 5:10:48 pm, Jun 28th

Abnormal process behavior (21376)

dev-c2.egsense.net - 4:58:28 pm, Jun 28th

Abnormal process behavior (21379)

dev-c2.egsense.net - 4:58:28 pm, Jun 28th

Abnormal process behavior (3693)

dev-receiver.egsense.net - 4:52:38 pm, Jun 28th

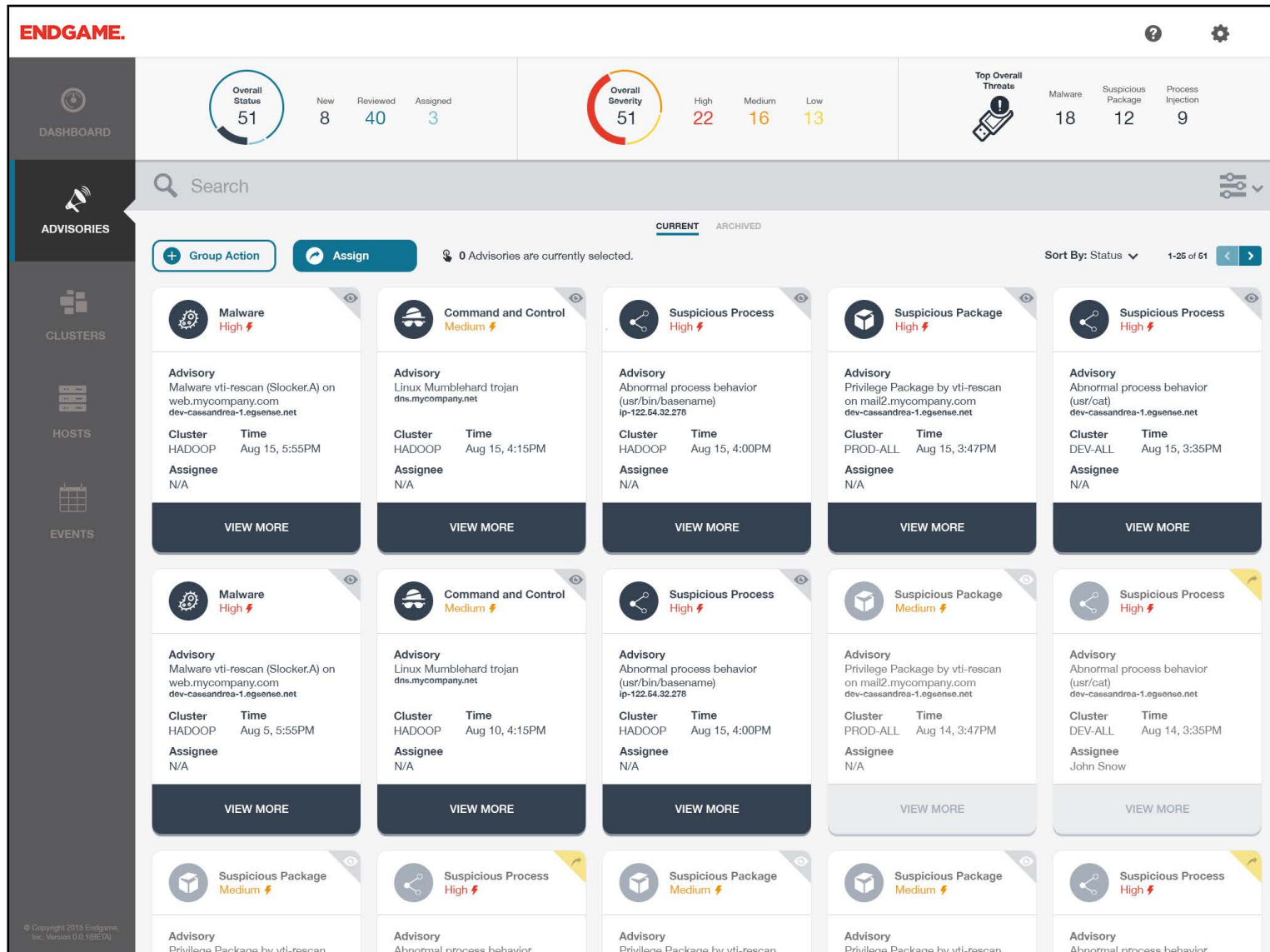
© Copyright 2015 Endgame, Inc. Version: 0.0.0.1 (BETA)

"You can't imagine how many times I was told that nobody wanted or would use graphics."

—Jef Raskin

# In 6 months, we are seeing results at Endgame

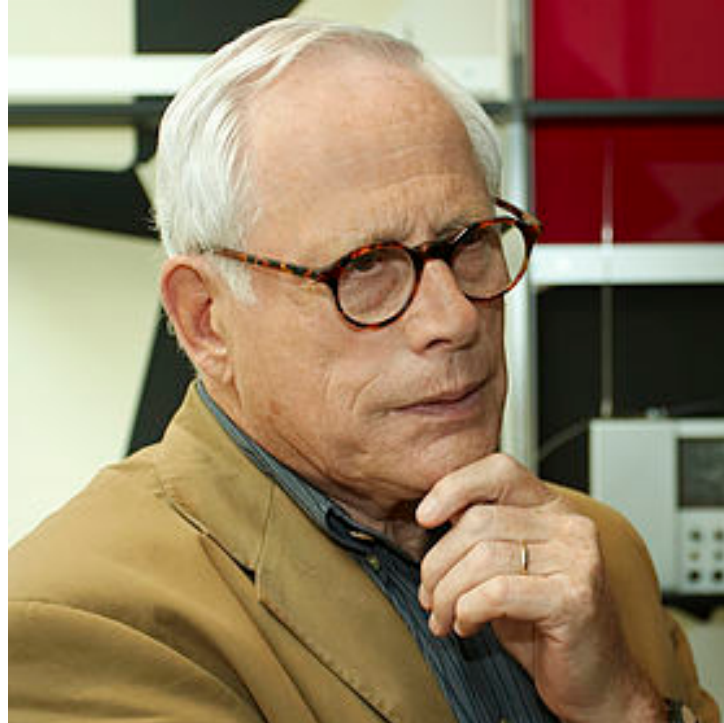
To this...



*"Often the best way to teach someone something is to tell the story of how we first learned that same lesson."*

*—Jesse James Garrett*

**If all else fails, just ask...**



## What would Dieter do?

*"Design should not dominate things, should not dominate people. It should help people. That's its role."*

*—Dieter Rams*



**Thank you.**

Find these resources at: [\*www.uxiseverywhere.com/resources\*](http://www.uxiseverywhere.com/resources)