THE USER EXPERIENCE TEAM OF ONE

A Research and Design Survival Guide

by **Leah Buley** Foreword by Stephen Anderson

Rosenfeld

THE USER EXPERIENCE TEAM OF ONE

A RESEARCH AND DESIGN SURVIVAL GUIDE

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The User Experience Team of One

A Research and Design Survival Guide

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For Theo and Chris, my boy and my man.

HOW TO USE THIS BOOK

Who Should Read This Book?

While many people are attracted to the field of user experience because they want to be champions for users, simply loving users doesn't guarantee that you'll be a successful user experience team of one. UX teams of one are people who love users and also make sure that designs get tested, business people's questions are answered, design problems receive an appropriate amount of creative exploration, UX specifications are implemented according to plan, the product is continually monitored and improved upon, and support for UX is ever growing. And they do it all without a roadmap or a blueprint, with the help of people who may or may not be active supporters of UX themselves.

This book is for anyone who is interested in taking on the challenging and rewarding work of spreading a user-centered mindset to new places where it's never been before. While this book is intended to be approachable for anyone who picks it up, it was written with two particular audiences in mind.

- One core audience for this book is people who are already working on product teams in another role but are interested in transitioning into the field of UX. If that sounds like you, that may mean that you've never thought of yourself as a UX professional before, and you're interested in crossing over into the field, either as a main role or part of an adjacent role. For this type of reader, **Chapters 1** and **2** are a must.
- Another core audience for this book is more experienced practitioners who are seeking ways to work more effectively within a cross-functional team. For this type of reader, **Chapters 3** and **4** are highly recommended.

What's in This Book?

The user experience team of one ethos is equal parts philosophy and practice (see Figure 0.1). It focuses on having the right attitude, seeking out opportunities, being patient and inclusive, and doing the best work you can. Between philosophy and practice, I'll cover not just guiding principles, but also the nuts and bolts of how to successfully run a UX project as a team of one.

Accordingly, this book is organized in two parts: Part I is philosophy, and Part II is practice.

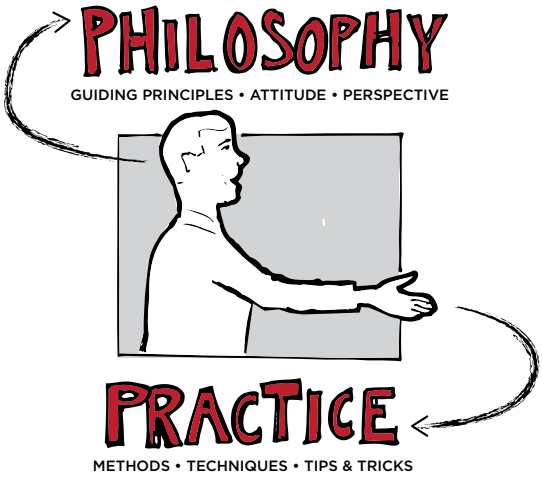


FIGURE 0.1
Being a successful UX team of one is equal parts thought and action, head and hand, philosophy and practice.

Part I, "Philosophy," is a frank walk-through of the UX team of one's concerns, from start to finish. In this section, I'll explain what it means to be a UX team of one, how to establish a successful foundation, how to grow yourself and your career, and how to involve others and build support for UX along the way.

- **Chapter 1, "UX 101,"** gives an overview of what UX is, how it came to be, and what it takes to be a UX practitioner.
- **Chapter 2, "Getting Started,"** focuses on how to begin, including the fundamentals of user research and design for the new and aspiring UX team of one.
- **Chapter 3, "Building Support for Your Work,"** addresses some of the most challenging parts of life as a team of one: how to build support and do great work in spite of real-world organizational and interpersonal constraints.
- **Chapter 4, "Growing Yourself and Your Career,"** is a blueprint for thriving and flourishing as you grow yourself and your career in user experience.

In **Part II, "Practice,"** I'll focus on the nuts and bolts of user experience work. This half of the book is intended to function as a ready reference, full of practical methods that have been selected and, in some cases, adapted to fit the realities of a UX team-of-one's situation. What is this reality? Most importantly, teams of one must rely heavily on their non-UX colleagues to help them get work done. That means there is a preference here for methods that can be done in a quick-and-dirty fashion, and an even greater bias toward methods that invite collaboration and cross-functional participation. In some cases, these methods may already be familiar to you, but the approach and tips are adapted for the work of a team of one.

- **Chapter 5, "Planning and Discovery Methods,"** helps you set up a UX project for success. It includes planning and discovery of the team's requirements and expectations. It also covers techniques for establishing a shared UX strategy with the team.
- **Chapter 6, "Research Methods,"** is all about research. This includes research with users, the centerpiece of a UX practice, as well as research into competitors and best practices.
- **Chapter 7, "Design Methods,"** covers methods and techniques for inclusive and participatory user experience design.
- **Chapter 8, "Testing and Validation Methods,"** provides methods for validating that your strategy, research, and design work has led you in the right direction.
- **Chapter 9, "Evangelism Methods,"** brings our discussion of philosophy and practice full circle, and finishes up with approaches for building support and awareness of UX throughout your organization.
- **Chapter 10, "What's Next,"** closes with a personal challenge for you to think critically about where you're taking your work in UX and how it aligns with the growth of the field overall.

Parts I and II are heavily cross-referenced, so methods that are described in detail in Part II are explained in context in Part I and vice versa.

The book is designed so that you can dip in and out as needed when you face a specific challenge or are working at a particular point in a project. That said, reading Part I from start to finish will give you a sense of the common growth path for a UX team of one. And reading Part II sequentially will give you a complete plan for how to run a UX project.

What Comes with This Book?

This book's companion website (rosenfeldmedia.com/books/ux-team-of-one/) contains some templates, discussion, and additional content. The book's diagrams and other illustrations are available under a Creative Commons license (when possible) for you to download and include in your own presentations. You can find these on Flickr at www.flickr.com/photos/rosenfeldmedia/sets/.

FREQUENTLY ASKED QUESTIONS

What is a user experience team of one?

A UX team of one is someone who works in a situation where they are the key person driving a user-centered design philosophy. Certainly, if you are the only person in your company practicing (or aspiring to practice) user-centered design, you are a user experience team of one. However, even in organizations with multiple UX professionals, if you regularly work on a team where you are the *only* UX person, you are a UX team of one. Chapter 3 explains the kinds of challenges that UX teams of one commonly face, and explains what to do about them.

I'm a freelancer. Is this book for me?

The User Experience Team of One focuses primarily on people working in or with organizations. It is not explicitly geared toward freelancers, consultants, or contractors. Still, much of this book may be relevant for independents, insofar as they, too, must often work with the cross-functional teams of their clients. And for readers who are considering going out on their own, be sure to check out the section "Considering Going Independent?" in Chapter 4.

What's different about life as a UX team of one?

If you are a UX team of one, you have these unique challenges:

- **You feel like a jack of all trades, master of none.** You do a variety of work: probably some design, some research, some writing, some testing, and some evangelism. You care about your work, and you want to do it well. But being a generalist, you may feel as if you are spread a bit thin. You may also wonder at times if you're "doing it right." Would a specialist's level of knowledge make a tough design problem or difficult conversation easier to get through?
- **You need to evangelize.** You probably work with or for an organization that doesn't yet "get it." That is, they haven't fully bought into the value and purpose of UX. Or, even if they do value user experience, they may not be in a position to fully fund and build a robust UX practice. Either way, that means that you're constantly seeking to educate and influence.

- **You're learning on the job.** You need to figure out how to do your work on your own. You may have discussion lists and professional communities that you can turn to for peer-to-peer advice, but in your day-to-day work, you often have to make an educated guess and then trust and defend your hunches as to the best next steps.
- **You're working with constrained resources.** The biggest challenge for teams of one is time. There's only one of you, and there's a lot of work to be done.
- **You're charting your own course.** No one in your organization has done this before. You're figuring out your own career path, without a guide or a manual to follow.

What makes this role interesting is the dramatic tension between needing to inspire through expertise and trying to build your own expertise at the same time. This leads to a unique set of challenges that go well beyond simply trying to do good design. It makes skills like facilitation, flexibility, assertiveness, and persuasiveness central to the team of one's toolkit. This interesting tension has practical considerations, as well as philosophical ones—and that simple fact is the inspiration for this book.

Chapters 2 and 3 explain the working conditions that a team of one often experiences, while Chapters 5 through 9 provide specific methods that are optimized for those working conditions.

Is this just an intro to a UX book?

Yes and no. This book is intended to be accessible to people who are just starting out in user experience, as well as seasoned practitioners. Chapter 1 provides an overview of user experience and can serve as a basic introduction to the field. However, the methods in Chapters 5 through 9 aren't just typical UX methods. They have been chosen because they educate and involve others who may not be familiar with or supportive of user-centered design, while requiring less time and fewer resources.

CONTENTS

FOREWORD

There are some things you should never do at the same time: Move. Have a baby. Adopt a puppy. Change jobs. Leah did all of this while also writing this book.

And while anyone who knows Leah shouldn't be surprised by her ability to pull all of this off, this speaks to a tenacity shared by those who find themselves in a "UX Team of One." There's a certain amount of grit, or perhaps it's foolhardiness, that allows us to plunge into the unknown, the untried, the undiscovered.

My own entry into the user experience world was a solitary one: dot-com boom. Lone visual designer. Surrounded by a team of engineers. Like many others, I had to look around and figure out *on my own* how to do things. Fifteen years later, I'm delighted to report that's still the case. Even as a consultant, hired for my expertise, I'm still learning and making stuff up as I go along. We all are! What's more, this learning is not all solitary—we have the shared experiences of a maturing community to draw upon. What Leah has shared in this book will no doubt add new tips and processes to your own bank of knowledge, as it has mine.

But, beneath all the artifacts and processes, there's something more that keeps us going, something timeless, something fundamental: *grit and curiosity*. These traits are what keep us in the game. I suspect most of us aren't happy to leave well enough alone. And it is this dissatisfaction, this searching for something better, combined with a deep empathy, which defines the UX community. Everything else flows from this core.

I was fortunate to see Leah debut her "UX Team of One" talk at the 2008 Information Architecture Summit. (I still have my button!) Aside from a stellar presentation to a standing-room-only crowd, I recall Leah's *no-nonsense* approach to design. From the hand-sketched slides to the quick exploration of different ways to refresh an aging online service, it all just made sense. Cut the crap, do what needs to be done. No more, no less. Her presentation was at once obvious and inspiring. That was one of the few slide decks I looked for after the conference.

Which is why I was thrilled to find out later that Leah would be sharing these ideas in a book. We need to exchange rigid processes for more flexible ways of responding. Yes, there's merit to a hardened, repeatable process, or having a team of specialists to work with, but working alone means jumping in there and getting things done, whatever it takes! No nonsense. No formal process. This is better than defined roles and responsibilities. Working alone brings with it a certain amount of freedom and autonomy. We can shape the path before us. For this reason, working alone is something to savor, rather than endure.

Certainly, individuals need a team to pull off great things. But I've found that nearly every successful product story can be traced back to one or more devoted mavericks, individuals who pushed forward, against all odds.

And here's the bigger truth: Whether you find yourself all alone or in a team of like-minded folks, we are all individuals with a unique voice, opinions, and diverse experiences that define us. We are all a UX Team of One. My challenge to you: Draw upon this diversity—magical things happen at the intersection of seemingly unrelated ideas. Don't let a job title define you. Do what makes sense, not what process dictates. And most of all, never stop playing and learning. If we can all hang on for the ride, there is no limit to the places we'll go!

—Stephen P. Anderson,
author of *Seductive Interaction Design*

INTRODUCTION

In June 2011, this message appeared on the Interaction Designers Association (IXDA) discussion list:

> I am at a point in my life where I know I want to do UX design after doing Web design for so long and then reading about usability testing, etc., 6 years ago. But my issue is I'm tired of working for orgs who say they care about their customer but don't do testing to even know what their customers want from them... I'm kind of fed up with working for people who don't get it.

This frustrated plea perfectly sums up the challenge that many passionate user experience professionals face. Many organizations have only a modest understanding of user experience. Some have none at all. In such an environment, if you are the key person driving for a more user-centered way of working, you *are* a user experience team of one. (And that's true whether it's your official job title or not.)

But this is about more than just professional frustration.

While this book is intended to be a practical resource for people who do user experience design without the support of a large UX team, I'll tip my hand right here at the beginning and confess that I believe that being a UX team of one is much more than just a job. It's also an important avenue for doing good in the world. The UX team of one is as much a professional circumstance as a constructive philosophy. And here are its founding principles:

- **UX is a force for good.** In an increasingly technological world, designing products with real people in mind helps us make sure that technology integrates in our lives in a human way. It's a voice of reason, arguing that products and technology can support and even enrich our fundamental humanity.
- **The world needs more of it.** As the boundaries continue to blur between the technological world and the analog world, everything that we buy, use, and do will need this user-centered perspective. Companies that never thought of themselves as being in the user experience business before will realize that they are now. We all are. This field can only grow.

- **You can make that happen.** Yes, you. The person reading this book right now, whatever your job title, whatever your career aspirations, you have it in your power to spark an awareness of the "user's perspective" in the work that you do and with the people that you work with.

This book can help you spread the growth of a new and exciting field, one person, team, and company at a time.

PART I

Philosophy

What makes a team of one special is that you find yourself in situations where you not only see an opportunity for a more user-centered approach, but you also need to lead the charge, bringing others along with you. A team of one challenges the mighty forces of the status quo, inertia, and other people's way of doing things. That's brave and ambitious work, and it requires not only technical know-how but also vision, conviction, and a soft touch. This part of the book will arm you with all of the above. The approach outlined here can help you spread the growth of a new and exciting field, one person at a time.

CHAPTER 1

UX 101

PHOTO BY ANGELO AMBOLDI (FLICKR)

Talking about user experience (UX) can be a bit like looking at an inkblot test: whatever matters the most to you ends up being what you see. People find their way to the field of user experience through a variety of pathways, and they naturally apply their own lenses in how they think about and describe the work of UX. This chapter will attempt to balance out the picture by giving you a simple definition of user experience to work with, a little more information about where it comes from, and an understanding of how it's different from other fields.

Defining User Experience

User experience is a famously messy thing to describe. Many people have offered their own definition, and yet no single one has prevailed as the clear favorite. UX, it turns out, is a controversial concept. This is probably because "user experience" is a general term that describes not only a professional practice, but also a resulting outcome. To be a user experience designer means to practice a set of methods and techniques for researching what users want and need, and to design products and services for them. Through good UX, you are trying to reduce the friction between the task someone wants to accomplish and the tool that they are using to complete that task. The resulting user experience that someone has is determined by a multitude of factors so vast that no one person, team, or even technology can claim to be responsible for it (see Figure 1.1).

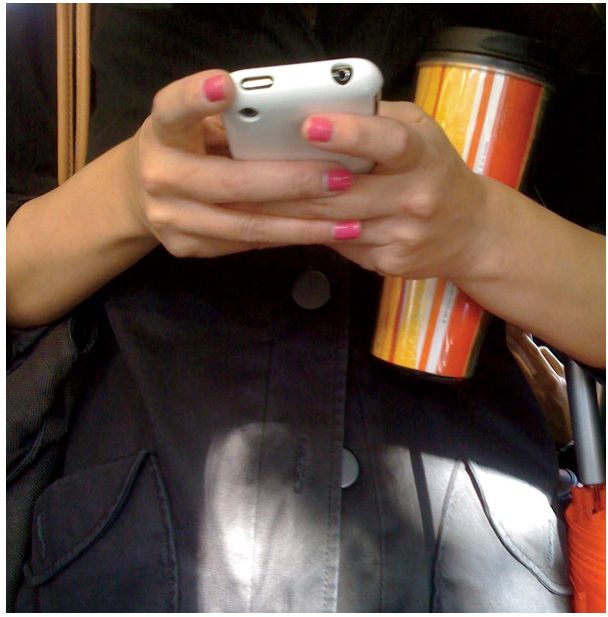


FIGURE 1.1
Often, the term *user experience* refers to the encounters that people have with digital products, like software or a Web app.

In a simple working definition, you might say that a user experience is the overall effect created by the interactions and perceptions that someone has when using a product or service (see Figure 1.2). *User experience* is a fancy term for what people often describe with words like "love" or "hate"; or phrases such as, it's "easy to use," or "a pain in the butt." You may recognize *user friendly* as a term that has worked its way into popular usage. For example, when someone says a product is user friendly, he is basically referring to the user experience. Given that we transact so much of our lives through technology, how easy or difficult it is to use is what really matters. And that's what user experience is all about.

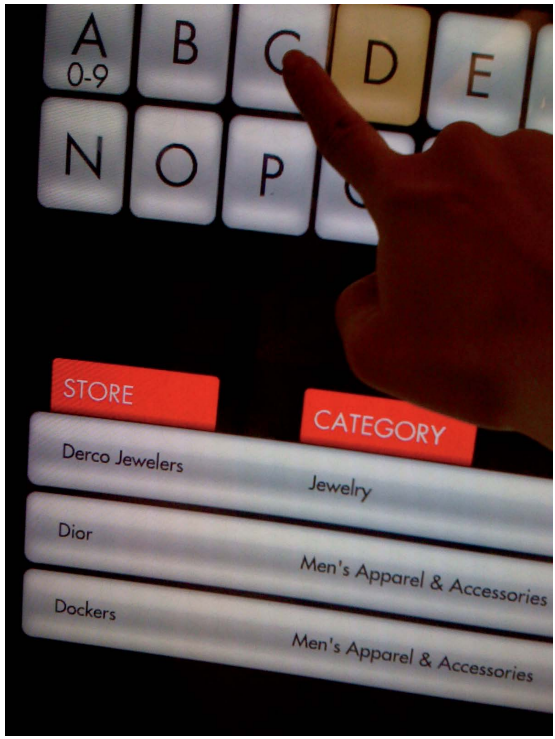


FIGURE 1.2
User experience is not just restricted to what you do on your phone or your laptop. This shopping mall directory has an interactive user experience, which impacts how easily shoppers can find what they are looking for in their physical environment.

As a field of professional practice, user experience encompasses several disciplines. The main contributors are user research and user experience design. User research is about understanding users and their needs, and user experience design is about designing a user's interactions with a product from moment to moment. Lots of user experience professionals have one of those titles, but it's also common to see people mixing and matching these terms into inventive but nonstandard titles like "user experience architect" or "user interaction designer."

What's in a Name?

An alphabet soup of acronyms has been adopted as shorthand for user experience. Which one you use depends largely on what term your organization or professional community has adopted to talk about user experience. Although they vary quite a bit, all terms tend to be variations on the theme of "experience." Among them, you'll find: UX (user experience), XD (experience design), and UE (user experience, again). Although the acronyms differ, they pretty much mean the same thing.

Things get a little trickier when you start talking about the subdisciplines that make up UX. Being a somewhat new field, the user experience community hasn't done a great job of standardizing its job titles yet. A quick scan of user experience job postings will unearth a grab bag of titles: UX designer, UI designer, user researcher, customer experience researcher, interaction designer, information architect, user experience architect, usability engineer, graphic designer, visual designer, Web designer, copywriter, tech writer, content strategist, design strategist—and infinite permutations on all of the above. Ultimately, these roles fall into one of just a few categories:

- **Interaction Design or Information Architecture.** Someone who designs the structure and detailed interactions of an application or product, similar to an architect. This person decides which rooms need to be in a building, how people get from room to room, and where the windows and doors are placed. Note that some people see the two roles as distinct. You could argue that interaction designers focus on screens, detailed interactions, and workflows, whereas information architects focus on information structures, controlled and uncontrolled metadata, and ultimately, findability. However, both roles share a fundamental goal: designing how a user moves through a complex information system from moment to moment. So, for simplicity's sake, I have placed them here together.

- **Visual Design.** Someone who focuses on the visual layer of an application or product (color palette, typography, hierarchy of information, and visual elements). Although layout of screens and pages is typically considered to be the interaction designer's job, a good visual designer will also have a point of view on layout. If the interaction designer is like the architect, the visual designer is like the interior designer.

- **User Research.** Someone who conducts research into user needs and behavior. This could be qualitative (for example, one-on-one interviews with a handful of people to gain a rich understanding of their motivations and experiences). This could also be quantitative (for example, sampling large pools of people to uncover broad trends in attitudes, behaviors, pain points, and the like). The research usually spans up-front discovery of user needs all the way through to product validation and usability testing. If the interaction designer is like the architect and the visual designer is like the interior designer, the researcher is like the demographer that uncovers who really lives in this place and what important factors characterize them.

- **Content Strategy or Copywriting.** Someone who thinks strategically about the role of content across the entire product. This person considers what messages are being delivered to users, how the language should be framed, what the voice and tone of the product is, and how and when the content will be created (and by whom). This person makes sure that all in-product content is consistent, on-brand, and contributes to a unified experience. Basically, the content strategist sets the tone for the tenor of conversations that take place here. What topics do people talk about? What's the local dialect? What stories get told? How do the people who live here ultimately communicate with each other?

Most UX teams of one act as generalists, blending some or all of the above roles together. If you see the title *user experience designer*, it's usually one of those catchall roles.

But there are other disciplines that certainly contribute to the resulting experience that a user has with a product, even if they may not fit as snugly into the job description of a user experience designer. These disciplines include visual design, content strategy, copywriting, business analysis, product management, project management, analytics, search engine marketing and optimization, brand marketing, and even engineering. In this field, there are lots of heated discussions about who gets to claim ownership of the user experience. Without fueling the flames, let's just say that for the purposes of this book, if you do *any* of these things, you're contributing to the user experience of your product, and this book is for you.

An Example

Personally, I think it's easier to understand UX when you think about what it's like to actually use a product. For example, right now I'm sitting in front of my computer, hopping around within the operating system and keying from my word processing program to my email program to my music program. My perception of each of those programs is impacted by how it looks, how it functions, and how well it serves its purpose in the personal need that it satisfies. (Helping me write a book; managing my personal and professional communications; and listening to some tunes that keep me tapping my feet as I work, respectively). In any of these programs, a thousand little decisions were made by someone—or more probably, many "someones"—to create what I experience as the flowing, seamless experience of working (see Figure 1.3).

And that's just the software. My user experience is also impacted by the physical hardware of my computer: How big and bright the screen is, and whether it feels like "enough" to help me effectively use the hodgepodge of programs for which this laptop is intended. The tactile feel of the touchpad as I scroll down long Web pages. The satisfying clickety-clack of fingers tapping their way across the keys. These are all user experiences, too.

And what about the products and services that are connected to my laptop? Recently, I set up an in-home music system that integrates wirelessly with software that I run on my computer and my mobile phone. I can control the volume from an app on my phone and watch the volume level change on my computer while I hear the music get quieter or louder on the speakers in the other room. This is great execution on the part of the music system manufacturer. But it also casts a warm glow back on my laptop and my mobile phone, for being well designed to support such integration. Sometimes, a user's perception of the product is beyond the control of any one manufacturer. It's the cumulative effect of many (see Figure 1.4).

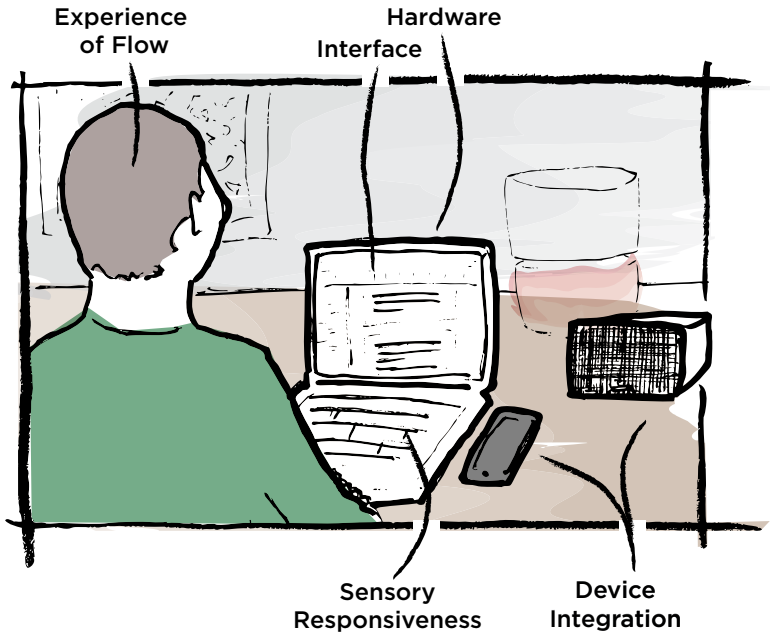


FIGURE 1.3
A user's experience is the cumulative effect of many factors, some that you can control, and some that you can't.

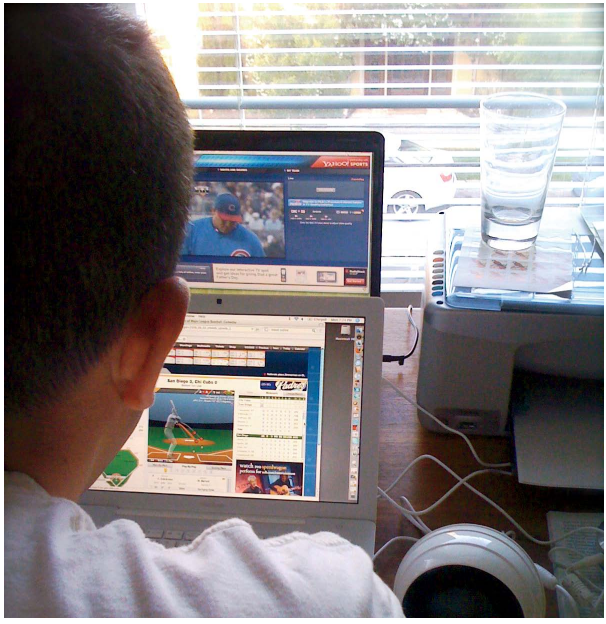


FIGURE 1.4
In the absence of better alternatives, users will try to hack together their own solutions, as this baseball fan has. But the companies who make the products that we love do a better-than-average job thinking about the complexities of the user experience.

Where UX Comes From

As a team of one, knowing the history of user experience helps you reassure people that it's not just something that you dreamed up in your cubicle. If I were to sum up the history of UX in a few short sentences, it might go something like this: villains of industry seek to deprive us of our humanity. Scientists, scholars, and designers prevail, and a new profession flourishes, turning man's submission to technology into technology's submission to man (see Figure 1.5). Pretty exciting stuff.

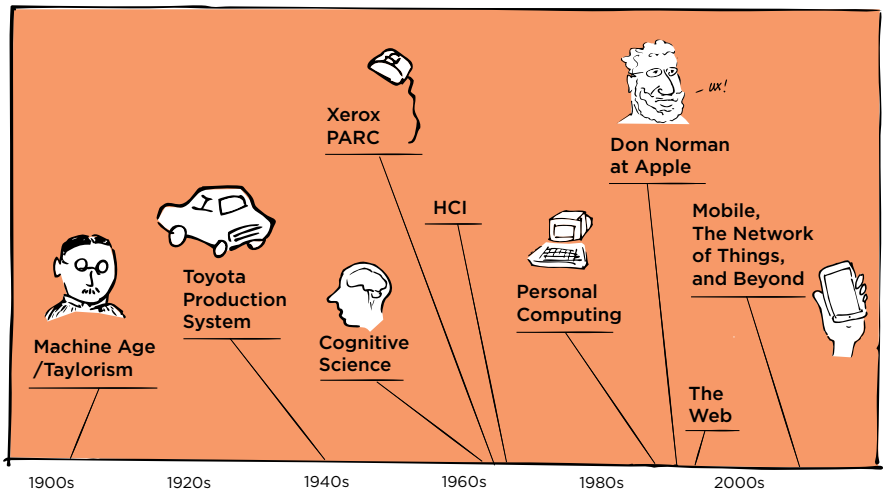


FIGURE 1.5

UX has a long and storied history that intersects with other business, design, and technology developments that your colleagues may be familiar with.

Now here's the longer version. User experience is a modern field, but it's been in the making for about a century. To see its beginnings, you can look all the way back to the machine age of the late 19th and early 20th centuries. At that time, corporations were growing, skilled labor was declining, and advances in machine technology were inspiring industry to push the boundaries of what human labor could make possible. The machine age philosophy was best exemplified by people like Frederick Winslow Taylor and Henry Ford, who both pioneered ways to make human labor more efficient, productive, and routinized. But they were criticized for dehumanizing workers in the process and treating people like cogs in a machine. Still Taylor's research into the efficiency of interactions between workers and their tools was an early precursor to much of what UX professionals think about today (see Figure 1.6).

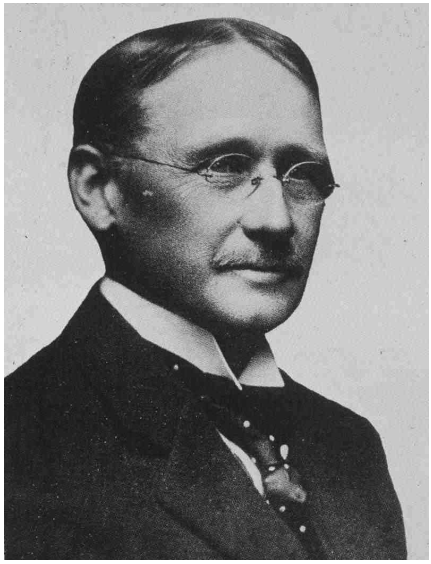


FIGURE 1.6
Frederick Winslow Taylor, the father of Scientific Management, pejoratively known as *Taylorism*.

The first half of the 20th century also saw an emerging body of research into what later became the fields of human factors and ergonomics. Motivated by research into aeromedics in World War I and World War II, human factors focused on the design of equipment and devices to best align with human capabilities.

NOTE THE ORIGINS OF ERGONOMICS

In the late 1940s, research into pilot errors in the cockpit by Lieutenant Colonel Paul Fitts (who was also a psychologist) led to recommendations for the most effective organization of cockpit control knobs. Several years later, Fitts would coin Fitts's Law, one of the basic laws of physics for user experience designers. Fitts's Law states that the time required to move to a target is determined by the distance and size of the target.

By the mid 20th century, industrial efficiency and human ingenuity were striking a more harmonious relationship at places like Toyota, where the Toyota Production System continued to value efficiency, but treated workers as key contributors to a continually improving process. One of the core tenets of the Toyota philosophy was "respect for people," and it resulted in involving workers in troubleshooting and optimizing the processes that they were a part of. As one example, workers at Toyota factories could pull a rope called the Andon Cord to stop the assembly line and give feedback if they saw a defect or a way to improve the process.

Around the same time, industrial designer Henry Dreyfuss wrote *Designing for People*, a classic design text that, like the Toyota system, put people first. In it, Dreyfuss described many of the methods that UX designers employ today to understand and design for user needs, as shown in Figure 1.7. In *Designing for People*, Henry Dreyfuss writes "when the point of contact between the product and the people becomes a point of friction, then the [designer] has failed. On the other hand, if people are made safer, more comfortable, more eager to purchase, more efficient—or just plain happier—by contact with the product, then the designer has succeeded."

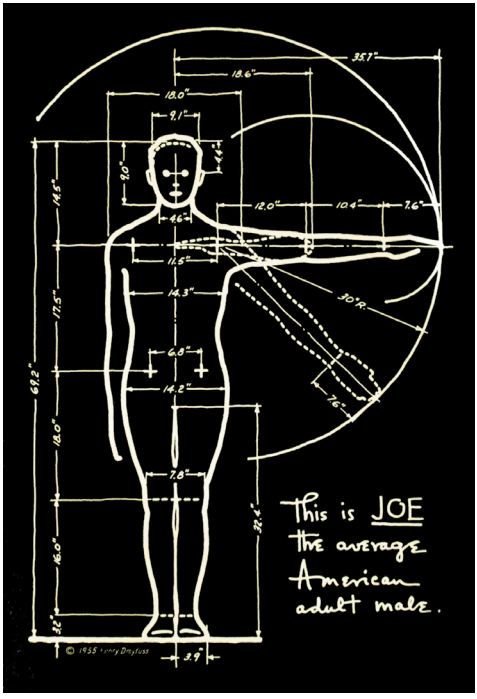


FIGURE 1.7
Dreyfuss created Joe (and a companion diagram, Josephine) to remind us that everything we design is for people.

At the same time, some interesting parallel movements were taking shape. A small handful of academics were doing research into what we now describe as *cognitive science.* As a discipline, cognitive science combined an interest in human cognition (especially human capacity for short-term memory) with concepts such as artificial and machine intelligence. These cognitive scientists were interested in the potential of computers to serve as a tool to augment human mental capacities.

Many early wins in the design of computers for human use came from PARC, a Xerox research center founded in the early 1970s to explore innovations in workplace technology. PARC's work in the mid-70s produced many user interface conventions that are still used today—the graphical user interface, the mouse, and computer-generated bitmap graphics. For example, PARC's work greatly influenced the first commercially available graphical user interface: the Apple Macintosh.

The term *user experience* probably originated in the early 1990s at Apple when cognitive psychologist Donald Norman joined the staff. Various accounts from people who were there at the time say that Norman introduced *user experience* to encompass what had theretofore been described as *human interface research.* He held the title *User Experience Architect*, possibly the first person to ever have UX on his business card. Norman actually started out in cognitive psychology, but his writing on the cognitive experience of products, including technological products, made him a strong voice to lead and inspire a growing field (see Figure 1.8). According to Don Norman, "I invented the term because I thought Human Interface and usability were too narrow: I wanted to cover all aspects of the person's experience with a system, including industrial design, graphics, the interface, the physical interaction, and the manual."

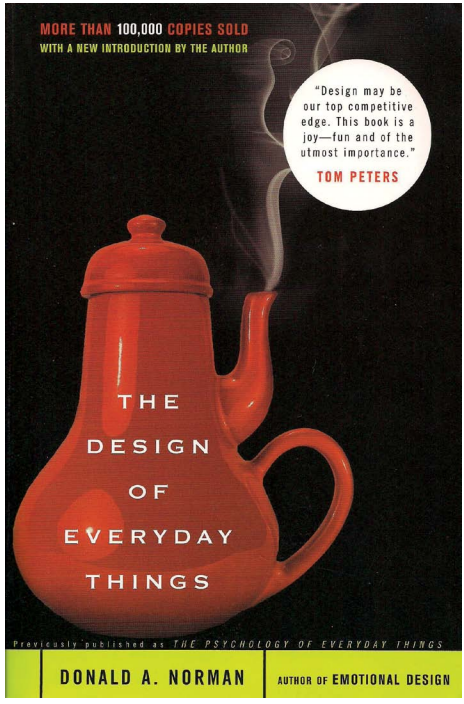


FIGURE 1.8
Norman's book *The Design of Everyday Things* is a popular text that deconstructs many of the elements that contribute to a positive or negative user experience. It's still pretty much required reading for anyone who is interested in UX.

UX and UI: What's the Difference?

You may find that the average person is more familiar with the term UI than UX. UI refers to the *user interface*, or the screen through which a person interacts with a computer or device. Because most people have used computers at one time or another and have had encounters with UIs that were both good and bad, they often have some idea of what a UI is, and why it matters. UX, on the other hand, is a more intangible concept that encompasses not just UI, but also the hardware, the user's context of use, and the user's goals and motivations. That's a lot harder to cram into one mental picture. To explain the difference to others, it can be helpful to provide a tangible example. For example, PayByPhone is a service that integrates with parking meters to solve a basic problem: paying for parking even if you don't have change. The picture on the left in Figure 1.9 is the app's user interface, or UI. The picture on the right conveys some sense of the broader user experience of needing to pay for your parking, discovering that there's an alternative way to pay, and then trying to figure out how to do it.

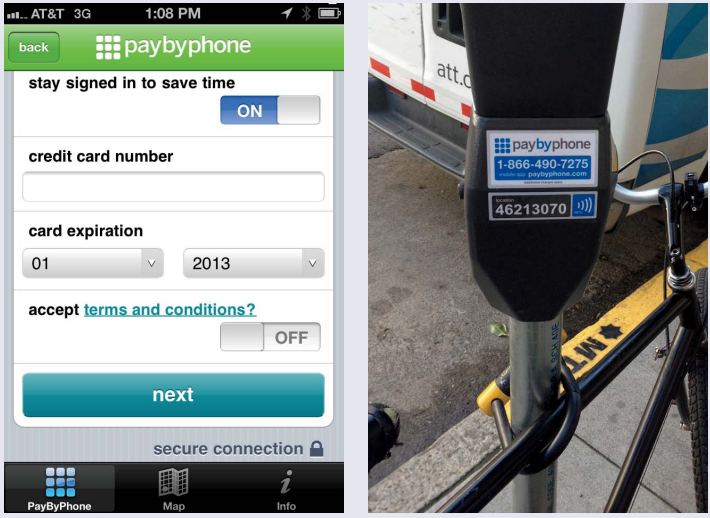


FIGURE 1.9
With the PayByPhone service, the user interface is just one part of the overall user experience.

With the rise of personal computing in the 1980s and then the Web in the 1990s, many of these trends converged on each other. Graphical user interfaces, cognitive science, and designing for and with people became the foundation for the field of human-computer interaction (HCI). Suddenly, more people had access to computers and, along with it, a greater need to understand and optimize their use of them. HCI popularized concepts like usability and interaction design, both of which are important forebears to user experience. In the Internet bubble of the mid and late-1990s, new jobs with titles like "Web designer," "interaction designer," and "information architect" began cropping up. As people became more experienced in these roles, a deeper and more nuanced understanding of the field of user experience began to develop. Today, user experience is a rapidly growing field, with undergraduate and graduate level programs being developed to train future generations of professionals to design products for the people who use them.

Where UX Professionals Come From

The field of user experience grew primarily out of human factors and usability—both fields with very strong ties to the world of software development. As a result, people often connect UX with user interface design. This isn't completely inaccurate, but it's just one part of the story. Increasingly, UX doesn't even have to involve a technical product. Service designers, industrial designers, physical space designers, and those people who are designing for an increasingly networked world are all working on the same basic problem. How can they design flowing experiences that respect, empower, and delight real people?

So does that mean that anyone can be a user experience team of one? Not necessarily. Certain backgrounds are better grooming for user experience than others. You're a good candidate for user experience work if you have past experience in one or more of these areas:

- **Web or software design and development.** This is a natural one. Many of the elder statesmen of the UX world started out as Web masters or Web designers. And indeed, a big focus of their work may still be Web-oriented, depending on what type of product they work on. People with this background make good UX practitioners because they've probably seen firsthand how users make sense of and interact with unfamiliar designs. The fact that they know a bit about Web technologies helps, too.

- **Editing, journalism, or copywriting.** This field is also a common pathway into user experience because it is fundamentally about how people consume and make sense of content. That's true whether it's in print or digital. People with this background are naturals at thinking about the reader's needs and perspectives, which translates directly into the user's point of view. These folks also think a lot about how voice, tone, and structure influence a reader's perceptions and experiences with a medium. That's a good thing.
- **Graphic or print design.** The user experience is impacted by decisions that are made at every level of the product. But when end users think of the product, they usually think of the parts that they can see and interact with—the visible, surface level. Graphic and print designers are trained to think about how people see and respond to layers of visual information. They have the ability to create designs that convey practical information, while also evoking a desired emotional reaction. People with this skill know how to design for understanding, as well as meaning, which is a very user-centered ethos.
- **Research, sociology, anthropology, and psychology.** Understanding and empathizing with the user's perspective is a vital foundation for user experience design. People with this background know how to conduct studies or experiments to uncover what people *really* do and why. That can be harder than it seems. It's very easy for the observer to unconsciously change the behavior of the observed. But sociologists and anthropologists have rigorous methods and techniques for getting at what people really do. They also have the ability to turn a dizzying array of observations and data points into broader themes and ultimately meaning. These themes and their significance become the foundation upon which user experience design decisions are made.
- **Engineering.** Engineers and developers write the code and build the systems that make the experience real. That moment when a flat concept on a page becomes a working, functioning, interactive thing is like making life. It's incredibly rewarding. It also enables them to see and understand how it will feel and function for the end-user. And sometimes, it doesn't feel or function like they thought it would. So they iterate and adjust. Engineers are skilled at jumping back and forth between the two mindsets that make this possible: the maker's mindset and the tester's mindset. This cycle of making and adjusting *and* making and adjusting is the fundamental flow of user experience design.

- **Product management and business analysis.** People in these roles are often the bridge between many different parties who contribute to product design. Consequently, they have one of the broadest views of the ins and outs of the product. That holistic perspective often enables them to envision where the weak points are—not just from the perspective of the project plan or the business goals, but also the user experience.

How about you? If you have one of the titles listed above, you may already be doing user experience work, whether you realize it or not. Or you may have come to user experience by a circuitous path. Possibly you started out in one of these fields and are now crossing over. Whatever your origin, you are here now, and you believe that user experience matters. You understand that it makes the difference between products and services that must be suffered through, and those that delight and inspire. Now, how do you start working as a UX team of one? In the next chapter, we'll take a look and find out.

NOTE **A UX TEAM OF ONE CAN COME FROM ANYWHERE**

I know of one UX team of one who started out as a general contractor. Thinking about questions like how close to make the electrical outlet to the sink naturally got her thinking about user-centered problem solving more generally. And that led her straight to user experience design.

If You Only Do One Thing...

This chapter establishes some basic information about the field of user experience. What is it, where does it come from, and what skills are required? We begin this way because understanding what user experience is and being able to explain its importance to other people is the first, and often the hardest, thing you need to do. As a UX team of one, you are pretty much guaranteed to find yourself in situations where you are asked to clarify what UX is and justify why it's important.

So the most important thing you should take away from this chapter is an understanding of how UX is defined. Even better, try to think in terms of examples—either the example given in this chapter or one of your own. Examples are effective at triggering memory and imagination. A well-chosen example will help you illustrate the complexity of user experience and what design elements must be executed well to create a distinct and positive user experience.

CHAPTER 2

Getting Started

Many people make their way to user experience by crossing over from an adjacent field. These crossovers are the people who are carrying UX forward, taking it to new levels and new organizations.

Learning about user experience can often feel like a discovery. For many, that moment of discovery might feel like a revelation, as if they've found a calling. Because it's an experience that can ignite a lot of passion, crossovers are often enthusiastic ambassadors for user experience. Crossovers can come from engineering, visual design, technical writing, and project management. There are other areas, too; it's a diverse community. The reality for many crossovers is that UX or usability is now and may remain just a part of what they do. Even so, there's nothing stopping a new crossover from getting started. Many seasoned UX professionals started out by seeing an opportunity to improve something and seizing it. In this chapter, you'll find a basic framework for diving in. In fact, *framework* may be overstating the case. It's really just four simple steps:

1. Get to know the UX toolkit.
2. Establish a point of view on what can be improved.
3. Get to know your users.
4. Start designing.

Get to Know the UX Toolkit

Many models and diagrams have been created to illustrate the typical UX set of offerings, and they can be a great place to start in understanding the UX process, and how it fits in with other business processes (see Figures 2.1–2.5).

Figure 2.1 shows a model that was created by Todd Zaki Warfel when he was at Message First. It gives a good sequential overview of the activities that are conducted in a typical user-centered design process, with helpful distinctions made between functional design, content analysis, interaction design and information architecture, and engineering.

By contrast, the model in Figure 2.2 from David Armano at Edelman Digital places more emphasis on the major conceptual phases of work that you go through in a user-centered design process. His Uncover > Define > Ideate > Build > Design framework is nice because it helps you think about the higher-level goals of each phase.

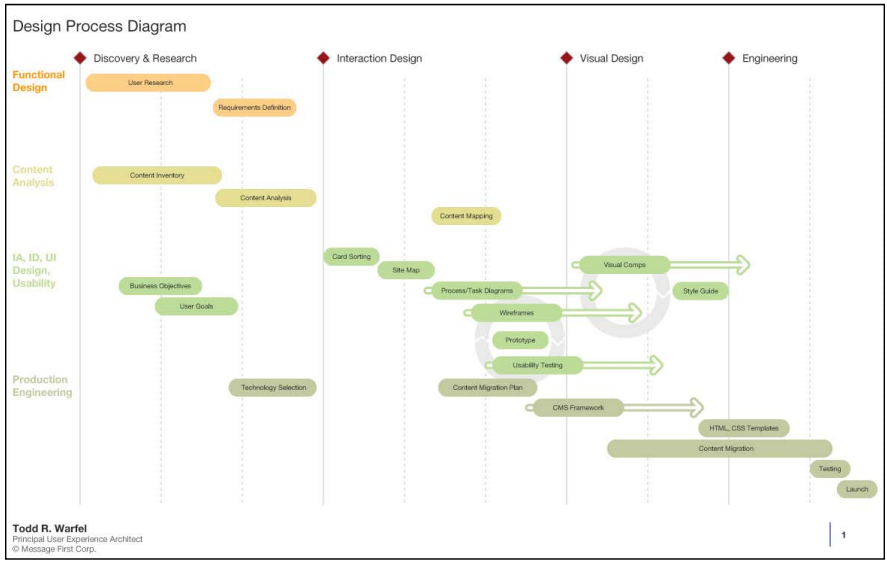


FIGURE 2.1
Todd Zaki Warfel's UX model.

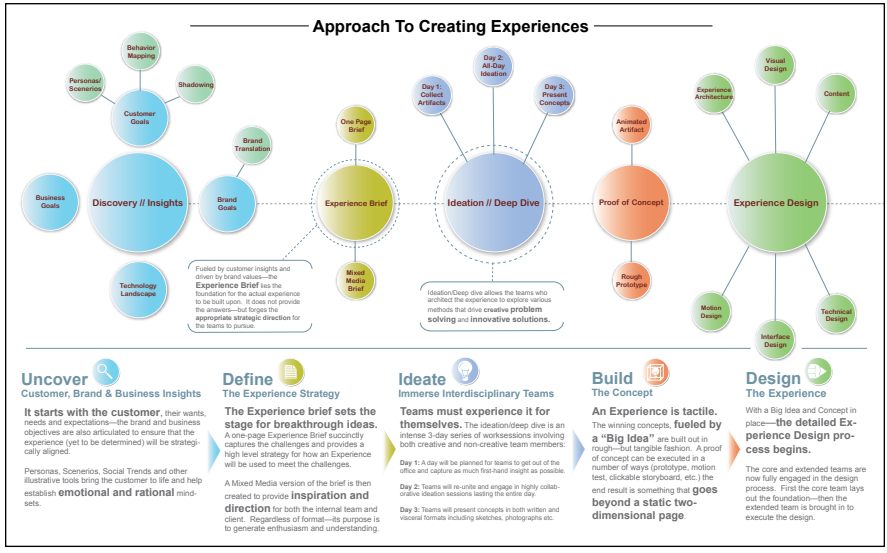


FIGURE 2.2
David Armano's UX model.

Figure 2.3 shows a model from Namahn Design in Brussels. Styled like the London Underground map, it shows the relationship between specific methods and activities.

For a different way to visualize the UX process, the model in Figure 2.4 from independent consultant Stephen P. Anderson focuses not so much on phases or deliverables, but rather on the primary considerations to take into account when designing user experiences.

Like many of the previous models, the model in Figure 2.5 from James Kelway of the Danish design firm Hello Group shows the key phases and activities or deliverables within each—but in a sketchy, low fidelity way.

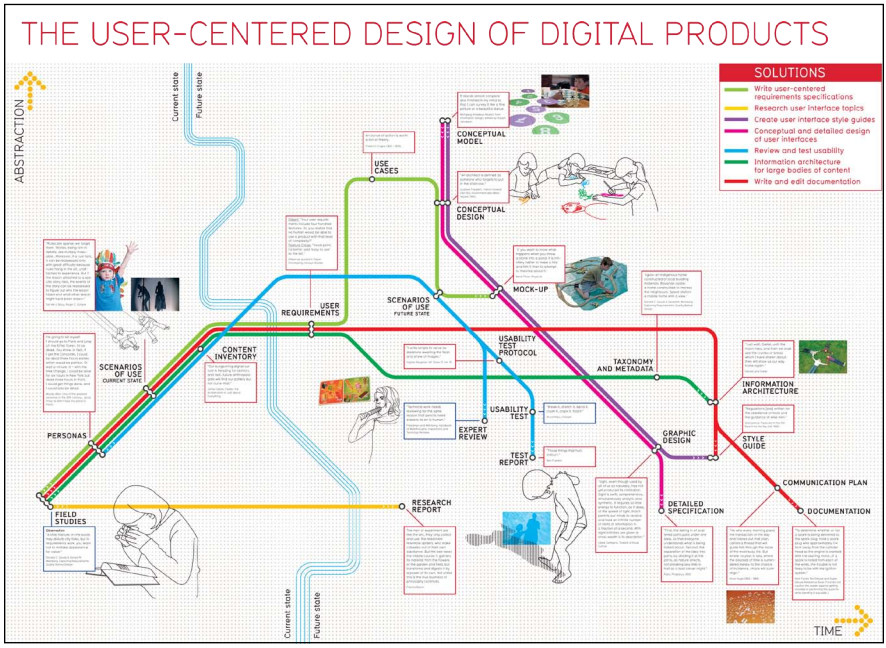


FIGURE 2.3
Namahn Design UX model.

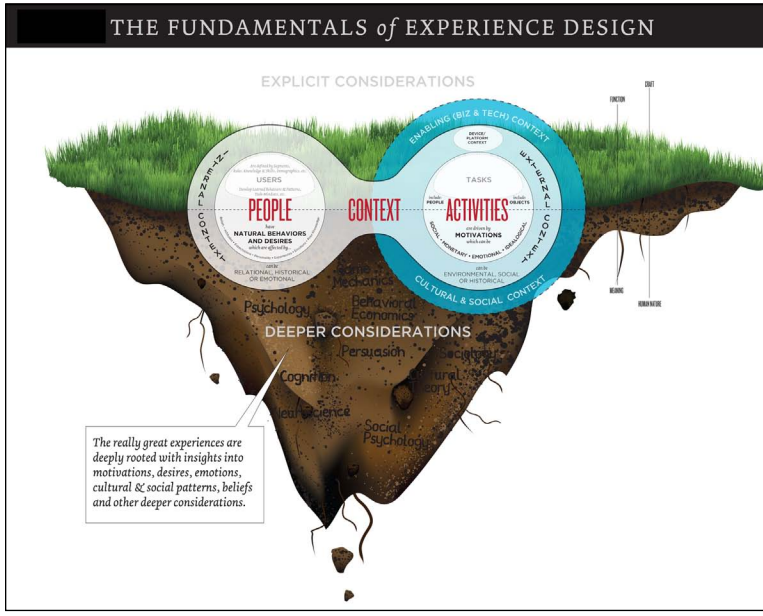


FIGURE 2.4
Stephen P. Anderson's UX model.

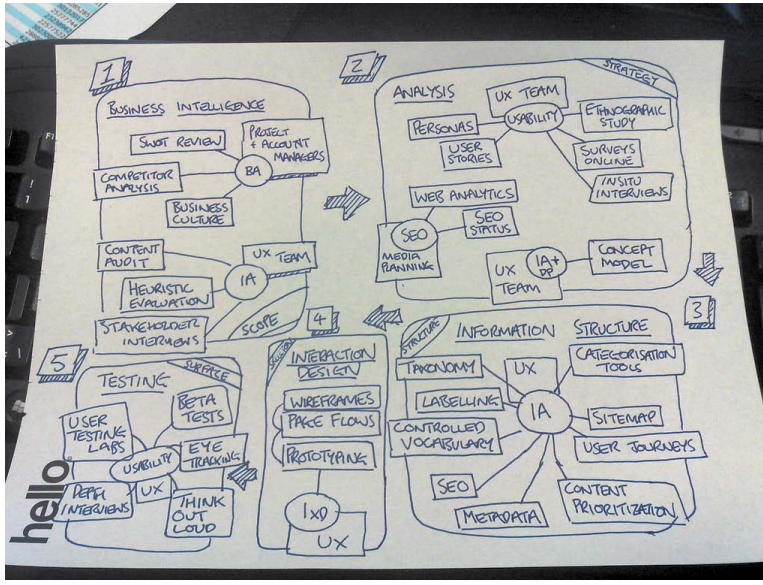


FIGURE 2.5
James Kelway's UX model.

My Crossover Story

Here's how I discovered UX. When I was growing up, I always wanted to be a writer. When I graduated from college, I got a job in what seemed like the most logical field—working at a magazine. The trouble was, I kept nodding off over my copyediting. There was one part of my job that I loved, however, and that was updating the website. I had picked up some rudimentary HTML skills in college. Soon I found that my favorite part of each week was the time I got to spend on the website. So I decided to take the leap and become a full-time Web worker.

I put my resume online and quickly got in touch with a recruiter from a tech firm. It was the 1990s tech bubble, and HTML skills—even rudimentary ones—were in high demand. I tinkered around as a front-end coder for a few years, but couldn't shake the growing conviction that I would really rather be doing what those people with that funny title "information architect" were doing. Not writing code, but thinking about things from the human perspective and designing systems that were intuitive. So I went back to school to study information architecture. While I was working on my master's degree, I took what I now realize was my first "team of one" gig. My title was "tools developer" for a boutique firm (that means little company) that helped law firms manage all the data that they had to keep track of when companies filed for bankruptcy. Glamorous stuff. They hired me presumably because of my technical skills, but they liked and benefited from the fact that I was interested in design and usability, too.

It was a good training ground because they had a lot of funky, homegrown applications that needed plenty of UX help. It was a great place to test out the principles I was learning in school. I designed a slew of software interfaces. I spent time thinking about solutions for navigating large repositories of information. I conducted usability tests. It was also a great place to discover how little other people understood or valued the concept of user-centered design. Or, to put it more fairly, it exposed me to the challenges of getting people to prioritize user needs and design when there were so many other fundamental and urgent business issues to be addressed. And finally, it was where I learned the hard lesson that not all companies need or are ready for their team of one. That's okay. Eventually, I knew it was time to move on. What I learned there I put to good use in my next job, another team-of-one gig, but this one was a lot more rewarding.

So, what skills and experiences got me on the path? Just a handful:

- Familiarity with the concept of user experience
- Interest in how people think, understand, and see
- A little bit of technical know-how
- An opportune environment to tinker and practice
- Just enough education to fuel my experiments

As you can see from these examples, while there's no certified process that all UX practitioners follow, you'll find a relatively standard set of activities and deliverables that they all use. A large UX team may have the luxury of conducting most of these activities on a given engagement. Teams of one use many of these methods, too, just sometimes in less depth or without putting quite so many methods together into a full-fledged work plan. It's helpful to start with an understanding of the full roster of options, though, and then think a bit about which ones seem most useful in the work that you're doing.

NOTE FOR MORE INFORMATION ON THESE METHODS

Most of the methods described here are further explained in Part II, "Practice," of this book. Where that is the case, you will see a cross reference.

What follows is a fairly exhaustive list of the activities that may take place in a typical UX process.

- **Discovery.** Figuring out where you stand and what you need to do so you can design products that meet the business's needs.
    - **Stakeholder Interviews.** Spending time with key decision makers to understand their expectations for the product, plus any other important considerations that you should be aware of. (See "Listening Tour" in Chapter 5, "Planning and Discovery Methods," for a lightweight way to conduct stakeholder interviews.)
    - **SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis.** Various methods for assessing the strengths, weaknesses, opportunities and threats that impact the user experience of a product. First developed as a strategic planning tool, a number of UX techniques such as competitive review, content audits, and heuristic or expert reviews ultimately fall into this category. (See "Opportunity Workshop" in Chapter 5 for an inclusive technique that gathers SWOT information with the help of a team.)
    - **Requirements Gathering.** The process of working with business decision makers and others on the team to determine what must go in the product and, in some cases, how it must be implemented. (See "Strategy Workshop" in Chapter 5 for a method that uncovers explicit and implicit requirements.)

- **Strategy.** Establishing a vision for the target user experience so you can design products that are coherent and unified.
    - **Design Principles.** A small handful of characteristics that collectively embody how the product design should be experienced by users. (See "Design Principles" in Chapter 7, "Design Methods," for more information.)
    - **Vision Artifacts.** Diagrams, schematics, storyboards, or vision movies that convey the essence of the user experience and give a taste of how a person might experience a product that follows this strategy in the context of their normal lives. (See the tips for planning a "Strategy Workshop" in Chapter 5 to learn how to create low-fidelity vision artifacts with the help of your team.)
    - **Roadmaps.** An analysis of what needs to be built first, next, and last in order to deliver on the target experience.
- **User Research.** Learning as much as you can about who your users are and what motivates them so that you can design products that meet their needs.
    - **Primary User Research.** Various methods for learning from users firsthand. Could include field research, diary studies, surveys, and other forms of guerilla research. (See "Guerilla User Research" in Chapter 6, "Research Methods," for quick and dirty tips for conducting primary user research.)
    - **Secondary User Research.** Reviewing an aggregation of third-party research that has been conducted into this user population. Could include publicly available research or research that's been conducted by other parts of the organization. (Marketing segmentation is one of the most useful forms of secondary user research for UX professionals to review, so if your organization has done segmentation work, definitely start there.)
    - **Personas, Mental Models, and User Stories.** Documents that synthesize what you've learned about users through primary and secondary research and distill the key points into a handful of memorable profiles, with supporting diagrams and stories for how the product should fit into their lives. (See "Proto-Personas" in Chapter 6 for more on personas. Indi Young's book *Mental Models* is also an excellent resource on mental models.)

- **Design.** Envisioning and specifying how a user will encounter a product or service from moment to moment in the most fluid, intuitive, and enjoyable way possible.
    - **Information Architecture/Site Map.** Documentation of how the system is organized, including major groupings, categories, or sections, as well as other pertinent information structures such as search capabilities, taxonomies, tags, or other forms of metadata. (*Information Architecture for the World Wide Web* by Lou Rosenfeld and Peter Morville is a comprehensive text, if you're interested in learning more about information architecture.)
    - **Process and Task Diagrams.** Models for how users will interact with the system step-by-step, and how the system will adapt or respond based on what the user does. (See "Task Flows" in Chapter 7 for more information.)
    - **Wireframes.** Schematic diagrams of each page or state in the system. Usually, this means each screen in the user interface. (See "Wireframes" in Chapter 7 for more information.)
    - **Design Comps.** Detailed visual designs for each page or state in the system. If wireframes show a screen at a schematic level, design comps show a page exactly as it should look when implemented, including visuals such as color palettes, photography, typography, and other graphical elements.
    - **Detailed Specifications.** Extremely detailed documentation of how the system should function. Detailed specifications include things like how the product adapts in response to user interactions like clicks, swipes, and keystrokes. It also includes how to handle error conditions, and how the system adapts and evolves in response to various system and user states (for example, signed in vs. signed out, first-time visiting vs. repeat visits, and so on).
    - **Style and Pattern Guides.** Documentation of standard conventions for repeatable patterns. For style guides, this could be standard conventions for visual design or content. For pattern guides, this could be standard interaction conventions.
    - **Prototypes.** Functioning or semi-functioning examples of how the design should behave and operate once implemented. (See "Paper and Interactive Prototypes" in Chapter 8, "Testing and Validation Methods," for more information.)

- **Implementation.** Ensuring that the design works for users and that it is implemented according to plan.
  - **Usability Testing.** Various methods for assessing whether and how easily people can use the design to accomplish anticipated tasks. (Chapter 8 includes a range of testing and validation methods.)
  - **Implementation Oversight.** Sustained involvement between user experience designers and the engineering team to address additional UX questions as they come up and ensure that the design is implemented as planned.
  - **Metrics/Analytics Tracking.** Ongoing monitoring of key usage data to determine how people are using the product or service and to identify opportunities for future improvement or enhancement.

One way to get clear on the boundaries of your work is to create a one-page summary of what services you provide—and, by implication, what services you don't. Think of it as an offering card: a clear, one-page artifact that clarifies the range of activities you are responsible for. Figure 2.6 shows an offering card that I created when I was a UX team of one at Barclays Global Investors. (This can also be an incredibly useful tool if you're a UX freelancer.) Figure 2.7 shows how you can use an offering card to clarify what updates you'll be conducting for a specific project.

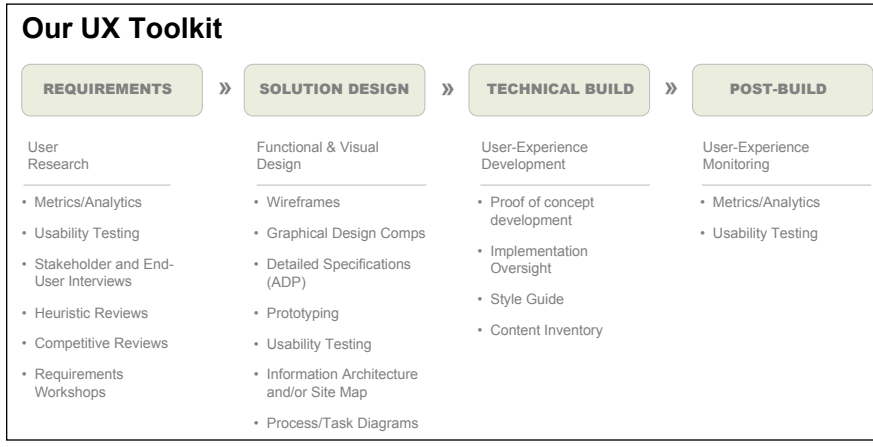


FIGURE 2.6

As you can see, this offering card is not a perfect match with the general process described previously. This particular one was customized to the specific activities that I conducted in that particular company and in that particular role.

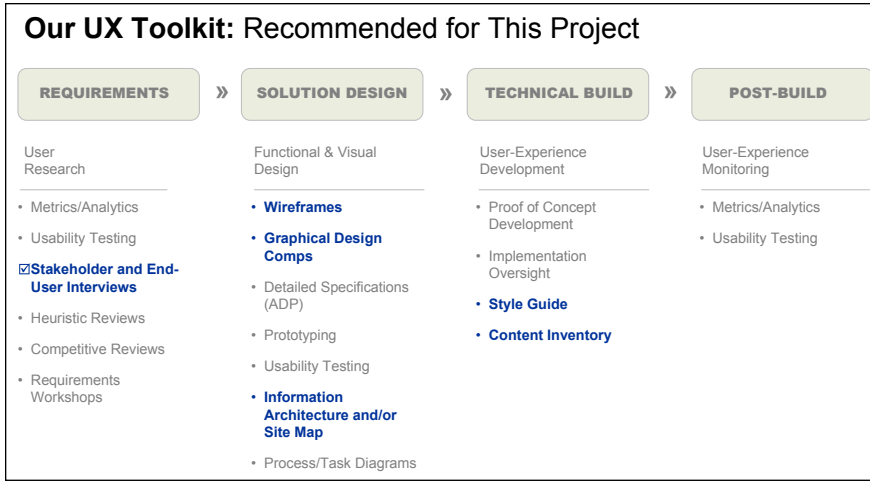


FIGURE 2.7

When I worked on specific projects, I highlighted which methods were being used, to help people understand how this project fit into the broader user-centered design approach.

NOTE **A UX STARTER LIBRARY**

If you're interested in reading more about the fundamentals of UX and how a typical user experience project is structured, start with the books on this shelf (see Figure 2.8). These books ably cover what user experience is, why it matters, and how to practice user-centered design.

FIGURE 2.8

A user experience starter library.

Establish a Point of View on the Work to Be Done

Before you get started, it's a good idea to have a clear picture of what work needs to be done and how you can best contribute to it. The good news is, you don't really need permission to be a UX team of one. You can infuse the UX philosophy into work that you're currently doing. You can also find small opportunities to get started. You might think that if you want to transition to UX, you should start by changing your title and your role. But asking for a wholesale role change before you've gotten people to understand and see the value in UX might be a long shot. It's better to start doing UX-related activities in smaller, under-the-radar ways, and then build momentum from the positive support that your work causes.

Here are a few recommendations as a foundation for any crossover. They're not UX activities per se, but they pave the way for them:

- **Find the low hanging fruit.** Entice your colleagues with a vision of what might be. Find the parts of the product that everyone knows need improvement, and then plan your attack from there. However, it's key to do it in a way that is positive and respectful. Use a "Black Hat Session" (Chapter 8) to get people thinking about where and how your product might be improved, or a quick "Heuristic Markup" (Chapter 6) to do the legwork on your own.
- **Make a plan.** If you want to get people to buy into the concept of UX, you've got to be offering them something of value. How do you do it? Sit down and sketch out how you'd like to approach a UX project. Think about what activities you'd propose—when and why. Think about what big questions you believe need to be answered, and work your way backward in thinking through how you'd answer them. Write a "UX Project Plan" (Chapter 5) to make it clear in your own mind. And then, ask yourself, "Do I need permission or support to do this, or is it possible that I might be able to do it now?" You may find that the answer is that you can just get started right away.

NOTE **METHOD CARDS**

Method cards are a great tool for identifying quick activities that you can do in the course of a normal workday to infuse a user-oriented perspective in your work. The user experience design firm IDEO has created method cards that can be purchased (see the top box in Figure 2.9). Trading cards from the user experience design firm nForm are shown at right, and they can be found online: **http://nform.com/tradingcards/**. Or you can create your own collection, as shown at the bottom.

FIGURE 2.9
A variety of method cards.

TIP **BYPASSING OBJECTIONS**

If you encounter objections and you need permission, the following tip might be helpful. Sales pros have a clever technique called the "alternative close." Instead of asking permission to close the deal (or, in this case, to do the work), they provide two alternatives for how to go about it. Not, "Can I ring you up?" but rather, "Will that be cash or charge?" In UX, an equivalent would be *not* "Can we do some research," but rather "We could do a large research study, or we could do a small informal evaluation to get some quick feedback." Then the negotiation becomes not *if*, but *how*.

Get to Know Your Users

Once you've identified some opportunities and developed a rough plan, your next priority should be to get firsthand experience with users, talking with them and learning about their needs. Users are at the core of user experience. Simply put, they are the people who use your products. It's important to keep these people in mind when designing products because they're the ones who will endure firsthand the consequences of myriad design decisions.

Good products eventually become somewhat invisible, sinking into the background as users achieve a kind of flow where they're actively and fluidly doing whatever the product is supposed to make possible. Not "posting to a wall," but responding to a friend. Not "formatting a Word document," but writing. If you're a product maker, this is nirvana. It's also darned hard to accomplish. In fact, you're virtually guaranteed to get some of it wrong—especially at first—which is why the field of user experience places a big emphasis on understanding user needs and testing the design of products with users. This emphasis on connecting with users is so essential that it's one of the core tenets of user experience: design products *for* and *with* users.

Personally I dislike the word *user*. I much prefer to call them, simply, *people*. That helps me remember that it's the people all around us that we're designing for. But to design for people, you have to know something about them. That means you must resist the tendency to treat them as flat statistics derived from market segmentation and strive to understand them as the complex, erratic animals that they all are. Eric Ries of the Lean Startup movement has a great one liner that sums it up perfectly: "Data are people, too." This requires you to suspend what you know and adopt someone else's perspective long enough to feel their pain and envision better alternatives (see Figure 2.10). That's harder than it sounds, which is why it's essential that you take time to actually get to know real users.

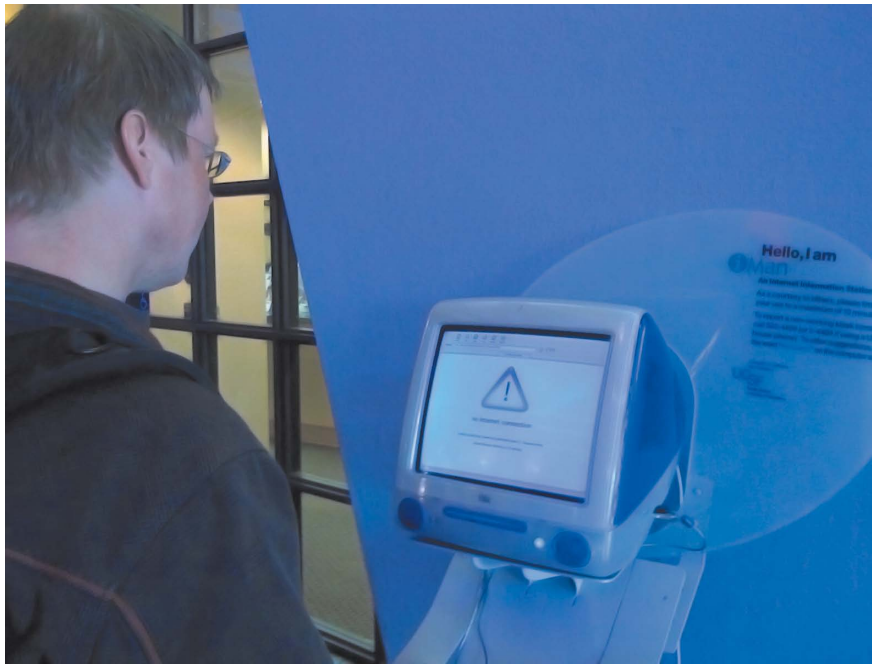


FIGURE 2.10
A well-designed product enables a user to accomplish his goal efficiently and without confusion or disruption. When a user encounters a breakdown in the system, it really shows.

It's shocking how many people say they're practicing user-centered design, but rarely talk to actual users. Don't be one of them. Real UX teams of one are committed to knowing not just "users" in the abstract, but the people who really use their products. It pays off. Jared Spool of User Interface Engineering has done research that shows that the amount of face-time a team has with end users directly impacts the quality of the product. You can read more about the optimal number of user "exposure hours" here: www.uie.com/articles/user_exposure_hours/. So it's very important to start reaching out and talking to your actual users. Here's how to do it:

- **Figure out what you know (and what you don't).** Learn how to gather available user data and use it as a tool to guide your work in Chapter 6. Specifically, you can use the "Proto-Personas" method to turn users into people.

- **Do guerilla research.** Even if you can't get formal support to do it, there are a host of lightweight ways to connect with and put designs in front of actual users. The "Guerilla User Research" method (Chapter 6) is a great starting place.

Start Designing

It's a funny fact of user experience work that people expect that you're going to produce designs that are just undeniably better. Lovelier. Simpler. More intuitive. You know, *better*. And you certainly don't want to disappoint them. The challenge is that many of us come to this field by other routes, and don't have formal design backgrounds. As a result, it's not uncommon for a team of one to find himself or herself in a position of defending a design without necessarily believing or knowing with 100 percent conviction that it is, in fact, a *better* design. The challenge for user experience professionals is to understand user needs well enough to look past the prosaic solutions to discover the elegant ones (see Figure 2.11).

FIGURE 2.11
Sometimes the right user experience solution can be deceptive. While this giant remote may solve one problem (visibility and motor control when using a TV remote), it may also introduce other ones (the awkwardness of handling a remote the size of a TV dinner tray, perhaps).

In fact, for many of us, our first taste of design is through a software tool that makes laying out a page easy, but doesn't necessarily teach us anything about how people encounter and make sense of features and information in an interactive medium. While it's tempting to throw yourself into the software and get lost in the satisfying process of laying out a page, that's not necessarily the best way to ensure that designs are being developed that successfully balance user expectations, business expectations, and team expectations. This is where many of the tools of classically trained designers can come in handy for UX folks—in particular, sketching, critique, iterative improvement, and seeking inspiration from the world around you. Here's how you can bring these techniques into your work as a team of one:

- **Sketch your ideas.** The simplest and most beautiful designs are seldom born that way (see Figure 2.12). It takes a lot of work to make something simple. That process often starts with sketches and back-of-the-napkin inspiration, and evolves over time as you iterate, refine, and mold your ideas into increasingly higher fidelity. Chapter 7 provides a range of methods that you can use to guide yourself and your team through the sketching process.

FIGURE 2.12
Paradoxically, beautiful designs often start in an unattractive place, as mere sketches on paper or scribbles on a whiteboard.

- **Enlist colleagues to generate design ideas.** Host activities that invite others to participate in the design process (see Figure 2.13). See Chapter 7 for a variety of techniques for planning and hosting such sessions—especially "Sketchboards," which are tailor-made for this purpose. Figure 2.13 shows what a successful cross-functional collaboration between a UX team of one and her team should look like: lots of sketches and visual artifacts, and lots of notes as a record of the conversation.

FIGURE 2.13
An example of a completed sketchboard, explained in further detail in Chapter 7.

- **Learn from other successful products.** Create inspiration libraries to keep abreast of current standards and have a place to turn for multiple ideas when working on a new problem (see Figure 2.14). But also question things. Spend time asking yourself "What makes a particular design work?" Equally importantly, when something doesn't work, see if you can pinpoint why. You might even go so far as to practice verbalizing these thoughts (either to a friend, or to your mirror, if you'd prefer). Being confident in the language of critique is one hallmark of a strong designer, and it goes a long way in helping nondesigners understand objectively what works and what doesn't in an otherwise subjective medium.

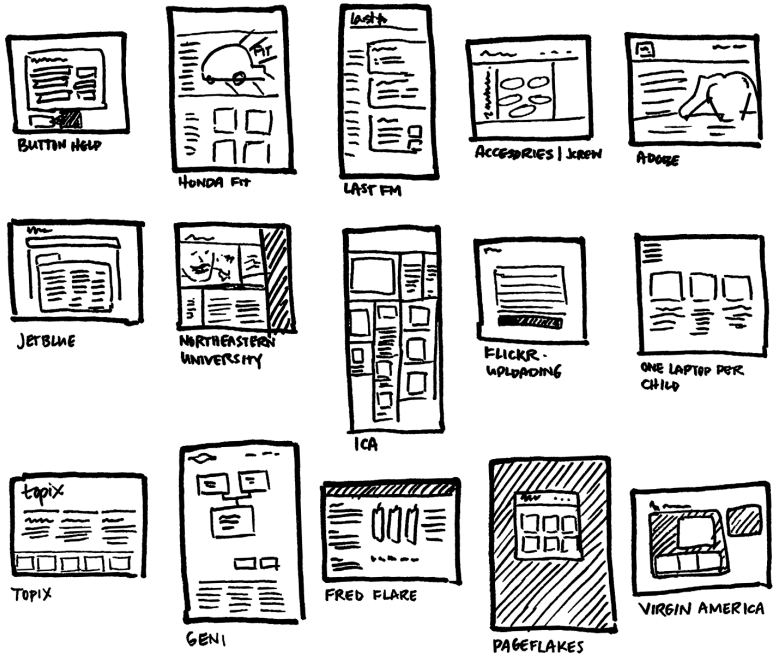


FIGURE 2.14

An inspiration library can be as simple as a folder where you keep screenshots of designs you've encountered that are notable, either for being good or bad.

If You Only Do One Thing...

This chapter covers the building blocks of any UX practice. First, establish a point of view on where to start. Then figure out a sensible process with an appropriate balance between user research and design. However, the most important concept here—and indeed, the most important concept in the whole field—is to actually talk to users.

So if you only have time to do one thing from this chapter, focus on getting started with user research. Usually, even a little bit of time spent investigating the needs and realities of users will lead to "ah-has" so important and obvious that they will create their own momentum to get you started.

A Typical UX Team of One Job Description

If you happen to be in the job market, it can be helpful to know how to spot a UX team-of-one situation. Few UX jobs are advertised as a team-of-one gig, but there are usually telltale signs that give them away. Figure 2.15 shows a job description that is adapted from several real jobs posted to a popular UX job board.

We're looking for a talented user experience designer to help us maintain our proprietary software and direct the design of new features and enhancements. This person should have a passion for usability, an eye for visual consistency, and a knack for reducing the complex to the bare essentials.

Responsibilities:

- Keep the interface beautiful and easy to use. Direct the visual appearance of all new features and enhancements on our software application
- Initiate, suggest, and spearhead major UI re-factorings for a more intuitive user experience
- Design elegant solutions to complex workflows. Design things that people will talk about
- Act as the user-advocate during the development process, subjecting early-stage designs to usability testing or expert review, and offering implementation suggestions from a user-centered perspective
- Act as "go to" with in-depth knowledge of user interface best practices and standards. Use research-related services, theories and methods to support your recommendations
- Take the initiative in providing input and feedback in both departmental discussions and on issues relating to other departments
- Develop wireframes, behavioral specifications and personas

FIGURE 2.15
This is, in many ways, a standard UX team-of-one job description. This employer shows a clear awareness that user experience is essential in creating a competitive product, but the employer might not know how it will integrate with the company's existing way of working.

This job description shows an employer who is looking for someone who can drastically improve the quality of the user experience. The product will be "elegant," reduced to the "bare essentials," and "beautiful." People may not say it directly, but there's usually an expectation that having someone who will focus on UX will result in changes to the product that will immediately wow everyone. This can be a tricky expectation to manage, since design improvements often happen gradually, over time. The design methods in Chapter 7 show you how you can improve the quality of the product and bring people along with you in the process.

What you also see in this job description is a common challenge that UX teams of one face—employers are often confused about the relationship between visual design and user experience design. This may point to a lack of awareness about the processes and people involved in user experience work. Some user experience professionals *do* include graphic design in their arsenal of tools, but many do not. You can still be a user experience designer even if you just stop at wireframes, but user experience generalists—which most teams of one are—are sometimes called upon to do a bit of visual design as well. To get a sense of what your colleagues do and don't know about user experience, take them out to lunch and have a casual conversation. Consider a "Bathroom UX" campaign (also in Chapter 9, "Evangelism Methods") to promote a broader understanding of the roles and functions of user experience.

Employers expect UX practitioners to be able to back up their recommendations and show their work. Employers also might expect the user experience practitioner to challenge and persuade others in the organization to adopt new approaches. UX teams of one sometimes have to be diplomatic, informed, and well-meaning meddlers.

CHAPTER 3

Building Support for Your Work

PHOTO BY MTNEER_MAN WWW.FLICKR.COM/PHOTOS/MTNEER_MAN

Dedicated as you are, it can still be difficult to get others to stand behind the UX approach, particularly when it butts up against executive fiat or the very real constraints of time and budget. It's not that people are hostile or unsupportive of the idea of a well-designed product that meets users' needs. But UX sometimes doesn't have a lot of muscle in the face of other challenges, like an unhappy VP, or a constrained project schedule. Organizations that are new to UX can show a kind of ebbing and flowing commitment that can leave teams of one with sometimes more support, sometimes less. The constant tug and pull of trying to help others understand and care about user experience can put you at times in conversations that feel like battles (and at worst, losing battles). But they don't have to feel this way if you're willing to be creative and a little bit strategic about how you overcome obstacles to UX. You can do this by building trust, setting expectations, and then showing progress against them. This chapter will tackle the squishier side of life as a team of one: how to deal with the inevitable people and organizational issues that can influence how successful your work ultimately is.

Principles over Process

One team of one I spoke with said, "We don't have the process in place that we need to have. In the next year, I'm going to push for that." This desire for more process is common. But too much emphasis on process can be a distraction that takes your energy and attention away from relationships, which are more important—particularly when UX is still trying to establish itself in an organization and as a field. You can have all the processes in the world, but if people don't participate or support them, they're a fruitless exercise. And processes may need to change—often right in the middle of them—but principles can keep the work anchored. Principles are deceptively simple; they're just statements, really. They are a way for you to articulate a vision for what your user-centered approach should ultimately entail. Principles can apply to not just *what you make*, but also *how you work*. Think of the following principles as core tenets for how to work as a team of one. With startling consistency, the most happy and successful teams of one explain that it's their mindset, not just their methods, that keep them going. This mindset is embodied by the following principles of engagement.

#1 Invite People In

Overworked teams of one can sometimes spend more time at their desks than in conversations with colleagues. You think you're getting lots of work done and surely people will recognize and applaud your efforts, but it can have the unintended effect of making you seem inaccessible and unfriendly. In bringing people over to your cause, openness and friendliness can go a long way. Every day is an opportunity to invite your non-UX colleagues into the world of UX (see Figure 3.1). In fact, your co-workers may already think of themselves as savvy UX supporters. Even though you may see missed opportunities or on-again/off-again support, you can still cultivate advocates for UX. Invite them into the conversation and the community, and treat them as partners in the ongoing project of making your products as user-friendly as possible.

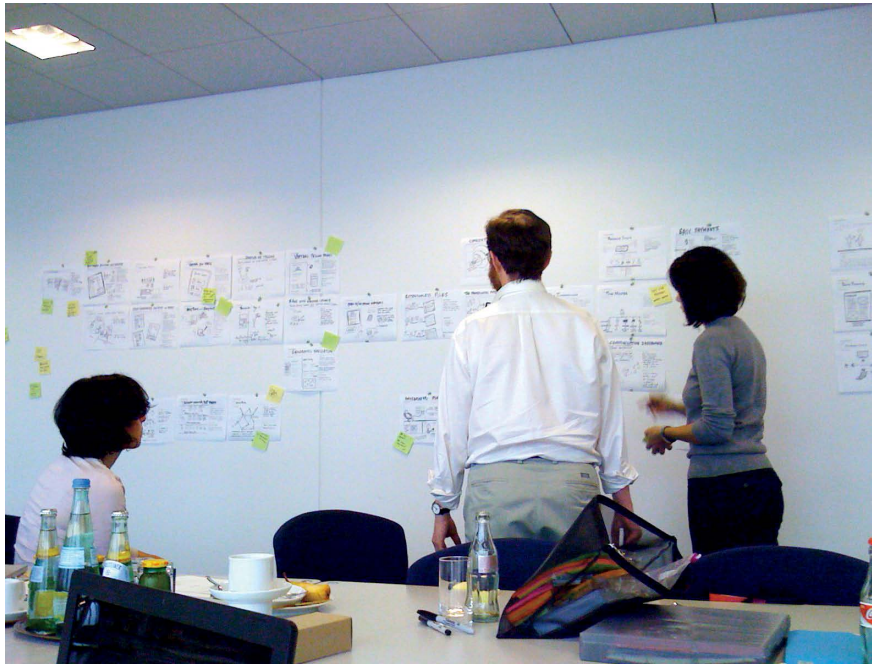


FIGURE 3.1

The more you can facilitate a cross-functional team, the more you will empower others to feel ownership and involvement in the process.

#2 Make Things Together

User experience work (and who are we kidding, work in general) can often be adversarial. Even though everyone on the team is presumably working toward the same goal, often *how* to accomplish that goal can become a battlefield of differing opinions, each informed by the professional experience and expertise of their owners. Meetings are one culprit here. Unstructured conversations are another. The two in conjunction create fertile soil for endless discussions back and forth that can get mired in all the bad habits of interpersonal communication. But you don't want that. And odds are good that your colleagues don't want it either. Happily, you have a very important tool at your disposal: the ability to make ideas tangible, and then to use that tangibility as a tool for further discussing and refining those ideas. Simply put, if you can quickly *make* examples of what you and your colleagues are talking about (even the sketchiest, most rudimentary examples), you can break the conversational cycle and instead help foster a constructive evolution of shared vision. How do you do this? Take a look at Figure 3.2. Model good behaviors like sketching, white boarding, and in-the-moment willingness to say "Can we draw that out?"

IMAGE BY DELL, INC., WWW.FLICKR.COM/PHOTOS/DELLPHOTOS/

FIGURE 3.2

Simply sketching out things is a great starting point. You can get even more creative and have a cross-functional team participate in collaborative design exercises, which are great for loosening people up and getting the ideas rolling.

#3 Truly Listen

Closely related to the previous principle, happy teams of one have learned to see themselves as facilitators and conduits of ideas held by an entire cross-functional team. Their job, once all the information and viewpoints are understood, is to create a design solution that cleverly reconciles those tensions and produces a satisfying experience for users. But to play this role of facilitator, you have to be truly interested in other people's viewpoints and actively engaged to understand where they're coming from, question what you believe must be questioned, and make a good faith commitment toward achieving the right balance in the end (see Figure 3.3).

IMAGE BY HIGHWAYS AGENCY, WWW.FLICKR.COM/PHOTOS/HIGHWAYSAGENCY/

FIGURE 3.3

Following this principle often means letting the other guy do more of the talking and asking "why" whenever the opportunity presents itself.

#4 Know When It's Good Enough

Finishing a UX project is like sweeping a floor. You get the big pile fairly easily, but those last few specks of dust are impossible to ever really clean up. You just keep cutting the dirt pile in half until finally you're left with an acceptable amount of grime to put the broom away and get on with the next thing. Suffice it to say, the work is never really done. Having an ongoing conversation with your non-UX colleagues about what's most important to get right and taking a "let's show the sausage being made" attitude can turn that problem into a compelling way to get others involved. By committing yourself to the idea that it *will* be imperfect and that others *will* have good ideas for how to improve it, you start to get a feel for what "good enough" looks like (see Figure 3.4). Good enough to convey the basic idea. Good enough to have a conversation about it. Good enough to get started writing code

You will see all four of these principles in action in the two main challenges that are addressed next: dealing with people issues and dealing with organizational issues. Finally, we'll close this chapter with a deep dive into common objections and questions you might expect to encounter, and some ways to respond to them.

FIGURE 3.4
Wise words.

Dealing with People Issues

Relationships are one of the most important means by which you can establish a foundation for UX. And yet, in a complex organization, it can sometimes be difficult to engage without getting sucked into interpersonal politics. Those people whom I've known to be most successful in this area seem to make themselves present and available, but without soiling their reputations or impartiality. They seem to assume that everyone has good intentions, and they try to see the situation from other people's perspectives, rather than just their own. That may sound warm and squishy, but it speaks to one of the supreme paradoxes of our work: it's frustrating when our efforts are impeded by others, but it's only by working with others that we build unofficial *and* official support for UX. Here are some techniques that will help.

- **Interview the team about how they want to engage with UX.** One thing I learned in consulting is that you must work with the resources that are available. People are resources, too. You can assess what sort of environment you're stepping into with a "Listening Tour" (Chapter 5 , "Planning and Discovery Methods"). These "tours" involve one-on-one meetings with key people that quickly educate you as to their perspectives on the project, organizational norms, how they like to work, and how receptive they are to the idea of your involvement.

- **Build an informal UX network.** In larger organizations, it's actually possible that there are a lot of other people who also think of themselves as user-savvy advocates. Develop communities of practice or lunchtime brown bags to pull the UX enthusiasts out of the woodwork and promote broader UX uptake within the company. Create a "Peer-to-Peer Learning Community" (see Chapter 9 , "Evangelism Methods") to create an informal community of support for UX and to educate others.

- **Ask others to participate.** Fluctuating support suggests that managers and colleagues need to better understand the value of UX. Invite them into your process and yourself into theirs so they get a better sense of what UX means and what value it provides. When conducting user research, invite your non-UX colleagues to come along. Offer to facilitate a "Strategy Workshop" (Chapter 5), where a cross-functional team can openly discuss opportunities to improve the user experience of your products. Also, hone your sketching skills so you can

turn any meeting into a design session (see Chapter 7 , "Design Methods") and invite your colleagues to sketch as well. People love it when ideas start to become tangible, and it's a way for you to demonstrate your leadership and help guide a conversation if it seems to be spinning. Host "Sketchboard" sessions (Chapter 7). These are generative design workshops that give your non-designer colleagues an opportunity to contribute to the design process.

- **Arrange pre-meetings to avoid the "big reveal."** I was on a project once with a manager who set up pre-meetings with all of her senior executives prior to formal share-out of proposed designs. At the time, it seemed to me like a lot of unnecessary conversations, but it had a magical effect on the big meeting. When we pulled out the designs and started explaining our logic, the senior execs smiled knowingly and nodded their heads in the affirmative. There were none of the puzzled "I'm thinking about it" expressions that I was used to in such presentations. Pre-meetings help you get people to commit their support for your approach prior to going in for the big reveal, and they give your colleagues a very important gift: the time and space to really *think* about proposed designs and establish their own point of view.
- **Use relatable language.** UX is rife with jargon that can be off-putting to people from other fields. Find plain-English ways to describe what you're attempting to do, and speak to the outcome, not just the process.

Dealing with Organizational Issues

User experience practitioners, due to their focus on both user needs and business needs, can provide a holistic view that can actually be rare within an organization. That's particularly true if your business is siloed or heavily segmented by department. If you find that your vantage point is restricting you from looking beyond one piece of the system or process, you are ultimately hampered in your ability to consider and design for user experiences that are fluid. You may need to find novel ways to gain access and visibility across departments, deal with conflicting priorities, and make the most of insufficient or unclear resources. Here are some ideas.

- **Offer to visualize requirements.** Early on in the process, offer to be the design hands to help others visually convey what they have in mind and tease out their ideas. If you know that preliminary product strategy conversations are taking place, or that use cases and requirements are being written prior to UX involvement, this is the perfect moment to offer your services and suggest in a friendly fashion that the user experience of the product often benefits down the road from having UX involved in early stage efforts. By offering yourself in the capacity of early stage visualizer and prototypist, you can make a place for yourself in strategic conversations that establish the fundamentals of the product or service.
- **Help others see how UX impacts the process.** Make it clear how UX changes the established process. Show a "UX Project Plan" (Chapter 5) to give everyone (including yourself) a realistic understanding of the time and resources needed to work UX into the process. It can also give you a better idea of the resources and support you'll need to do your work well. To address concerns about the amount of time or effort that may be required, create one version that shows the project timeline with UX, and one that shows it without. This also gives you a tangible way to talk about trade-offs and compromises: where you could shorten your process, where there are dependencies, and what the team will be giving up if UX is not involved.
- **Play nicely with vendors.** You may find yourself having to work with vendors or outside agencies from time to time. These can be analytics vendors or development vendors or, really, any kind of vendors. When it's UX vendors, it hurts a little. If you've been struggling to establish a robust UX practice, having someone from outside the organization come in with the freedom and the support to do all the most interesting work can be a little frustrating. But this is a great opportunity, actually, and you don't want to waste it sucking on sour grapes. Here are a few tips:
    - Get invited to their meetings. Position yourself as someone who can share internal knowledge and bring the work they generate back in-house.
    - See it as an opportunity to learn. They might have some tricks/techniques you can add to your own arsenal.

    - Work *with* them rather than *against* them. A positive attitude will reflect well on you, and it shows maturity and understanding of the organization.
    - Know that outside vendors never really do *all* the work. Often, they set a direction, but due to a limited statement of work, much work will remain to be done to extend that vision through the product. Stay actively involved so you can own and direct how the work gets executed.

- **Turn the rubber stamp into an opportunity.** One common problem for teams of one is getting called in only near the end of development to do a quick usability review—in others words, to rubber stamp a product. This can be frustrating and makes it very hard to suggest anything beyond the most surface changes. But you can treat this as a teachable moment to expose others to what user-centered design really entails. Do "Guerilla User Research" (see Chapter 6, "Research Methods") to give the team an understanding of what needs to be improved that is based on first-hand observation.
- **Develop case studies.** Often, people don't really know what you do, even after you've done it. Wrap up past projects into a tidy story. People love stories. Instead of talking about the deliverables that you produce or UX concepts in the abstract, case studies and stories give people a memorable narrative that they can envision themselves in. This is also good because it makes it easier for *you* to remember what you did, so you can tell your stories confidently and on the fly. Develop a collection of "Mini-Case Studies" (Chapter 9) that you can call on or conjure up whenever you have an opportunity.
- **Break bread.** Turn lunch into relationship building time. Shared experiences (even minor ones) turn co-workers into allies. Getting out of the office and trying to relate on a personal level can change the dynamics of your relationship for the better.

A Success Story

James Goldsworthy is a UK-based team of one. He shares this story of the success that he's experienced from offering to visualize requirements:

I can't state strongly enough that I truly believe, and have success to prove, that "guided inclusion" or "guided participation" is one of the simplest and most useful tools in your armory as a UX team of one. In a nutshell, this plays on the strengths of all of the people involved. Firstly you, as the designer, get to use your skills in UX to understand and balance the user goals with business aims and requirements. For this, you will get to prove your chops as "the User Experience expert" or more succinctly "the person who makes things easy."

You will hold meetings with the business stakeholders or project teams and thrash out your goals, essentially creating a quite loose but tangible set of requirements. Business people not used to the strange design world will find it easier to talk, rather than getting the Sharpies and Post-its out right away.

Now you get to go away and start sketching, iterating, and sketching some more until you've got some designs that answer the questions that were raised. When you next meet, you can use the designs to test some assumptions or even push some of the boundaries. Making it real, even in a low-fidelity way (I use Balsamiq and a projector) allows your crowd to see how their ideas will play out on-screen. This gives you the validation and buy-in required to actually do the work and start to test these designs on real users in whichever way works best for you.

Even if you come back with bad news from testing, the team is engaged, knows the history, and how they got here. They've bought into the process and are emotionally connected to it.

Next time, you might even be able to start with the Sharpies and Post-its! Rather than fighting for entry, you'll start to become the "go to" problem solver.

Well done, you've just introduced your business to UX thinking.

Responses to Common Objections

Talking about UX often leads to questions, and in some cases objections. But any seasoned salesperson will tell you that objections are an opportunity, not a threat. Think of an objection as an invitation to a more direct and honest conversation, where you can really probe about what's driving someone else's point of view. The following is a cheat sheet of the most common questions that UX professionals face, and some good ways to answer them.

Objection: ***It's just Web design, right?***

Answer: Researching user needs can impact the product at many levels: what features and functions are included, how content is written and presented, how support works, and how well it integrates with other touch points like mobile, desktop, and print. Limiting the scope of responsibility and involvement that the UX designer has to merely the Web or interface level limits its potential impact and effectiveness. Many UX designers never even touch the Web. (They might go by more specialized titles like mobile designer or tablet designer, but they're practicing UX, too.) UX is a role that should span product development from start to finish and at all major product decisions.

Objection: ***But we already do market research.***

Answer: User-centered research is, fundamentally, design research. Design research differs from market research in approach and intent. They are complementary but different. Market research is about identifying what people want, whereas design research is about identifying how best to achieve what people want, i.e., *what* versus *how*. In design research, you look for evidence of habits, biases, needs, and native worldviews. The goal in design research is to develop empathy and insight into why people do what they do and to spark inspiring ideas for how products can meet unmet needs and enhance their lives. What you learn through design research can help you develop tools like "Proto-Personas" (see Chapter 6, "Research Methods," for more information).

NOTE **THE ROI OF DESIGN RESEARCH**

To help companies determine whether design research and persona development is worth the investment, the market research firm Forrester developed an ROI model to measure the benefit of personas to the companies that undertake them. They discovered that a redesign effort with personas can provide a return of up to four times more than a redesign without personas. (From the Forrester Report "The ROI of Personas.")

Objection: ***User experience work is too expensive.***

Answer: It's *always* less expensive to fix or improve the plan for a product before it's built, instead of after. In *Cost-Justifying Usability*, CEO Janice Durst explains, "It costs much less to code the interface in a customer acceptable way the first time than it does to introduce a poor UI in the field and then rework that UI in version two. In addition, a poor UI will increase support costs." You could therefore think of UX as a preventative investment to keep the costs of your product from getting out of control down the road. Ultimately, user experience work can be as expensive or as affordable as you're prepared to make it. It only takes a quick chat with a real user or showing a proposed design to a few people to quickly uncover if there's any major misalignment between how the product is framed and how people are likely to use it.

Objection: ***It takes too much time.***

Answer: It's important to be realistic that it might take some time to do UX well. Still, UX work doesn't have to add months. In fact, one benefit that UX can bring to your process is the ability to rapidly prototype, test with users, and evolve the product design. Be optimistic but also realistic. The time you put in up front is an investment that defrays other, more burdensome, costs down the road. And whether your organization realizes it or not, UX is probably already in your process in some surprising forms. It currently shows up in places like time in the call center providing support, or extended time up front for sales, or time in QA testing,

or time in maintenance and bug fixes. Ultimately, formalized UX can save you time by taking less time up front to address usability and experience issues that could become a lot costlier to fix once built.

NOTE THE COST OF *NOT* DOING USER-CENTERED DESIGN

In *Software Engineering, A Practitioner's Approach*, Roger Pressman presents a compelling return on investment for focusing on user needs early in the product development lifecycle. For every dollar spent to resolve problems during product design, Pressman shows it would cost $10 to address the same problem during product development, and $100 or more to solve the problem after the product is released.

Objection: *But UX research isn't statistically significant.*

Is it statistically significant?

Answer: To be statistically significant means that a result has been determined by statistical methods to be unlikely to have occurred by chance. Statistical significance creates confidence about the linkage between cause and effect. With quantitative research (for example, research conducted with large numbers of people), it is easier to prove statistical significance. In qualitative research (for example, research focused on gathering in-depth understanding of behavior, but often based on relatively small sample sizes), statistical significance is pretty hard to prove. User-centered research typically errs on the side of the qualitative, which means small sample sizes, usually somewhere between six and a dozen people. The main reason for this is that you spend more time with each participant one-on-one—a lot more—and thus a larger sample is prohibitive in terms of time and cost.

The other big reason is that you don't really need to do it. With even just a small sample size, you can get a sense of the big trends. Sometimes, seeing just one or two users experience the same problem can clue you into a major opportunity for improvement. You can also get some pretty fascinating and rich detail, and that ultimately is the main goal of design research. But in particularly numerate environments, people sometimes object that what you find with design research is not statistically significant. David Gilmore writing in *Interactions* magazine called this studying "large numbers shallowly [vs.] small numbers in depth."

In fact, rich contextual research probably should *not* be used to influence major business decisions because it is not necessarily representative of market averages. But it's perfect for getting inspired, and for triggering empathetic thinking about the context and mindset that people will have when interacting with your product, which enables you to think creatively about how to help your customers. It's also possible to combine quantitatively valid research, such as surveys, with qualitative user research, to create a complete picture of what people do (quantitative) and then why (qualitative).

NOTE **A MAGIC NUMBER FOR USER RESEARCH**

Usability experts Jakob Nielsen and Tom Landauer conducted research in the early 1990s that showed that by testing with just five users, you can uncover 85% of the usability issues with a product. The more users you add, says Nielsen, the less you learn because you keep seeing the same issues again and again.

In 2012, Nielsen revisited this question to see if the magic number five still held true. By analyzing the number of usability findings relative to the number of users across 83 different research studies, Nielsen concluded that "testing more users didn't result in appreciably more insights." The optimal number of users to test in a qualitative study is still five—just five. Conversely, warns Nielsen, "zero users give zero insights." By taking the time to conduct research with just a few users, you gain significantly more insights than you'd have with no research at all. (See **www.nngroup.com/articles/why-you-only-need-to-test-with-5-users/** for more.)

Objection: ***But we already know what needs to be done.***

Answer: UX tells you not just what's wrong, but also why and how to fix it. It also gives you an opportunity to validate that you got it right. Sometimes, things that seem pretty straightforward or that users may even have asked for explicitly really come from a deeper need that you can only discover by getting out of the office and into people's lives. And, in the long run, observing real people using your products (or their preferred alternatives) may teach the team some things they didn't know before.

Objection: ***That's [marketing's/engineering's/product management's] job.***

Answer: In product development, there are a lot of people who are thinking about the product from various angles. Engineers think about how to write code that's efficient and reliable. Marketers think about how to connect to and engage the target market for the product. Quality assurance folks think about whether people can use the product to complete the intended use cases. UX is, in some respects, the glue that binds these considerations together, ensuring that the actual experience of using the product is, from moment to moment, clear, fluid, and even a little bit delightful.

NOTE THE ROLE OF USER EXPERIENCE

A 2005 article from IEEE called "Why Software Fails" listed the top 12 reasons why software projects are unsuccessful. Of the 12, three were directly connected to issues that user experience practitioners can help with:

- Badly defined system requirements
- Poor communication among customers, developers, and users
- Stakeholder politics

While UX isn't a silver bullet for all the complexities of product development, much of a user experience practitioner's work is about making sure that what is being built is relevant to both customers' goals and business goals. A user experience practitioner can help the team ensure that system requirements and product designs are aligned with what's usable and desirable for users.

If You Only Do One Thing...

In UX, designing great products is only half the work. The other half is handling all the "people stuff" that goes along with it: building support, ferreting out lingering objections and concerns, untangling a knot of competing agendas, and rallying your colleagues around a new direction. This chapter encourages you to address those challenges and objections head on. Having the right attitude matters. Be vigilant against feelings of defensiveness or combativeness in yourself. Rather, cultivate a collaborative, curious, and respectful mindset.

So if you do nothing else from this chapter, be sure to think about the principles at the start: invite non-UX people into your process. Listen with genuine curiosity. Make ideas tangible. And, above all else, be patient with yourself and others, remembering that design is an iterative process that takes time to get right.

CHAPTER 4

Growing Yourself and Your Career

PHOTO BY JAMISON YOUNG (FLICKR)

For teams of one, it's important to establish a few growth strategies that are just for you, regardless of what your colleagues think or say about UX. They will keep you passionate, motivated, and may even give you skills that you can bring back into your practice to help advance the commitment to UX shared by all. In this chapter, we'll look at a range of resources for continual growth. This includes not only finding opportunities in your own organization, but also taking advantage of the extensive range of external options that are available for user experience professionals.

Professional Communities

Be it formal or informal, having a community of like-minded professionals can be one of the most important things you do for your career. It will give you people you can learn from (or mentor), people you can share experiences and best practices with, people to commiserate with, and can often lead to future job opportunities. In short, it will keep you sane. Professional communities come in lots of different flavors.

Professional Associations

Most professions have professional communities. These are third-party organizations that exist for the sole purpose of connecting professionals and advancing the cause of their field. User experience is no exception. There are several well-established professional communities that UX professionals can belong to. Members typically receive benefits, such as access to job listings, access to other members of the network, special publications of the professional community, discount rates at events and conferences, and access to community discussion lists. For the UX field, the following associations shown in Figures 4.1–4.7 have vibrant communities.

FIGURE 4.1
IXDA (Interaction Design Association).

IXDA (the Interaction Design Association) is dedicated to the field of interaction design, but judging by its vibrant discussion list, it covers all aspects of user experience design. With 20,000+ members, it's an active global community (www.ixda.org/).

FIGURE 4.2
SIGCHI (Special Interest Group of Computer-Human Interaction).

SIGCHI (Special Interest Group of Computer-Human Interaction) is a part of the ACM, or Association for Computing Machinery. This long-standing group has been around since the 1980s and tends to have a more academic focus than some of the other professional associations (www.sigchi.org/).

FIGURE 4.3
IA Institute (Information Architecture Institute).

The IA (Information Architecture) Institute was founded with a focus on information architecture. This professional association today exists to support individuals who specialize in the design and construction of "shared information environments" (http://iainstitute.org/en/).

Known until recently as the Usability Professionals' Association, the UXPA (User Experience Professionals' Association) has a broader purview than mere usability, and aims to support user experience designers and researchers worldwide. UXPA has very active local chapters in a number of major cities. Don't give up hope if your city isn't listed. In addition to "official" listed local chapters some "tech hub" cities are likely to have unofficial or unlisted groups that organize events and meet-ups on an informal ad-hoc basis. These may be hosted or sponsored by companies interested in promoting UX within the local community—perhaps even as a way of identifying potential hires (www.uxpa.org/ and www.usabilityprofessionals.org.).

FIGURE 4.4
UXPA (User Experience Professionals' Association).

ASIST (American Society for Information Science and Technology) has been in existence since 1937, when it was founded as the American Documentation Institute and focused mainly on the then prevalent technology of microfilm. In addition to having special interest groups focused on topics such as information architecture and human-computer interaction, ASIST hosts the IA Summit and the Euro IA Summit, two annual conferences that draw a large turnout from the user experience community (www.asist.org.).

FIGURE 4.5
ASIST (American Society for Information Science and Technology).

Formerly known as the American Institute for Graphic Arts, this organization is now just called the AIGA. This group is focused broadly on design, including graphic design, user experience design, and product design (www.aiga.org.).

FIGURE 4.6
AIGA.

FIGURE 4.7
STC (Society for Technical Communication).

While the STC (Society for Technical Communication) focuses more broadly on the field of technical communication and supports people with titles like "proposal manager" and "documentation specialist," their usability and user experience special interest group is squarely focused on UX (www.stcsig.org/usability/).

Discussion Lists and Online Communities

All of these professional associations have discussion lists that you can sign up for. You'll also find discussion lists and online communities that aren't sponsored by any particular association. For many people, discussion lists are the richest and most active resource that a professional community provides. Discussion lists are usually freely available to the public, which means that a vast catalog of first-hand knowledge from practicing professionals can be conjured forth with a simple Google search. Often, for a specific question or just a bit of perspective, the discussion thread will give you more ideas than you need. Many UX practitioners subscribe to these lists by email or through RSS feeds.

These are some popular discussion lists for user experience professionals:

- **IXDA:** www.ixda.com/discussion
- **IA Institute:** http://lists.iainstitute.org/listinfo.cgi/iai-members-iainstitute.org/
- **SIGCHI:** www.sigchi.org/connect/mailing-lists
- **Anthrodesign:** http://groups.yahoo.com/group/anthrodesign
- **Stack Exchange:** http://ux.stackexchange.com/

Social networks can also be a good place to find an online discussion. LinkedIn has thousands (yes, thousands) of groups with a focus on UX (see Figure 4.8). Many of them are quite large. Do a search for "UX" in the groups section of LinkedIn to get started. Twitter can also be a great resource for connecting to others in the user experience community. Doing a search for "UX" will point you toward lots of experienced UX practitioners who regularly tweet about the field. You'll also find plenty of great general UX resources, such as UX companies, UX job lists, and feeds that aggregate the latest UX news and methods.

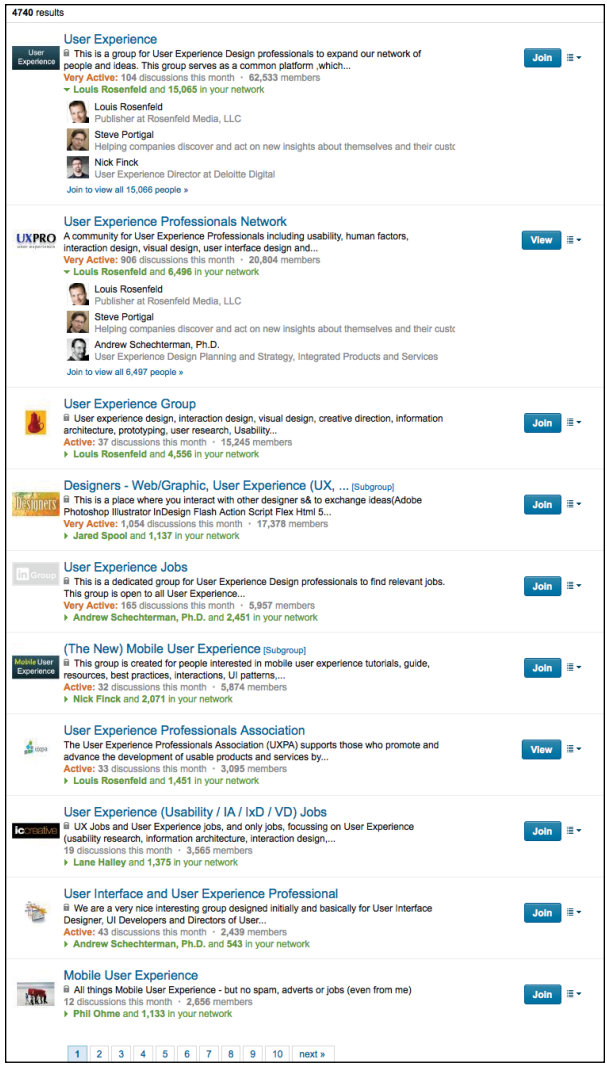


FIGURE 4.8
LinkedIn has nearly 5,000 UX groups.

Meet-Ups and Locals

Many cities have local groups with their own active programs of events and meet-ups. Some events are topical and deliberately focused on learning (book clubs or bringing in outside speakers, for example). Some are purely social and geared toward giving people opportunities to meet and mingle. In either case, these are fantastic occasions to gain professional connections, talk shop, and trade war stories. To see if there are local chapters and events in your area, start with an Internet search. Or you may be able to find others in your area by posting to one of the discussion lists cited earlier.

If there doesn't appear to be a local group in your area, consider starting one. Post a note or invitation on one of the discussion lists, and see if there are any takers. Or, if you know of other companies in your area that do UX work, consider reaching out and introducing yourself to see if there are others who might be interested in co-hosting a meet-up. If there are schools or universities in your area with formal programs in user experience or even related disciplines like HCI, graphic design, or information science, get in touch with them.

NOTE CONSIDER HOSTING A LOCAL MEET-UP

Brian is a team of one who started a local IXDA chapter. He has found that in addition to putting him in touch with other UX professionals, it has actually sparked more interest in UX in his organization. His current manager and his previous manager both now attend IXDA meetings with him, and he's talking with his company about the possibility of sponsoring a future IXDA event. This is a great approach because it not only makes you feel less isolated as a UX team of one, but it also helps your co-workers see that UX is part of a larger trend that goes well beyond the walls of your organization.

Mentors and Buddies

Some professional associations offer mentorship programs, where you can pair up with someone who is more experienced and establish an ongoing relationship to seek guidance, wisdom, and periodic sanity checks. Or, if you'd like to share your own experiences to help another practitioner, you can volunteer as a mentor. Either way, you are guaranteed to learn more about how to balance perspective, people skills, and practical expertise. Again, check your professional association's website to see if this service is offered.

If it isn't, consider looking to the people you already know. Is there someone you met in the professional community who might make a good mentor? Why not ask her? Or maybe someone you work with might be helpful. This person doesn't necessarily have to be a UX-savvy individual. Even someone who can help you examine and evolve the way you position your work for maximum effectiveness can be a tremendous support.

The Rule of Threes

Here's a fun fact. Social network theory has a concept called the Rule of Threes, which states that you're likely to feel a network effect at up to three degrees of separation. All kinds of things spread according to the Rule of Threes: obesity, happiness, and jobs. It's a well-known fact that most people get jobs from someone they know, for example, through their networks (see Figure 4.9). It's a less well-known fact that most of these jobs come from someone who is only weakly connected to you—for example, not someone who you currently see or work with on a regular basis. It stands to reason, then, that if you want to increase your opportunities, you need to grow your second and third ring networks. Becoming a part of a professional community is how you do it.

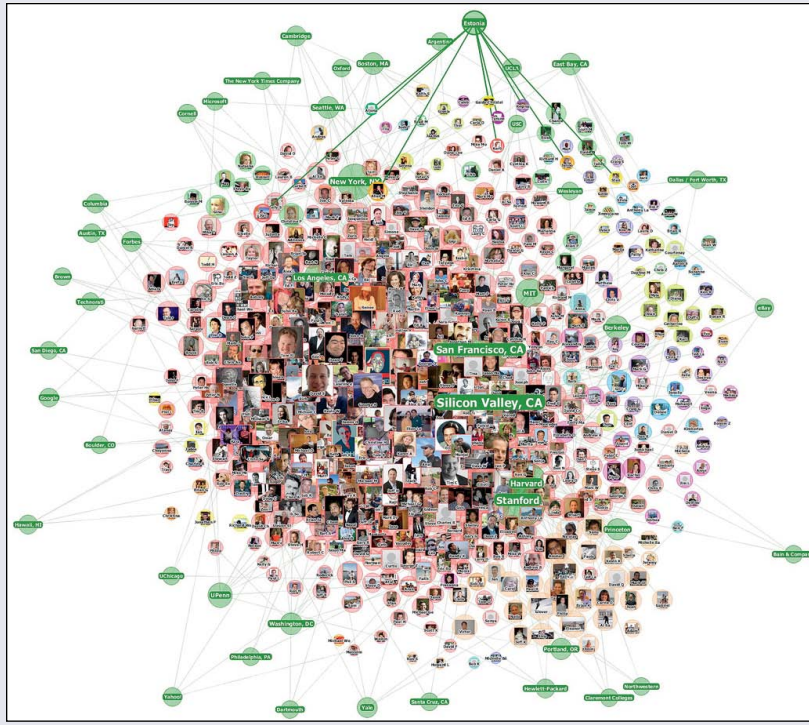


PHOTO BY JURVETSON (FLICKR)

FIGURE 4.9

The bigger your professional community, the more opportunities you're likely to encounter.

Continuing Education

One reason why continual growth is a good idea for teams of one (or indeed, any UX practitioner) is that the field is changing fast. Maybe you started out focusing on the Web, and then gradually discovered that now you need to conduct research and design for mobile. Tomorrow, it might be tablet, or even device-independent connected service strategies. The simple truth is that technology is a fast-changing field, and since you are responsible for designing people's experiences with technology, you need to be able to move fast, too. To keep up with the pace of change, UX teams of one can benefit from a variety of continuing education options, ranging from classroom learning in degree granting programs to online education in the comfort of your own home.

Online Resources

You can find an abundance of informative, well-written online newsletters and magazines that focus on UX, which you can sign up to receive by email. These magazines are a more curated alternative to a discussion list, but they share the same virtue of authentic content from fellow user experience professionals. Here are some of the most popular ones:

- **UX Booth:** www.uxbooth.com/
- **UX Matters:** www.uxmatters.com/
- **A List Apart:** www.alistapart.com/
- **Boxes and Arrows:** www.boxesandarrows.com/
- **Smashing Magazine:** www.smashingmagazine.com/
- **Core77:** www.core77.com/
- **.Net Magazine:** www.netmagazine.com
- **UIE Newsletter:** www.uie.com/uietips/
- **Adaptive Path Blog:** www.adaptivepath.com/ideas

For more guided learning in the comfort of your home or office, online seminars or learning modules can pack a lot of information in an hour or two of dedicated learning (and provide tangible how-to's and examples). Online learning generally gives good value for your buck. Many resources are free. The ones that charge tend to be relatively inexpensive (far less than the cost of attending a conference or taking an in-person class). And because it's online, if you know other people are interested in this information, too, you can get them together with a projector and

some speakers and learn together. Many of the online content providers know that this happens and tacitly encourage it. To find online learning options, check out the following providers:

- **User Interface Engineering Virtual Seminars:** www.uie.com/events/virtual_seminars/
- **Rosenfeld Media Virtual Seminars:** http://rosenfeldmedia.com/seminars/
- **Lynda.com:** www.lynda.com/
- **TreeHouse:** http://teamtreehouse.com/
- **Coursera:** www.coursera.org/ (Coursera is not specifically a user experience resource; they host online resources on pretty much any topic you can think of. However, there are several courses that focus on topics relating to user experience.)
- **AIGA Webinars:** www.aiga.org/resources/
- **Slideshare:** www.slideshare.net

Another great resource is videos of conference proceedings, which are often posted online once a conference is over.

Books

Kudos to you for picking up this book. Of course, there are lots of other great ones out there. In fact, a handful of publishers specialize in books of relevance to user experience professionals. Browsing their catalogs may turn you on to new titles that you were unaware of. To get started, check out the following publishers:

Rosenfeld Media (see Figure 4.10): Publisher of user experience titles exclusively (and the publisher of this book). Founded by one of the authors (Lou Rosenfeld) of a foundational text of our field, *Information Architecture for the World Wide Web* (http://rosenfeldmedia.com/).

FIGURE 4.10
Rosenfeld Media.

New Riders (see Figure 4.11): An imprint of Peachpit Press. Peachpit publishes titles on a variety of topics for creative professionals, such as desktop publishing, multimedia, Web design, and general computing. The New Riders imprint contains a number of titles of particular relevance to UX professionals (www.peachpit.com/imprint/index.aspx?st=61074).

FIGURE 4.11
New Riders.

FIGURE 4.12
O'Reilly Media.

O'Reilly Media (see Figure 4.12): Not so much a publisher as a media empire, O'Reilly not only publishes books on basically every topic you can think of, but they also host an impressive array of conferences (http://oreilly.com/).

FIGURE 4.13
A Book Apart.

A Book Apart (see Figure 4.13): The publishing arm of the popular website A List Apart, A Book Apart publishes short books principally on topics related to Web design. This is a relatively new publisher, so their catalog is still growing, but their early publications are timely, well written, and to the point (www.abookapart.com/).

Conferences

For what you pay, conferences provide a straight shot of inspiration, information, and networking in one very effective and compressed chunk of time. Going to conferences is a little like going to a professional spa, where you refresh and revitalize your energies for the work to come. If possible, I recommend going to at least one conference a year, and even trying to identify your "home" conference—the one that you attend consistently and where you can catch up with your UX buddies every year. Having a home conference also enables you to see how the content and issues in the field evolve over time. You can find a comprehensive list of conferences at www.interaction-design.org or www.lanyrd.com.

So, how do you cover the cost of traveling to and attending a conference?

- Start by asking if your employer will pay for it. Many companies recognize conferences as a beneficial form of continuing professional development and are willing to cover your attendance as a reasonable part of continuing education costs.
- If your employer won't cover the costs, don't give up. Many conferences provide opportunities to go for free or at a reduced cost if you are willing to volunteer some of your time to help out during the conference. Send the conference organizers an email asking if they have any volunteer opportunities.
- Another way to attend a conference and get some or potentially all of your costs covered is to be a presenter. This may sound intimidating if you have never spoken in public before, but many conferences openly solicit submissions for talks, workshops, and poster sessions, and they're often seeking to balance known speakers with new voices. Check the conference website for information about submissions.

NOTE **FINDING YOUR CONFERENCE PRESENTATION**

Don't think you have a talk in you? Spend some time brainstorming topics that you know the most about. Or think about projects you've worked on that are interesting or notable (either because they went really well, went really poorly, had some new angle or technique, or some combination of all of the above). Pick your two or three best ideas, give each one a title and a few sentences of description, and submit them to the conference organizers.

You might be surprised by what happens. In my experience, once you've got your title, your abstract, and a looming deadline, the rest of the content pretty much takes care of itself. But if you'd like some inspiration for how to structure your talk, check out past conference presentations if they are available online, or sites like Slideshare, to see examples of what works well in other people's presentations.

The most beneficial thing you can do at a conference is to meet other people (see Figure 4.14). It is often said that the best part of the conference happens in the hallways, but only if you make an effort. How? Attend the happy hours, dinners, and informal mixers that the organizers inevitably offer as opportunities for socializing. Introduce yourself when you sit down next to someone at a session. Be friendly and forward, even if just for a few days, and you'll be glad you did.

PHOTO BY YOHAN CREEMERS (FLICKR)

FIGURE 4.14
Networking and meeting people is the best part of the conference.

Classes and Courses

In person, group-based training can cost a bit more than an online seminar, but can also serve as a boot camp or intensive to take you quickly from a newbie level of knowledge to expert. These options tend to be more limited, but the organizations that do them often schedule tours, taking their curriculum to different parts of the world. Check out:

- **Cooper U:** www.cooper.com/#training:introduction
- **Adaptive Path UX Intensive:** http://ux-intensive.com/
- **User Interface Engineering UX Immersion:** www.uie.com/events/#uxim
- **Nielsen Norman Group:** www.nngroup.com/
- **Rosenfeld Media Workshops:** http://rosenfeldmedia.com/events/
- **General Assembly:** http://generalassemb.ly/

Local colleges, universities, and community colleges may also offer relevant courses that you can sign up for without being required to enroll in a degree program. Check your local school's catalogs under design or computer science to see what courses are available.

Finally, many conferences offer optional workshops before or after the conference where, for a little extra money, you can get comparable training tacked on to your conference.

Degree Programs

While the UX field tends to welcome self-taught folks with open arms, eventually you may decide you want to go back to school. This is a good idea if you're interested in becoming more specialized in the field of UX, or if you want to earn more money. Although our field is still somewhat new, many more formal education options exist now than did even just a few years ago. Here is a list of some of the established and well-regarded schools that offer graduate degrees in UX-related disciplines as of this writing.

North America

- Carnegie Mellon University (CMU), Pittsburgh, Pennsylvania, U.S.
- Illinois Institute of Technology (IIT), Chicago, Illinois, U.S.

- Pratt Institute, Brooklyn, New York, U.S.
- University of Washington iSchool, Seattle, Washington, U.S.
- Berkeley iSchool, Berkeley, California, U.S.
- University of Indiana, Bloomington, Indiana, U.S.
- Stanford, Palo Alto, California, U.S.
- MIT Media Lab, Cambridge, Massachusetts, U.S.
- Georgia Institute of Technology, Atlanta, Georgia, U.S.
- NYU Interactive Telecommunications Program (ITP), New York, New York, U.S.
- University of Toronto School of Information and Interactive Media Lab, Toronto, Canada
- Laval University School of Design, Quebec City, Canada

South America

- Universidade Positivo, Curitiba, Brazil
- Universidad del Pacifico de Chile, Concepción, Chile

Europe

- Royal College of Art (RCA), London, England
- City University London, London, England
- Middlesex University, London, England
- The University of York, York, England
- Limburg Catholic University College (KHLim Experience Design Lab), Diepenbeek, Belgium
- University of Applied Sciences, Potsdam, Germany
- Delft University of Technology, Delft, Netherlands
- Copenhagen Institute of Interaction Design, Copenhagen, Denmark
- Umeå Institute of Design, Umeå, Sweden
- Malmö University, Malmö, Sweden
- The Domus Academy, Milan, Italy

Asia and Australia

- Indian Institute of Technology, Bombay, India
- Korean Advanced Institute of Science and Technology (KAIST), Daejeon, Republic of Korea
- Hong Kong Polytechnic University, Hong Kong
- Nanyang Technological University, Singapore
- The University of Sydney, Sydney, Australia
- The University of Queensland, Brisbane, Australia

Be sure to do your own research as well. This list is far from exhaustive and new programs are cropping up all the time.

In Your Organization

For some, your own organization may not be the first option that comes to mind. You are trying to help *them* grow a user experience practice. How can you expect them to help *you*? Even though they may not be experts in user experience, well-intentioned employers often have programs and structures in place that are designed to help their employees continue to grow and ensure that their work contributes meaningfully to the organization's goals. Depending on the company, general management training may also be an option, or training in specific skills, such as time management or communication. Any training that gives you a chance to meet other people from around the organization can be worthwhile, too. Sometimes you learn new things about people when you have an opportunity to work with them outside the context of a project.

The first place to start is with your written goals. In some respects, goals are the agreement that an individual and an employer make concerning what that individual will focus on in the next year, and where they can expect support. Consider making user experience work and training an explicit goal. This will make others (e.g., your boss and your boss's boss) aware that this is a priority for you, and will invite a useful conversation about the lengths to which your organization will go to support this goal.

A less formal way to leverage your organization is to create a voluntary peer-to-peer learning community where you and other people who are interested in user experience commit to learning more with each other's help. (See the "Peer-to-Peer Learning Community" method in Chapter 9, "Evangelism Methods," for more details.)

Finally, your organization may be able to provide support for your growth in the form of resources—resources such as time to learn, money to take a class or group conference, or, the biggest coup, people to help you. If you can get help in the form of other people, you've taken the first step toward transitioning from a team of one to a full-fledged team. When your workload becomes heavy enough that it's more than one person can handle, resist the urge (if you feel it) to try to take on more work and prove how industrious you are. Ask for help. Can they open up headcount for a fellow user experience practitioner, or even a temporary allocation for a freelancer or contractor to help until things ease up? Any feint in this direction (even an unsuccessful one) starts to position UX as a legitimate hiring concern and not just your personal pet project.

Making a Case for Career Growth

I know a team of one who actually has to sustain her own position and budget by writing grant proposals to fund her work. A budget sounds like an incredible luxury to most teams of one. But for this team of one, the internal grants process is smart (if painstaking) because it makes it very clear that UX initiatives take time and money, just like any other organizational initiatives. In writing the grant, she must make the case for *why* to do the work, *what* the work will entail, and what *outcomes* can be expected. And she can put a dollar amount next to that. In business-speak, this is called being *numerate* (literally, the ability to understand and work with numbers), and it's usually what is required before anyone will entrust you with the budget to build a team. To be numerate, you need to understand how your work contributes to the company's profit, and how you're going to sustain that over time.

- **Align with business goals.** What sometimes happens when you start digging into this question of business goals is you learn that your organization doesn't really have any. Or, it has a lot of them, and they're all set at the individual business unit level, and in fact, some compete with others, and good luck dealing with all that. If your work doesn't align with business goals, or you can't explain how what you're cooking up will support what the business is trying to accomplish, there's a good chance that others won't be able to see its value. Sending out a "UX Questionnaire" (see Chapter 5, "Planning and Discovery Methods") can help you assess how your organization sees UX goals aligning with business goals (or doesn't, as the case may be).

- **Measure your progress.** If you can get everyone to agree to a minimum but standard UX measurement process and then diligently and regularly measure it, your colleagues and managers will have a better understanding of the impact of user experience. For a simple way to start measuring your progress in user experience, try a "UX Health Check" (see Chapter 8, "Testing and Validation Methods").
- **Strategic planning.** When it comes to product development, businesses often plan and budget around projects. They deliberately attempt to manage risk and minimize complexity by scoping things as narrowly as possible. They put a lot of effort into defining what's in and what's out. With your broad, how-people-really-work purview, you may be seen as the harbinger of scope creep. Here is where having some long-term strategic priorities can help. Combine a "Strategy Workshop" with a "UX Project Plan" (see Chapter 5) to create a big picture vision, and then plot out what needs to happen now, next, and later.

Moving Out and On

Hey, it happens. You may at some point decide that you've exhausted the learning opportunities and resources that your current situation can provide. If that happens, the most important thing a UX team of one can do is to take his or her career into their own hands and decide the next step. At this point, there are a few important questions to ask yourself.

- **Team of one, or team of many?** Do you prefer to continue being a solo UX practitioner, or do you want to work with other user experience folks and learn from them? There are pros and cons to both situations, so there's no one right answer, just the right answer for you right now. Some people even like to go back and forth between big teams and teams of one to keep their skills sharp.
- **Innie or outie?** Do you want to work inside an organization, or do you prefer to consult with a variety of organizations? Being on the inside can give you lots of practice in owning and evolving your own product, not to mention the interesting interpersonal and political muscles you flex in an organization. Being an outie can give you an opportunity to work on a variety of new and challenging problems, though sometimes you don't get to see them all the way to market.

- **Employed or independent?** Do you prefer to work for a company, where the work is steady (if not always of your choosing), or do you prefer to be your own boss, making your own hours and running your own show (but also responsible for drumming up your own business)? Note that certain parts of the world may be easier to freelance in. Urban centers with a sizable UX community tend to provide more opportunities to work with UX-friendly companies and to subcontract for firms that specialize in user experience services.
- **What topic or touch point?** Are you passionate about mobile? Social? Search? Consider whether there are certain areas of user experience that you are particularly inspired by and where you would like to focus your work. Or you may like working on a variety of touch points and problems, and that's okay, too.
- **Specialist or generalist?** Finally, what do you want the balance of your work to be? When you are a UX team of one, usually you don't have a choice. You're doing your own research, creating your own designs, running your own validation testing, and even managing your own project. That makes you a generalist. However, you may find that there are parts of the work you enjoy most or that you do best, and in that case, it's fair to ask yourself if you'd be more fulfilled (and have more impact) by going deep into one specialty rather than staying broad.

All of these questions are basically filters to help you clarify and focus on the right next step for you personally. While many of us are thrilled just to have the opportunity to start doing UX work at first, make no mistake: our skills are needed and in growing demand in an increasingly digital world. For yourself and for the people who will use the products you create in the future, be deliberate and choosy as you grow your career and plan your next steps.

NOTE **USING TWITTER TO FIND WORK**

Joe is a UX team of one who got laid off on a Friday, tweeted on a Monday that he was looking for work, and has been in business for himself ever since. Somewhere along the way, he paid a small fee to become incorporated. Here's what it takes: 1) some past experience, 2) a good network, and 3) a Twitter account. The rest takes care of itself.

Considering Going Independent?

The UX field has a lot of independent practitioners. One reason is that many organizations can't yet justify hiring a full-time UX person, so an expert on call is just right for them. Another reason may be that UX independents can command a relatively high wage, particularly if they've been doing this for a while and have a strong portfolio to show for it. Being new, the field suffers from a supply and demand problem. There's often more demand than there are people, particularly in some of the more established markets for UX. And another reason is that we're a highly networked community, with strong professional affiliations, regular meet-ups, and a chirping Twitter back channel. That makes it surprisingly easy for independents to market themselves and broadcast their availability—in short, to get work and keep it going (see Figure 4.15). So, in the UX industry, going independent is a very viable option. If you do, you just want to be aware that there are some things you may find yourself dealing with.

FIGURE 4.15
Twitter is an effective tool for independent practitioners to notify their community that they're available and looking for work.

Getting Paid

Your rate will be affected by several factors: your experience level, norms in your local market, and how aggressive you are about it. The following techniques can help you make sure that you're earning enough to keep yourself in business.

- **Calculate your rate.** UX professionals who go independent and stay independent have figured out a rate and a schedule that puts enough in the bank, even if they encounter a slow period. Be thoughtful when you set your rate (see Figure 4.16). Spend some time thinking about how much you actually plan to work, and how much of that time you can reasonably expect to be billable hours. And be sure to check the salary surveys regularly published by the professional associations like the UXPA to get a sense of standards in your area.

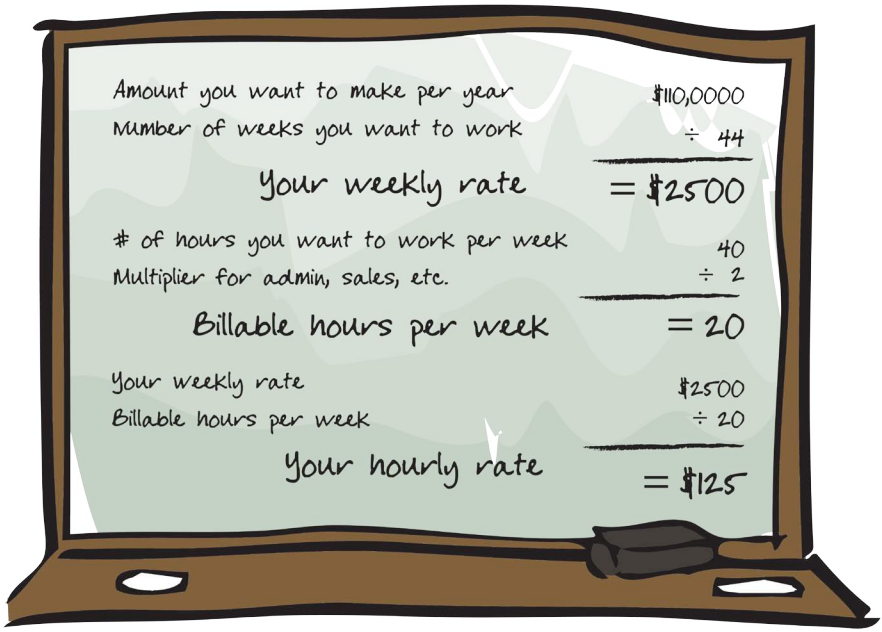


FIGURE 4.16

This is a general formula you can use to create a ballpark estimate of your hourly rate. Some people pad their rate an extra 10 or 20 percent to leave room for negotiation.

- **Negotiate.** If you don't have to negotiate, you're probably pricing yourself too low. See the previous guidelines for pricing yourself, and then, no matter what they offer, promise yourself you'll haggle a little.
- **Establish a fee schedule that protects you.** It's common to ask for some money up front and then the rest upon completion (or to coincide with the delivery of major deliverables). Some may argue that this kind of formality isn't really necessary if you have good relationships with your clients. You'll ultimately have to decide for yourself what is right for your business. As principles go, though, it's not a bad idea to commit to protecting yourself over serving your client relationships. This ensures that you can stay in business to serve those relationships longer. If your client isn't paying you, the strongest leverage you have is to withhold or stop work. Asking for some payment up front or along the way means there's in-progress work left for you to stop. Otherwise, you can find yourself in the powerless and uncomfortable position of begging for payment for services already rendered.

Position Your Engagements for Success

Let's face it. Some organizations have serious problems. Some take forever to make decisions. Some are so politically fraught that nothing ever gets done. Some are just not nice environments to be in. Any of those things can certainly impact how successful and enjoyable the engagement will be for you. Here are a few tips to make sure you really know what you're getting yourself in to.

- **Do a project brief.** Ask good questions about the project and the organization up front. Take a moment to ask yourself and your contacts hard questions about timelines, team, goals, your role, total team skills, ultimate decision makers, how success will be measured, and biggest risks to success. Then ask yourself if you still want to do it. When your gut tells you "no," respect it. Taking the time to complete a "Project Brief" (see Chapter 5) can help with this.
- **Be choosy about what you call yourself.** If you can position yourself as a consultant rather than a freelancer, your time and work may be perceived as more valuable. It's a semantic sleight of hand to call yourself a *consultant* instead of a *freelancer*, but I believe it makes a difference. As a freelancer, you run the risk of being perceived as staff augmentation. And because the company has no

long-term commitment to you, it's okay to give you the dirty jobs. As a consultant, however, you're enhancing what they can do by bringing a particular expertise into their office—one that they perhaps could not afford to hire full-time. Try to think of yourself and talk about yourself as a consultant. The key difference is that consultants bring a unique expertise. You might ask yourself, what is yours?

Manage Your Time

In design work, there are usually two things that contribute to how long something takes: 1) how much time it takes you to make the thing, and 2) how much time it takes to communicate about, revise, and get buy-in on the thing. Ideally, you want to be able to bill for both. One of the biggest threats to scope creep (and your profitability) is when you have accurate estimates and agreements for the first part, but not for the second. To manage the first part well, know thyself and know thy process. To manage the second, know thy client.

- **Estimate conservatively.** There's a popular misperception that going independent makes life less busy. You're doing 60 hours a week in your current job, working for the man? Scale back! Become your own boss! In an ideal situation, independents can make as much as a full-time employee in 75% or 50% of the time. But that requires formidable time management skills, a keen sense of focus, and a very healthy client list. It's very common, at least initially, to find yourself working a lot. The key is to make brutally realistic estimates about how long something will take and track your time well. That will allow you to recalibrate your estimates, learning as you go. To develop realistic estimates, don't just guesstimate how many hours it'll take. A far better predictor is how complex the problem is. A complexity index (as described under the "UX Project Plan" in Chapter 5) can help you gauge where in the work there's the greatest chance for a slowdown in the schedule. Then you can plan extra buffer time accordingly.
- **Create timeboxes.** Your own perfectionism can be another risk to timely completion. It's dangerously easy to lose yourself in your work and suddenly realize that something has taken far longer than it should have. That creates problems whether you work for a company or for yourself, but it exacts a particularly personal toll when you're working for yourself. Ultimately, it comes out of time that you would otherwise have for yourself and the people you love. It's also

sometimes questionable whether you'll get paid for that time. Timeboxing can help. In other words, give yourself small chunks of time to complete discrete, well-defined portions of your work. Personally, I am a terrible procrastinator and will take every opportunity to put off finishing my work, so for me, it helps to have immovable boundaries boxing my time. (Such as a train that I absolutely can't miss, lest I am stranded. Sometimes, setting an alarm can also help.)

- **Manage feedback loops.** Managing that second category of time—the time it takes for others to digest, give input, and approve—can be its own full-time job. At a minimum, you should assume that there will be some communication time at major decision points. Often, it's not just communication time but full-fledged freak-out time. That's OK—natural, even. However, because it's charged with the extra energy of humans discussing and in some cases disagreeing, you don't want to exacerbate it by pinching or curtailing the discussion to protect the schedule. Instead, plan ahead for it to ensure that there's time for necessary conversations (and that you get paid for them). Plan for triage periods, as described in the "UX Project Plan" method in Chapter 5, and include reasonable estimates for discussions, weekly check-ins, presentations, and client review time in your project plans.

If You Only Do One Thing...

This chapter hopefully reinforces that UX teams of one are not alone. Far from it, you are part of a dynamic and growing community. How you choose to engage that community is a matter of personal preference, but *whether* to engage should not be. Keeping yourself connected to other user experience professionals outside your organization is especially important. It will help you experience continual growth and greater professional satisfaction.

So if you only have time to do one thing from this chapter, focus on finding your community and getting plugged into it in whatever format makes sense, whether that be a digital discussion list, or live and in person.

PART II

Practice

Up to this point, I've been focusing on the UX team of one philosophy—why you do it, how you build support, how you can identify and handle common challenges, and how to keep growing. Now, let's turn our attention to the nuts and bolts of user experience work. These are the practices and methods that make this philosophy a reality.

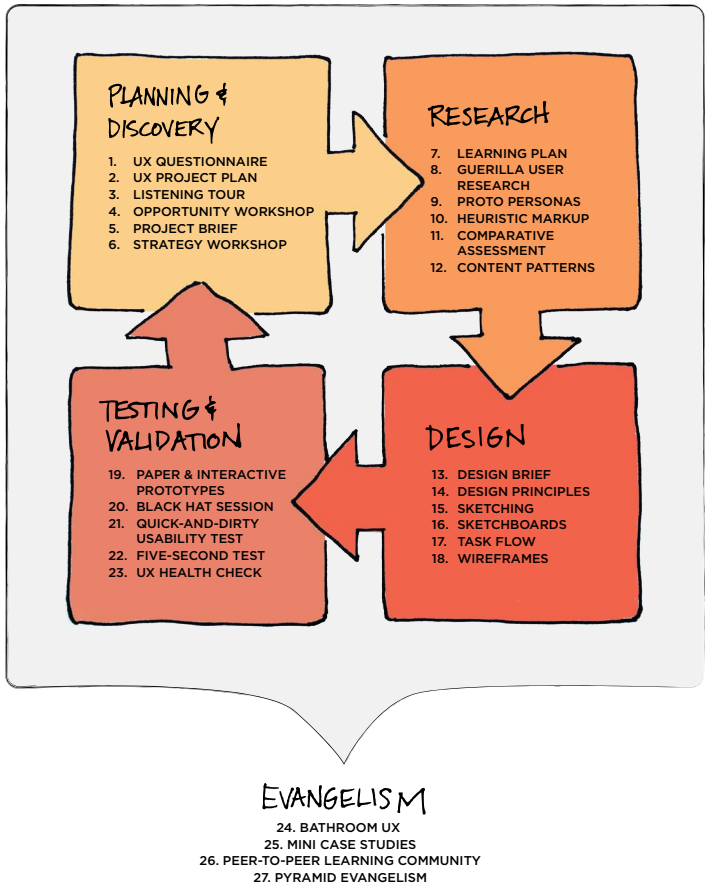
While passion and vision are what bring many people to user experience in the first place, it's the successful practice of the craft that keeps them here. And yet, user experience teams of one often have the precarious balancing act of learning their craft, involving others, and improving it, all at the same time. Part II, "Practice," gives you tangible tools for managing this balancing act.

You can think of Chapters 5 through 9 like a cookbook filled with recipes for the UX team of one. But here the recipes are UX methods. These methods have been chosen or in some cases adapted specifically for teams of one. For ease of scanning and to serve as a quick reference tool, each method follows a standard format. This format includes:

- An overview of the method
- How much time it will take
- When you might want to use the method
- A detailed explanation of the process to follow if you want to try this method for yourself
- Tips and tricks to keep in mind when using this method
- Sample visuals or deliverables

The methods you'll find here also share the following characteristics that are critical for teams of one:

- **Inclusive and participatory:** Many of these methods are designed to create opportunities for participation and discussion with a cross-functional team. Why the big focus on conversations? Because you will get more done and go farther if you get people's help.
- **Focused on prioritization:** Rather than explore and document everything that's possible, these methods help you understand where 20 percent of the work will bring 80 percent of the benefit.
- **Lowest fidelity possible:** These practices discourage time wasted on perfectionist polishing of deliverables.
- **Self-documenting:** As you're working, you're also creating the pieces that you need for the deliverable. For the most part, nothing is created that can't be shared and used.
- **Modular:** These are the opposite of 100-page documents that require constant updating. These practices are deliberate and modular, so you can mix and match them to tailor your process to the needs of your organization.



From start-to-finish, these practices constitute a complete and robust blueprint for a UX team of one to work from. You can follow Part II from beginning to end, or pick and choose practices to match your need and time available. A detailed reference chart with all the methods in Part II is provided in the appendix.

NOTE GOOD LIFE LABS CASE STUDY

Most of the methods in Part II aren't just activities; they also result in some form of documentation. To show how these outputs build upon one another, most of the work samples that are shown center around a common case study: the fictitious software company Good Life Labs, makers of software to help people work less and play more. In our scenario, Good Life Labs wants to take their successful business-to-business software and adapt it to sell directly to consumers.

CHAPTER 5

Planning and Discovery Methods

The practice of user experience begins with planning and discovery. Planning and discovery methods focus and guide your work, and, in the end, set you up for long-term success. This is the point in the process where you get focused, get organized, and get agreement with others on priorities and goals before jumping in and overhauling the product. All of those things not only give you more confidence as you work, but they also give others confidence that there is rigor and predictability in this practice—in short, that it's good business.

The practices and methods in this chapter will help you ask yourself these questions: What do you plan to fix or improve through user experience design? What is the high-level vision for the resulting experience? What is the opportunity here, relative to the market and to your organization's own standards for a quality outcome? Finally, what are the nuts and bolts of the work you'll be doing? What's the plan, and how will UX work integrate with the other parts of the product development effort?

In this chapter, we'll cover the following methods and answer the questions they provoke:

- **UX Questionnaire.** What do you know about your product and the user experience that it's intended to provide, and what do you need to know?
- **UX Project Plan.** What UX practices will you employ to design a great user experience?
- **Listening Tour.** What are the team's priorities, and how much awareness and support for UX currently exists?
- **Opportunity Workshop.** What areas of the product are most in need of improvement from a UX perspective?
- **Project Brief.** What are the expected outcomes for this user-centered design project?
- **Strategy Workshop.** What is your team's vision for the ideal user experience, and what do you need to focus on to bring that unique experience to life?

METHOD 1

UX Questionnaire

How much do you know about your product and the user experience that it's intended to provide? What else do you need to know?

A user experience questionnaire is deceptively simple: it's just a standard list of questions for you to ask yourself about a product or user experience at the start of any engagement. Why not just start working on the user experience and see where things go? In theory, if a product has a clear purpose and a specific audience, and you have some good ideas for how to improve the user experience, then you're all set. Of course, product design can go off track for any number of reasons. UX work, in particular, often is brought in as a silver bullet to solve what can be a dizzying set of challenges, ranging from lack of product strategy to issues with the organizational structure. The user interface is often where these problems become visible.

A good user experience questionnaire can help you spot issues early on, which puts you in a better position to point out all those red flags and prevent them from putting the design at risk. On a more practical level, a user experience questionnaire can also help you make sure that the goals are clear and that you know what you're designing and why. A good user experience questionnaire will also get you thinking about what work still needs to be done and how you might want to proceed. This then feeds into the "UX Project Plan" (described later in this chapter).

You can create a template like the one shown in Figure 5.1 to make it an easily repeatable process. As you can see, the final document doesn't have to be too polished. Mostly, it's a scratch pad for you to help yourself think through specific questions.

Average Time

1–2 hours total

- 1 hour to put together
- (Optional) 1 hour for follow-up questions with colleagues

Use When

- You're about to start work on a new project and have questions about whether you're set up for a successful engagement. You wonder if there is more planning, positioning, or strategic thinking that needs to be done before the user experience design can be improved.
- At any point to help you assess your own understanding of the product

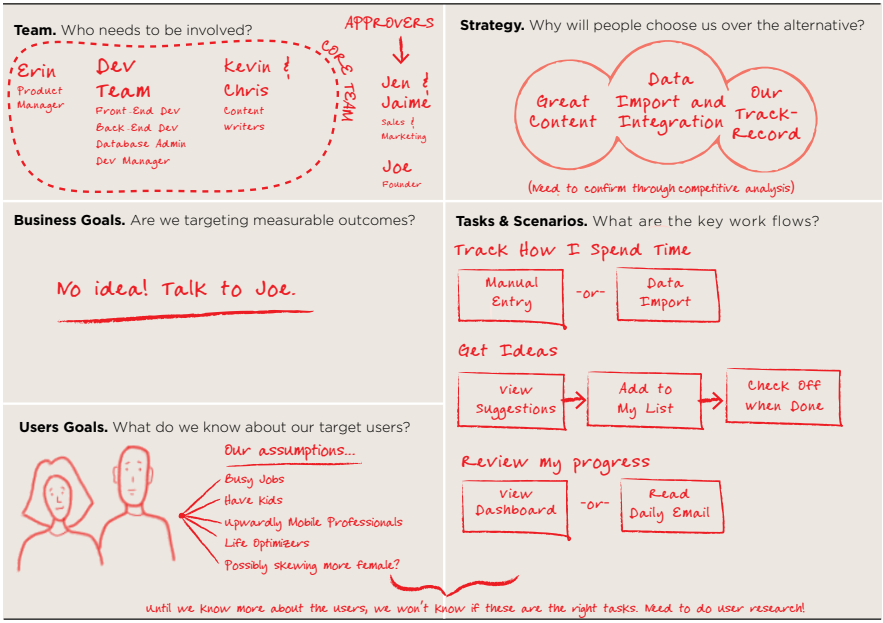


FIGURE 5.1
A sample UX questionnaire.

Try It Out

1. **Ask yourself some key questions.**

   Set aside an hour at the start of a project to answer the following questions.

   - **Team:** Who is responsible for the product? Who is in charge? Who sponsors changes or new work (for example, whose budget does it come out of)? Who has approval power? Who knows about the history of the product and why certain decisions are made? (These individuals would be good to talk to.) Who determines the strategic direction for the product? Who specifies what the features and functions should be? Who currently designs them? Who builds them? Who should you keep in the loop with regular project updates? Who maintains it?
   - **Goals:** What are the project goals? Ideally, you can summarize this as a short list of things you aim to achieve with this project. If you have three to five items in this list, you're probably in good shape. If the project has dozens of goals, expectations may be overly broad

or ambitious. Ask around to figure out which ones are top priority and which are less critical, if push comes to shove.

- **Users:** Who are the target users? Describe the main categories of users who will use the product in as much detail as possible. Why do they use the product? What are their primary motivators, passions, and goals? If the answer is "our users are everybody," this is a red flag. Talk to colleagues to try to define your target users with more specificity.
- **Strategy:** What is the value proposition of the product? Why do people use it? Why do they choose to use it over competitors' products? What does the product stand for? What is the product vision?
- **Tasks and scenarios:** What are the primary tasks and scenarios that the design should support?
- **Success measures:** How does the product make money? Which levers influence whether the product is profitable or not? What user behaviors translate to profit? What key performance indicators are tracked? Are there any other numbers that people track to determine if the product is performing well or poorly?
- **Key dates and milestones:** Are there any significant deadlines that you should be aware of, either related to one-off projects or regular production or milestones?
- **Risks:** Are there any significant red flags that you see up front?

2. **If you don't know, ask.**

   If you encounter a question you don't know the answer to, ask a co-worker—or even a few of them. Different people may give you different perspectives on the situation.

Tips and Tricks for UX Questionnaires

- **Feed into the project brief.** If you fill out a user experience questionnaire in relation to a specific project or initiative, the answers you provide here can become the foundation of your "Project Brief" (described later in this chapter).
- **If you work remotely…** It's even more important for you to ask yourself these kinds of questions, to ensure that being at a distance isn't creating any blind spots for you. Using a template like the one shown in Figure 5.1 can help you spot any areas that you may be overlooking.

METHOD 2

UX Project Plan

What UX practices will you employ to design a great user experience?

A UX project plan shouldn't be confused with the overall project plan, which is usually owned by a project manager and includes such things as engineering and quality assurance. The UX project plan may help you think about how UX work will integrate with the broader project timeline, but it is primarily your plan for how you're going to conduct UX activities. Sometimes, the work you are asked to do as a UX team of one doesn't warrant a full-blown plan. Fix a Web page. Do a heuristic assessment. Such activities may just take a day or two. However, if your involvement is likely to span more than a few weeks, a plan is important. Mainly, a UX project plan forces you to be honest with yourself about how you are going to tackle the work. This can be especially helpful if you are not *really* sure how you're going to tackle work—which, let's face it, happens every now and again. Sitting down to craft a plan helps you figure out what your process should be.

Even if no one has directly asked you for a UX project plan, it's probably a good idea to put one together. There may come a time in the project when someone does ask you. When they do, you'll be ready. Because UX processes are sometimes unfamiliar and new, your non-UX colleagues may not know what to expect as far as a process or deliverables. A clear and jargon-free UX plan can help set their expectations. It's even better if you can include work samples. If you don't have examples from your own portfolio yet, borrowing examples from books or online works, too.

Average Time

2–3 hours, plus ongoing maintenance thereafter

- 1 hour to put together
- 1–2 hours to share and revise

Use When

- You start your first step in planning a UX project.
- Or, after doing some preliminary research, when talking to stakeholders, and once you're confident that you understand project goals.

Try It Out

1. **First, make sure you understand the goals of the project.**

   Try to summarize them in a few short statements. The goals should speak to the business or behavioral change that you hope to create through your work. (If you've completed a "Project Brief," described later in this chapter, it will satisfy this step.)

2. **Brainstorm relevant methods.**

   Start free-listing activities that you think will help you achieve your goal. Sometimes, it helps to start by working backward. For example, if the project goal is to produce more inbound sales leads, you'll need to make it easier for customers to understand and be excited by your services and request more information. To do that, you'll need to redesign your landing pages. But before that, you'll need to understand users' perceptions of the landing pages now, why they're going there, and in what ways the site does and doesn't currently meet their needs.

3. **Estimate duration.**

   Once you've got a solid list of activities that you think will help achieve the project goal, estimate the time you think each activity will take. (For help with time estimates, refer to the average time estimates throughout Part II of this book, and be sure to check out the tip on estimating complexity later in this chapter.)

4. **Place milestones.**

   Talk to your colleagues—especially those who are responsible for specific milestones relating to the product—and find out if there are key milestones or firm deadlines that you need to be aware of. Often, these will influence how much time you have for each step and, in turn, what type of activity you choose. For example, do you need to have a functioning prototype ready in four weeks? If so, maybe you don't have time for extensive in-the-field contextual research. Maybe aim for a day of "Guerrilla User Research" instead (see Chapter 6, "Research Methods").

5. **Create a simple document.**

   Put your plan together in a simple document that lays out activity, duration, inputs, outputs, and who needs to be involved. You can also show points of overlap or dependencies with the broader project plan. Avoid the tendency to spend too much time on this document overly

finessing its design. Figure 5.2 shows a simple Project Plan formatted as a table. Figure 5.3 shows how you can lay out a Project Plan to visualize dependencies. This can be accomplished by simply coloring in cells in Excel. Figure 5.4 shows that your plan doesn't even have to be digitized. A large white board can be all you need.

DURATION	ACTIVITY	OUTPUT	WHO'S INVOLVED
2 weeks	**User Research** Research in two parts: (1) interview existing customers about what's good and bad about the product, and (2) interview target customers about how they balance work/life today, pain points, tools they use today, etc.	Proto-Personas	• Me • Erin, Product Mgr (attend interviews and help take notes) • Customer Support Team (help recruit existing customers to interview)
2 days	**Product Assessment** Review existing product to identify what can be used in the new product, what needs to be improved, and what's not relevant	Heuristic Markup	• Me
1 week	**Strategy Workshop** Share what we've learned so far and create alignment on our vision for the project	"Vision Board" that Includes Triads, Artifact from the Future, and Bang/Buck Graph To Live on the Wall and Inspire the Team	• Me • Erin, Product Mgr • Dev Team • Customer Support Team • Kevin & Chris, Content • Jen, Marketing • Jaime, Sales • Joe, Founder
3 days	**Recommendations** Synthesize research, product assessment, and strategy workshop and make design recommendations	Design Brief	• Me (co-author) • Erin (co-author) • Jen, Jamie, Joe (approvers)
2 weeks	**Initial Concepts** Do sketches and run a sketchboard session. Develop higher fidelity sketches for approval.	Medium-Fidelity Concept Sketches for Core Workflows	• Me • Erin, Product Mgr • Dev Team • Customer Support Team • Kevin & Chris, Content • Jen, Marketing • Jaime, Sales • Joe, Founder
6-8 weeks	**Iterative Detailed Design** Co-locate with engineering team and product detailed wireframes for core workflows. Bring in contract visual designer for look and feel.	Detailed Wireframes and Design Comps	• Me • Contract Visual Designer (to be hired)
6-8 weeks (concurrent w/ detailed design)	**User Testing** Conduct task-based usability tests on core workflows	Recommendations for Improvements to Designs	• Me (conduct) • Erin, Product Mgr (observe) • Development Team (observe)

FIGURE 5.2

This project plan is simply a table with some estimates and assumptions spelled out.

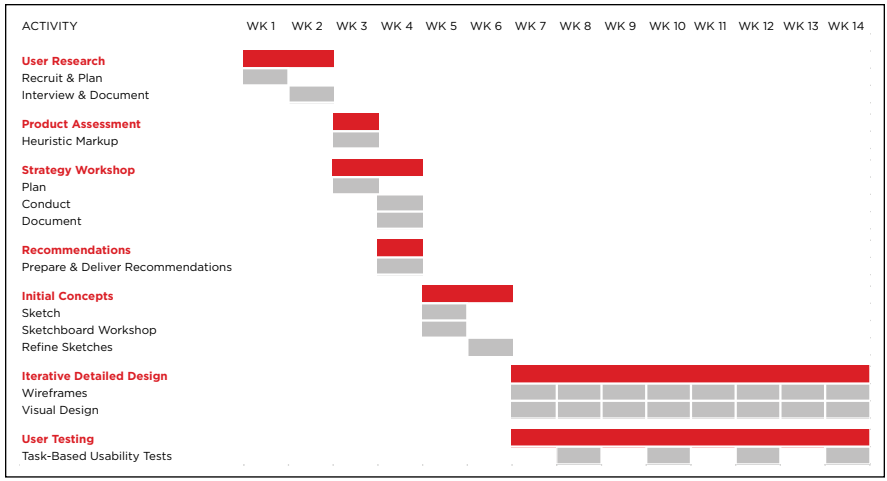


FIGURE 5.3

Alternately, if you need to visualize the work over time, you can use a format like this (which is known as a Gantt Chart) to see duration and dependencies.

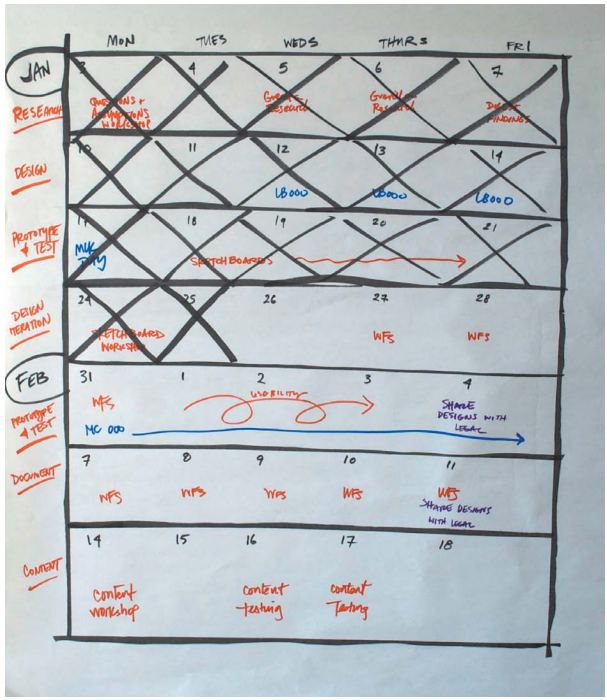
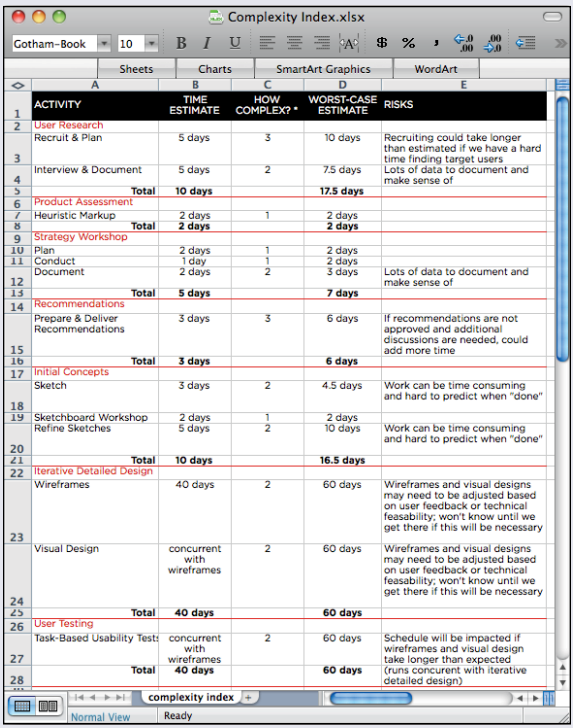


FIGURE 5.4

Of course, a white board works just fine as well, especially if you have a dedicated workspace where the whole team can pop in and check on the plan as needed.

Tips and Tricks for UX Project Plans

- **Scope and re-scope.** Often, your first pass at a UX project plan is luxuriously paced and, alas, unrealistic, given the time available. It's common to have to do another pass through the plan, to reduce it down to a manageable minimum.
- **Estimate complexity.** While reducing is often necessary, be careful not to shortchange yourself in the process. Use a complexity index like the one shown in Figure 5.5 to figure out which pieces are most likely to require extra time. Here is how a complexity index works: give each task or step a number to indicate how hard or complex it seems. One equals not hard at all. Three equals pretty complex and unpredictable. Two would be somewhere in between. For the most complex items, pad the calendar with extra time. Alternately, you can ask yourself whether these need to be done as planned, or whether they can be simplified or reduced.
- **Use checklists.** Make sure that you are considering all the standard parts of the UX process and assessing whether and if each part applies. Use a simple checklist like the one shown in Figure 5.6 to mentally go over each part of a standard process and determine which should be included in your work.


Complexity Index.xlsx

Gotham-Book 10

Sheets | Charts | SmartArt Graphics | WordArt

	A	B	C	D	E
1	ACTIVITY	TIME ESTIMATE	HOW COMPLEX?	WORST-CASE ESTIMATE	RISKS
2	User Research				
3	Recruit & Plan	5 days	3	10 days	Recruiting could take longer than estimated if we have a hard time finding target users
4	Interview & Document	5 days	2	7.5 days	Lots of data to document and make sense of
5	**Total**	**10 days**		**17.5 days**	
6	Product Assessment				
7	Heuristic Markup	2 days	1	2 days	
8	**Total**	**2 days**		**2 days**	
9	Strategy Workshop				
10	Plan	2 days	1	2 days	
11	Conduct	1 day	1	2 days	
12	Document	2 days	2	3 days	Lots of data to document and make sense of
13	**Total**	**5 days**		**7 days**	
14	Recommendations				
15	Prepare & Deliver Recommendations	3 days	3	6 days	If recommendations are not approved and additional discussions are needed, could add more time
16	**Total**	**3 days**		**6 days**	
17	Initial Concepts				
18	Sketch	3 days	2	4.5 days	Work can be time consuming and hard to predict when "done"
19	Sketchboard Workshop	2 days	1	2 days	
20	Refine Sketches	5 days	2	10 days	Work can be time consuming and hard to predict when "done"
21	**Total**	**10 days**		**16.5 days**	
22	Iterative Detailed Design				
23	Wireframes	40 days	2	60 days	Wireframes and visual designs may need to be adjusted based on user feedback or technical feasability; won't know until we get there if this will be necessary
24	Visual Design	concurrent with wireframes	2	60 days	Wireframes and visual designs may need to be adjusted based on user feedback or technical feasability; won't know until we get there if this will be necessary
25	**Total**	**40 days**		**60 days**	
26	User Testing				
27	Task-Based Usability Tests	concurrent with wireframes	2	60 days	Schedule will be impacted if wireframes and visual design take longer than expected (runs concurrent with iterative detailed design)
28	**Total**	**40 days**		**60 days**	

complexity index

Normal View | Ready

FIGURE 5.5
The key to the complexity index is the rating given in the third column (how complex?).

- **Plan for triage periods.** In every project, there are rough patches and smooth patches. Usually, the rough patches correspond to important transition points. This is natural. Those are the moments when groups of people are working together to determine how to move forward. That inevitably requires some extra time for communication, thinking, and getting aligned. Being caught unaware inevitably makes it feel like the project is in trouble, but you can plan ahead for it by adding triage buffer zones into your project plan. There are a few places where triage padding is advisable:
  - Use after research, around the time that you are socializing the research findings and deciding what to do about them.
  - Use once the designs start to transition to higher fidelity (for example, moving from sketches into wireframes). Seeing the designs become more "real" triggers all kinds of reactions and often a need to adjust based on those reactions.
- **If you work remotely...** Find ways to make your plan easy for others to see and access. This doesn't necessarily have to mean heavy documentation: a Google Spreadsheet or an Excel document on a shared drive is probably all you need. It can also be helpful to set up a physical reminder of the plan (such as a printout or a white board) to help keep yourself on track.


PROJECT

New Consumer Product

PROCESS		
	Discovery	☐ Stakeholder Interviews ☐ Competitive Analysis ☐ Content Audit ☐ Discovery Brief
	User Research	✓ Recruiting ✓ Field Research ✓ Synthesis ✓ Personas Both existing and target customers
	Strategy	☐ Strategy Brief ✓ Design Principles ✓ Design Concepts
	Information Architecture & Interaction Design	☐ Site Map ✓ Task Flows / User Stories (do as sketches) ✓ Wireframes ☐ Content / Asset Inventories
	Visual Design	☐ Mood Boards ✓ Design Comps (need visual design contractor) ☐ Visual Style Guide
	Front-End Development	☐ Prototypes ☐ HTML/CSS ☐ Asset Production
	Validation	✓ Usability Tests ☐ A/B Testng
	Implementation Oversight	✓ Design Review of Production Code ✓ Design Consulting During Development
	Tracking & Analytics	☐ Review & Track Metrics ☐ Check Server Logs ✓ Review Customer Feedback

FIGURE 5.6
Your checklist should be customized to the parts of the process that you typically include in your work.

METHOD 3

Listening Tour

What are the team's priorities, and how much awareness and support for UX currently exists?

A listening tour is time set up to gather information and learn what matters to your colleagues. Especially for teams of one, knowing the priorities of others will help you identify where there are opportunities and problems to solve, and where user-centered design practices might be a good fit. Sometimes, UX practitioners describe this as *stakeholder interviews*, and they usually take the format shown in Figure 5.7, just you and a colleague chatting in an office or conference room. Whatever the label, the goal is the same: to learn about your colleagues' priorities and goals, and to formulate a point of view on the role of UX in helping them accomplish those goals. If you're lucky on your listening tour, you'll be pleasantly surprised by how much people already value human-centered products (as evidenced by code words like "user-friendly," "intuitive," and inevitably, "Apple"). If you're less lucky, you might find that people have a wary and seasoned caution about what can and cannot be done. But that's valuable information, too.

IMAGE BY VICTOR 1558, HTTP://WWW.FLICKR.COM/PHOTOS/76029035@N02/

FIGURE 5.7
A listening tour.

Average Time

5–8 hours total

- 1 hour to plan and schedule
- 3–5 hours to interview people
- 1–2 hours to synthesize your notes

Use When

- You're new to a company or team.
- You're trying to transition your responsibilities to include more UX and want to make a case.
- You're starting out a big project.

Try It Out

1. **Ask yourself what you want to learn.**

   This could be as broad as understanding the overall priorities of the company, or as specific as learning what each person on this project sees as your role. Having a few clearly stated learning objectives in mind will drive who you talk to and what questions you ask. To determine your key learning objectives, ask yourself, "If I learn nothing else, what are the two or three things I must understand better after talking with people?"

2. **Next, put together your list of interviewees.**

   Ask colleagues or a supervisor whom they would recommend that you speak to. Leverage their knowledge of the organization. Or think in terms of roles and then attach names to those roles. For example, who has the budget for this project? Who will be engineering the product? Who is marketing it? Who has ultimate veto power over the design? In any case, aim to speak to a cross-functional team so you can see the project or product from a variety of angles.

3. **Write down your questions.**

   Basically, an interview guide is just a list of questions you want to ask. These questions should ultimately roll up to your learning objectives, but you may find that you need to ask them in different ways, depending on the role of the person you're talking with. Here are some good generic questions to start with:

   - What's your role in the organization, and how does it relate to the product?
   - What are your goals and objectives in your role? What are your top priorities? How do you know if you're successful? How do you measure success?
   - How does your work impact customers? Who do you consider to be your primary customers? Can you describe them? What are their priorities and goals? Why do they use your products? What prevents them from using your products, if anything? What questions do you have about your users that you don't currently have answers to?
   - Who are your competitors, and how well are you doing compared to them? What do you do well? What could be improved? What differentiates your company and your products in the market?
   - [If there's a specific project underway that you're involved in…] What are your goals for this project? What is your vision for how this project will improve our product? Do you see any risks or red flags?

4. **Start listening.**

   Schedule one-on-ones and ask your questions. Each conversation will probably be different, but try to refer back to your learning objectives in each one, so you can compare answers and spot interesting differences in points of view. If you're the shy type, or you feel like it will be awkward to ask for people's time and start interviewing them in this way, here are a couple of things that may help:

   - Offer to keep it short. Even 30 minutes of someone's time is better than nothing, and it's a lot harder for people to turn you down. You might even offer to take them out to coffee for this meeting, which tends to make conversation more natural and friendly.

- Explain (either beforehand, by email, or at the start of the interview) what you're trying to accomplish. Let them know that this is a big help to you. Even if you think they could care less about the potential improvements to the user experience, explain that this will help you improve the way you work. And, of course, be gracious and appreciative.

5. **Figure out what you heard.**

   After you have finished all your interviews, review your notes and tease out the big themes. Pay particular attention to:

   - Expectations people have of you or of user experience.
   - Assumptions and working knowledge about users. What do you absolutely know to be true, what things are merely hunches, and are there any gaping holes in your knowledge?
   - Problems or concerns with the existing product.
   - Things that have been tried in the past that haven't worked well and why.
   - Questions to follow up at a later date.
   - Who wants to be actively involved with UX and in what ways?

These interviews should help you see what parts of the product you should be focusing on, and what sacred cows are truly sacred (versus those that can be challenged). They may also help you see what technical and practical constraints you will need to work within. Without a doubt, they will give you a sense of formal and softer measures by which success will be judged. Finally, they will help you gauge how much support and enthusiasm there is for user-centered improvements. The art of the listening tour, and interviewing in general, is to accept and believe what your interviewee is telling you, but also to ask probing questions to try to understand what's really underneath their beliefs. When in doubt, keep asking "why?"

Tips and Tricks for Listening Tours

- **Share what you learn.** It's courteous to offer to share your findings with your interviewees. Send a heartfelt thank-you and a summary of the themes that you heard from your interviews to build goodwill for the next time you need to do a listening tour.
- **Take good notes.** If you are a competent touch-typist, take along a laptop for note-taking and type your notes as you go. If you're more of a hunt-and-peck kind of typist, consider taking along a buddy to take notes, so you can focus on the conversation. While it's common to record interviews with users, it's probably best to put the recorder away for your listening tour. Part of what you're trying to accomplish here is to build rapport. Being recorded can make people a little cautious. If you're a truly terrible note-taker, leave a few minutes at the end of each conversation just for summarizing and ask your interviewee to sum up the most important things from his point of view. During this time, you can jot down just the high-level things as he rattles them off.
- **Plan ahead how you want to share what you learned.** Think in advance about how you might like to report, share, or otherwise use your findings. Then structure your questions accordingly. For example, if you'd like to be able to easily compare the top three priorities for all interviewees on one slide, that pretty much means you should ask a question like, "What are your top three priority areas in our product?"
- **If you work remotely…** Use a video conferencing tool like WebEx, GoToMeeting, or Skype. Up to 80 percent of communication is non-verbal, so being able to take in the visual cues as well as the verbal ones is important.

METHOD 4

Opportunity Workshop

What areas of the product are most in need of improvement from a UX perspective?

An opportunity workshop is a way to quickly assess what work needs to be done to improve the user experience, what's highest priority from a business perspective, and what will have the most impact from a user perspective.

Average Time

3–4 hours total

- 1 hour to plan and invite people
- 2 hours to conduct workshop
- 1 hour to document what you learned and plan the next steps

Use When

- You find yourself having general discussions about the need for an improved user experience, but there is no clear momentum or sense of how to get there

Try It Out

1. **Host a work session.**

   Block off at least two hours on the calendar and invite together a cross-functional team of people who all work on the product.

2. **State the goals of the work session.**

   - To identify issues and pain points in the current product or process
   - To prioritize from a UX point of view
   - To help the team decide on the next steps to address or improve any of them.

3. **Uncover problem areas.**

   Guide the team in a pain storm activity on Post-it notes or index cards, as shown in Figure 5.8. Ask everyone to write down as many things they can think of that are:

PHOTO BY BART EVERSON, WWW.FLICKR.COM/PHOTOS/EDITOR/

FIGURE 5.8
Brainstorm opportunity areas.

- A problem in the current product
- A missed opportunity in the current product
- Just plain important to get right in the product
- One-by-one, ask people to share their Post-it notes, and put them on the wall where others can see them.

4. **Discuss strengths.**

   Next, ask the team to write down the product's strengths—again, one strength per sticky note, as shown in Figure 5.9. It's useful to follow problem areas with strengths so that the team ends on a positive note, even if the overall discussion may have been constructively critical.

5. **Find themes.**

   Next, guide the team in an activity to organize the issues that were identified into related groupings. Once some clear groups begin to emerge, ask the team to label each group. Put the label on another sticky note (preferably of a different size or color, so it stands out from the other Post-its) so everyone can easily stand back and see the issues and opportunities as broad themes.

PHOTO BY BART EVERSON, WWW.FLICKR.COM/PHOTOS/EDITOR/

FIGURE 5.9
Brainstorm strengths.

6. **Prioritize.**

   Now, lead the team in a prioritization exercise. This could just be a discussion. Or, to make it more structured, give everyone a certain number of votes, and ask them to put their votes next to the clusters that they think are most urgent to address, improve, or enhance.

7. **Discuss.**

   Once the priorities have been clearly identified, lead the group in a discussion about how urgently these should be addressed, and how you'd like to address them.

Tips and Tricks for Opportunity Workshops

- **Use as a foundation for follow-up conversations.** Just because the team reaches some clear priorities doesn't necessarily mean that they will or should all be acted on. You can, however, use them as a starting point for tangible conversations with decision makers about what changes the team is recommending and why.
- **Don't skip user research.** An opportunity workshop is a great way to create a dialogue about how to improve the user experience, but it should not be considered a replacement for actually talking to customers. Issues raised here should be considered hypotheses to be validated or disproven through subsequent research and user testing.
- **If you work remotely…** It's definitely easier to do this kind of thing in person in a workshop setting. However, if that's not an option, you can probably gather much of the same information using a survey. (SurveyMonkey and the forms feature in Google Spreadsheets both create easy and free surveys.) Set up your survey to ask people about the perceived strengths and weaknesses of the product. Once you've gotten responses from everyone, do your own clustering, and send a follow-up survey asking people to prioritize problem areas and provide thoughts on how urgently they believe these issues need to be addressed.

METHOD 5

Project Brief

What are expected outcomes for this user-centered design project?

Often, when a project is beginning, everyone involved has distinct ideas for what the right outcome looks like. In team discussions, it's possible for people to express their point of view and *think* they're all saying the same thing, but actually have very different ideas of what they expect to see. A project brief states directly what goals or expectations should prevail as the main mandate for the work. The brief, as its name suggests, capitalizes on the cardinal virtue of brevity to distinctly and clearly summarize the overall plan for the project: what you're doing, why you're doing it, relevant constraints that will drive your work, and what outcomes you expect. Another bonus of the brief is that by being a short description, it's more likely that people will actually read it. This creates an opportunity for everyone to agree or, if not agree, at least have a productive conversation about the focus and goals of the project.

Average Time

2–3 hours total

- 1 hour to write the brief
- 1–2 hours to share with people (either in one-on-one conversations or a group meeting)

Use When

- You're starting a new project.
- You've inherited an in-progress project or have joined a team that's already been working together, but you need to get clarity and alignment on what you're ultimately expected to deliver.

Try It Out

1. **Determine the right building blocks for your project brief.**

   Based on your organization and what you're working on, here are some key questions to ask yourself (either on paper, or just in your head) when you're teeing up a project. Note that these questions reflect many of the things you think about when doing a "UX Questionnaire" (described earlier in this chapter), so if you've already completed one of those, you can start by pulling your answers from there.

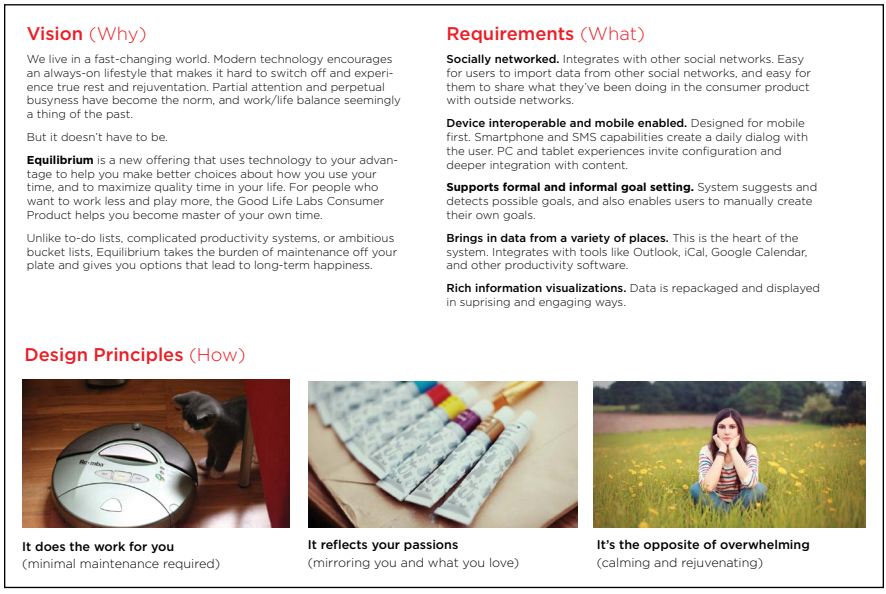
   - **Business needs.** What business needs are driving this project? If this is successful, what will be the impact on business? What is the revenue model for this product? What measurable impact will improving this product have?
   - **User needs.** Who are your customers? What are their primary needs? What do you know about them? What *don't* you know about them? What assumptions are you making about them that you need to validate?
   - **Goals.** What are your team's goals? What are your personal goals? How will you personally know if you are successful? When capturing goals, be careful not to confuse the *what* with the *how*. A *how* might be "redesigning your company website." The *what* in this case might be "to produce more inbound sales leads through the company's website."

- **Key expectations.** What are they expecting from you? Are there any discrepancies between their picture of your role and yours? What questions might they have? What things should you address prior to kicking off the work?

Consider also whether there are softer, but no less important, qualities of the work that are relevant to the overall project mandate. For example, what is the product's value proposition, and what brand characteristics should the work reinforce or activate? If there are known design principles that should be reflected in the output, what are they? (If not, see the "Design Principles" method in Chapter 7, "Design Methods," for guidance.)

2. **Write up what you know, or your best guesses, into a short document.**

   Ideally, a project brief should fit on one page, so you can print it out and stick it on the wall for an ever-present reminder of the top priorities. The example shown in Figure 5.10 has just a few key sections: what we're building; who it's for; and what the user experience should ultimately feel like from a user's point of view.



Vision (Why)

We live in a fast-changing world. Modern technology encourages an always-on lifestyle that makes it hard to switch off and experience true rest and rejuventation. Partial attention and perpetual busyness have become the norm, and work/life balance seemingly a thing of the past.

But it doesn't have to be.

Equilibrium is a new offering that uses technology to your advantage to help you make better choices about how you use your time, and to maximize quality time in your life. For people who want to work less and play more, the Good Life Labs Consumer Product helps you become master of your own time.

Unlike to-do lists, complicated productivity systems, or ambitious bucket lists, Equilibrium takes the burden of maintenance off your plate and gives you options that lead to long-term happiness.

Requirements (What)

Socially networked. Integrates with other social networks. Easy for users to import data from other social networks, and easy for them to share what they've been doing in the consumer product with outside networks.

Device interoperable and mobile enabled. Designed for mobile first. Smartphone and SMS capabilities create a daily dialog with the user. PC and tablet experiences invite configuration and deeper integration with content.

Supports formal and informal goal setting. System suggests and detects possible goals, and also enables users to manually create their own goals.

Brings in data from a variety of places. This is the heart of the system. Integrates with tools like Outlook, iCal, Google Calendar, and other productivity software.

Rich information visualizations. Data is repackaged and displayed in suprising and engaging ways.

Design Principles (How)

FIGURE 5.10
A sample project brief.

3. **Circulate the document.**

   Share it with team members and key project sponsors, and get their agreement or input. If you have a hard time getting feedback by email, turn it into a meeting. Or visit people where they work.

4. **Regularly revisit and make sure that you're on track.**

   After the team agrees on the brief, revisit it at major milestones of the project and use it as a framework for communicating how the work is progressing toward the overall high-level goals outlined in the brief itself.

Tips and Tricks for Project Briefs

- **Make it ceremonial.** One way to turn the request for feedback on the brief into a more memorable and significant event is to turn it into a redlining workshop. Put together your best possible draft of the project brief based on everybody's feedback. Create a large-format poster of the brief that is big enough to put on the wall and see from across the room: 2' × 3' is a good size. Then schedule a meeting for the redlining. Invite the core team who will be working with you on the project, plus upper level sponsors. Working within teams or as one big group, facilitate a conversation about how the team would modify or change the project brief to make it the best possible reflection of the project goals. Give everyone big red pens and ask them to work together to make their changes directly on the project brief poster. Afterward, update the brief to reflect the changes and send it around to the group.
- **Keep the brief, well, brief.** While assembling your brief, consider the rule of threes. Try to avoid turning this into a laundry list of features that must be delivered. For each category, seek to summarize the top three: top three business needs, top three user needs, top three features and functions to be modified, added, implemented, and so on. This will help you in your efforts toward brevity.
- **If you work remotely...** A redlining workshop would be difficult to pull off remotely, but you can certainly create a brief and set up one-on-one meetings with people to get their feedback. After you've had a chance to review material with the key people, compile changes and share them with the broader group. It may also be helpful to pair up with a buddy on this, preferably someone who has responsibility for the overall project success and who has a vested interested in the team having a shared vision. Work with that person to put the first draft together, and then conduct your review sessions together. When you share the brief with others, it may have more weight coming from both of you.

METHOD 6

Strategy Workshop

What is our vision for the ideal user experience, and what do we need to focus on to bring that unique experience to life?

There is a special moment that's just right for a strategy workshop, and it's early in the process before design has been kicked off. It's the time when optimism and interest in "what could be" are at their highest. This stage gets people when they are most likely to engage with an open mind, and times it so that strategic thinking can influence the ultimate work plan.

In a strategy workshop, you're leveraging the collective wisdom of a cross-functional team to begin to establish a vision and a strategy for your user experience. When people talk about strategy, often they're using the same word to talk about very different concepts. To one person, *strategy* is about prioritization and having a timeline. To another, it might mean establishing a vision for the future. Neither is wrong, and a strategy workshop can help you get clarity on both.

Average Time

4–8 hours total

- 2–4 hours to plan
- 2–4 hours for the workshop

Use When

- You have a product that feels like a loose collection of features but doesn't stand together as a cohesive whole.
- When the team is having trouble prioritizing.
- When you don't know what differentiates your product from its competitors.
- When you need to develop a shared vision with the team on the product's direction and future.

Try It Out

1. **State your goals.**

   Decide on your goals for the workshop. Are they to:

   - Articulate what makes the product unique?
   - Create an inspiring picture of the future of your product that can unify and motivate the team?
   - Prioritize features and areas to focus on?
   - Determine what your team should be focusing on now, next, and later?

2. **Make a plan.**

   Once you have identified your goals, think about how you need to structure the workshop to achieve them. A stakeholder workshop can include a hodgepodge of different activities, depending on your needs for that particular project, team, and time. A range of activities is described further in the sections that follow.

Triads

Triads help you explore the identity of your product, starting with a simple word-listing exercise. For this activity, get the team to brainstorm a list of keywords that they would like the product to embody, as shown in Figure 5.11.

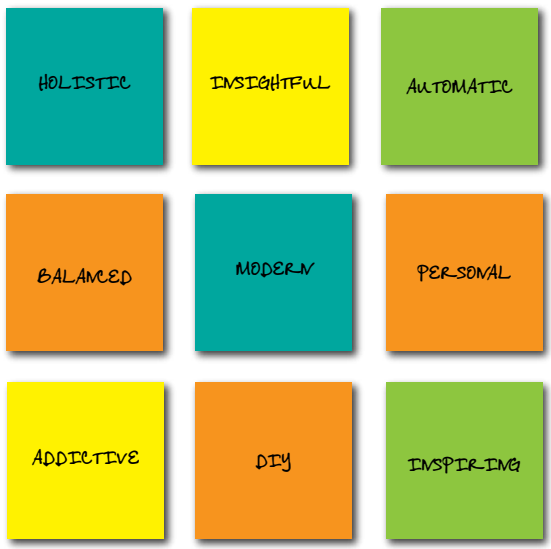


FIGURE 5.11
The first step in triads is to brainstorm words that you want to describe the product.

The second step is shown in Figure 5.12. Pick three words that you'd put together to describe the core of the product experience. Work with the group to identify combos that are interesting to them. Then, for that particular three-word combo, brainstorm related nouns, verbs, and adjectives that might go with a product built around this triad:

- Nouns help you think about actors or objects that you might have in the system.
- Verbs help you think about actions that the system should support.
- Adjectives help you think about the more fuzzy and abstract parts of the experience, like how it should feel, how it should look, and what design principles should be evident throughout.

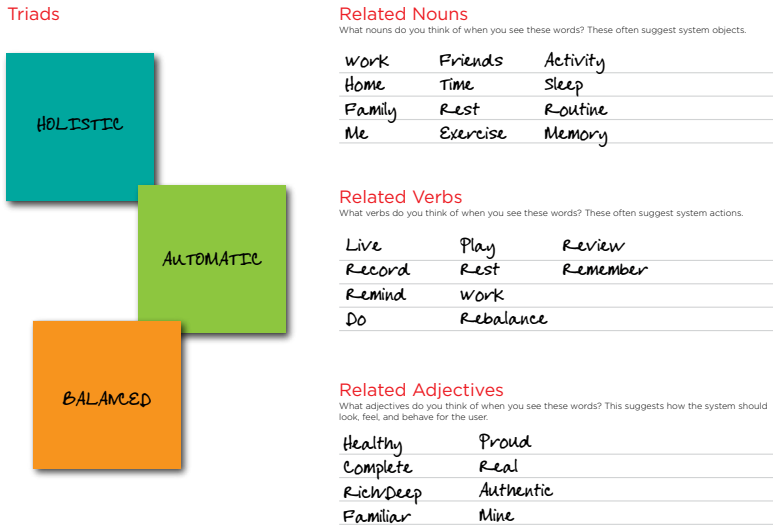


FIGURE 5.12

Next, pick out three words that you think work well together to describe the core of the product experience.

It's okay to reuse keywords in multiple combinations. Figure 5.13 shows another triad that is built on a different three-word combo. As you might expect, different word combos lead to different nouns, verbs, and adjectives. If you create a few different triads, you can use them to spark a conversation with the team about which direction feels more appropriate for your product.

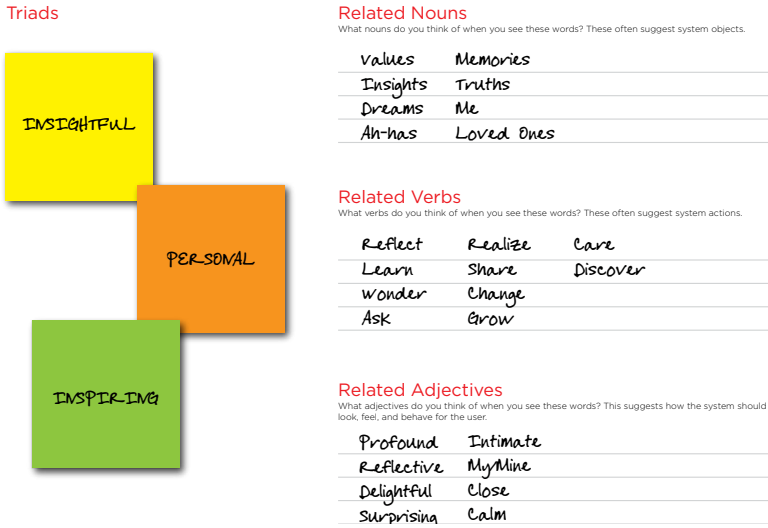


FIGURE 5.13

Try creating a few different triads and exploring how those product experiences would be different.

For each combo, discuss what an experience that is characterized primarily by those three words would look like. Talk about what would be the most important parts of the products and how the product would function or behave. What would users use the product for, and how would they feel about it? How would it fit into their lives? Capture the conversation on flip charts or a white board. Allow at least 30 minutes for this discussion.

Elevator Pitch

An elevator pitch helps you align around a shared description of your product and what's special about it. For this activity, you can use a template to create a succinct statement of what distinguishes your product from its competitor or comparator offerings.

To do an elevator pitch, provide copies of the template you see in Figure 5.14 and, working as a group or broken into teams, have participants fill in the template. The elevator pitch can help you understand what differentiates the offering, and hence, which features and characteristics should serve as the defining elements of the product. It can also help you prioritize by shining a light on what matters most in delivering on the core value proposition of the product.

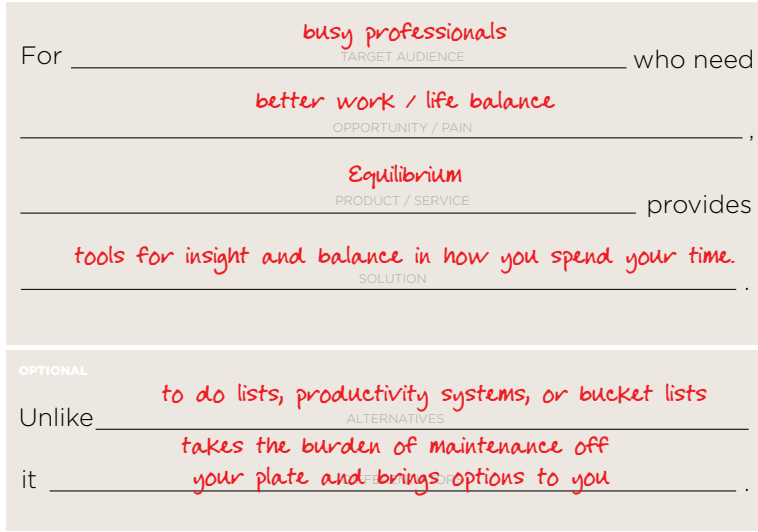


FIGURE 5.14

A variation on the elevator pitch template from Geoffrey Moore's *Crossing the Chasm*, this simplified template comes from Adaptive Path's User Experience Intensive Training. More information on this training can be found at http://ux-intensive.com/.

Artifact from the Future

This is a technique for getting a team to think beyond specific features and functions and help them envision what impression the product will make, in its entirety, when it is complete and live in the world. An artifact from the future can take many different forms: a press release, a blog post, a newspaper article, or a customer testimonial (see Figure 5.15). The key here is to invite people on the team to create their own version of an artifact from the future.

Ask people to imagine that the future is now. The design of the product is complete, and it's out in the world. What does the press release say? Or what does a blog post say about it? Ask people to share their artifacts to understand their vision, and then discuss what still needs to be built, what kind of personality the product will need to have, and how it will fit into their customers' lives for this vision to be realized.

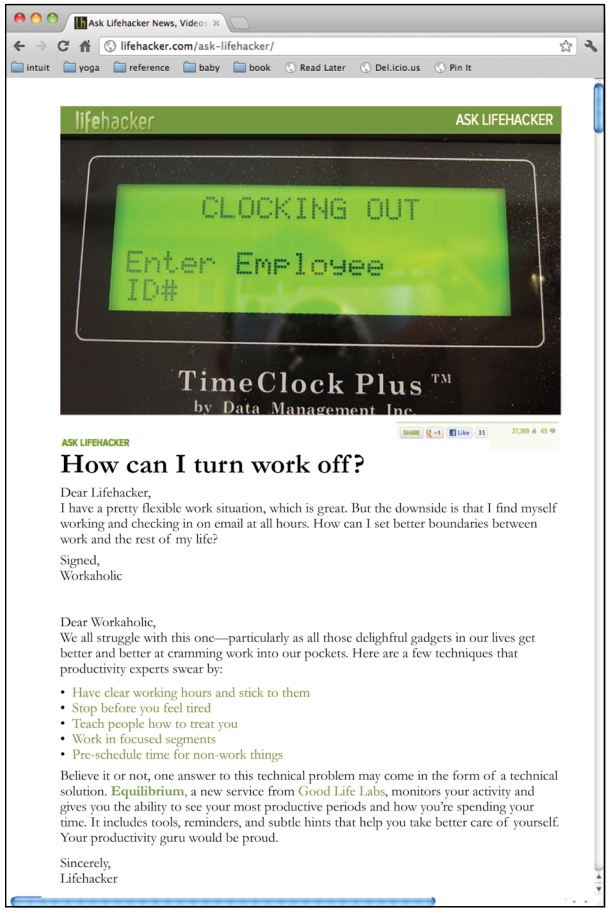


FIGURE 5.15
An example of an artifact from the future. In this case, the artifact is a made-up blog post from the website Lifehacker.

Storyboards

Storyboards are usually a tool for later in the process, once you start developing product concepts and transitioning into a detailed design. But in a strategy workshop, they can be an interesting activity to get the whole team (even stakeholders whom you might think of as too high up to be participating in detailed design) to start thinking about the user experience. Often, it's good to do a storyboard exercise after spending some time thinking about customer needs. Then the storyboard becomes a fun, visual way to explain how an offering can address those customer needs.

The example storyboard in Figure 5.16 digs into the discovery and first-use experience. In a strategy workshop, you can break people up into teams and ask each team to make their own storyboard. You may find that people naturally dig into different aspects of the experience, which is great. That gives you more breadth in discussing options and priorities with the group. Reassure them that it doesn't matter how it looks, and that even stick figure sketches will do.

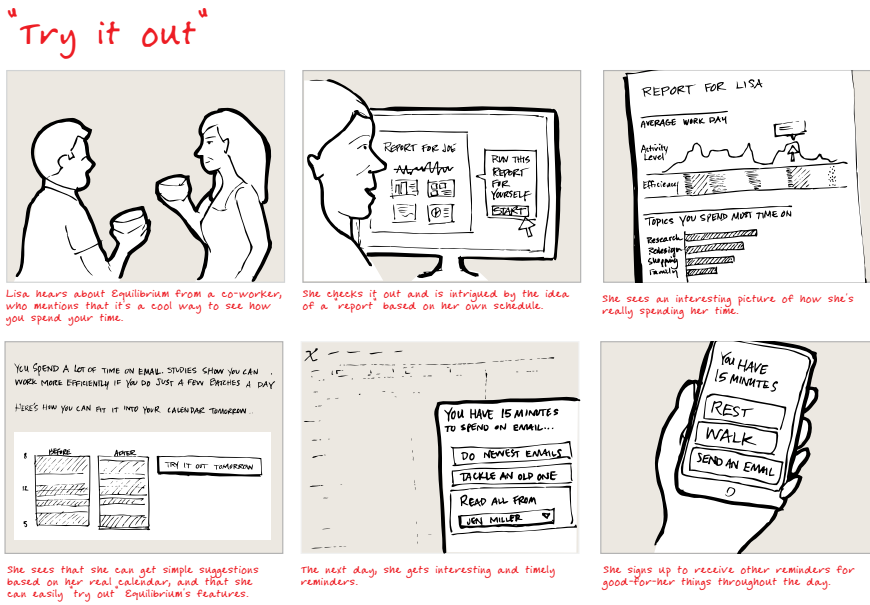


FIGURE 5.16
An example of a storyboard.

Mood Boards

Similar to a storyboard, the mood board is a tool traditionally reserved for later in the design process. But when turned into an up-front and collaborative exercise, the mood board can get the whole team to discuss their individual visions and begin to get excited about a shared vision.

Mood boards are essentially large collages where visual inspiration is carefully assembled to represent the feeling, appearance, and impression that the finished product should make (see Figure 5.17). The mood board typically brings together colors, photos, catch phrases, and other visual stimuli to create visceral impressions that the team agrees will be the direction the product should aspire to.

FIGURE 5.17
An example of a mood board.

Like an artifact from the future, a mood board can serve as a touchstone throughout product design and development to allow the team to check back in and assess whether the product is coming together in a manner that is true to the team's vision. As you can see in Figure 5.17, you can bring in a range of pictures for participants to choose from, or ask them to bring their own images and then work together to create a curated picture of how the experience should feel and function.

2 × 2 or Kano Model

A strategy workshop has two goals: vision and focus. When you get a team together, often all the good ideas far outpace the team's capacity to develop them. For a team of one, it's important to manage expectations about how many of the items on the team's wish list can be done—and done well. This is important not just because teams of one are operating under resource constraints, but also because it impacts the user experience. Users almost always prefer a simple product with fewer features executed extremely well over a feature-bloated product with a lot of capabilities that are executed only marginally well. Establishing a focus helps you do this (see Figure 5.18).

FIGURE 5.18
For either a 2 × 2 or a Kano Model, step 1 is to list the features that the team believes should be included in the product.

If you generated a lot of ideas in your discussions, do a team-based prioritization using a 2 × 2 structure. A 2 × 2 can be used to plot cost versus impact, as shown in Figure 5.19.

Another alternative use of the 2 × 2 is the Kano Model, as shown in Figure 5.20. Originally developed to support the product specification process in product manufacturing, a Kano Model is a handy tool for plotting the value of features from a UX perspective. The Kano Model helps you identify three categories of product features: those that are considered "basics" (think of these as tables stakes), those that are considered "performance" attributes (you've got to do at least some of them to remain competitive with the market), and those that are considered "delight" attributes (people don't expect them, but they love you for having them). Note that in the traditional use of the Kano model, you would get this feedback directly from customers or users. In this adapted approach, we're using it as a tool for facilitating a discussion with a cross-functional team.

Both structures can be used to facilitate a useful discussion with the team on which features and capabilities should be the focus.

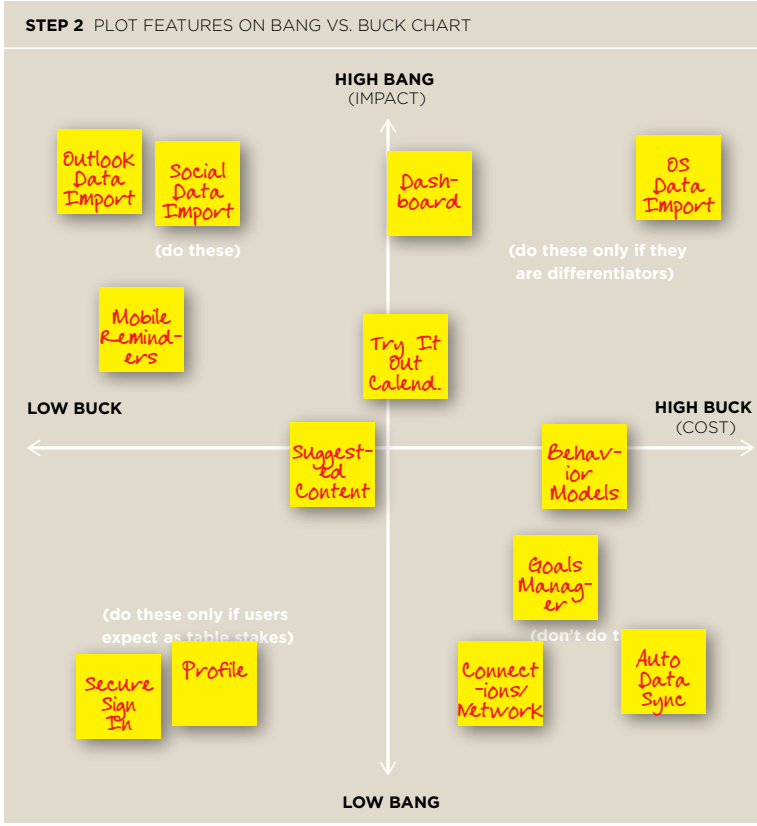


FIGURE 5.19

If you're doing a 2 × 2, step 2 is to plot each feature on the cost versus impact axes. The plotting of features should be a group activity, with everyone out of their seats and talking about where they would place each feature.

FIGURE 5.20

If you're doing a Kano Model, step 2 is to plot each of the features on axes corresponding to satisfaction and achievement.

Tips and Tricks for Strategy Workshops

- **Pick and choose your methods.** Certain activities are optimal for answering certain questions:
  - How we're unique: triads, elevator pitch exercise, design principles
  - Our vision for the future: artifact from the future, storyboards, mood boards
  - Priorities: 2 × 2 or Kano Model
- **If you work remotely…** A strategy workshop should be done in person and is worth making a special trip for. If your whole team is remote, see if you can arrange a time to meet in the same city and to commit to this important vision-building exercise.

If You Only Do One Thing…

The methods in this chapter cover a range of activities that you can use to get a clear understanding of project goals, opportunities for improvement, and how to go about getting started. But at its heart, this chapter is about discovering the expectations that your colleagues have for your product and giving yourself the time and space to think about your own expectations—what you really believe needs to be done to create a satisfying user experience.

So if you only have time to do one method, focus on the one that best lays bare other people's ideas and hopes for the product: the "Listening Tour." Even if you do nothing else, the "Listening Tour" will give you valuable background on team dynamics, and will help you discover the assumptions and conditions you'll be working with as you set out to change and improve the user experience.

CHAPTER 6

Research Methods

When you work on a product day in and day out, you can start to become *too* familiar with it, seeing and accepting all the pragmatic trade-offs that have been struck to make a complex thing possible. To take an uncharitable view, that perspective can make you an apologist for a product's shortcomings. However, users have no incentive to apologize for your product. In fact, they usually have quite the opposite: a wealth of alternatives and the ever-constant option of voting with their feet. Put simply, if your product doesn't support users in what they want or need to do, they can usually just go elsewhere.

The best way to provide experiences that satisfy users is to design with them in mind. The practices in this chapter can help you investigate what it's like for users when they use your product. These methods enable you to learn directly and indirectly what users need, want, and experience—and then build products that are optimized toward delivering on those needs. In this chapter, we'll look at the following methods and the questions they answer:

- **Learning Plan.** What do you know, what don't you know, and how are you going to learn it?
- **Guerilla User Research.** What concerns are top of mind for users? How do they really behave? How are people using your product today?
- **Proto-Personas.** How can you think empathetically about your customers' needs, goals, and challenges when using your product?
- **Heuristic Markup.** How does a user experience the product from beginning to end?
- **Comparative Assessment.** What are the standards and best practices that customers are likely to expect in a product like yours?
- **Content Patterns.** What content and capabilities do users have access to in your product, how is it structured, and what is the overall quality?

METHOD 7

Learning Plan

What do you know, what don't you know, and how are you going to learn it?

A learning plan sounds like a formal concept, but really it's just about taking the time to ask yourself where the gaps are in your current understanding of users' needs and experiences, and how you can fill in that understanding. A surprisingly large number of people claim to practice user-centered design, but fail to ever actually speak with or spend time with users. Don't be like them. One of the core tenets of a user-centered philosophy is that you respect and learn from your users' sometimes-unpredictable lives. A learning plan is a simple tool that you can use by yourself or with a team to map out what you know and what you need to learn (see Figure 6.1).

BELIEF	CERTAINTY	NOTES	RESEARCH METHODS	EVIDENCE
Typical User Profile				
Busy Professionals - Our most likely users are busy professionals (e.g., work more than 50 hours a week. Probably skew more female, and many have children/families. Age range is 30s and 40s.	Medium	The high-level details are taken from our typical enterprise user. Need to confirm whether the consumer oriented product would appeal to the same type of user, or someone else.	[+] Doublecheck marketing reports and business case [+] Embed dry test in enterprise product and survey respondents	Marketing Segments
Needs				
Family-Oriented - Users are interested in family-oriented activities.	Low	Purely speculative. We need to do more to understand the variety of activities that users are interested in.	[+] Contextual interviews with 5-8 target users	Personas + Behavioral Dimensions
Stressed by technology - Our typical user feels some stress due to the "always on" nature of technology and devices. It's the desire to eliminate or reduce that stress that leads users on a search for products like ours -- therefore users may be having an experience of stress at the moment they first encounter our product.	Medium	True for enterprise customer; need to confirm with target consumer customer.	[+] Do market research review (especially Pew reports) [+] Contextual interviews with 4-6 target users	Marketing Segments Personas
Motivations				
Achieving and accomplishing - Users are high achievers and interested in accomplishing more outside of work, but not necessarily scaling back what they do at work.	Medium	True for enterprise customer; need to confirm with target consumer customer.	[+] Contextual interviews with 5-8 target users	Personas + Behavioral Dimensions
General goals - Goals tend to be generic: vacation, retirement, get in shape. Not a lot of adventure seekers and bucket listers.	Low	This is an assumption we've always made about enterprise customers, but never really confirmed.	[+] Contextual interviews with 5-8 target users [+] Intercept survey of current users	Personas
Behaviors				
Balance Achieved Through Activities - Ways they achieve a sense of balance now: church or spiritual practices, TV, exercise, commute time (listening to music, books on CD, etc.), shopping, reading print material (books and magazines), FaceBook for viewing photos and catching up with friends.	Medium	True for enterprise customer; need to confirm with target consumer customer.	[+] Contextual interviews with 5-8 target users (include journey lines)	Personas Experience Map Journey Line
Always On - Users are not early technology adopters, but they tend to be online a lot. Usually have computers at home and at work (personal computer at work, shared computer at home). Also likely to have a smart phone, and others in their household are also likely to have smart phones.	Medium	True for enterprise customer; need to confirm with target consumer customer.	[+] Diary study with 2-3 target users	Personas + Behavioral Dimensions

FIGURE 6.1

If possible, make this sample learning plan *glanceable*. A table is a great way to format all this information into an easy-to-scan, one-page plan that you can stick up on your wall or drop into a presentation deck as needed.

Average Time

1–2 hours

- About an hour to assemble
- Ongoing discussions after that

Use When

- You're first bringing a user-centered mindset to an organization (whether in an official or unofficial capacity).
- You first start out in a new job as a UX team of one.
- You've started a new project, and you need to know more about your product and your users.

Try It Out

1. **Start with what you know.**

   Set aside 30 minutes or an hour to free-list everything you think you know about your users (see Figure 6.2). What are your working assumptions? Think about things like the following:

   - What are your main segments/types of users?
   - What motivates them?
   - What frustrates them? What delights them?
   - What features and functions are most important to them?
   - What considerations are key in their purchase and reuse decisions?
   - Do they use your competitor's products? When and how?
   - What other products do they use?
   - How much time do they spend with your product in a year? In a month? In a week? (You may discover that the number is surprisingly low.)
   - What else competes for their attention?
   - What frustrates them about your product?
   - What do they like best about your product?
   - What parts of your product do they use the most? The least? What parts of the product do you *want* them to use the most?
   - What *is* the main goal your audience aims to achieve, and which parts of your product/areas of your site help meet this goal?

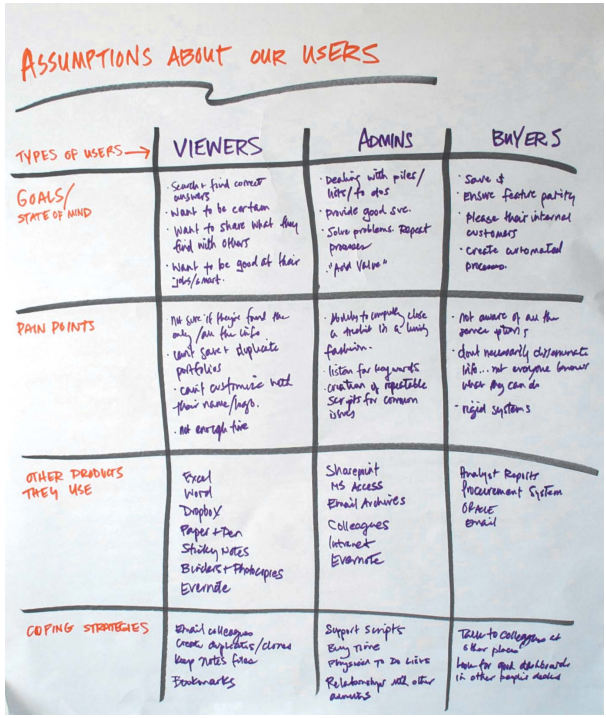


FIGURE 6.2
Give yourself 60 minutes in a conference room and invite a few team members to simply talk through your assumptions, capturing the discussion on the whiteboard.

2. **Separate certainties from assumptions.**

   For each assumption, indicate how confident you are in that assumption. While you do this, look for any questions that can be grouped together and simplified.

3. **Brainstorm research methods.**

   Now, for each of your questions, brainstorm how you might go about getting more data or info in this area. Also think about what resources will be required to actually answer these questions (for example, face-to-face time with users, a Web intercept survey, access to server log data, etc.). Note that not all research questions will require direct and immediate access to customers. Some answers can be derived from tools or processes that users touch—for example, call center transcripts, search analytics, and so on. Be creative in thinking about where and how you can gather data to answer your questions.

4. **Plan outputs.**

   Finally, for each area that you'd like to research further, think about what form your evidence will take (for example, presenting and distributing new personas).

Tips and Tricks for Learning Plans

- **Seek feedback.** It's one thing to write a plan. It's another thing to get support to execute that plan. Share your plans with the team and your supervisor, and invite their feedback. They may encourage you to slim down your ambitions. That's okay. That's really an aid toward greater focus. Encourage and incorporate this feedback.
- **Revisit from time to time.** Consider revisiting your learning plan at regular intervals (annually, for example) to keep it fresh. This periodic update is quite important. It's not uncommon for companies to have some research that was done years ago that they're using to inform future design decisions. But users, the products they use, and the technological landscapes in which they operate may have changed a lot in the intervening years. Take time now and again to reassess your working assumptions about user behavior and see if it's time to revalidate or update them.
- **If you work remotely...** You may want to brainstorm methods that are easier to conduct remotely, such as phone interviews or remote usability tests. See Nate Bolt's excellent book on remotely usability testing for specific ideas: http://rosenfeldmedia.com/books/remote-research/.

METHOD 8

Guerilla User Research

What concerns are top of mind for users? How do they really behave? How are people using your product today?

There is one key requirement of user research, and it's simple but not always easy: You have to actually talk to users. It doesn't have to be a lot of them. Even just two or three is better than none at all. In guerrilla user research, you make it a priority to talk to and learn from at least a few users, firsthand and by whatever means necessary. Guerrilla user research can take any number of forms, from calling a user on the phone to approaching people in a coffee shop.

Average Time

About two days

- 3–4 hours to figure out where to go to find users and write your research goals
- 3–4 hours in the field, talking to users
- 4–6 hours to mine your data

Use When

- You're forming goals and priorities for design and feel that you need grounding in an understanding of user goals.
- The team is making decisions for the product without any primary or firsthand knowledge of user needs. (You know this is happening when you find yourself in stalemate design arguments, or when you see people rationalizing product choices by speculating how a fictitious user, or even they themselves, would use the product.)

Try It Out

1. **Think about your target users.**

   Start by asking yourself whom you'd like to talk to and how. Think about what characterizes your users. How old are they, on average? What kinds of behaviors and interests might they have? Where might they live and work? How do they spend their free time? Once you have a basic idea of whom you're looking for, think about where this type of person might be likely to spend his or her time. If it's the type of situation or place that you could easily get access to, go there and ask the random people you meet if they'd be willing to participate in a short study. For example, let's say your target customer is creative freelancers. Creative freelancers are known to spend lots of time working in coffee shops. So you would plan to spend an afternoon in a coffee shop, politely asking people you see working on their laptops if they would be interested in doing a short user study.

2. **List your research questions.**

   Think about what you're trying to learn from your users and list your questions. Articulate why you're doing this work and what you hope to learn from it. Do a mind map to get your questions out of your head and onto paper or a white board (see Figure 6.3). To do a mind map, start by writing the topic in the middle (in this case, "user research questions.") Now, when you think about your user

research questions, what are the first things that come to mind? Write those around the central topic and connect them to the center with a line. For each branch, repeat this process until you can't think of anything else that you want to learn from your users.

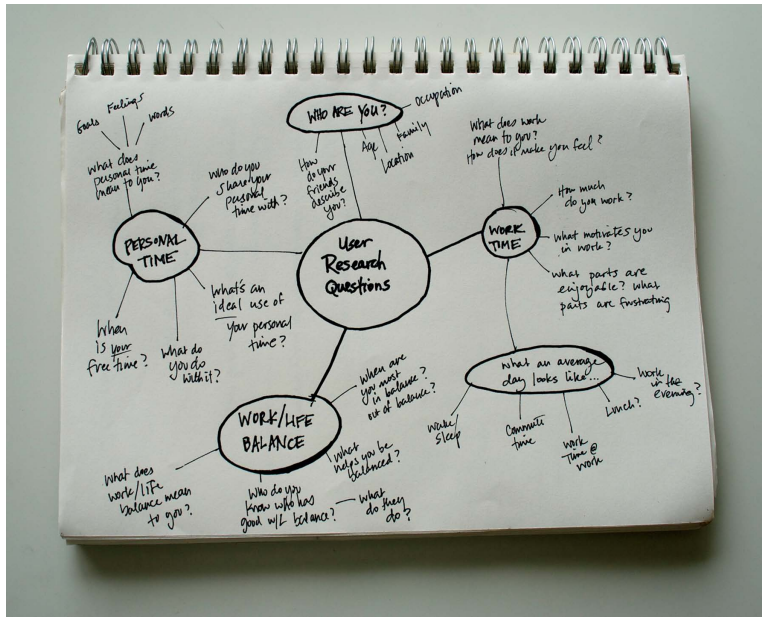


FIGURE 6.3
A sample mind map.

3. **Go into the field.**

   For the research session, ideally meet with the user in his own environment: work, or home, or somewhere he spends a lot of time. Ask him to show you as much as he is comfortable sharing about what's relevant and important in his own environment. If he's okay with it, take pictures or videos to document what you see as visceral artifacts to remind you of this person and the things you learned about him. During your conversation, be sure you're covering all the research questions that you listed in step 2.

4. **Mine the data for insights.**

   After you're done with your research interviews, spend some time reviewing your notes from all the interviews and looking for the answers to those questions that you listed at the beginning.

Tips and Tricks for Guerilla User Research

- **Use your organization.** Are there existing channels within the organization that afford direct access to your customers? Sales teams and support teams often have direct connections with customers, and they may be able to put you in touch with some of them. Another good place to connect with users is at industry-specific events or conferences. Or, if there are existing communications that are regularly sent to customers (for example, marketing emails, newsletters, and so on), see if you can arrange to slip a sentence or two into one of those communications inviting customers to participate in a research study. Or, if your organization uses Twitter or Facebook, send out a call for volunteers that way.
- **Use your network.** If you're having trouble finding good research participants, send out an email to your friends and colleagues saying that you're looking for a person who fits this particular type of profile for some research that you're conducting. Often, the people in your community will have friends and acquaintances that fit the bill, and they can put you in touch with them.
- **Get their consent.** An important bit of housekeeping before any research interview is to inform the research participant of how you will be using this research and get her official permission. This is called *informed consent*. Figure 6.4 shows a standard template that you can use to cover both you and your research subject.
- **Ask open-ended questions.** There is an art to user research. The goal is getting people to open up and share relevant information about themselves without leading them into answers. One technique that helps is to ask open-ended questions—questions that require more than a single word answer. Open-ended questions begin with words like "why" and "how." Avoid starting questions with words like "did" or "was." When in doubt, employ this powerful one-word sentence: "Why?"
- **Ask about past events.** Another technique for getting rich information without leading users to predetermined answers is to ask them to recall or remember events from their own lives. (For example, "tell me about the last time that you took a picture on your phone." Or, "tell me about the last time you bought a car.") Ask people to recall the experiences chronologically, which can help them remember specifics that they might otherwise gloss over. The journey line is a simple pen-and-paper technique that you can do with users to facilitate this type of chronological conversation (see Figure 6.5).

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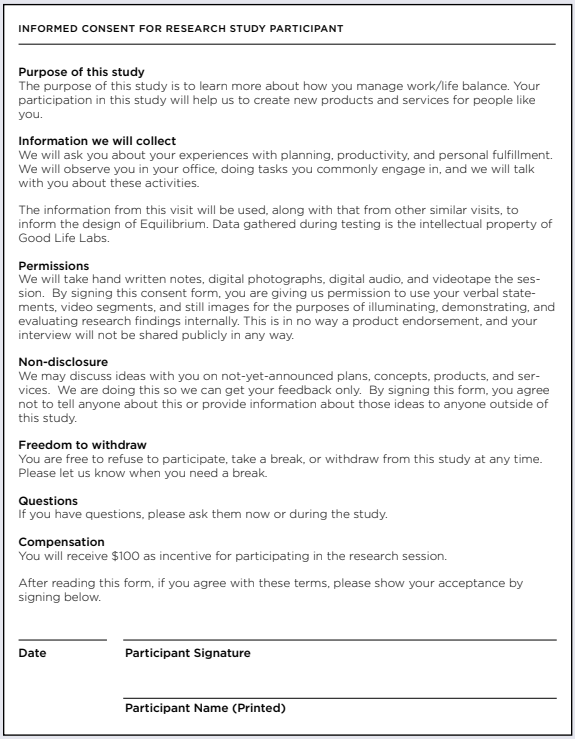
Tips and Tricks for Guerilla User Research (continued)



INFORMED CONSENT FOR RESEARCH STUDY PARTICIPANT

Purpose of this study
The purpose of this study is to learn more about how you manage work/life balance. Your participation in this study will help us to create new products and services for people like you.

Information we will collect
We will ask you about your experiences with planning, productivity, and personal fulfillment. We will observe you in your office, doing tasks you commonly engage in, and we will talk with you about these activities.

The information from this visit will be used, along with that from other similar visits, to inform the design of Equilibrium. Data gathered during testing is the intellectual property of Good Life Labs.

Permissions
We will take hand written notes, digital photographs, digital audio, and videotape the session. By signing this consent form, you are giving us permission to use your verbal statements, video segments, and still images for the purposes of illuminating, demonstrating, and evaluating research findings internally. This is in no way a product endorsement, and your interview will not be shared publicly in any way.

Non-disclosure
We may discuss ideas with you on not-yet-announced plans, concepts, products, and services. We are doing this so we can get your feedback only. By signing this form, you agree not to tell anyone about this or provide information about those ideas to anyone outside of this study.

Freedom to withdraw
You are free to refuse to participate, take a break, or withdraw from this study at any time. Please let us know when you need a break.

Questions
If you have questions, please ask them now or during the study.

Compensation
You will receive $100 as incentive for participating in the research session.

After reading this form, if you agree with these terms, please show your acceptance by signing below.

Date _____ Participant Signature _____

Participant Name (Printed) _____

FIGURE 6.4
A standard informed consent template.

- **A picture speaks 1,000 words.** When sharing what you learned, include choice photos and audio clips to illustrate key concepts and bring the voice of the user to life.
- **Get into their environment.** The things that people do and keep in their environment and the hacks they've created are often the biggest source of realization and inspiration for UX practitioners. For example, UX practitioners for a property website went into people's home to watch them searching for property on the Web. They discovered that many people were copying and pasting URLs of property they liked into separate Word documents to find them again later or send a complete list by email. This led them to design a "favoriting" feature with email capabilities.
- **Offer compensation.** People are often more willing to give you their time and insights when they are rewarded for doing so. Offering some form of compensation up front as a thank you for their time generally increases your odds of finding willing research participants. What you give them doesn't have to be a lot. Depending on how much time you need, a nominal gift card may be enough.

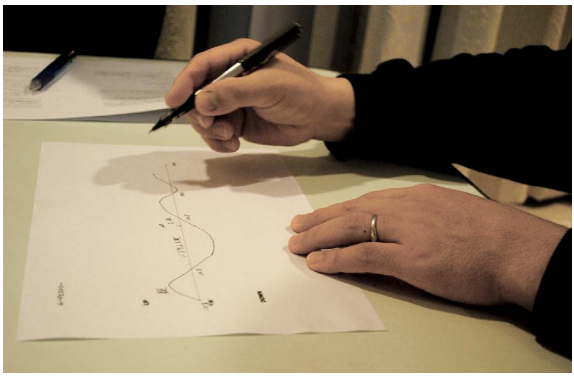


FIGURE 6.5
A research participant completing his journey line.

- **Interview tips:**
  - Be confident. If you seem like you know what you're doing, it will put your interviewee at ease.
  - Explain what's going to happen. Tell them why you're doing your research. Explain what kinds of questions you'll be asking. Tell them what's required of them. Let them know how long it's going to take.
  - Allow silence. Give them time to think about your questions before answering. Resist the urge to fill in silence by reframing questions or suggesting possible responses. Be careful not to finish their sentences.
  - Memorize a few sentences that will keep the conversation going. For example, "That's interesting. Tell me more." "Say more about that." "What's the reason for that?" "How come?" "Why?"
  - Get people to tell you their stories and show you their things.
- **If you work remotely...** Do this where you live, and aim to take lots of videos and photos to share with the rest of your team. If traveling to a location where your colleagues are is an option, take advantage of it and conduct some guerilla interviews with the members in tow. Research insights are always more profound for those who have witnessed it firsthand.

METHOD 9

Proto-Personas

How can you think empathetically about your customers' needs, goals, and challenges when using your product?

Proto-personas are a technique to provoke empathetic, customer-oriented thinking without necessarily requiring you to do exhaustive customer research or have loads of statistical data to underpin your thinking (see Figure 6.6). *Proto-personas* are inspired by the UX technique of a simpler name, *personas*. Personas are a time-tested tool of the user experience field. A persona is a composite picture of a collection of users boiled down into one relatable, human profile. A persona is usually presented as an individual person with a name, a face, and a backstory. Personas usually explain that person's needs, values, goals, frustrations, and desires. Personas are made as human as possible to further enhance the sense that this is a real person with a messy life and quirky ways of coping with very recognizable human situations. A persona is a fictitious composite based on extensive user research that you or someone else has observed firsthand. The trouble is, creating good personas takes time and resources.

Proto-personas are a modified version of personas that stimulate the same type of empathetic and user-oriented thinking, but with less investment in time. They can be created with the help of the cross-functional team, which makes them a quick and inclusive tool for turning on the user experience goggles. In essence, proto-personas are a persona hack that you create using whatever data you have available and with the help of the team. Whereas a classic persona is based on firsthand user research, a proto-persona is based on whatever insights you have, which can include secondhand research, or even the well-informed hunches of a team of people. (Of course, if you have firsthand research to refer to, that's ideal.) Proto-personas are less scientific and rigorous than traditional personas, but they can be equally effective for helping a team shift into a more empathetic mindset about users' needs.

Average Time

3–6 hours total

- 2–4 hours prep time
- 1–2 hours for the workshop

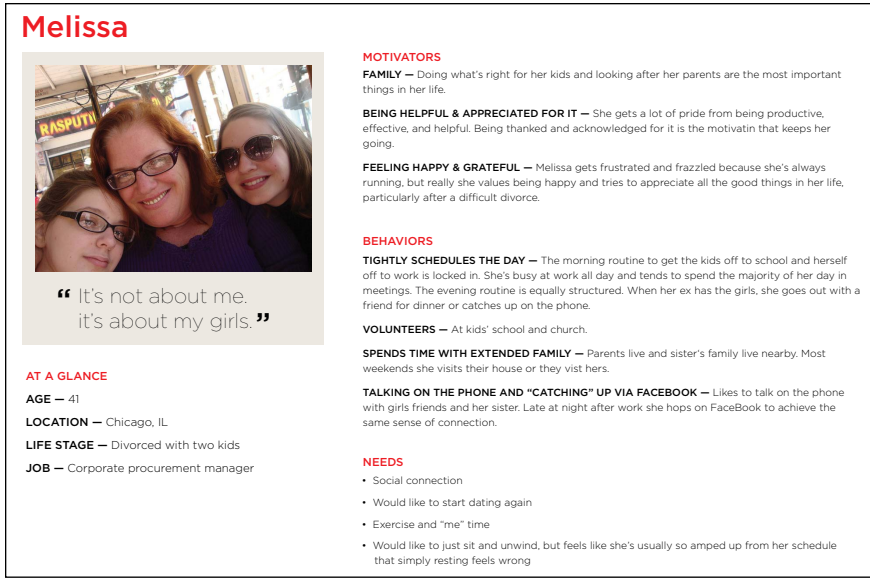


FIGURE 6.6
An example of a completed proto-persona.

Use When

- You have an unclear picture of your target user.
- You find that you and the team talk about users and their motivations in generic and non-specific terms.
- You sense that the team needs a more empathetic and human-centered way of thinking about users.

Try It Out

1. **Plan a working session with the team.**

   Schedule an hour or so for a working session and invite a cross-functional team to help you create the proto-personas. Since this is a group activity, the number of people involved matters. Aim for no fewer than 4 people and no more than 12. Any more and the group becomes a bit unwieldy. Consider including people who have direct access to customers (for example, sales people or call center representatives). They will have great firsthand insights about customers.

2. **Set expectations.**

   Once you have everyone assembled, explain that thinking of users as individual people with unique needs helps you create products that are easy to use and respect your users' time. Help them understand that UX is a frame of mind, and this activity will help get them in that frame of mind. Explain that what you are about to do is an *unscientific* technique that will nevertheless get everyone thinking differently about the people who use your products.

3. **Create teams.**

   Organize the group into small teams of about three people. Ask each team to discuss what they know or suspect to be true about your users, and then focus in on one particular type of user that they want to develop as a proto-persona.

4. **Fill in basic information for each proto-persona.**

   Give each team a poster-sized persona template and ask them to fill in the details of a fictitious but realistic person they might expect to use their product. Ask them to create a story for this person, including a name, where they live, what they do for a living, what frustrates them, what a day in their life looks like, and what they are doing before, after, and during the use of your product.

5. **Bring the proto-personas to life.**

   Ask each team to add photos, quotes, and other forms of real-life "color" to their posters. For this, you can simply give them a stack of stock photos or a selection of magazines and have them pick images to represent their persona and what a day in their life might look like.

6. **Share and discuss as a group.**

   After the teams have each assembled their posters, ask each one to share the story of their proto-persona. As a group, discuss your reactions to the proto-personas. What questions do the proto-personas raise that you might want to explore or research further? Discuss how you'd like to use these personas in the future and if there are any particular proto-personas that are especially relevant and effective in getting the team to think empathetically.

Tips and Tricks for Proto-Personas

- **Base them on whatever research you have.** If any pre-existing customer research exists, this can be a good starting point for your proto-personas. Gather any information that you have available about the different types of customers who use your products. Look for any market segment information, demographics, or customer support insights. If you don't have any of that, simply start by talking with the team about what types of people use your products. Sales people or customer support people are often especially knowledgeable about customers and their goals and challenges.
- **Treat them as a hypothesis.** After the exercise, look for opportunities to validate (or invalidate) the details in the proto-personas against data from the field. In other words, don't let the process stop here.
- **Don't confuse these with real personas.** User research purists may have some concern about this method, because it's not necessarily grounded in directly observed user research. Proto-personas are very useful for generating empathy, however, and the fact that they can be done in the course of a group activity makes them good for building interest and buy-in to provide a better experience to support users' needs. However, if and when the opportunity to do real personas arises, jump at it.
- **If you work remotely...** It would be difficult to approximate a proto-persona workshop remotely, but this type of exercise can still be a useful tool to do by yourself to guide you as you think about the design. If you're not necessarily planning to share the proto-persona with others, you can also take a lower fidelity approach, like the one shown in Figure 6.7.

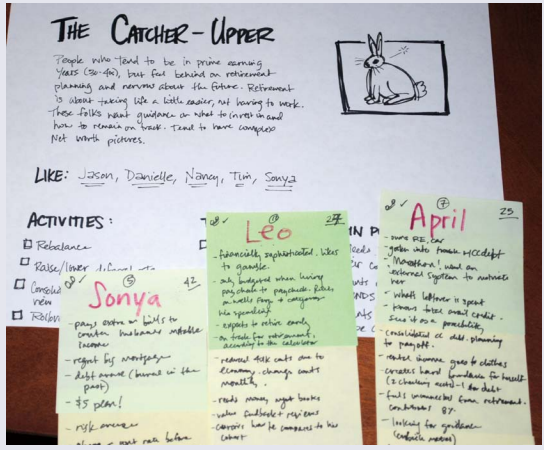


FIGURE 6.7
Here, notes from past research (in this case, individual interviews) are captured on Post-its and then compiled into a single profile.

METHOD 10

Heuristic Markup

How does a user experience the product from beginning to end? Heuristic markups are inspired by heuristic evaluations. A heuristic evaluation is a fancy term for a review of a product to see how well it complies with recognized usability principles. In a typical heuristic evaluation, a user experience professional audits a product and identifies any parts that don't conform to established standards and best practices. A *heuristic markup* is conceptually similar to a *heuristic evaluation*, but it places less emphasis on recognized standards and more emphasis on your own gut reactions and responses as you move through the product. A heuristic markup helps you tell the story of how a user might experience the product from start to finish (see Figure 6.8). In a heuristic markup, you start at the beginning of the product and record your thought process as you move through the experience. A heuristic markup is easy to do and surprisingly fun. Plus, taking the time to really notice what you notice is a good way to lift the goggles of familiarity.

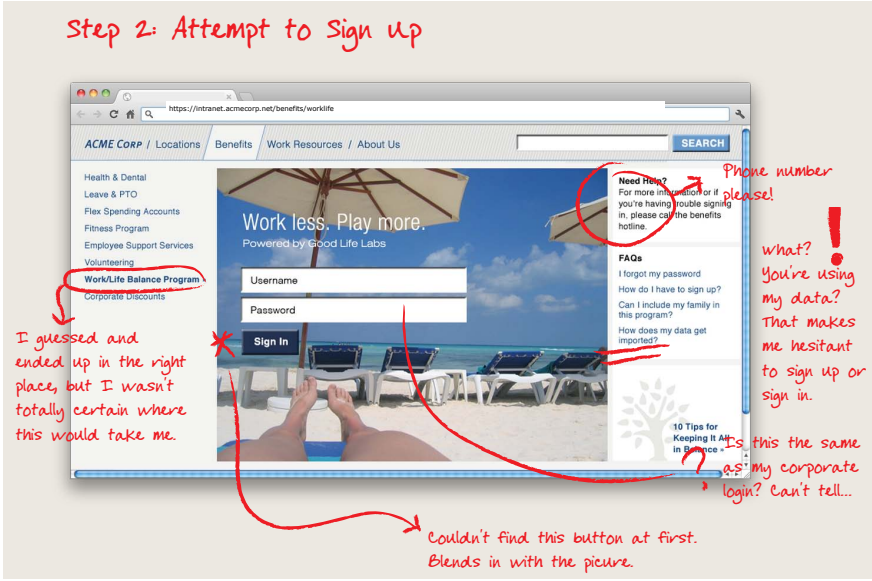


FIGURE 6.8
An example of a screen from a heuristic markup.

Average Time

4–6 hours to conduct and document the review

Use When

- You want to assess the basic quality of the product and spot potential opportunities for improvement.
- In the design process, if you want to check your work as new designs are under way.

Try It Out

1. **Block off a good amount of time.**

   Set aside some time to really use the product, from start to finish. Plan more time than you think you need. This gives you enough time to take notes and capture your observations.

2. **Begin at the beginning.**

   Think about where a typical user starts with your product. Is it with a Web search? A trip to the app store? If your product includes a physical device, does their experience begin with the process of opening the product box? Whatever it is, try to approach your offering from the same angle that first-timers would. Take screenshots or pictures and record your thoughts as you move from screen to screen or step to step. A PowerPoint document is a great place to store your images and observations. At each step or screen in the process, paste a screenshot on a new slide and add a note (or several) about what you are noticing and thinking about in your user's mindset. Or use a screen recorder that also records sound (Silverback works well) and record your stream of consciousness as you move through the product, thinking aloud as you go.

3. **Pay attention to your reactions.**

   As you progress through the product, be alert to the subtle responses and questions that you find yourself having. Often, we encounter these thoughts so quickly that we may not be fully conscious that we've had them. They can still influence our perceptions of the quality of the product, though. Try to go slowly and be attentive to what your inner voice is saying.

4. **Go from beginning to end.**

   Continue moving through the product, recording images and observations as you go.

Tips and Tricks for Heuristic Markups

- **Adopt a persona.** If you have some sense of who your users are, it can be helpful to create a backstory of your motivations and what you're trying to accomplish to guide your thinking as you move through the product. (Use your proto-personas if you have them.)
- **Record emotions.** Along with your thought process, it can be illuminating to record your emotional responses to each step or screen (see Figure 6.9). Did it make you feel happy? Surprised? Confused? Frustrated? Make an emotional graph of the entire experience to help you pinpoint the most critical areas to improve or, alternately, to preserve. Think in terms of the seven universal human emotions: anger, joy, sadness, disgust, fear, contempt, and surprise.

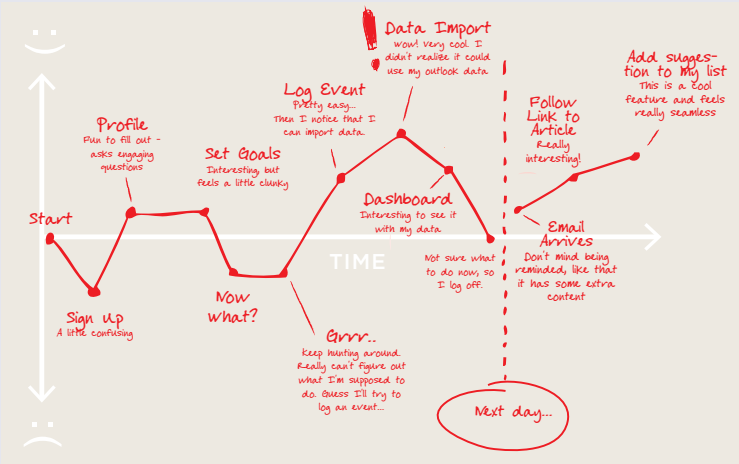


FIGURE 6.9
An example of a journey line that shows the highs and lows of the experience.

5. **Share what you find.**

   When you're done, you'll have a candid and easy-to-share narrative that illustrates potential areas for improvement within the product. Keep in mind that you may be critiquing someone else's hard work here, so be sure to soften any overly sharp or critical language before you share it with others. Capture the feeling, but leave the expletives out. At the end, include a summary of the key takeaways—the small handful of things that you believe are most critical.

- **Gather additional evidence.** If people question the process because it's not "expert" enough, connect your observations to recognized standards or patterns, such as those described here:
  - Jakob Nielsen's 10 usability heuristics: www.useit.com/papers/heuristic/heuristic_list.html
  - Bruce "Tog" Tognazzi's basic principles of interaction design: www.asktog.com/basics/firstPrinciples.html
  - Yahoo! Design Pattern Library: http://developer.yahoo.com/ypatterns/
- **Share the experience.** Invite your colleagues to go through the process as well. Ask them to bring their beginner's mind as they move through the process. Experiencing this type of walkthrough firsthand helps people see what you're talking about and provokes empathy and curiosity about how real users will experience the product.
- **Think in terms of tasks.** You can structure your heuristic markup from start to finish or, alternately, according to common tasks. To do a task-based markup, identify a handful of core use cases or scenarios that the product should support, and then follow the path for each one as you complete your review.
- **If you work remotely...** The process itself is easy to conduct remotely, but sharing what you find may take a bit more coordination. Try showing your walkthrough to a colleague whose perspective you trust first to get a second opinion on whether anything seems sensitive or incendiary. Once you've gotten confirmation that it seems good to share, set up time for a share-out with a larger group. Use screen-sharing software and walk the team through your notes.

METHOD 11

Comparative Assessment

What are the standards and best practices that customers are likely to expect in a product like yours?

A comparative assessment is a slight variation on the competitive assessment. In a competitive assessment, you evaluate your direct competitors. In a comparative assessment, you look at products and services that your customers are likely to encounter and use, although they may not necessarily be your direct competitors. The idea behind a comparative assessment is that people develop their expectations from the products and services that they use every day. They may be benchmarking the experience you provide not against your direct competitors, but against eBay, Amazon, iTunes, and so on. A comparative assessment is a good way to start thinking about and discussing what an optimal experience looks like, even before you've begun creating any designs.

Average Time

4–8 hours total

- 4–6 hours to pick comparators and review them
- Plus an optional 1–2 hours to document in a guidelines document

Use When

- You're trying to establish vision and expectations for a new user experience.
- The team seems to be focusing on feature-by-feature comparison against competitors and not aiming to create a simple, holistic user experience.
- You keep hearing comparisons like "it should be the Apple of _____," but nothing more specific.

Try It Out

1. **Pick which products to evaluate.**

   Create a list of the products you want to include in your assessment. This should be a small, manageable number. Five is about right. Ten is probably too many.

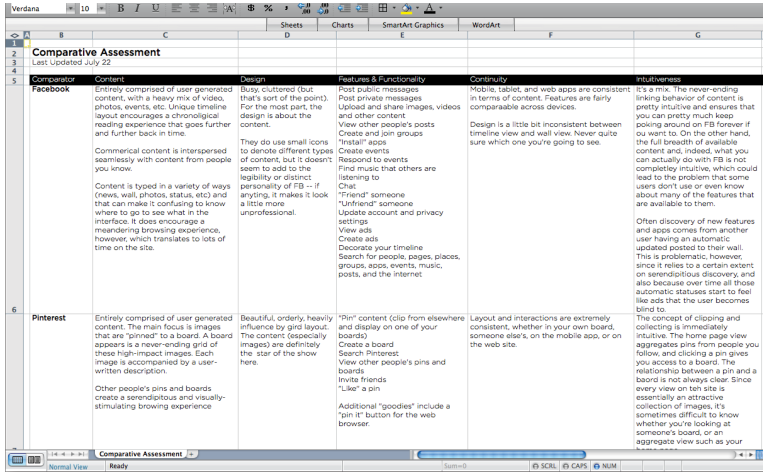
2. **Create a list of areas to evaluate.**

   Next, determine the framework that you will use to evaluate each product. A framework can be as simple as a spreadsheet with a column for each key question in your evaluation and a row for each product. The areas you focus on may be influenced by the domain you are evaluating and your goals for the project, but here are some common areas to focus on in your framework:

   - Content
   - Design
   - Features and functionality
   - Continuity or flow
   - Intuitiveness
   - Strengths, weaknesses, opportunities

3. **Walk through each product.**

   Now, with these focus areas in mind, begin to assess each product. Imagine that you have never encountered this product before and try to see it with fresh eyes. Take screenshots as you go and note your assessment of each product, as shown in Figure 6.10.



Comparative Assessment

Last Updated July 22

Comparator	Content	Design	Features & Functionality	Continuity	Intuitiveness
Facebook	Entirely comprised of user generated content, with a heavy mix of video, photos, events, etc. Unique timeline layout encourages a chronological reading experience that goes further and further back in time. Commerical content is interspersed seamlessly with content from people you know. Content is typed in a variety of ways (news, wall, photos, status, etc) and that can make it confusing to know where to go to see what in the interface. It does encourage a meandering browsing experience, however, which translates to lots of time on the site.	Busy, cluttered (but that's sort of the point). For the most part, the design is about the content. They do use small icons to denote different types of content, but it doesn't seem to add to the legibility or distinct personality of FB -- if anyting, it makes it look a little more unprofessional.	Post public messages Post private messages Upload and share images, videos and other content View other people's posts Create and join groups "Install" apps Create events Respond to events Find music that others are listening to Chat "Friend" someone "Unfriend" someone Update account and privacy settings View ads Create ads Decorate your timeline Search for people, pages, places, groups, apps, events, music, posts, and the internet	Mobile, tablet, and web apps are consistent in terms of content. Features are fairly comparaable across devices. Design is a little bit inconsistent between timeline view and wall view. Never quite sure which one you're going to see.	It's a mix. The never-ending linking behavior of content is pretty intuitive and ensures that you can pretty much keep poking around on FB forever if ou want to. On the other hand, the full breadth of available content and, indeed, what you can actually do with FB is not completley intuitive, which could lead to the problem that some users don't use or even know about many of the features that are available to them. Often discovery of new features and apps comes from another user having an automatic updated posted to their wall. This is problematic, however, since it relies to a certain extent on serendipitous discovery, and also because over time all those automatic statuses start to feel like ads that the user becomes blind to.
Pinterest	Entirely comprised of user generated content. The main focus is images that are "pinned" to a board. A board appears is a never-ending grid of these high-impact images. Each image is accompanied by a user-written description. Other people's pins and boards create a serendipitous and visually-stimulating browing experience	Beautiful, orderly, heavily influence by grid layout. The content (especially images) are definitely the star of the show here.	"Pin" content (clip from elsewhere and display on one of your boards) Create a board Search Pinterest View other people's pins and boards Invite friends "Like" a pin Additional "goodies" include a "pin it" button for the web browser.	Layout and interactions are extremely consistent, whether in your own board, someone else's, on the mobile app, or on the web site.	The concept of clipping and collecting is immediately intuitive. The home page view aggregates pins from people you follow, and clicking a pin gives you access to a board. The relationship between a pin and a baord is not always clear. Since every view on teh site is essentially an attractive collection of images, it's sometimes difficult to know whether you're looking at someone's board, or an aggregate view such as your

FIGURE 6.10

This spreadsheet is a simple way to capture what's special about the comparators that you're researching.

4. **Answer your questions.**

   Once you've assessed each product or offering, fill in your framework, so you can easily compare across offerings.

5. **Summarize findings or guidelines.**

   Finally, consider documenting key insights from the assessment in a "guidelines" document that you can refer to as you proceed through the process of user-centered design, as shown in Figure 6.11. (These can be used in conjunction with "Design Principles," described in Chapter 7, "Design Methods.") Your guidelines can serve as a cheat sheet for fundamental design standards that you'll want to meet or exceed. This really doesn't take a lot of time, and helps teams understand important best practices and start using a common language.

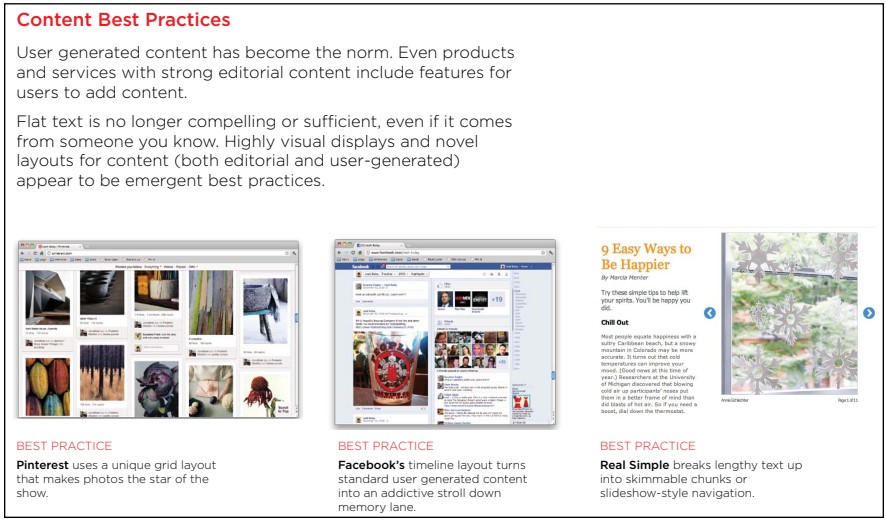


FIGURE 6.11

One way to make your most important findings a little more visual and memorable is to take a few screenshots and assemble them into a series of guidelines or best practices that you've observed through the competitive or comparative review.

Tips and Tricks for Comparative Assessments

- **Go beyond mere features.** Sometimes, these types of assessments are used to create feature comparison lists. This is dangerous. It encourages you to compete on feature parity, which can lead to user experience that is bloated with features and functionality. Instead, focus the assessment on the overall quality of the experience offered. Think not just about creating an inventory of features, but instead, what is the product's overall flow? How harmonious and consistent is the design? How readable, relatable, and human is the content? How intuitive are the categories in the navigation? What are important interaction patterns and conventions that would appear to be emerging standards? How well does the experience flow from device to device? Asking these kinds of questions can help you get a sense of the quality of the overall experience.
- **Plan it like a report.** One technique for determining your question framework is to design the report that you want to share at the end—but design it prior to starting the assessment. For example, if you want to report on the voice and tone of content in all of the offerings in your assessment, you know that you'll need to examine voice and tone of content specifically. First, decide on the key elements you want to be able to compare and how you'd like to report them. From there, you can determine what questions you will need to ask, and whether you'll want to track them in an open-ended way, on a numeric scale, through screenshots, in a yes/no fashion, and so on.
- **Share what you learn.** A comparative assessment can be helpful for simply familiarizing yourself with trends in the field, but it's even better if you can use it to discuss those trends with a cross-functional team. A summary document like the one in Figure 6.11 can be the starting point for an informed discussion about what matters most for your product.
- **Make it a group exercise.** This can also be useful when done as a group exercise. Ask the participants to bring in sites that they think are relevant comparators, and then, as a group, review those sites and discuss significant trends.
- **If you work remotely…** This is a great activity for a remote team of one. Have at it!

METHOD 12

Content Patterns

What content and capabilities do users have access to in your products, how is it structured, and what is the overall quality?

In a content inventory, you sit down with the product or service and attempt to create a representative sampling of all the types of information, assets, and functionality that it includes—sort of an index of the world. If that sounds painstaking, it is. You can get many of the same benefits (intimate understanding of structure, deeper familiarity with the content, etc.) with a lot less effort. Content patterns are less comprehensive than a traditional content inventory, but they do show the recurring patterns of content and functionality that exist and how they are they structured.

Average Time

4–8 hours, depending on how deeply you want to go

- 2–4 hours to review patterns
- 1–2 hours to create a content map or spreadsheet
- 1–2 hours to summarize key findings

Use When

- You want to get deeply familiar with the structure, information, and capabilities of your website or product (often this is at the beginning of a project).

Try It Out

1. **Pick key sections.**

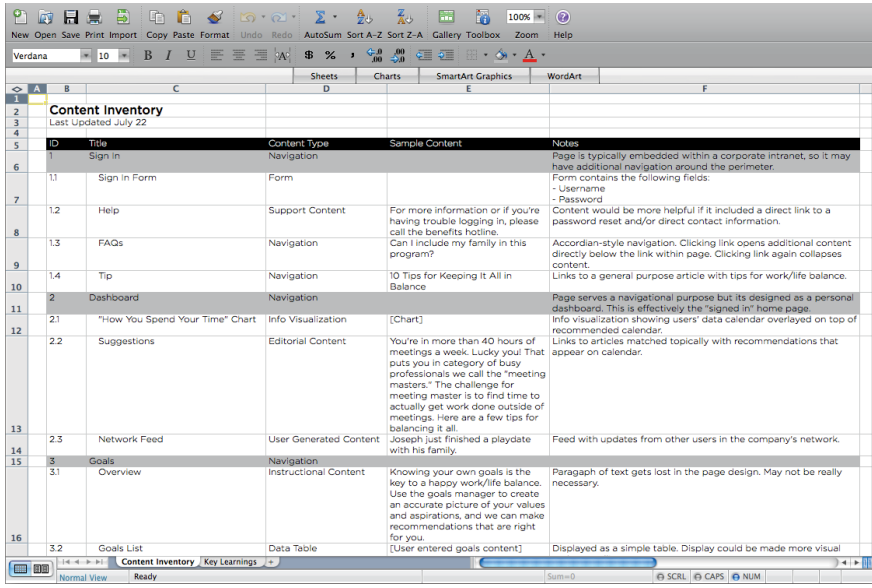
   Start by picking a few representative sections to feature in your sampling. Within each of these sections, look for recurring patterns or structures in the way that content is configured and presented. For example, case studies, articles, help files, and so on. This could also apply to features and functionality, which may have their own recurring patterns.

2. **Find the patterns.**

   List all the elements that come together to make up a unit of content. (For example, an article is comprised of a title, a byline, date, author, several long form paragraphs, some images, and finally some tags and categories, which are used as metadata for searching and filtering.) Repeat this process for each new type of content that you find.

3. **Document what you find.**

   Put the patterns you've found into a spreadsheet, or to make it easy to visualize the structure and patterns of your content, make a diagram or a map of the different types of content you find (see Figures 6.12–6.14).



Content Inventory
Last Updated July 22

ID	Title	Content Type	Sample Content	Notes
1	Sign In	Navigation		Page is typically embedded within a corporate intranet, so it may have additional navigation around the perimeter.
1.1	Sign In Form	Form		Form contains the following fields: - Username - Password
1.2	Help	Support Content	For more information or if you're having trouble logging in, please call the benefits hotline.	Content would be more helpful if it included a direct link to a password reset and/or direct contact information.
1.3	FAQs	Navigation	Can I include my family in this program?	Accordian-style navigation. Clicking link opens additional content directly below the link within page. Clicking link again collapses content.
1.4	Tip	Navigation	10 Tips for Keeping It All in Balance	Links to a general purpose article with tips for work/life balance.
2	Dashboard	Navigation		Page serves a navigational purpose but its designed as a personal dashboard. This is effectively the "signed in" home page.
2.1	"How You Spend Your Time" Chart	Info Visualization	[Chart]	Info visualization showing users' data calendar overlayed on top of recommended calendar.
2.2	Suggestions	Editorial Content	You're in more than 40 hours of meetings a week. Lucky you! That puts you in category of busy professionals we call the "meeting masters." The challenge for meeting master is to find time to actually get work done outside of meetings. Here are a few tips for balancing it all.	Links to articles matched topically with recommendations that appear on calendar.
2.3	Network Feed	User Generated Content	Joseph just finished a playdate with his family.	Feed with updates from other users in the company's network.
3	Goals	Navigation		
3.1	Overview	Instructional Content	Knowing your own goals is the key to a happy work/life balance. Use the goals manager to create an accurate picture of your values and aspirations, and we can make recommendations that are right for you.	Paragaph of text gets lost in the page design. May not be really necessary.
3.2	Goals List	Data Table	[User entered goals content]	Displayed as a simple table. Display could be made more visual

FIGURE 6.12
As you identify different types of content, you can track them in a spreadsheet.

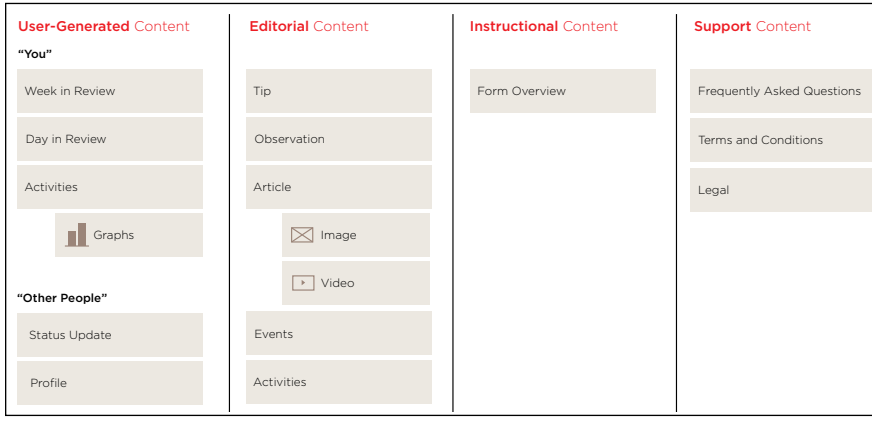


FIGURE 6.13
An example of a content map.

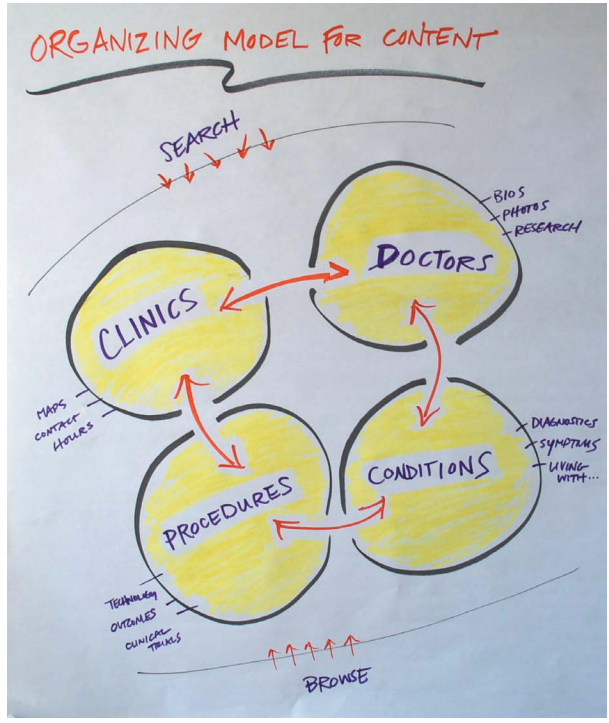


FIGURE 6.14
Even a hand-drawn model can be illuminating for clarifying the different types of content in the system and how they relate to each other.

4. **Summarize key findings.**

   Finally, use this analysis to identify significant observations or findings. What are your top observations? What specific recommendations would you make to improve the product?

5. **Share and discuss.**

   Optionally, share your findings with the team and discuss what actions you'd like to take, based on what you've learned.

Tips and Tricks for Content Patterns

- **Summarize what you discover.** Documenting content patterns can be a fairly technical exercise. This can make it hard to share and present to others. You can try to present a spreadsheet, but you may find people falling asleep in their chairs. To get people to pay attention and appreciate the significance of the findings, just talk through your high-level findings (which you identified in step 4 previously) and leave the spreadsheets at your desk (see Figure 6.15). Also show real, in-product examples to illustrate your points. If you are making specific recommendations for improvement, you can also show examples of this done well in other people's products to give everyone a vivid picture of what those changes might look like in practice.

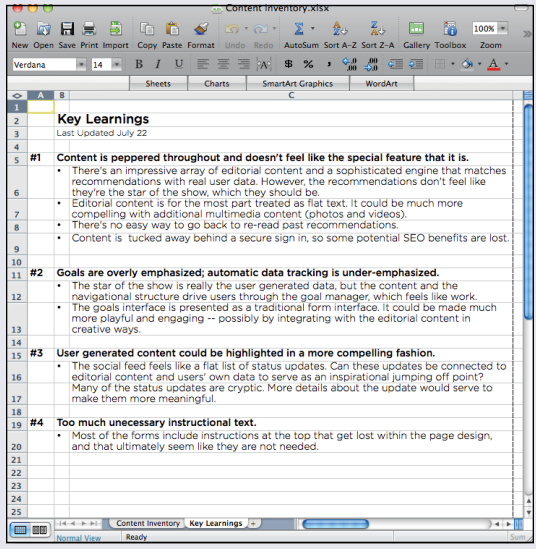


FIGURE 6.15
An example of a content inventory summary.

- **If you work remotely...** This, too, is an exercise that can easily be done remotely. Just be sure to plan time to share your findings with your remote colleagues. A conference call complemented by screen sharing works well. In this type of format, focus more on the summary and the key themes, and show as many examples as possible from the actual content.

If You Only Do One Thing...

The methods in this chapter cover a variety of investigative activities for learning more about your product, your users, your competitive landscape, and even what you don't know now but need to learn more about. At the core, however, these methods are about looking past what's familiar and known in order to see the product with fresh eyes.

So if you only have time to do one thing, try the one method that best helps you see the world through your users' eyes: "Guerilla User Research." It will enable you not only to see areas for improvement in your product, but it will also give you a better sense of who your users are and what matters to them.

CHAPTER 7

Design Methods

Designer Damien Newman created the design process illustration in Figure 7.1 to help illustrate a fundamental but little known truth about the design process: the path to a clean, complete, well-considered product is messy, messy, messy. You generally have to throw away a lot of work before you get to something that you keep. And often you don't know what should be kept and what's headed for the trash until you get other people involved in the process. But showing your colleagues the messy design process can be a bit like making sausage: sometimes it can ruin their appetite for the meal. The trick is to follow an iterative design process that enables you to do your best work, but also brings people along for the ride. The methods described in this chapter are tailor-made to get you through that process. They focus on iterative design coupled with structured, facilitative activities that you can do with your non-UX colleagues to make them partners and co-owners of the UX design process. In this chapter, we'll cover:

- **Design Brief.** At a high level, how would you describe your target design solution? What are the features and personality of the product? Who is it designed for, and what activities is it intended to encourage or enable?
- **Design Principles.** What should the experience of using the product feel like to a user?
- **Sketching.** What are some different forms the product design could take?

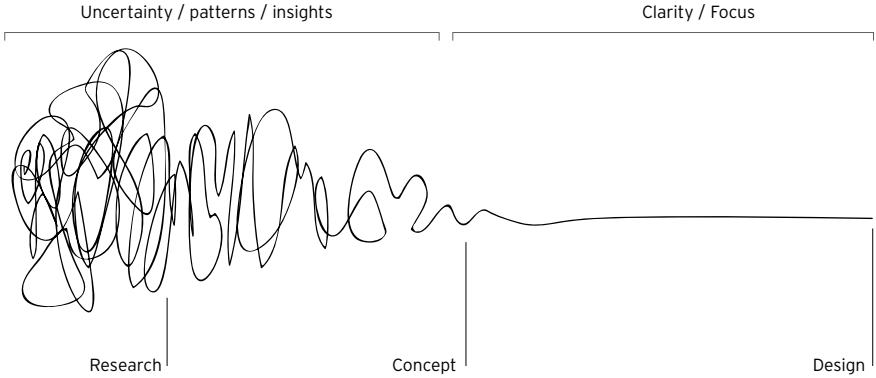


IMAGE BY DAMIEN NEWMAN, CENTRAL OFFICE OF DESIGN. HTTP://V2.CENTRALSTORY.COM/ABOUT/SQUIGGLE/

FIGURE 7.1
Damien Newman created "the squiggle" to convey the messiness of the design process.

- **Sketchboards.** What might the overall system or product look like, and what range of ideas are possible at each point in the process?
- **Task Flows.** How will the experience unfold over time?
- **Wireframes.** How will the product look and function in detail?

NOTE **A NOTE ON VISUAL DESIGN**

The methods in this chapter cover high-level design direction, flow, and interaction design. They do not cover visual design which would require its own book to do it justice. If you're interested in learning more about visual design, check out these resources:

- *The Principles of Beautiful Web Design*, by Jason Beaird
  www.amazon.com/The-Principles-Beautiful-Design-Edition/dp/098057689X/
- *Designing for the Web*, by Mark Boulton
  www.fivesimplesteps.com/products/a-practical-guide-to-designing-for-the-web
- *Non-Designer's Design Book*, by Robin Williams
  www.amazon.com/Non-Designers-Design-Book-Robin-Williams/dp/0321193857/

METHOD 13

Design Brief

At a high level, how would you describe your target design solution? What are the features and personality of the product? Who is it designed for, and what activities is it intended to encourage or enable?

The design brief documents your working assumptions about the optimal design of the product and puts forth your hypotheses for how best to bring that design to life. Much like a project brief, a design brief is intended to be a clear summary of what direction you plan to move (see Figure 7.2). But the design brief is a little more focused on design specifics. It seeks to articulate the vision for the user experience and connect the dots on how that vision will be brought to life. The design brief is something you create for your team, for any stakeholders who need to approve the design direction, and for yourself. Where the project brief helps you get shared vision on the overall project goals, a design brief helps you get shared vision on the personality and essence of the user experience design.

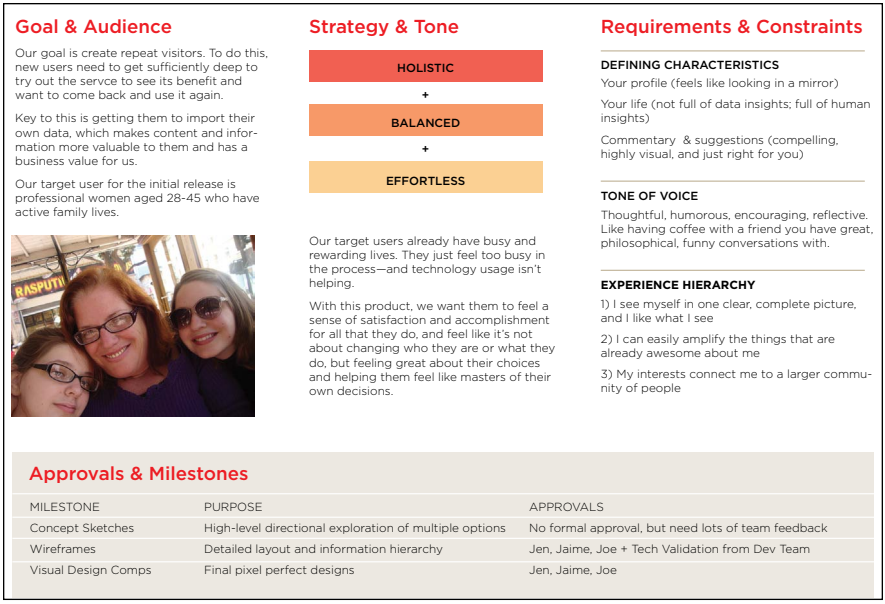


FIGURE 7.2
An example of a design brief.

Average Time

2–3 hours to summarize what you've learned and put it into a document

Use When

- You want to clarify the team's expectations as far as design is concerned and address early on any gaps or discrepancies in expectations.
- As the output of the strategy and research work described in the previous chapters.

Try It Out

There are two ways to do a design brief. One way is to start from a good template and fill in the details. (You can use a layout like the one shown in Figure 7.2.) The second is to look at what you know or have learned through your discovery and research work and build from the ground up. In either case, there are a few basic questions that you should answer with your design brief:

1. **Focus.**

   What is the focus of the design work? What will be created, improved, etc. as an outcome to this work?

2. **Audience.**

   Who will the design serve? Who are the primary audiences or personas that you will be designing for? While a design brief is intended to be brief, this is an area where a little more description will enable you to double-check that your assumptions about users—their needs, mindsets, and priorities—match your teammates' assumptions.

3. **Features and functions.**

   What are the core screens, states, or scenarios? What pieces of the experience will be central to the product?

4. **Feeling.**

   If you are successful, what will the *feeling* of the user experience be? This is basically about brand. When people use the product, will it feel fun and playful, dark and serious, or crisp and professional? As you're talking to stakeholders and team members about how they would like to see the products take shape, you will find that in addition to talking about features and functions, people do slip in words that effectively describe the desired feeling of the product. If you notice that language and write it down, put it in the design brief.

5. **Restrictions and expectations.**

   What constraints must be obeyed? What is most critical to the success of the design? What parts must you absolutely get right, and what things can you absolutely *not* do?

Tips and Tricks for Design Briefs

- **Work within constraints.** One way to think about a design brief is that it clarifies the constraints that the design solution must obey. These constraints could include features and functionality, value or brand propositions that the solution must reinforce or align with, and customers or users whom the solution should support.
- **Use it to validate assumptions.** One of the most important purposes of the design brief is to make sure that you know (and maybe can even help determine) what ideas or expectations your non-UX colleagues have for the product. Once you have provided a description of what the end result should look like, you've given non-UX-folks something that they can respond and react to.
- **Add images.** Try to make a brief more than mere words. Embellish the brief with suitable imagery (icons or photos, for example) that give visual and emotional resonance to the ideas in the document. This helps the team connect emotionally to parts of the brief and remember it better later. It is also an opportunity for you to begin to introduce visuals that foreshadow or allude to the quality of the experience the team is trying to deliver. For example, if the product should feel like a personal experience, include photos that seem candid, unstaged, and true to life. If the product should feel like a luxurious experience, include sophisticated, professional, polished imagery, and pay attention as well to a clean, sophisticated layout for the document itself.
- **If you work remotely…** Share your design brief with team members while it's in draft form and actively solicit their feedback. Documents like design briefs can spark strong reactions if they're handed down as though by decree. Rather, frame it as a conversation starter until you feel like you have enough input and alignment to call it final. Working with people in person speeds this process up a bit, because you can get people together and have a shared conversation to get their input.

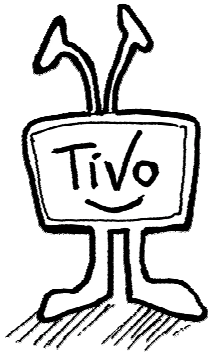
METHOD 14

Design Principles

What should the experience of using the product feel like to a user?

Design principles help you articulate the characteristics that should endow the user experience with a memorable personality or feeling. Does it sound strange to say that a product has a personality or a feeling? Some products may not have intentional personalities, but they may leave a distinct impression nonetheless. Some may feel confusing, complex, or technical. You may also have encountered products that feel fun, friendly, simple, and smooth (see Figures 7.3–7.4), or playful, social, productive, creative, and so on. Users tend to appreciate products with those kinds of personalities a bit more.

Design principles are a tool to help you clarify what personality is right for your product, and then to ensure as you progress that you are designing an experience with this personality. Because these design principles set a direction for the product design, they are ideally done before beginning a detailed design. Design principles can be shared with the team, similar to a design brief, to ensure that you have alignment on the product direction. As a tool for yourself, design principles can be a barometer to continually gauge whether the designs match the principles as you work.



- It's entertainment, stupid.
- It's TV, stupid.
- It's video, damnit.
- Everything is smooth and gentle.
- No modality or deep hierarchy.
- Respect the viewer's privacy.
- It's a robust appliance, like a TV.

FIGURE 7.3
The design principles that were created for the digital video recorder Tivo.

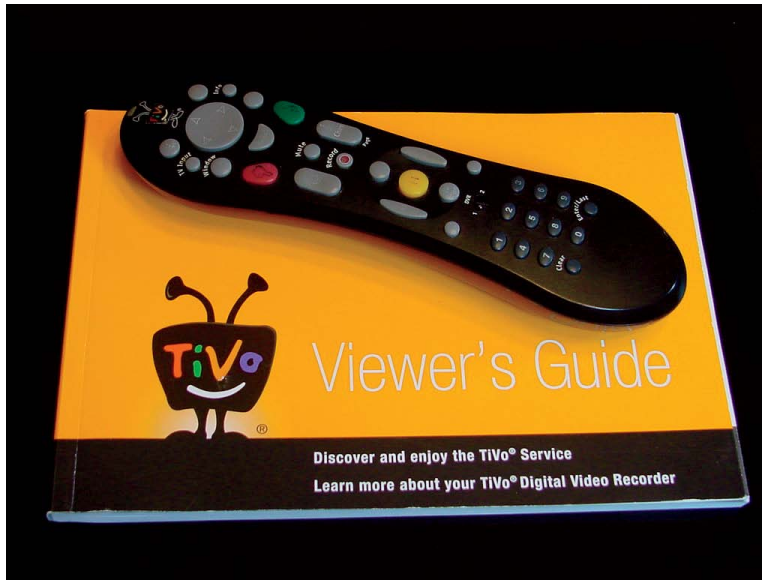


FIGURE 7.4
These design principles are evident in a variety of touchpoints—from the simple and ergonomically satisfying Tivo remote, to the friendly logo, to the inviting and non-technical language of the viewer's guide.

Average Time

2–4 hours total

- 1–2 hours to create the principles
- 1–2 hours to share with the team and incorporate feedback

Use When

- You need a tool to ensure that your user experience is coherent and consistent.
- You're not sure what the vision or personality for your product is.

Try It Out

1. **Consider what makes your offering unique.**

   Think about what you've learned through whatever research you've done. Have you discovered any differentiators and special

characteristics that are key to your product? Are there any assets in your content patterns that are important to feature? Have you uncovered any interesting opportunities via user research that your product is uniquely positioned to address well?

2. **Create a list of principles.**

   From this information, make a list of statements about what, ideally, the finished product should be like. Try to write short, pithy statements in an informal, human voice. Here, you are trying to capture how you would like a real person to describe your product after using it.

3. **Reduce your list.**

   If you come up with a lot of statements in your list (say, more than five), try to pare it down. Prioritize the statements that most directly give users what they need and create an offering that is differentiated from your competitors. You may be able to combine a few of your statements to come up with more nuanced, less generic statements that really speak to the experience that you're trying to create for your product. Ultimately, you want to whittle down your list to about five statements.

4. **Add more color to each statement.**

   Select a photo (or a few of them) to illustrate the statements symbolically, as shown in Figures 7.5–7.7. Add additional notes about some potential implications for each principle. Think about how each principle might influence specific parts of the design.

5. **Share and discuss.**

   Once you're satisfied with your principles, share them with the whole team. Consider creating nicely formatted, poster-sized versions of each principle to give each one a sense of significance and inspire others.

6. **Refer back to them regularly.**

   As you progress through design steps like sketching, wireframes, prototyping, and validation, continually refer back to your design principles and ask yourself, "Does what I'm designing *feel* like this principle?" If not, think about what changes you can make to bring the design more in line with the principle.

It does the work for you

The effort needed to put into it to get something that is personal and meaningful is suprisingly minimal.

IMPLICATIONS

» "Easy button" / one-click style interfaces
» Be up front and clear about how we get the data and what we do with it
» Auto syncing and updating are the default, but they're also clear and easy to override

It reflects your passions

Information and content are not generic, they're all about you and what you already do and love. No need for you to train the system—it just "gets" you right away.

IMPLICATIONS

» Content (user-generated and edtorial) are the star of the show
» Visuals, video, and even design should adapt to reflect the user
» If we get it wrong, it's easy for them to flag it and, presto, it's gone or fixed

It's the opposite of overwhelming

While the system knows a lot about you and others, it's good at being discrete and presenting just the right thing at the just the right time—resulting in a calming, soothing experience.

IMPLICATIONS

» Clean, uncluttered pay layouts
» Conceptually simple content models that leverage use metaphors
» Structurally uncomplex. The right stuff rises to the surface (no need to drill down).

FIGURES 7.5–7.7
Here, three different design principles work together to convey the overall feeling that a product should have for its users.

Tips and Tricks for Design Principles

- **No generic statements.** Design principles should help you make decisions in product design. This means they should be tangible and, to a certain extent, pointed. To test if a statement is specific and evocative enough, ask yourself if that statement could describe any of your competitors' products. If it could, it probably needs more work.
- **Go beyond easy.** Resist the urge to include a principle about being user-friendly, easy to use, or simple. Those things are all good, but they are table stakes for good design. With rapidly evolving design standards, a simple experience is not necessarily a differentiated experience anymore.
- **Make it a group activity.** If you'd like to include your non-UX team members in the creation of design principles, start by creating a big list of potential statements as described earlier. Then hold a meeting or mini-workshop and invite the team to reduce the list and modify your draft principles to make them better. You can do this as a hands-on, lo-fi activity, creating design principles like the one shown in Figure 7.8. You can also invite the team to discuss what the implications might be for each principle as you apply it to product design.

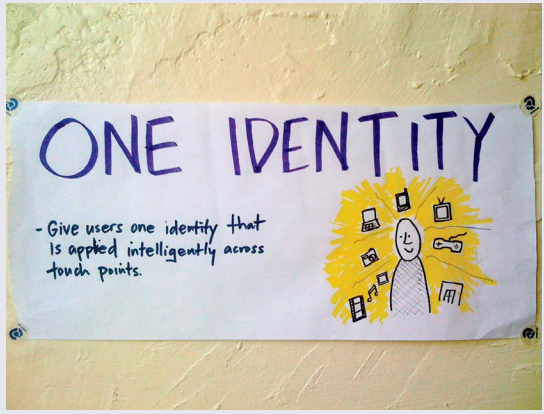


FIGURE 7.8
Design principles don't have to be highly polished, as long as they capture a distinct feeling.

- **If you work remotely…** Once you've gotten the team familiar with the design principles, ask someone who is located with the team to print them (ideally as posters or attractive large-format documents) and hang the design principles someplace where your colleagues can regularly encounter them. This keeps them top-of-mind for the whole team. In any case, be sure to refer back to them regularly as you progress through the design process. Design principles are like a north star to help you sail the ship of design.

METHOD 15

Sketching

What are some different forms the product design could take?

Sketching is an activity that should be familiar to pretty much all of humanity. It's when you sit down with pen and paper and allow yourself to start drawing out your ideas. However, in user experience design, sketching has added significance. It refers to the point in the process when you begin to explore different potential forms that the ultimate design could take. This is an important step before beginning detailed designs.

Sketches are a vital design tool because:

- **They're cheap.** Sketching is a fast and inexpensive way to iterate and refine your ideas before transitioning to a higher-fidelity and more painstaking medium like wireframes. While you are in the sketching phase, if you discover that a certain idea won't work, you can quickly evolve or revise the idea. All it takes is another sketch.
- **They help you explore.** In user experience design, there are usually a variety of directions a design could take. Sketching is a thinking tool that you can use to pinpoint an idea and then adjust and adjust again. It can also be used to generate a range of potential solutions to a particular problem. This makes sketching an excellent tool for exploring constraints and trade-offs, and thinking through the implications of one design over another.
- **They forestall perfectionism.** Because sketching helps you explore multiple directions, it's a natural deterrent to becoming too wedded to one particular idea too early. Sketching enables you to entertain a variety of ideas all at the same time, and even merge them together and evolve them into something greater than any one individual concept.
- **They invite conceptual feedback.** Sketches are messy. No one could confuse them with finished designs. Consequently, if you share a sketch with someone (for instance, a team member), they're more likely to give feedback on the core concept than to give you detailed feedback on layouts, fonts, colors, and so on. Early in the design process, feedback on the concept is the right level of feedback. Conversely, if you show a more polished looking design while you're still working on the basic idea, people may focus on surface aesthetics and feel that it's too late to give feedback that might change and even improve the overall conceptual direction.

- **They engage others.** Perhaps most valuable for a team of one (whose success often depends on getting support from non-UX peers), sketching gives you a way to translate abstract ideas into a tangible, visual language that you can share with others. You can use this to confirm with the team what you're thinking and incorporate their feedback before investing days of work into higher fidelity design.
- **Anyone can do it.** You don't have to be the only one sketching. In fact, inviting your cross-functional team to express their ideas on pen and paper gets them engaged, leads to great new ideas, and is fun!

For all these reasons, sketching is an essential tool in the UX team of one's toolkit, and one that everyone should be able to use with a degree of confidence.

Average Time

As much or as little time as you need. For example, 30 minutes of focused sketching time can make all the difference.

Use When

- You're starting to explore design ideas.
- You want to engage the team in a constructive and tangible discussion of possible design directions.
- You're not really sure what direction the designs could go in, and you need a tool to spur your creative thought process.

Try It Out

1. **Start with the right equipment: paper and pen.**

   You can sketch with tools as simple as an old pencil stub and a scrap of paper. However, having pens of varying weight and color, and blank paper (or better yet, a special notebook for sketching) can imbue the sketching process with an air of thoughtful intention, and can also make your sketches clearer to other people. Consider assembling a little sketching kit for yourself, as shown in Figure 7.9. Then stock this minimal set of sketching instruments in your pen case at all times:

   - Fine-tip black pen or marker—for roughing out a sketch.
   - Fine-tip red pen or marker—for annotations and notes.

FIGURE 7.9
Your sketching kit.

- Fat-tip black pen or marker—for creating thicker lines to draw attention to the more important or structural parts of a sketch.
- Non–photo blue pencil—for creating a first draft of a sketch, before inking it in. Especially useful if you are drawing hard things like hands or people. It's called a "non-photo" pencil because it's (mostly) invisible to cameras and scanners, which makes it a good way to rough out an idea and then go over it again later in black ink.
- Warm gray chisel tip marker—for creating drop shadows or inking in parts of the sketch that should be treated as the background.
- For sketching paper, basic copier paper works well. Or, if you are sketching screens for a specific type of device or screen resolution, it can be helpful to sketch on templates like those shown in Figures 7.10–7.13, which include a stencil or outline with an accurate sizing and aspect ratio for the target screen. Paradoxically, if your paper is *too* nice, it can make you more hesitant to sketch. Use fancy pens but unfancy paper.

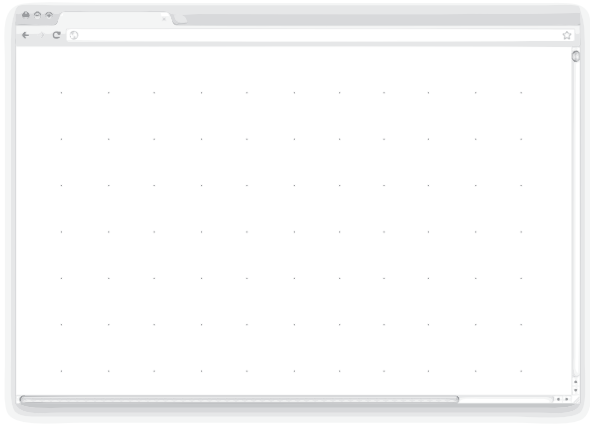


FIGURE 7.10
A sketching template for a Web browser.

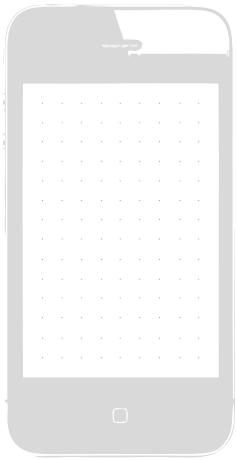


FIGURE 7.11
A sketching template for a mobile phone.

FIGURE 7.12
A sketching template for a tablet.

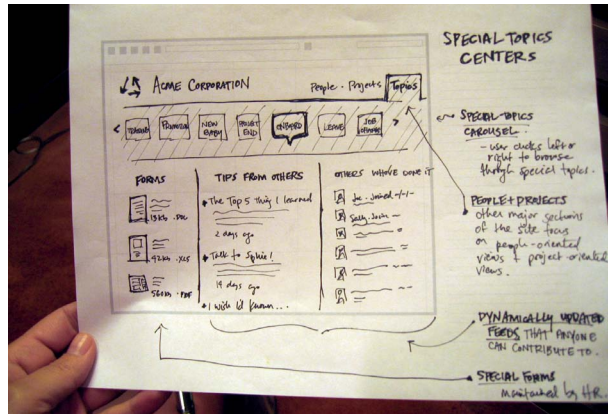


FIGURE 7.13
A sketch on a browser template.

2. **Block off some time.**

   When you're ready to sit down and start sketching, consider giving yourself a time constraint. For example "I will sketch ideas for the next 30 minutes." The time constraint is useful because it helps you move quickly rather than deliberating over an idea until it's perfect. Perfect doesn't matter when you're sketching. That comes later in the process. Here, it's about generating a lot of ideas for what's possible.

3. **Sketch your first ideas for key parts of the experience.**

   Start by asking yourself, what are the most interesting moments in this product? If I'm the user, what point am I trying to get to? What screen, state, or configuration of data will be most compelling and most likely to impress me or give me the most value? What part of the experience is most likely to "wow" me? Pick one of the key moments, and start to sketch some potential screen layouts for them.

4. **Sketch alternatives.**

   After you've sketched one or two ideas for a particular state or screen, try to force yourself to sketch at least a few additional ways you could design that part of the product. For example, if the first sketch was a text-heavy design, how about a very visual way that you could present the same information? Continue this exploratory, experimental way of thinking as you drum up at least a few ideas for each screen that you're sketching. You can use a "six up" template, shown in Figures 7.14 and 7.15, to help yourself sketch six quick, thumbnail-sized sketches for how you might design a specific page or moment of the experience. This may sound like extra work, but challenging yourself to continue and push past your first few good

ideas inspires interesting new thinking. It's a way for UX teams of one to bring the same kind of rigorous, exploratory, generative thinking that a team of designers brings to a design problem.

5. **Pick the best ideas.**

   Once you're satisfied that you've done rigorous exploration, identify which directions or ideas seem most promising to develop further. Only then should you fire up your computer and commence detailed design. You may find yourself mixing and matching some ideas from your initial sketches. That's great! Your sketches should help you arrive at design solutions that are bigger than any one particular idea.

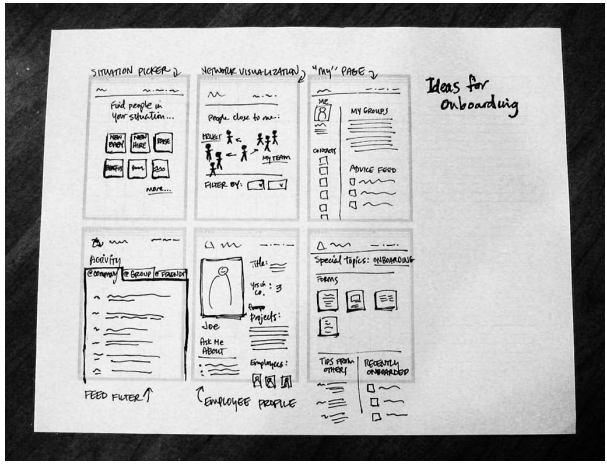


FIGURE 7.14
By forcing yourself to explore six different alternative approaches, you push past your first one or two good ideas.

FIGURE 7.15
Templates like this one aren't required, but can help you remember to sketch multiple options before settling on just one.

Tips and Tricks for Sketching

- **Clarity before beauty.** You don't have to be a great artist to be a great sketcher. When sketching, aesthetics are low priority. You do, however, want to try to make sketches that someone else could look at and possibly make sense of—or that you yourself could make sense of if you pulled them out of a drawer two or three months later. To make your sketches clear, add annotations, or use the pens as described earlier to add visual clarity. Often, a short note and an arrow pointing to some part of the sketch are all it takes to clarify what makes a bunch of squiggles a solid gold idea. Also, focus on drawing basic shapes. The sketches in Figure 7.16 were created by designer Rachel Glaves at Adaptive Path. Rachel shows that most user interface elements can easily be sketched using a few basic elements: lines, boxes, and arrows.
- **Sketching hacks.** If you are unhappy with the look of your sketches, there are tools that can help. Balsamiq is an online wireframing software with a sketchy appearance that you can use to put together sketch-like designs.
- **Sketch in words.** If you feel uninspired as you sketch, try to describe an idea in words before you attempt to draw it in pictures. Some people are naturally "word" people, and this sketching-in-text approach can be an equally valid way to explore the possibilities.

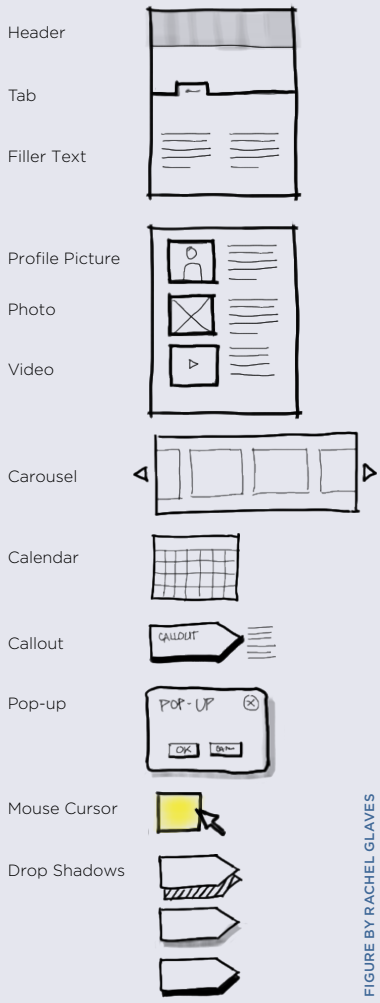


FIGURE 7.16
Focus on drawing simple shapes.

- **Carry your kit.** Keep your sketching kit handy so you can sketch on the fly, in meetings, or in ad hoc conversations. When a conversation seems to drag on, with participants going back and forth about what they believe should happen to the product design, grabbing a pen and drawing what you or others have in mind can be very powerful. It can help turn a purely speculative conversation into something more tangible. The person who sketches directs the conversation, which is a very strong position to be in. Likewise, handing a pen to a

colleague and asking her to "sketch it out" can give you a clearer picture of what she has in mind.

- **Frame the sketches for their audience.** To get people who are used to reviewing higher fidelity designs to engage with sketches, it can be helpful to spend a little extra time (but not too much time) to frame the sketches within a more polished deliverable. Scan your sketches and place them into a presentation or document that presents the sketches as visual examples to support a written overview of the conceptual directions being presented.
- **If you work remotely...** Even if you can't be there in person, you can still make sure that reviews happen as though you were there in person, which means setting up time and structures to enable the team to see your sketches, make their own, and have a highly detailed discussion around a collection of sketches. To do this remotely, schedule several larger blocks of time for an online working session with the cross-functional team. During this time:
  - Either block off a larger than average amount of time for the meeting (say, two hours), or explicitly give the working session a very narrow scope so you can be sure that you'll get through all the designs in the time available.
  - Ensure that the technology is set up for an optimal sharing experience. This usually means having a dedicated conference line for everyone to call in and conference software where everyone can see each other's faces and share documents. You can use software such as Adobe Connect, GoToMeeting, join.me, or even Skype. Or tools like ConceptShare, ProofHQ, and Cozimo are designed for visual collaboration online, and can be useful for sharing and annotating sketches, wireframes, and other visual artifacts.
  - In meetings like these, it's critical to have a clear agenda and a clear process for how content will be shared that everyone understands ahead of time. When technology issues derail a meeting, even if it's nobody's fault, it makes everyone annoyed (not the open, friendly, participatory vibe you're trying to create).
  - If the meeting is focused on sharing (or co-creating sketches), you can make sketches ahead of time, scan them, and then send them around by email so people can refer to them during the meeting. Or, if you have a tablet (such as a Wacom tablet, or even an iPad with a good sketching tool like the app Paper), you may be able to sketch real time during the meeting as you discuss ideas. If you're asking your colleagues to sketch and they're not similarly equipped, you can just ask them to sketch with pen and paper and ask them to hold their sketches up to their cameras or snap a quick photo with their phone and email it to the group. (Or scribblar.com is a collaborative whiteboarding tool that you can use.)

METHOD 16

Sketchboards

What might the overall system or product look like, and what range of ideas is possible at each point in the process?

A sketchboard is a way to display the sketches that you and the team have created and facilitate a group conversation around them. You can think of a sketchboard as a big poster that you create by assembling your sketches and initial ideas for the design of the system. Sketchboards also help you look beyond individual screens and envision how someone will move among multiple parts of a product or system. The intended purpose of a sketchboard is to help you think across the broader design of the system, and to make sure that you're pushing yourself to make quality, creative designs. But sketchboards have lots of side benefits as well:

- They are interesting to look at, which makes people curious and draws them into your process.
- They're cheap and quick to assemble, so you can easily put one together whenever you need to think about the breadth or flow of a product.
- They're a good canvas for layering on new ideas, and even recording notes, questions, clarifications, priorities, etc. As such, they create a vivid and visual record of a whole team's input into the user experience design.

Average Time

3–4 hours total

- 1 hour to assemble a sketchboard (provided sketches have already been done)
- 1–2 hours to review with a team
- About 1 hour to go over notes and new sketches after the review and determine the next steps

Use When

You've done a bunch of initial sketches, or when you're ready to narrow down your ideas and need input from the team to move further into detailed design. This way of working settles design decisions. By doing the design thinking together and having a critical conversation about the benefits and drawbacks of certain approaches, the strong ideas

become self-evident. Rather than requiring you to preach or appeal to your colleagues' user-centered virtues, they can come to the same conclusions on their own by participating in the process.

Try It Out

1. **Assemble your supplies.**

   After you've sketched some preliminary ideas for the product (or part of the product) that you are designing, gather your supplies and prepare to assemble your sketchboard. You will need:

   - Paper. A large sheet of paper, approximately 3' × 6', or 1 m × 2 m. Brown paper creates an especially nice work surface because it contrasts sharply with the sketches, which are usually on white paper. Brown paper also seems like a less formal canvas, which has the subtle psychological effect of making you less hesitant to write all over it (see Figure 7.17). Plus, it's usually cheaper than white paper.

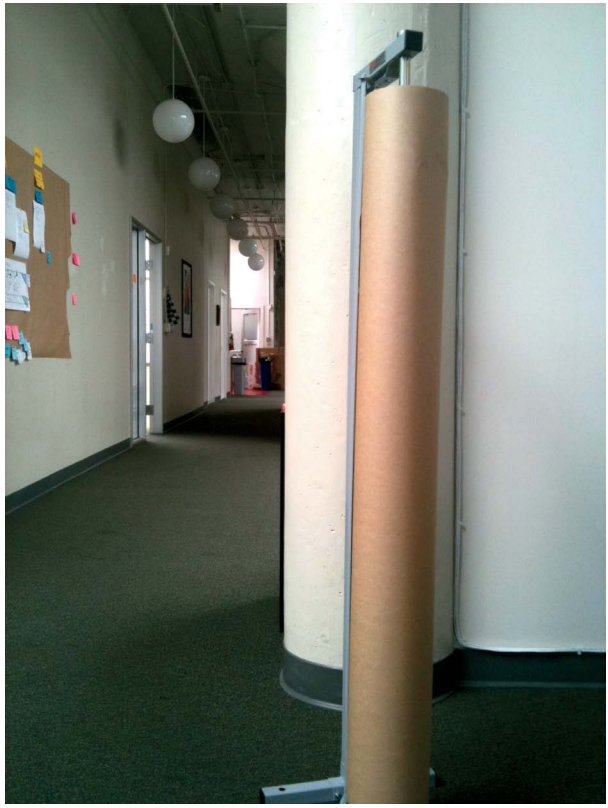


FIGURE 7.17
Consider buying a roll of butcher or craft paper to cut off pieces as you need them.

- Tape. The tape should be sticky, but not too sticky (see Figure 7.18). Painters tape works well or drafting dots. Drafting dots are single-serving bits of round tape, often used by architects and drafters to hang blueprints and schematics on the wall. The key is to find tape that's strong enough to hold a big piece of paper on the wall without ruining the paint, but it should also enable you to affix paper to paper (your sketches to the sketchboard paper) and pull them off and reposition them in a new spot without tearing the paper underneath.

FIGURE 7.18
If you put all of your sketchboard supplies in a handy kit, you'll be ready for impromptu sketching sessions whenever the opportunity presents itself.

- Post-it notes for labeling the sections of your sketchboard, which will correspond to the parts of the product that you are designing. Consider using color-coded Post-its. For example, green for positive comments and red for negative comments. This enables you to stand back and quickly spot the trends.
- Large markers to make big, clear labels and notes.

- Printouts of important information that influenced your design. You should tape these directly on your sketchboard, to connect the sketches to the user and business needs that inspired them. This will come in handy once you have other people looking at the sketchboard and talking through ideas. It will make it easier to discuss priorities, objectives, and trade-offs. Types of documents that you might include here: personas, use cases, user stories, design principles, marketing segment information, feature lists, and so on.
- Any sketches or designs that you've done so far. This can include high-fidelity design or back-of-the-napkin doodles. Whatever you've got can go on a sketchboard.

2. **Assemble your sketchboard.**

   Now that you've got your supplies in order, begin to put together your sketchboard. Start with the structure. Think about all the screens or sections of the product that you are designing. This may just be the high-level sections of the product, or if you are thinking about a specific flow or scenario, it may be sequential parts of that flow. (See the "Task Flows" method in this chapter for more guidance on creating flows.) Put sticky notes along the top of the paper for each of these parts or sections. In addition, reserve a spot on your large sketchboard paper for the "input" documents that you printed and label that section as well—something like "requirements" or "inputs" or even just "docs" (whatever works for you). In that spot, tape up the documents that served as inspiration for you as you were working on your initial design ideas.

3. **Put up your sketches.**

   Next, tape up all of your initial designs or sketches within each of the sections that you have labeled, as shown in Figure 7.19. If you find you have a section without any designs taped up, it probably means you need to sketch some more. Similarly, if you find you have a section with one or two potential ideas but there's still room for more that also means you probably need to sketch some more. A sketchboard helps you quickly see where your thinking so far has been heavy and where it's been a little light. Aim to have a handful of different ideas for how you could tackle the design at each part of the product workflow that you're working on.

FIGURE 7.19
On this sketchboard, reference documents are posted on the left, and sketches are posted on the right.

4. **Schedule a review session.**

   Now comes the most important part. Assemble a group of fellow team members, coworkers, or even just friends, and use the sketchboard to explain your ideas and get feedback. Start by explaining the inputs that informed your thinking. And then talk through your initial ideas for what the design solution might look like. While you're explaining your ideas, encourage people to ask questions and give their honest, off-the-cuff feedback. This is all valuable information about how the design is likely to impress people in the wild. As the group gives its feedback, write notes next to your sketches. You can write them directly on the brown paper or on sticky-notes that you place next to the relevant sketches. If you start talking about an alternate way you could treat a particular sketch (which is often triggered by your preliminary sketches), do new sketches right there in the middle of the discussion and add them to the sketchboard. If some sketches are clear winners, put a big star next to them and make a note that you should develop these further. Keep in mind that you can also rearrange the sketches and change the overall process flow if you realize as a group that the structure simply needs to change.

5. **Review the best ideas.**

   Your goal by the end of the sketchboard session is to come away with some sense of which ideas are promising enough to turn into higher fidelity designs. Those higher fidelity designs may just be more sketches, but they can also be wireframes, interactive prototypes, or even working code—whatever makes sense for the product development process that you're working with.

Tips and Tricks for Sketchboards

- **Get people on their feet.** One reason that sketchboards work well is because they turn the traditional process of presenting and seeking approval for design on its head. Instead, they get people out of their seats and working together in an active, participatory, animated fashion. Sketchboards turn people into contributors to the design process, rather than the recipients of it. They also provide extra quality assurance for the UX team of one to help you make sure that you're designing a product that isn't just the first idea that pops into your head, but rather the result of a rigorous and creative exploration. To make it work, have a "no butts in seats" rule when you're in the middle of a sketchboard session to make sure that you are truly keeping people active and engaged.
- **Know your altitude.** Sketchboards can be applied to design problems of varying specificity. You can use a sketchboard at the start of a project to explore what major components or sections of the product you want to address, and to begin to develop preliminary ideas for what each could look like. Alternately, you can use a sketchboard later in the process to figure out the details of a specific area or workflow. You could even have a sketchboard that focuses on one screen or moment, using the sketchboard to dig into all the permutations that one view might take, depending on the data the user has provided, what route they took to get there, if they are signed in or not, and so on. The important thing is to know the altitude of the problem you're trying to solve before you start your sketchboard. The process can become hard to manage if you think you're doing a 30,000-foot, system-wide sketchboard and then end up focusing all your ideas instead on a 5-foot view of a single state. Pick a scope for your sketchboard and stick with it.
- **Review with a focus.** Sketchboards can be an excellent tool for critiquing specific aspects of the product design. Instead of one sketchboard working session, consider having multiple review sessions with different types of people who will be focusing on different considerations, to ensure that you're thinking through all aspects of the product. For example, schedule a session with the engineering team to do a technical feasibility review and another session with the content folks to discuss whether the CMS can support these designs and how much of this content would need to be created or purchased.

sidebar continues on next page

Tips and Tricks for Sketchboards (continued)

- **If you work remotely...** Sketchboard sessions are very animated and physical. In general, that makes that makes them hard to do from afar. However, sketchboards are highly portable (as you can see in Figure 7.20) and can easily travel with you to where the rest of your team is located. If being there in person is simply not an option and you'd still like to try this, follow the same tips for remote workers described for the "Sketching" method in this chapter.

FIGURE 7.20
You can tell by the annotations and copious notes in between sketches that this sketchboard has been through a review session.

METHOD 17

Task Flows

How will the experience unfold over time?

People don't experience digital products page-by-page or screen-by-screen. They pop in the back door, jump erratically from one part to another, break your forms, and trick your logic. A task flow gets you thinking about how people really use your product. What are the most likely scenarios and sequences that users will follow? And what are some potential side doors that they may use to end up in the same place? Often, the user experience breaks down most at the "moments in between," when someone

moves from one step or screen to another (no matter how carefully each step has been designed). A task flow helps you design an experience that flows smoothly even through the transition points.

You can make a task flow in any software program that's good for diagramming. (Any of the programs described under the "Wireframes" method in this chapter will work.) Or you can simply draw it out on paper, as shown here in Figure 7.21. In fact, if you don't have a lot of time, paper and pen may be preferable because they enable you to add additional details easily without needing to "design" the flow document, which can be its own task.

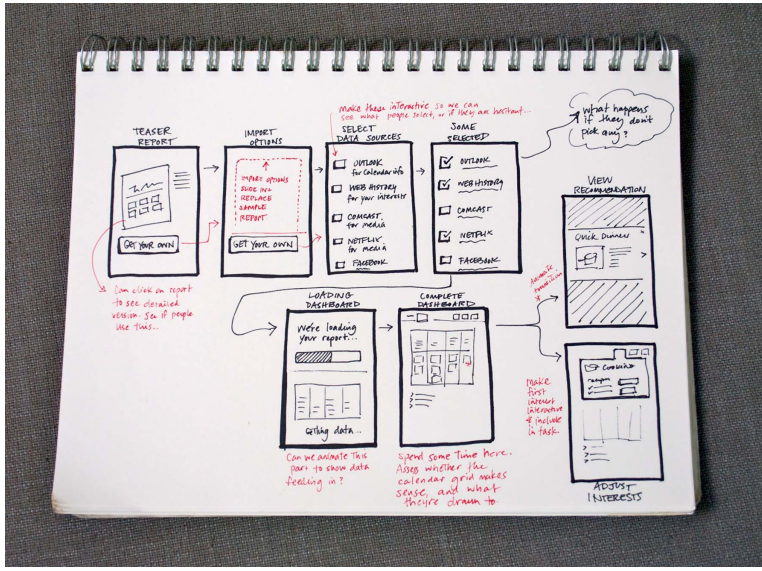


FIGURE 7.21
A low-fidelity task flow.

Average Time

1–2 hours to think through and document a specific task flow.

Use When

You need a complete picture of how the broader user experience hangs together for yourself and for your team.

Try It Out

1. **Figure out your starting point.**

   You can do this in a top-down fashion or bottom-up.

   - When you're thinking top-down, ask yourself what should a user encounter first? What is the starting point? What are the major parts of the product? What comes first, and then what might happen as the user works his way deeper into the product?
   - In the bottom-up approach, start with the most interesting steps in the process, or moments of truth, and ask yourself what comes before and after them? "Moments of truth" are the points in your product that represent key destinations or transition points for your users. They're the reason they're here. For example, the purchase and confirmation screens on an ecommerce site might be a moment of truth. Or the wall or activity feed on a social network site would be a moment of truth.
   - Another alternative is to focus on scenario-based sketching, which is a bit of a blend of the top-down and bottom-up approaches. Rather than just focusing on the top layer or the interesting moments, explore how users might start at the top and eventually work their way to the interesting moments.
   - Pick your approach, and then draw or depict the initial screen or step as a small, thumbnail-sized representation. (You don't need to show the entire screen, but giving just enough detail to convey the essence of the screen will make it easier to recognize it in your task flow.)

2. **Consider what comes next (or prior).**

   After you've picked your starting point, think about how your users would get to that point, and where they would go next. Repeat this process, either working your way from start to finish, or spreading out from the central moment you began with until you hit a reasonable start and end point.

3. **Think about alternate entries and exits.**

   For each step in the flow ask yourself, is there another way that someone could get here? Or is there somewhere else they're like to go from here (not necessarily the next step in the flow)? Also, consider

what should happen if people abandon at this point. If they come back later, what should they see? Similarly, if they come back on a different device or computer, what should they see?

4. **Add annotations.**

   Once you've captured all the key steps or screens for a particular task flow, go back through and add notes for how transitions should take place, or other important points to capture that are not self-evident from simply looking at the task flow.

Tips and Tricks for Task Flows

- **Keep it lightweight.** To go even more lightweight, use Post-it notes on large paper to plot out your task flow. Each Post-it note represents one screen. Lay them out on the large sheet of paper to figure out their relationship to each other and draw connector lines, annotations, etc. directly on the paper. If the flow changes, simply rearrange or redraw the Post-it notes. (Thanks to UX designer James Goldsworthy for this tip.)
- **Don't boil the ocean.** Instead of trying to create a massive task flow that encompasses an entire system, create discrete flows that focus on core scenarios. It's less daunting, easier to think through, and can help you focus on getting distinct threads of the experience as tight and fluid as possible. Afterward, you can go back through and think about how individual task flows connect to each other.
- **Use as a starting point for a clickable prototype.** This can also be a useful first step in determining what screens to include in a prototype and when interactivity should occur.
- **Think multichannel.** If you find yourself working on a task flow that switches channels or has non-digital components, consider creating an experience blueprint like the one shown in Figure 7.22 instead. Experience blueprints come from the field of service design, but they serve a function that is similar to a task flow—envisioning how an experience unfolds over time. To learn more about experience blueprints or service design more generally, check out the book *Service Design*, by Andy Polaine, Lavrans Løvlie and Ben Reason (Rosenfeldmedia.com).

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Tips and Tricks for Task Flows (continued)

- **If you work remotely...** Task flows are easy to put together wherever you are and may in fact benefit from the focused thinking time that being remote sometimes provides. However, your colleagues will be a useful resource for you in helping think about the edge cases and alternate paths that users sometimes take. (Engineers are especially good at thinking through this sort of thing.) So also set up some time for a phone call or remote review to talk through what you have so far and get your team's thoughts and feedback. If you're comfortable sketching or assembling a task flow on the fly, you could also do this as a remote facilitated activity, using screen sharing software.

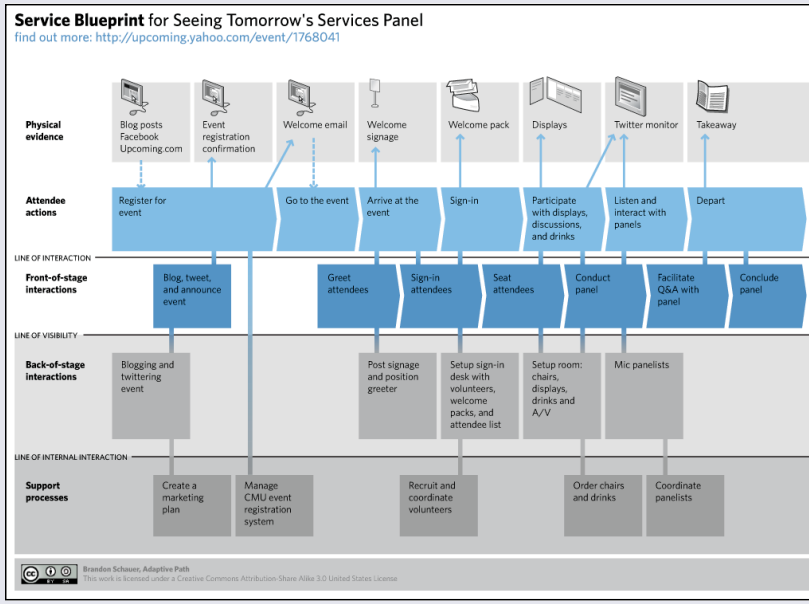


IMAGE BY BRANDON SCHAUER (FLICKR)

FIGURE 7.22

This service blueprint from Brandon Schauer of Adaptive Path conveys the steps that a user moves through, key touchpoints that they interact with, and supporting processes that happen "behind the scenes."

METHOD 18

Wireframes

How will the product look and function in detail?

Wireframes are the meat and potatoes of user experience design. Many of the methods leading up to this point have all been geared toward enabling you to create smart, appropriate, relevant designs right here. A wireframe is a skeletal depiction of what a product should look like (see Figure 7.23). If that sounds simple, let's not forget that a skeleton has an awful lot of bones. Like a skeleton, wireframes show you how the whole system hangs together to create a complete, interconnected structure that stands together as a whole.

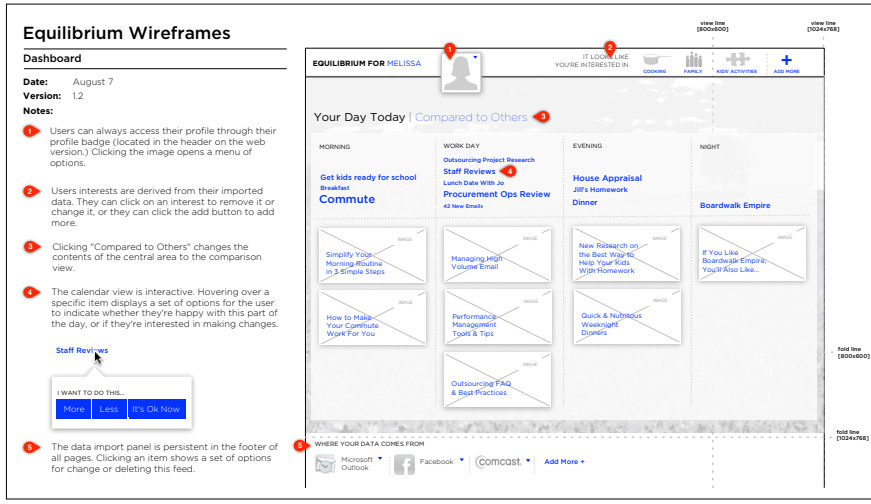


FIGURE 7.23

An example of a finished wireframe.

Wireframes are typically black-and-white schematics or renderings of all the pieces and parts of the product or service. In a digital product, they depict the parts of the product screen-by-screen. In a service, they may illustrate touch points that customers have with the service (be they digital, paper, or human). Wireframes are (usually) black and white because they're focused on just the basics: What is the information that should appear on a screen? How should it be laid out? What details appear there? What navigation is available (if this is a digital product)

to help someone move from one part of the product to another? Wireframes gives some sense of how all the information and details relate to one another: How do you get from one step to the next, and what is the appropriate hierarchy of information?

In addition to black-and-white diagrams, wireframes usually include notes or annotations about how the product should behave. For example, what should happen when you press on a particular button? How should interactive elements change, given certain conditions? Those notes make wireframes an interesting bridge between a design document and technical specifications. Wireframes can often simply be handed over to engineers for implementation.

Average Time

Hours, days, or weeks, depending on the scope of the system. When working on a digital product, a good rule of thumb is each screen takes 2–4 hours on average.

Use When

You're ready to really nail down the details of the product design.

Try It Out

1. **Pick your tool.**

   Start by deciding how you will create your wireframes. Usually, this means selecting a software program. For wireframes, pretty much any program that enables you to draw shapes will work. But there are some programs that are favorites for user experience professionals. Most of them feature easy drawing tools that allow you to easily approximate user interface elements in your diagrams. Many of these programs also feature libraries of standard user interface elements, so you can assemble your wireframes by simply dragging and dropping elements onto the page. Table 7.1 shows some of the most popular programs for wireframing.

2. **Create a template.**

   Once you've chosen your tool, your impulse may be to jump right into designing screens. Consider taking a moment first to lay out a template for your wireframes like the one in Figure 7.24—one that takes into account the device or form factor you are designing for. For example, are you designing for an iPhone?

TABLE 7.1 WIREFRAME SOFTWARE

Software	Description	Strengths	Weaknesses
Adobe Illustrator, Fireworks, Photoshop, or InDesign (otherwise known as the Adobe Creative Suite)	The ultimate suite of creative tools, these products can be used to render high-quality designs, photorealistic art, and pretty much anything in between. Their drawing tools make it easy to create and stylize basic shapes, which means it's a snap to render common interface elements or design interesting new ones.	Highly interoperable. Can start a document in Illustrator for basic layout and then take it into Fireworks to create a clickable prototype, or take it into Photoshop to create high-fidelity, visual design comps.	Expensive. Can be daunting to learn.
Balsamiq or Axure	These are listed together because they're both the young upstarts in the wireframing software market, rapidly gaining popularity and giving old dogs like the Adobe Creative Suite a run for its money. Both let you assemble informal looking wireframes using built-in user interface element libraries.	Wireframes can be turned into interactive clickable prototypes. It's easy to give the wireframes a sketchy, hand-drawn appearance, which lends an "in progress" feel that encourages feedback on the right things (for example, the overall information layout and hierarchy, rather than the color of a button).	Axure is relatively expensive. (Balsamiq, on the other hand, is quite inexpensive.)
PowerPoint or Keynote	You might not think of these two ubiquitous presentation programs as wireframing tools, but both have robust drawing and animation capabilities that make them surprisingly useful for quickly rendering a wireframe and then turning it into a clickable prototype.	Since most people already have at least one of these programs installed on their computer, the barrier to entry is next to nil. Public user interface element libraries (including mobile UI elements) are available for Keynote and PowerPoint at Keynotopia.com.	Can be harder to achieve a refined look and feel.
Omnigraffle	An inexpensive drawing and diagramming tool for the Mac. Omnigraffle comes with preinstalled user interface elements, referred to as stencils. Beyond the stencils that come pre-installed with the software, additional Omnigraffle stencils are freely available.	Easy to learn.	Mac only; difficult to export to PCs.
Visio	A Microsoft product for creating diagrams, schematics, and drawings. Visio also comes preinstalled with standard interface elements.	Integrates well with the MS Office Suite.	Preinstalled interface elements tend to look like, well, Microsoft UI elements.

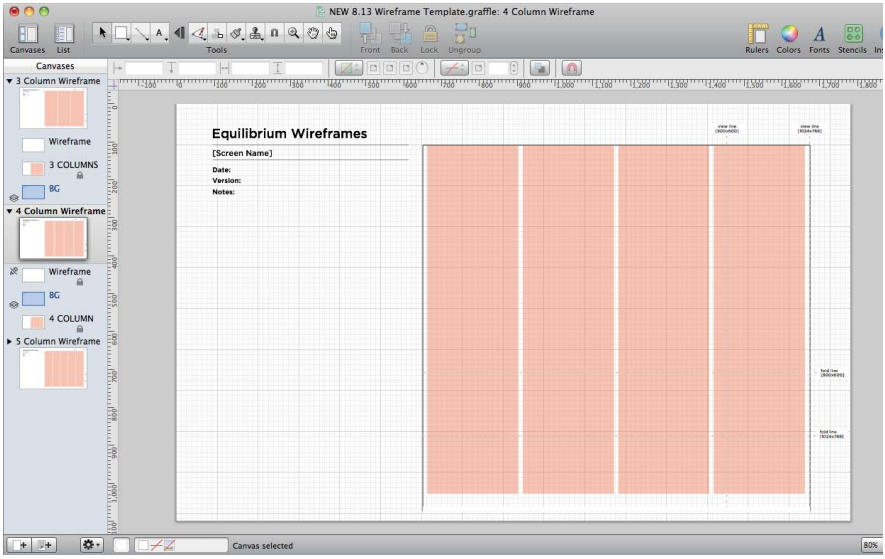


FIGURE 7.24

This is a wireframe template being created in Omnigraffle. On the left side of the template is room for annotations. On the right is room for the wireframe. The orange boxes represent a four-column grid.

A 1024 × 768 Web page? An 8.5 × 11 printed page? Create a template that represents the aspect ratio and proportional measurements of the area that you are designing for. You may need to scale down your measurements a bit to fit on the canvas of the software you are using. On your template, include a spot for a name to identify the page, screen, or design exploration. Also add a spot for notes or annotations.

3. **Create a wireframe inventory.**

   One final step before you start creating your wireframes: make a list of the wireframes that you think you'll need to create and gather together any sketches that you're planning to turn into wireframes. If there are any screens in your list that you don't have ideas for yet, take the time to start sketching out the design before you start to create the digital wireframe. If you need to evolve any sketches further, do it on paper before you move into software. Once you go digital, it can be hard to separate the functional questions from the natural impulse to pretty up your wireframes, so try to have a basic plan before you

get started. However, your wireframes don't have to be a perfect copy of your sketches. In fact, it's likely that you'll go into more detail, and think more about subtle nuances of the design, as you work through the wireframes. Some things that work on paper don't always work on screen, and that's okay. That's part of the process.

4. **Get wireframing.**

   At last, you're ready to start wireframing. Clear your calendar. Put on some good tunes. Pour yourself a nice cup of tea, and prepare to settle into the time-eclipsing flow of wireframing. As you work, rendering designs for each screen or part of the product, think about things like the following:

   - **Sequence and state:** How will someone get here and where will they go from here? Does this step have multiple states, depending on which path the user takes to get there?
   - **Information density:** What's the main message or action from here? What should I notice first? Does that differ at all from what I *am* noticing first in the design that I'm creating?
   - **Grid:** How clean, balanced, and orderly does the design feel?
   - **Design principles:** Is this screen or piece of the product delivering on the experience expressed in that handful of statements that were created?
   - **Error messages and states:** What does the user see when things don't go exactly as planned?

   Every once in a while, get up, take a walk, and then come back and try to see your wireframes with fresh eyes. When you do, ask yourself, how can I make it even simpler? Continue on this path until your wireframes are at a good stopping point to share with others.

5. **Seek and listen to feedback.**

   Share your wireframes with the team (or even just anybody you can find). Get feedback on whether the designs make sense, if the flow matches how people would expect to move through or use the product, and if anything seems just plain funky. Ask people what they would expect to happen when interacting with certain parts of the design. Do their expectations match what you have planned? Accept this feedback for what it is—valuable and honest input that will help you make the user experience design even better.

Tips and Tricks for Wireframes

- **Show your work.** Wireframing can be the most labor-intensive part of the process. This makes it an important but tricky piece of work for UX teams of one. How do you ensure that you are doing great design work but not spending all day, every day, pushing pixels around the screen? Taking time up front to do sketching and sketchboarding should help you balance the amount of time you spend working with others with the amount of time working on your own. Whatever you do, make sure that you don't get too far along in the wireframing process before showing your work to other people. Never go too far down the rabbit hole of ideas without having some basic conversations with your colleagues to see if what you're thinking is really viable. For a UX team of one, checking in and showing your work opens up the black box of design and helps your colleagues develop an understanding of the user-centered design process.
- **Give it a grid.** Within the wireframe template, consider adding a faint grid. Working with a grid gives you guides to create consistent, balanced, clean designs. A popular grid is 12 × 12, because it gives you the ability to subdivide designs and columns of 3 or 4 equally. However, different grid structures may be recommended for different types of devices. Pick up a good book on grid systems to learn more, such as *Making and Breaking the Grid*, by Timothy Samara (www.amazon.com/dp/1592531253/).
- **Think about tool compatibility.** As you are selecting your wireframing tool, think a bit about whom you'll be sharing these documents with and how editable they'll need to be. This may influence your choice of tool. If you are going to be handing wireframes off to graphic designers, integrating well with Photoshop may be a priority (which would argue for one of the Adobe products). If it's okay to just PDF the wireframes and send them around, pretty much any tool will work. But if you'll need to share ownership of the wireframes with other people and you're the only Mac user while everyone else is on a PC, you may want a tool that "plays nice" with the PC (for example, *not* Omnigraffle).
- **Consider novel techniques.** Design collage is a method that is similar to wireframing but approaches things from a more inclusive and less technical angle. In design collage, rather than design a screen from scratch, you literally collage a screen together from common interface elements (see Figure 7.25). For example, print out sample widgets from sites or products that you like (or pattern libraries can also be a good source) and then, with scissors, blank paper, and tape, begin to piece together a design that seems to have the right kinds of elements. You may need to modify some widgets by sketching over them. You may also need to make some new ones. The basic idea is to use found inspiration as your starting point—a great way to circumvent the daunting feeling of starting with a blank page. For teams of one, design collage can also be a fun group exercise, if you want to bring non-UX folks into the wireframe process through an inviting, inclusive activity.

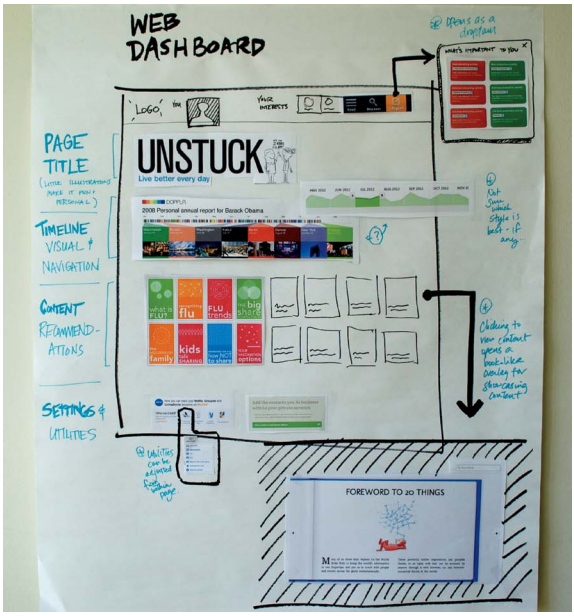


FIGURE 7.25
A Web page that has been assembled through design collage. The next step would be to turn this into a wireframe.

- **If you work remotely...** Design can be a tricky part of the process for remote workers. Some points require total heads-down focus (great for being remote). However, some points require quick iterations, lots of subtle feedback, and an astute reading of body language to understand how people really feel about it (better in person). There's also a lot of talking and explaining that happens during this time, and doing it over the phone is definitely harder than doing it in person. There's often a point somewhere about halfway through the design work ... when things finally seem to be taking shape and—surprise!—suddenly it all seems to go off the rails, and your colleagues start to express big concerns about the design direction. This is when it can be most difficult to be far from the rest of the team.

  Often, this moment coincides with the point at which designs have moved out of the comfortably ambiguous sketching phase and are starting to take a definite (and definitely digital) form. It may be that finally seeing something definitive and tangible causes people to get worried about all the things that aren't right yet. Fearing that they're being locked into a direction that's not all there yet, people sometimes freak out. I call this the *design triage period*. This is definitely a time to be with your team in a high-touch, face-to-face way, if you can. If possible, plan ahead and expect that there will be a design triage during the wireframe period, and expect to be onsite and in person with your team for a few days in the middle of it.

If You Only Do One Thing...

The methods in this chapter show the range of considerations that you have to think about when doing user experience design, from the core positioning of the product, to what different forms the user experience could take, to the tactical nuts and bolts of how the design will ultimately function. The underlying spirit of it all is that design should be an exploratory and inclusive process that you help shepherd other people through.

So if you really want to get bang for your buck, focus on "Sketchboards." They are your secret weapon for getting people involved, excited, and engaged. "Sketchboards" will not only help other people see how the user experience design process works, but they'll also help you improve upon your designs with the help of others.

CHAPTER 8

Testing and Validation Methods

Testing and validation methods help you figure out if your design will actually work. Will people be able to use the product or service as intended? Does it trigger positive emotional responses? How fluid and seamless does the user experience feel overall? Sometimes this kind of work is referred to as "usability" or "usability testing"—where the emphasis is clearly on whether you can use the product without error. Usability is part of it, but it's not the whole story. You'll also want to validate the emotional impact created by the experience, the fluidity of the product or service, and how well the overall product paradigm matches the mental models that people bring to it.

There's a popular misconception that this kind of research has to take a lot of time and effort to be done right. That's not the case. Whatever enables you to validate designs quickly with real people and gain confidence that the design is moving in the right direction is fair game. The testing and validation methods in this chapter can be done on the quick and on the cheap. In this chapter, we'll cover:

- **Paper and Interactive Prototypes.** Does it work and feel as intended?
- **Black Hat Session.** What areas of the design could be improved?
- **Quick-and-Dirty Usability Test.** Can people use this product as intended?
- **Five-Second Test.** What impression is created by a specific screen, step, or moment within the product?
- **UX Health Check.** Can you measure the baseline quality of a user experience and assess changes in quality over time?

METHOD 19

Paper and Interactive Prototypes

Does it work and feel as intended?

Prototypes are semi-functional models of a product that help you test how it will work and feel. Prototypes can vary widely from the crudest paper-based explorations to highly realistic, functional models. This basic approach—idea first, then prototype, and then further improvement based on what you learn—is a powerful and time-endorsed method for any type of new product development. And it's an excellent practice for you to get into as a team of one because people expect UX practitioners to drastically improve the product design. Some skilled UX practitioners just naturally know how to do that, but if you're (like me) not always exactly sure of what

needs to happen to make a killer design, prototyping and iterating give you a method where you can comfortably trust your gut and still give yourself space to learn and improve as you go.

Average Time

Varies based on format of prototype. You can turn wireframes into a paper prototype in just a few hours or less. Building a more functional prototype with working code can take multiple days.

Use When

You want to validate the direction prior to investing the time and resources to make it fully real. Often, you'll discover that an idea doesn't work quite as well as you originally imagined. Discovering this information early on enables you to modify your design in a relatively cheap and efficient way, and to evolve the design with real-time feedback.

Try It Out

1. **Think about the purpose of the prototype.**

   Different points in the process argue for different types of prototypes. Ask yourself what type of validation you are trying to do and select the appropriate tool. Here are some different forms a prototype might take, depending on your goal:

   - To validate early concepts, a paper prototype (just static pictures or sketches representing a few select screens or moments in the product) should be enough.
   - To get a sense of how a sequence of screens or moments flow together, a dummy clickable prototype usually suffices to illustrate how a discrete experience will unfold. A "dummy" clickable prototype includes the bare minimum of interactivity. These types of prototypes are often created by putting static pictures together in some software that enables you to create simple hyperlinks or hotspots to simulate the sense of interactivity. Fireworks does this well, but you can also use simple tools like PowerPoint, Keynote, or Adobe Acrobat to create a dummy clickable prototype.
   - To simulate intended interactions as realistically as possible more robust prototyping tools may be needed. You may need prototyping tools that enable you to integrate basic conditional logic. Popular tools for this include Balsamiq, Axure, iRise, Flash Catalyst (from Adobe), and good old-fashioned HTML. If you have technical knowledge, you can also prototype directly in

whatever the target technology is, which is arguably the most efficient because you may be able to repurpose the prototype into production code. This type of prototype can be useful when you want to do rigorous usability testing before actually building the product, or when you want your colleagues or potential clients to get a realistic sense of what it will be like to use the product.

2. **Make your prototype.**

   This is the fun part. Depending on your prototype fidelity and tool, this may be as simple as cleaning up some wireframes and printing them out, like the paper prototype in Figure 8.1, or it may require more time for writing code or setting up software to behave as you intend.

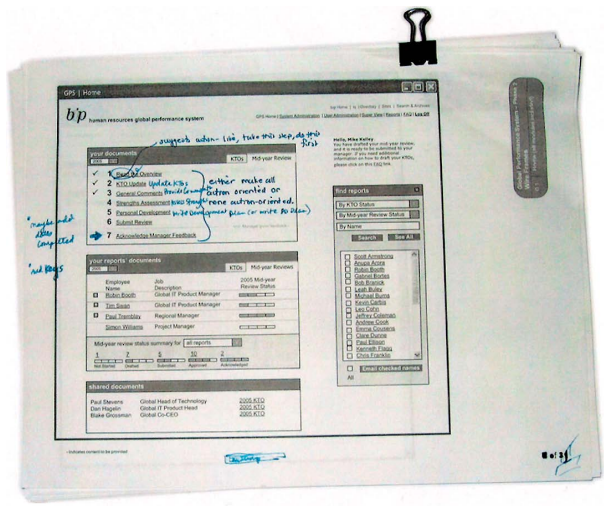


FIGURE 8.1
Here, wireframes have been repurposed as a quick-and-dirty paper prototype.

A couple of things to think about as you work on your prototype:

- Typically, a prototype shows a sequential experience. There is a beginning, middle, and end that correspond to how somebody would (ideally) move through the product. To structure your prototype, plan out your beginning, middle, and end on paper, and think about the states or screens that make up this sequence. Think about how minutely you want to illustrate the subtle transitions that take someone from one moment to the next in your

product. For example, do you want to show how a user might move from field to field in an online form and what validation messages might appear, or is it enough to just show an empty form, followed by whatever screen people would see after they filled it out? The answer depends on what you're trying to validate. If the purpose of the prototype is to show how form errors should be handled, then field-by-field is probably the way to go. If it's to show how someone can create a profile and then get started using an app, maybe form-level interactivity is overkill. The main thing is to think carefully about which states you will need.

- A design is the content and information within it, so it's great if you can test the comprehensibility and usefulness of the information—the content, the data, and so on—just as much as you're assessing the flow and functionality. Put a little thought into the placeholder content you'll be including in your prototype. While people are remarkably flexible in looking at and responding to in-progress designs, it turns out that with more realistic content, you can more easily make sense of what you're seeing. If possible, seed the prototype with reasonably realistic data to enable observers to see how information will unfold as they progress through the experience.

3. **Validate the prototype with yourself and others.**

   Use the prototype to observe how someone would really interact with the design if unaided and left to his own devices. To do this, put the prototype in front of a volunteer or a representative user and give him a task. Start at the beginning of the experience that you've prototyped and ask him to show you what he would do in order to complete the task. What would he interact with? What would he touch or click on to complete his task? Remind him that his only goal is to complete the task you've given him. Ask him to explain what he thinks he is seeing at each step along the way. Undoubtedly, you will see things that surprise you once you see people interacting with the design. From this, either one of two wonderful things happens. Either you learn that the design works as intended, which is great. Or you learn what's not working well yet, and you get some ideas for how to improve it—and that's great, too.

Tips and Tricks for Paper and Interactive Prototypes

- **Know when to prototype and when not to.** Not everything you design has to be prototyped. Prototyping can save you time, but making a prototype takes time, too. You want to be sure that you're investing the time to validate something that really needs to be validated. In general, prototypes are ideal for validating new or nonstandard interactions or products, or for testing parts of the product that are simply too important to get wrong. To figure out what parts of the product are good candidates for prototypes, you can plot features and functions on a Critical/Complex graph like the one shown in Figure 8.2.

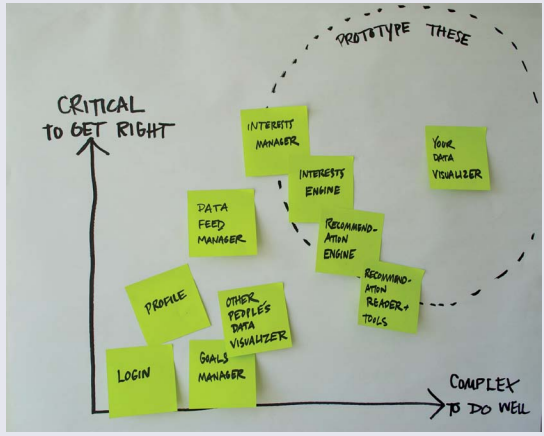


FIGURE 8.2
A Critical/Complex graph helps you identify which parts of the product are most important to prototype.

- **If you work remotely...** Prototypes are almost by definition incomplete. (If they were fully complete, they'd be the finished product.) That means that with any prototype, there's always a certain degree of imagination required to envision how the rest of the product functions beyond what has been prototyped in detail. If the viewer isn't familiar with how the prototype is meant to work, confusion can ensue. For that reason, unless the prototype is very functional and self-explanatory, schedule time to review it with the team—by phone, if not in person. Don't just release the prototypes into the wild and ask people to send feedback. If you are doing usability testing with the prototype, invite the team to observe remotely using video conferencing or screen-sharing software.

METHOD 20

Black Hat Session

What areas of the design could be improved?

Black Hat sessions are inspired by Edward DeBono's *Six Thinking Hats*. "Six thinking hats" is a facilitative framework where teams adopt deliberate mental attitudes in order to make group work more dynamic and directed. With a group discussion using six thinking hats, each individual figuratively puts on a hat of a certain color. Each color signifies a particular point of view. For example, there's a hat for optimism (the yellow hat), one for emotion (the red hat), one for creativity (the green hat), etc. There's also a hat for judgment, negativity, and skepticism, and that is the black hat. A person wearing the black hat is obliged to point out weaknesses or risks, and to be frank about what's confusing or seems like it could be further improved.

All of the hats are interesting, but for the purposes of design critique, the black hat is especially powerful. It's a quick framework that can put your teammates in a state of mind that enables candid and productive feedback on designs. This is valuable for several reasons:

- People don't necessarily know how to give critical design feedback. This can be even truer for your non-UX partners. When presented with a set of wireframes, it can often be hard to know where to start in evaluating them. For someone who is unaccustomed to the experience design process, it may be difficult to know if what you're looking at has issues or not. A Black Hat session gives a group of people permission to call things as they see them, which can release them from any worry about whether their feedback is relevant or even correct. Black Hat sessions provoke honest and constructive conversations.
- Because a Black Hat session is all about pointing out the hard things, it does a few very important things. First, it gives anyone who is unhappy with certain aspects of the design a constructive forum for sharing his concerns and instills confidence that he is being heard. Second, it creates a safe place where people who are less comfortable giving negative feedback can express their concerns as well. Third, it puts all of these data points into a format that you can see, track, manage, and take charge of.

- By running a Black Hat session, you show that you are not protective and defensive about the designs that you are creating, and that you are serious about doing what needs to be done to make a great product. It also shows that you are the driver of a process where designs get better and better through continuous input and iterative improvement. Figure 8.3 shows what a typical Black Hat session looks like.

FIGURE 8.3
A cross-functional team conducting a Black Hat session.

Average Time

30–60 minutes

Use When

- You're very close to the designs, and you need honest feedback on what's working and what isn't.
- You sense that the team is holding back or not fully engaging in design reviews.

- You want to do targeted reviews with subject matter experts (for example, technical feasibility reviews with the engineering team).

Try It Out

1. **Make time for a group work session.**

   Once you have designs in a shareable form, schedule a Black Hat session. Block off an hour on the calendar, find a room or area with large, usable wall space, and assemble a group of people to help you critique the designs. It's ideal if this group is actually the cross-functional team that works on the product together, but barring that, even a group of friends or uninvolved colleagues should be able to provide feedback on potential stumbling blocks from an end-user perspective.

2. **Explain the rules.**

   With the group assembled, tape to the wall any designs you want to critique. Explain the rules of the Black Hat session. Everyone has one job and one job only: to assume the most critical, judgmental perspective they can muster, and look at the designs from that point of view. Ask participants to write down every problem or issue they see on a sticky note (one issue per sticky note) and place the note on the designs near where they spotted the problem. One easy way to "put on" the black hat is to pretend that you are a grumpy and skeptical user who is short on time and trying to do four different things simultaneously. Or pretend that you're a tough and very senior leader who will be approving these designs before they are considered final.

3. **Start the clock.**

   Give the group 15 to 20 minutes to walk through all of the designs, reflect on what they notice, and write their sticky notes. You can have participants do this as a silent exercise, or you can invite them to discuss what they're seeing as a group. You can participate as well, writing your own sticky notes. Either way, make sure that everyone is writing lots of sticky notes. If they seem hesitant, you can give them some guidance as they go. Ask them things like:

   - When you look at each screen or step, do you understand its fundamental purpose?
   - What jumps out at you? Is it what *should* jump out at you?

- Do you know what you would click on or touch to advance to the next step?
- What questions do you have about the information and functionality that you're seeing?
- Are you satisfied that this is a reasonable number of steps?
- Is there anything that feels too complicated or cumbersome?
- Is there any language that doesn't make sense? Instructions? Labels on buttons? Anything else?

4. **Review and look for themes.**

   After all the sticky notes have been written, invite the team to step back and look at other people's sticky notes, looking for themes and issues they might have missed.

5. **Discuss and synthesize.**

   Now, engage the group in a discussion about the big themes that emerged. You may find that the issues identified run the gamut from language, flow, and ease-of-use, all the way to core assumptions about the design concept. That's great. You've just gotten a lot of help to make the design even better. During the group discussion, record the points on a flipchart or white board. That list effectively becomes the synthesis of all the individual sticky notes. Close with a discussion about what's most successful in the designs, in order to end the session on a positive note. Or close by discussing the top areas that need to be improved and what the next steps for making those improvements are.

6. **Update the designs.**

   After the meeting, revisit the designs to address the issues that the group identified. Some may be simple, quick fixes. Some may require more thought and rework to the designs.

Tips and Tricks for Black Hat Sessions

- **Use them whenever, wherever.** Black Hat sessions don't require a lot of prep and material—just some people, some designs, some Post-it notes, and a little bit of time. That makes a Black Hat session a durable and self-contained pop-up exercise that you can use whenever and wherever it's helpful. For example, if you're having a difficult design review meeting where the team seems to be rehashing the same issues again and again, call a timeout and run a Black Hat session. You can even do these by yourself, as a form of quality control.
- **Focus feedback.** Black Hat sessions can be general, as described above, but they can also be focused on specific topics. A Black Hat session that focuses on, say, technical feasibility can be a great way to quickly involve engineering and identify designs that may prove problematic from an implementation perspective. Similarly, you can run Black Hat sessions that are focused on content, usability, conversion, pretty much anything.
- **If you work remotely…** Giving critical feedback can be uncomfortable. So can receiving it (even if you're the one requesting it). For that reason, it's far preferable to do this sort of activity in person. The in-person dynamic makes it easier for you to read non-verbal cues, diffuse any awkwardness, and encourage your colleagues to be open and honest. It also makes it easier for you to use things like humor to defang the process. If you can't do this in person, here are some tips for conducting this kind of review remotely:
  - Set expectations as you would at an in-person session: explain that you need the team to provide critical feedback; set time limits; and provide a mechanism for them to capture and share their thoughts screen by screen and one by one.
  - Make the feedback visible by adding annotations directly within screen sharing software. Or use a tool like Usabilla (http://usabilla.com/) to get your team to go through the product and give feedback asynchronously.
  - Regularly remind them that this kind of feedback can be uncomfortable to give, but that you really need their honesty and candor to do your work well. Give them permission to say hard things.

METHOD 21

Quick-and-Dirty Usability Test

Can people use this product as intended?

A quick-and-dirty usability test is a natural output to many of the design methods described in Chapter 7, "Design Methods." The essence of the quick-and-dirty usability test is that you do it quickly—like the name says. With this method, you'll forego rigor and perfectionism to make it possible to get rapid feedback on designs. You'll let go of recruiting and scheduling time with real users and just test the designs with anyone who's available. Think of it as putting the design in front of the first person you find (who is unfamiliar with the product) and seeing if they can make sense of it.

Of course, ideally you should test designs with people who truly represent the intended end-user, and if you have the time and team support, you should go that route. But if you're just trying to get a gut check on whether a design direction works or doesn't, a fresh pair of eyes can help you see things from a new perspective and settle wavering questions.

Average Time

As little as 10 or 15 minutes per person, whenever you need it.

Use When

- At any point during the design process when you want to do a quality check on the designs.
- As often as possible to check your work along the way.

Try It Out

1. **Find someone, anyone.**

   As you're working on a design, when you want to see if it makes sense to others, print out the design or grab your laptop and wander over to anyone who hasn't seen it yet. This could be someone who sits in the desk next to yours, someone you encounter walking down the hall or in the cafeteria, or if you truly work alone, a friend or family member.

2. **Ask them what they're seeing and how they think it works.**

   Think about the purpose of the page, screen, or section of the design that you're working on. What are the main things people should be able to use it for? With this list of primary tasks in mind, show your

design to your volunteer. Ask her how she thinks she could interact with this design to accomplish a particular task. If there are multiple screens or steps that you're designing, proceed through each screen, asking her to explain what she's seeing and what she would do to advance to the next step. That may only take 5 minutes, or it might take 20.

3. **Find a few more volunteers.**

   Once you've shown your design to one person, try to find a few more people to run through the same process. Your colleagues may enjoy getting involved, since it's a break from their normal routine and shows that you value their perspective.

4. **Iterate the designs.**

   If you identify anything that's especially confusing to people or that they interpreted differently than you had intended, go back and revise the design.

Tips and Tricks for Quick-and-Dirty Usability Tests

- **Not for expert users.** Quick-and-dirty usability tests are preferable for products that don't have a highly technical purpose or audience (where the average person has a better chance of being a reasonable stand-in for your actual users). If you do have a very technical product and you're trying to run a quick-and-dirty usability test, you should try to find someone who is a good stand-in for a typical user. At a minimum, you may need to spend a few minutes up front explaining some concepts and terminology.
- **Be willing to stop and fix things.** If you discover after your first few conversations that something in the new design is just not working for people, stop and fix the design before continuing. Ultimately, it's more productive to test three different designs of progressively improving quality with two people each than to test one bad design with six people.
- **If you work remotely...** Enlist the help of family, friends, acquaintances, or people you meet on the street. You can also use online tools like OpenHallway (www.openhallway.com/), Chalkmark (www.optimalworkshop.com/chalkmark.htm), or TryMyUI (www.trymyui.com/) to create test scenarios and record users going through these scenarios remotely. TryMyUI also finds test participants for you.

METHOD 22

Five-Second Test

What impression is created by a specific screen, step, or moment within the product.

First popularized by Christine Perfetti at User Interface Engineering, a five-second test is a lightning fast but surprisingly insightful method to quickly assess the information hierarchy in a product. Read more at www.uie.com/articles/five_second_test/. A five-second test helps you see how clear and memorable a given moment in the product or service is to users (see Figure 8.4).

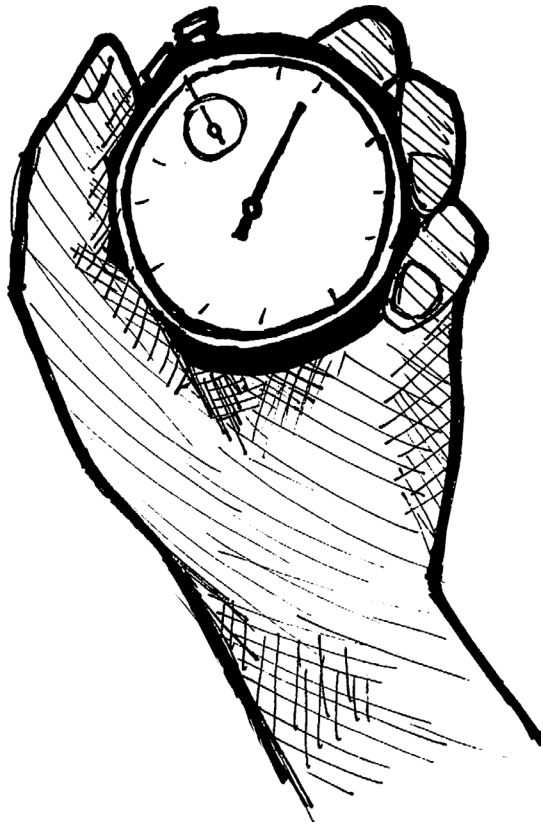


FIGURE 8.4
In a five-second test, show a design to a user for five seconds, and then remove it from sight and ask her what she remembers about the design.

Like a quick-and-dirty usability test, a five-second test can and should be done regularly to check your work as you progress through the design process. You can even combine a quick-and-dirty usability test with a five-second test for a rapid but rich round of validation. In a five-second

test, you basically expose the user to a screen or moment in a product, ask her to look at it for five seconds, and then remove the screen from view. Once the screen has been removed, ask her what she remembers seeing, and what she thought the overall purpose of the page or screen was. Considering that people often use products in a distracted, multi-tasking state, the five-second test is actually a pretty good indicator for how people really experience your products.

Average Time

5–10 minutes per screen

Use When

- You want to test the information hierarchy of a page, screen, or state.
- As often as possible to check your work along the way.

Try It Out

1. **Find a volunteer.**

   Find someone to test your designs on. This can be anyone who is handy (as in the quick-and-dirty usability test) or representative users. Explain that you are going to show your volunteer a screen in a product, but only for five seconds, after which you'll take it away and ask her some questions about it.

2. **Commence the five-second countdown.**

   Show your participant the design that you are testing and silently count off five seconds. You can do this in person by showing her a printout or a design on the screen of your computer, mobile device, or tablet. If you're doing this remotely, you can do it through screen sharing software, such as WebEx, Skype, or Adobe Connect.

3. **Ask the volunteer what she remembers.**

   After five seconds have passed, remove the picture from view. Now ask your research participant what she remembers seeing on the page or screen. Also ask her what she thinks the purpose of the page was, and, if she is unfamiliar with your product, what she thinks the product was.

4. **Did she get it right?**

   Did she notice the most important messages or information that you're trying to convey in that moment? If not, your information hierarchy may be off. Did she correctly interpret the purpose of the

product and the screen? If not, the balance of messaging and basic affordances (or, what it looks like you can do with that page) may need more work. Could she correctly identify the type of product this is? If not, you may need to think about navigation, branding, or messaging.

5. **Repeat regularly.**

   Repeat as many times as needed to vet key screens or moments in the product.

Tips and Tricks for Five-Second Tests

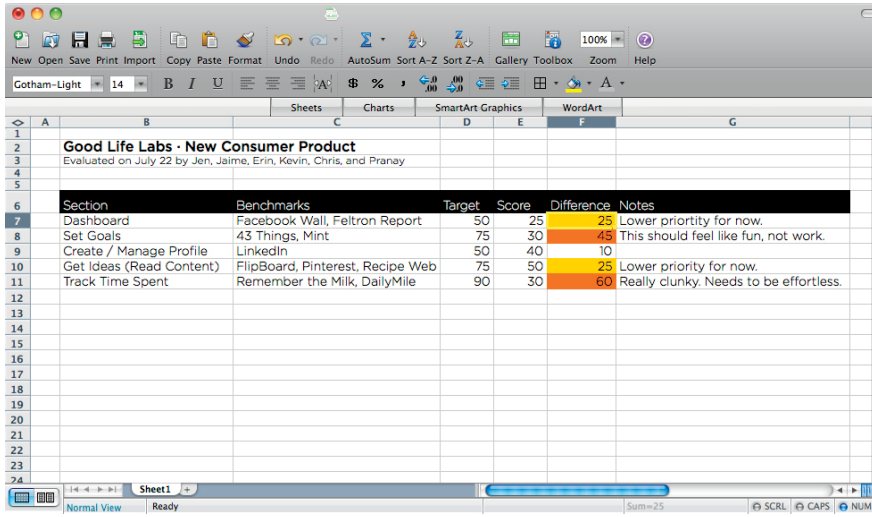
- **Test a variety of screens.** This is a great way to validate important parts of a product, like the start screen or the home page. But people sometimes enter products through the back door, too. They poke around online; they save bookmarks; they follow links in emails. To test that the product design is robust at all levels, consider running five-second tests on random lower-level pages as well.
- **If you work remotely...** Online tools for this sort of testing are getting more sophisticated all the time. Check out FiveSecondTest (http://fivesecondtest.com/), Verify (http://verifyapp.com/), or Clue (www.clueapp.com/).

METHOD 23

UX Health Check

A UX health check measures baseline quality of a user experience and assesses changes in quality over time.

In a UX health check, you regularly assemble a cross-functional team to do an audit on the quality of the product's user experience. This technique was developed by Livia Labate and Austin Govella while at Comcast. It's a way to quickly figure out how well the team feels the product is currently measuring up against user experience expectations (see Figure 8.5). This is a quick, rather unscientific method, but it has the benefit of inclusivity; you are establishing and measuring this baseline with the help of your colleagues. If you conduct this process regularly, it enables you to demonstrate and agree collectively on changes in quality over time.



Good Life Labs - New Consumer Product

Evaluated on July 22 by Jen, Jaime, Erin, Kevin, Chris, and Pranay

Section	Benchmarks	Target	Score	Difference	Notes
Dashboard	Facebook Wall, Feltron Report	50	25	25	Lower priortity for now.
Set Goals	43 Things, Mint	75	30	45	This should feel like fun, not work.
Create / Manage Profile	LinkedIn	50	40	10	
Get Ideas (Read Content)	FlipBoard, Pinterest, Recipe Web	75	50	25	Lower priority for now.
Track Time Spent	Remember the Milk, DailyMile	90	30	60	Really clunky. Needs to be effortless.

FIGURE 8.5

An example of a UX health check spreadsheet.

Average Time

1 hour on a recurring basis (could be weekly, monthly, quarterly, and so on)

Use When

You want to start tracking the quality of UX over time and don't have other formal measures in place.

Try It Out

1. **Designate a team.**

   Identify a cross-functional group of people to be the health check team, and set up a recurring meeting: monthly, quarterly, weekly, or whatever duration makes sense for your product. Ideally, this is the team who is responsible for the product on a day-to-day basis.

2. **Break the product into sections.**

   Looking at your overall offering, break it down into sections or areas of focus. This could correspond to the sections of the product from a navigational perspective (for example, registration, account, homepage, etc.). Or, alternately, this could be layers of the experience (content, brand, interactivity, cross-channel consistency, etc.)

3. **Set competitive benchmarks.**

   For each section or area of focus, pick a relevant competitive benchmark to serve as an inspiration. For example, you want your product suggestions to be as good as Amazon's. Or you want your cross-channel consistency to be as good as Apple's, and so on.

4. **Set a target.**

   Next, for each of those sections, decide how good your product actually needs to be, compared to its competitive benchmark. You may not be able to make your cross-channel consistency 100% as good as Apple's, but maybe 50% as good would be pretty great. As a team, assign a target percentage for each section and its benchmark. As you discuss why you've chosen the target percentage that you have, note and document your rationale. This is so that you and the team can remember your thought process in the future and explain it if anyone asks.

5. **Measure yourself against the benchmarks.**

   Now, for each of these sections, give the product a rating. You might want to be 50% as good as Apple, but after discussion, you decide that you are presently only 25% as good. Discuss how well each section measures up against its competitive benchmark, and give each section a percentage number that reflects where you think you are today. The team may need to have a bit of discussion to arrive at a number that everyone can agree on. That's good! The discussion is the most valuable part.

6. **Spot the biggest opportunities for improvement.**

   Once you've agreed on your rankings, identify the biggest gaps between your target and where you stand today, and then discuss how you're going to improve it.

7. **Repeat regularly.**

   As you continue to evolve the product, keep checking back and measuring yourself against your benchmark. Where your product is improving, congratulate yourselves. Where your product is underperforming relative to your baseline, focus on your next round of improvements.

Tips and Tricks for a UX Health Check

- **Don't pretend it's hard science.** This is definitely an unscientific approach. Basically, it takes a subjective measure—who you like and want to be like—and layers on further subjectivity by asking how good everyone thinks you are compared to them. Don't pretend that this is anything but a thumb-in-the-wind measurement. However, what is effective about this technique is that it gives a cross-functional team a shared and familiar language to talk about product quality. Equally effective, it's a low overhead activity that you can do on a regular basis. This enables you to develop a long view of your own product and to look backward and forward in time in discussing what you're improving now, next, and later.
- **Use it to prioritize.** One of the subtle benefits of this method is that it helps you easily see where to prioritize your resources and effort. Often, there is a need to improve the user experience throughout the product, but wholesale redesign isn't realistic. You may want to rebuild from the ground up, but a far more pragmatic approach would have you focus on improving a small set of things at a time. The group-led process of the UX health check makes it clear to everyone (including you) what that handful of priorities should be.
- **If you work remotely…** You can do this process via a conference call with screen sharing to ensure that you're all looking at the same part of the product as you provide your assessment. Keep in mind that the discussion is the most important part of this process, so resist the urge to turn it into an asynchronous activity where everyone just sends in his or her individual scores.

If You Only Do One Thing…

Falling in love with your own ideas is an ever-present risk in design. Being proud of your work is great, but you never want it to prevent you from seeing that designs can evolve, simplify, and improve. This chapter offers a variety of methods for assessing how well a design is working—quickly, and with minimal overhead. The spirit of this chapter is simple: always be more curious about what *isn't* working than what is.

So if you only have time to try one thing from this chapter, focus on the "Black Hat Session." Of all the methods in this chapter, the Black Hat session is the fastest and most blunt instrument for satisfying your curiosity about what isn't working. Black Hat sessions clear away all the niceties and expose bad or unworkable designs with striking efficiency.

CHAPTER 9

Evangelism Methods

In addition to actually designing great user experiences, it's important that a UX team of one spends time building awareness of UX. Often, we think of this as spreading the word of UX, and so the methods in this section are described a tad facetiously as "evangelism" methods. Evangelism would seem to imply that it's about preaching to the unconverted. Well, it is, and it isn't. While growing support for UX certainly requires introducing it to new people, we also don't want to appear tone deaf to the other side of the conversation. In fact, it's the conversation that's key. The methods in this section are about creating awareness, to be sure, but more importantly, they're about provoking conversations that will help you identify opportunities for UX, build support for your work, and learn more about how you can help other people using the skills of user experience.

The happiest and most successful teams of all talk about the same thing: having the support of peers and leaders. It isn't required that your manager and colleagues are also UX aficionados. But it is important that colleagues are supportive of what you're trying to accomplish, and that they have an open mind. If you don't have these kinds of supportive relationships, these methods will help you start making them. This may not even be that difficult. User experience has gotten a lot of interest in recent years. It's quite possible that people you work with are already familiar and interested. These methods will help you identify and mobilize your base of supporters. In this chapter, we'll cover:

- **Bathroom UX.** Builds awareness of user-centered design and keeps people interested in your work.
- **Mini Case Studies.** Summarizes your work and turns it into compelling, bite-sized stories that you can share with others.
- **Peer-to-Peer Learning Communities.** Mobilizes support and knowledge within a community of interested colleagues.
- **Pyramid Evangelism.** Builds relationships and potential opportunities for UX in an organization.

METHOD 24

Bathroom UX

Bathroom UX is a technique for building awareness of user-centered design and keeping people interested in your work.

Bathroom UX gets its name from the environment in which it is practiced—you guessed it, the bathroom. The idea is simple: get people where you have their captive attention (for example, on the inside of the bathroom stall door) and post bite-sized notices to create awareness for UX and promote what's been going on (see Figure 9.1). Bathroom UX doesn't have to happen exclusively in the bathroom, of course. The same approach can be used in elevators, stairwells, and heavily trafficked hallways. The basic idea in all cases is to do a little informal promotion and awareness building.

FIGURE 9.1
This flyer reminds readers of a core principle of UX and challenges them to get involved.

Average Time

An hour or two to design flyers and post them around the office.

Use When

- You want to build awareness for UX quickly, creatively, and with minimal effort.
- You have recently completed some UX-related work that you'd like to showcase.

Try It Out

1. **Think about your message.**

   One approach is to create a UX newsletter. Include some news from recent projects, their outcomes, and how to connect with you if people are interested in learning more. This is effective if you're trying to build interest in UX services, and you work within an organization where you see lots of potential opportunities for UX. Another approach is to build awareness of UX resources. That could be you. Or, if you have or know of a Web page or a place where people can go to learn more about UX, draw attention to that. Or you can use bathroom UX to simply educate people about new concepts. For example, what is user research and how does it differ from market research? In all cases, include some information about how to get in touch with you if someone is interested in learning more.

2. **Make it fun to read.**

   Design a one-page flyer (or a few different types of flyers that work together to form a little campaign). Show your flyers to a friend to make sure that they make sense and cast you and UX in a flattering light.

3. **Distribute.**

   Print a bunch of copies of your flyers and post them around the workplace. (Remember to clean up after yourself a week or two later by going around and removing any flyers that are still hanging.)

4. **Repeat.**

   Plan to do this again once every few months. The UX avenger strikes again! A surprising location, plus a novel message will definitely get people's attention.

Tips and Tricks for Bathroom UX

- **Permission vs. forgiveness.** Should you notify someone or get advance permission to do this? You will be the best judge of what's acceptable where you work, but generally in this type of situation my motto is it's better to ask forgiveness than get permission. If you spend time beforehand getting permission and showing draft flyers to people, it can turn a simple idea into a big deal and slow the process. The whole point is that this should be light and easy to do. Whereas, if you just do it and see how people react (assuming your flyers themselves are tasteful and appropriate), usually it's not a big deal.
- **Don't be shy.** Capers like this elevate what you do from undercover UX to something that's public and you're proud of. That kind of exposure can be a little intimidating, especially if you're the shy type. Here again you will be the best judge of what you're comfortable with. However, when someone shows passion and leadership, people usually appreciate it and are attracted to it. Here, you are demonstrating that not only do you care about creating great products for real people, but you also have vision and a clear process for how to make it happen.
- **Be patient.** In contrast to the previous point, there's also the possibility that your first foray into bathroom UX won't suddenly have your phone ringing off the hook. Its intent is to begin to create awareness and familiarity with UX. Eventually, over time, what we are familiar with, we come to like better. This first batch of bathroom UX flyers may not necessarily have people banging down your door to lead the next user-centered redesign of the company's flagship product, but they do start to create awareness and receptivity, which over time helps build opportunities and relationships.
- **If you work remotely…** Turn it into an email newsletter that you send to your colleagues from time to time.

METHOD 25

Mini Case Studies

A mini case study summarizes your work and turns it into compelling, bite-sized stories that you can share with others.

Mini case studies are good hygiene at the end of every project or sizable piece of UX work you've conducted. "Mini" is a strategic choice here. By focusing on the most bite-sized of stories, you create easy-to-remember, quick-to-tell, simple-to-share anecdotes. This also makes them easier for others to hear, understand, and make sense of. By keeping them mini, you also make less work for yourself, which means that you're more likely to actually do them. If possible, see if you can tell the whole story in one page, like the mini case study in Figure 9.2. Then it's easy to print or send this one page around. Or you can put all your mini case studies together in a presentation or a document, and it becomes a self-contained portfolio of your UX work.

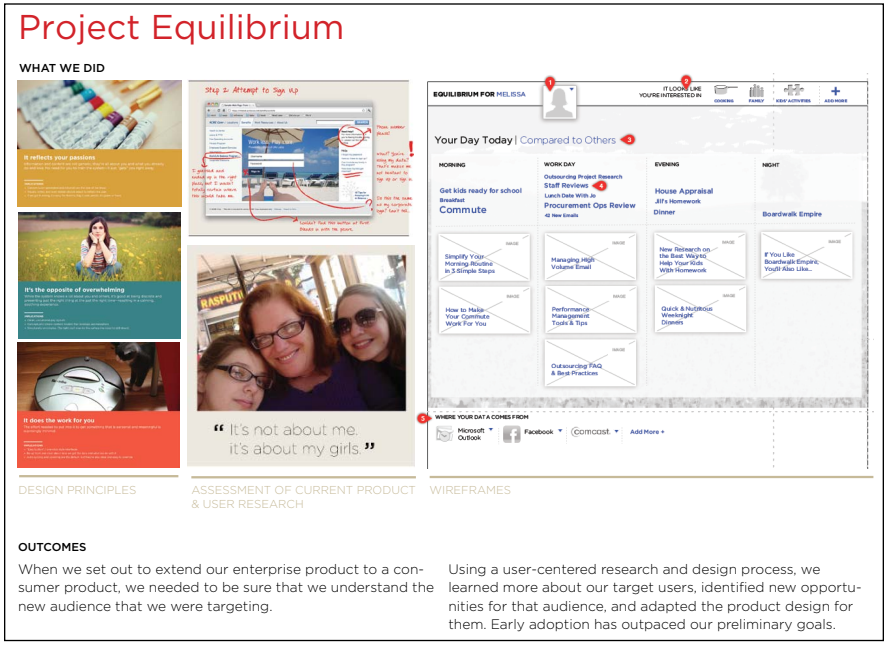


FIGURE 9.2
A sample mini case study.

Average Time

About two hours per case study.

Use When

- You need examples of past UX projects to share with colleagues.
- You want to get better at explaining your work clearly and succinctly.

Try It Out

1. **Ask yourself some questions.**

   For a given project, consider the following questions:

   - What is a one or two-sentence description of the project goals? Try to think about the why, not the what. Instead of "redesign the website," perhaps it could be to "help more customers sign up (and increase your conversion rates)."
   - What did you do, and whom did you work with? Don't think too hard about this. Keep it high level. Just a few bullets will do.
   - What was the impact of your work? If you have access to any quantitative measures of impact, that's ideal here. If not, even anecdotal evidence of impact, such as customer or stakeholder quotes, is good.
   - What's one interesting thing you learned in the course of the project? People love these kinds of details. They're often described as the big "ah-ha's." If you can identify one or two, it makes your mini case study more interesting and makes people curious about what kind of ah-ha's there might be to unearth in their project or product.

2. **Gather visuals.**

   Pull together three to five interesting, attractive images—either of the final design, or of some particularly visual working documents that were developed in the course of the project. Having a few pictures in your mini case study pulls people in and makes them more memorable.

3. **Create a one-pager.**

   Put your images and mini write-up into a nicely formatted document. Ideally, it should all fit within one page.

4. **Memorize it.**

   Try to commit your mini case study to memory, so you can easily share your story when the right opportunity arises. And, of course, be prepared to send along your document when someone expresses interest.

Tips and Tricks for Mini Case Studies

- **Tell a simple story.** When you do your mini write-up, try to think about it from the lay person's perspective—or even better, the business person's perspective. UX experts tend to be interested in craft and process, so it's tempting to fill in a lot of details about the work that you did. But someone who is unfamiliar with UX is likely to have a more basic set of questions: What kind of problems does this solve? What kind of impact does it produce? How much does it cost in terms of time and resources? And is it worth it for the benefit that it gives? Try to craft your mini case study to tell that story.
- **If you work remotely…** This technique is great for remote practitioners because it produces an overview of your work that is self-explanatory and easy to share with people who are far away.

METHOD 26

Peer-to-Peer Learning Community

A peer-to-peer learning community mobilizes support and knowledge within a community of interested colleagues.

While you may be the only one practicing UX where you work, you may find that engineers, product managers, marketers, and others are all at least nominally familiar with the concept and eager to learn more. Host a peer-to-peer learning community to create a voluntary forum for sharing information that also up-levels the knowledge of user experience within your organization (see Figure 9.3). One important aspect of a peer-to-peer learning community is that everyone is interested in learning, and no one claims to be an expert. This engenders a participatory, open attitude that invites people in.

IMAGE BY BETTYX1138, WWW.FLICKR.COM/PHOTOS/BETTYX1138.

FIGURE 9.3
One example of a peer-to-peer learning community: a UX book club.

Average Time

Depends on your format, the frequency with which you meet, and what role you take. If you're the one organizing it, assume at least two to four hours of coordination effort per meeting.

Use When

A peer-to-peer learning community is appropriate at any time, but is a particularly good idea once you've built some initial awareness.

Try It Out

1. **Invite everyone.**

   Send out a broad invitation announcing the peer-to-peer learning community and inviting people to participate. Include a date and a time for a kick-off meeting, which ideally takes place in person (although remote and via video conference will work too, if that's your only option).

2. **Agree on format and goals.**

   In the first meeting, discuss goals of the community. What is everyone hoping to learn or do? How much working knowledge of UX is there, and how much do people want to learn? Record this conversation on a whiteboard or flipchart. Also, discuss what format people are interested in following to foster learning. This could take a number of different form. Any of these models can work well—or even a combination of them—to give a group just enough structure and a reason to stay engaged.

   - A book club (where everyone agrees to read and discuss a UX book)
   - A discussion list (where people can share interesting examples and links)
   - A brown bag or lunch-and-learn series (where outside presenters can be brought in, or community members can volunteer to research and share on specific UX topics)
   - A whitespace learning project (where the community decides to work together to design a solution to an interesting problem)

   Finish the meeting by agreeing on a topic, format, frequency, and date for the next community meeting.

3. **Pick a leader and plan ahead.**

   Communities generally need organizers. That's probably you, unless someone else has volunteered to organize it. You can also share responsibility, putting a new member of the group in charge week by week or month by month. If you agree to follow a format that requires some work in between meetings (for example, to find a presenter or organize an activity), be sure to plan for and block off enough time for adequate preparation. Even if your format is as simple as a book club, sending out one or two reminder emails in between meetings is a good idea, to keep the community in people's minds.

4. **Meet. Learn. Have fun.**

   Pay attention to what's working well, and what could benefit from a revised approach. Check in regularly with individual participants to see that they're getting value from the community. Continue to fine-tune and tinker with the format as needed.

Tips and Tricks for Peer-to-Peer Learning Communities

- **Estimate and block off prep time.** A common mistake with community efforts like this is underestimating the amount of time needed for organizing and administration. Try to make a realistic estimate up front of how many hours per week or month this will probably take, and be sure you're in a position to make that commitment. If not, consider asking someone to be a co-organizer.
- **Give it a time limit.** If you're not sure if your organization has the appetite for an ongoing peer-to-peer learning community, consider pitching it as a fixed-length experiment (say, three to six months). That way, you're not committing to do this forever, and there's also some urgency for people to get involved, or else they'll miss the opportunity.
- **If you work remotely…** Keeping up momentum can be difficult when you lack the in-person element. A format such as an internal discussion list may work better in this case.

METHOD 27

Pyramid Evangelism

Pyramid evangelism builds relationships and potential opportunities for UX in an organization.

The basic idea of pyramid evangelism is that you make it a priority to connect to people at every level of the organizational pyramid—at the base, in the middle, and even at the top. Instead of trying to win an executive over in one presentation, build an army of supporters throughout the organization. The approach is simple: Connect to people, introduce yourself if you haven't met before, tell them that you're interested in this thing called user experience, ask them about their own work, listen sincerely and carefully, and discuss any ways that you think UX could help.

In addition to doing your regular job, have a parallel track of influence and education that's always in the back of your mind, and seek out opportunities for one-on-one conversations to spread the word one person at a time. In pyramid evangelism, the lunch date is your most powerful weapon. Still, there are many ways to connect to people at various points in the pyramid, and the format that you use may depend in part on whom you're connecting to. The goal when connecting to people

at any level is to inspire them with interest in the user-centered design approach, and to find more opportunities to apply UX practices to improve the experiences that are being delivered by your organization.

Average Time

Ongoing

Use When

You've done the undercover UX thing and would like to start building a recognized UX role or practice.

Try It Out

- **For people you feel comfortable approaching directly, the best format is usually a casual and social conversation.**

  Ask people out to lunch, or a drink after work, or even a coffee break. Tell them that you've been working on some things that you'd like to talk with them about and you'd like their advice and input. This works well with people who you already actually feel friendly and social with. It can also be surprisingly helpful with precisely the people that you feel least inclined to spend time with—that co-worker who always seems grumpy, that person you've had some workplace tension with, and so on. Treat this as an opportunity to learn about their priorities and what they're trying to accomplish. This is less about pushing your perspective on them, and more about listening and offering to help where there's good alignment between their needs and yours.

- **For people who operate more at the "managing lots-of-stuff and always-busy" level, you can approach it like a sharing of capabilities and services.**

  Ask them if they'd be interested in learning a bit about some projects that you've been working on that use new kinds of techniques for product design. If yes, schedule a half hour or an hour for a brief presentation or walk-through of your work and approach. Leave time to discuss if they have any questions about any of it, or if they saw anything in your work that seems relevant to what they're working on.

- **For people at the most senior level in the organization, getting access to them and finding a way to connect your passion with their priorities may be understandably more daunting.**

Two good paths for connecting with these kinds of people are 1) under the guise of sharing and briefing them on project work and 2) connecting with them through the people who work directly for them. In either case, you may need to work with other people in the pyramid—to get yourself invited to a project update meeting, for example, or to get to know people at lower levels and ask them to help you represent your message higher up in the organization.

Tips and Tricks for Pyramid Evangelism

- **Give it time.** Be patient with yourself and other people, and don't necessarily expect that one conversation will be enough to win support and a home for UX. One of the most important lessons for UX teams of one is that a UX practice isn't built by delivering great projects (although it certainly doesn't hurt); it's built through relationships, trust, and goodwill over time. If you arm yourself with that expectation from the beginning, you will have the endurance, patience, and flexibility to build a good idea into a flourishing practice.
- **If you work remotely…** It's definitely easier to build relationships face-to-face. If you'll be meeting with other members of your team in person any time soon, think ahead about whom you'd like to meet with, and drop them a note in advance to set up a little extra time with them while you're there.

If You Only Do One Thing…

The methods in this chapter are all focused on building visibility and support for UX, whether that's project-by-project, with "Mini Case Studies," or moment-by-moment, with "Bathroom UX." The ultimate goal of all these methods is to built rapport and goodwill with others who could be potential supporters of UX—or, in a word, to build relationships.

So if you only have time to do one method, focus on building your relationships with pyramid evangelism. And if you don't have time for the whole pyramid, start by identifying a few key supporters and ask them to lunch. It will lay the foundation for more work together in the future. Even more importantly, it will help you feel that even though you may be a UX team of one, you are certainly not alone.

CHAPTER 10

What's Next?

PHOTO BY CHRISTIAN LAU (FLICKR)

The idea for this book was born in 2008. That's when I first saw that there were people who, like me, felt that they were staking out a user experience practice in a place where it had not previously existed. It is now five years later, and a lot has changed in the user experience field.

The Evolution of UX

Five years ago, Web and software design were the standard. Today, mobile and app design are taking the lead. Five years ago, it was more common to talk about user experiences as existing within the context of a single channel or touch point. Today, we understand that a digital product is often a full, multichannel experience, and that our job is to give people a seamless product experience even as they jump from PC to mobile to tablet and back again. Even the concept of PC, mobile, and tablet is, ultimately, very 2008. Today, digital experiences are embedded in our homes, in our cars, and in what we wear on our bodies. Today, the very idea of a stand-alone user experience seems old-fashioned. Open APIs mean that our products now exist in an interconnected ecosystem of interoperable services. The user experiences enabled by that ecosystem are sometimes awesome and, more often, still pretty fragmented.

All of this change just means more opportunities for UX teams of one. It's five years later, and there are now more UX education options, more UX practitioners, and more UX jobs than ever. Undoubtedly, many of these jobs will require teams of one who are prepared to lead multifunctional teams to better designs. And how will they do this? By focusing on the durable value and purpose of design.

The Endurance of Design

Design is the act of creating new solutions under constrained circumstances, whether those constraints are aesthetic, technological, or resource-driven. That may sound like a restriction, but actually it's a gift. Constraints, in the end, are a designer's friend. They give you boundaries, sure, but those boundaries become landmarks of inspiration that are just as instrumental for expanding your thinking as they are for limiting it.

For UX teams of one, constraints largely come in the form of other people. The product managers, engineers, marketers, and decision-makers you work with to put products into the world challenge you to be creative within constraints.

Successful teams of one know that this is the role that their teams and colleagues play, and like a master designer working with the best materials, they work within these constraints in a purposeful way. Just as much as your non-UX counterparts constrain what's possible, they also shine a light on opportunities for improving user experience. They provide supplemental thinking to your own singular point of view. They help you be a better designer. When handled confidently and patiently, your colleagues can become your own landmarks for inspiration, and they can help you make far more impact than you could on your own.

The Secret Agenda of the UX Team of One

As much as a book can have a secret agenda, here is this book's secret agenda: to give you the confidence and ready tools to take on the non-UX world as unwitting allies, essential and welcome co-conspirators in creating the human-inspired, technology-enabled world of tomorrow.

Hopefully, this book has given you some comfort and confidence in knowing that you are by no means alone—neither in your passion for user experience nor in the constraints that shape your work. You may even have seen that you're already doing a lot of the best practices and techniques that work well for UX teams of one. Perhaps, you've added some new tools to your toolkit as well. But far more than methods and tools, this book has aimed to inspire you to think about what it is that you're trying to accomplish in your work—what changes you're trying to effect, what kind of future you're trying to make possible.

If You Only Do One Thing...

While this book has focused heavily on methods, ultimately, winning the hearts and minds of the non-UX world requires more than method-by-method or project-by-project thinking. It requires you to get clear with yourself on your own master plan. A master plan might sound daunting, but it doesn't have to be (see Figure 10.1). We'll close out this book with one final method, one that's just for you:

- Clear five minutes on your calendar.
- Grab a piece of paper and something to write with.
- Quickly, without thinking too much about it, write down 3–5 things that you want to be true about your work in five years.

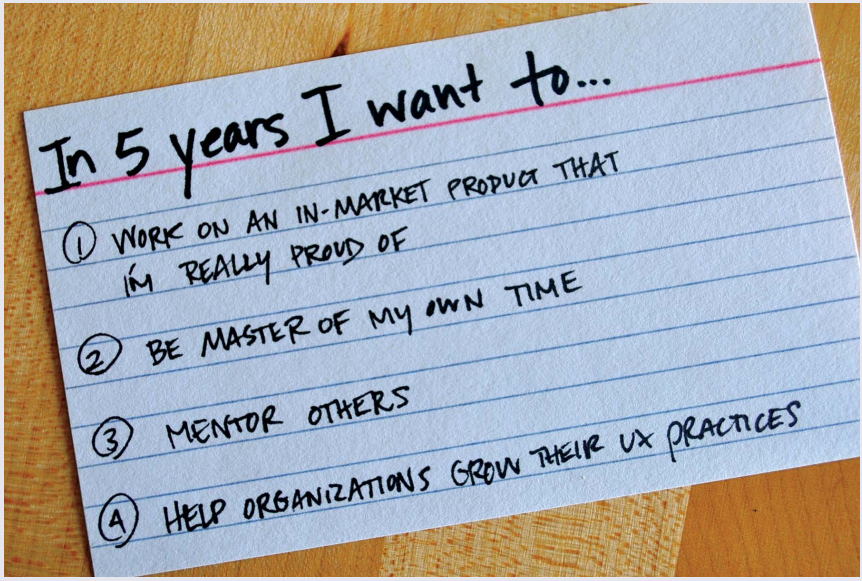


FIGURE 10.1
You don't have to name the job title that you want or the company that you want to work for—although that's certainly fine if that's what comes to mind—but think in terms of what qualities you want each day to have. Here's mine, as an example.

If you feel stuck, here are some questions you can ask yourself:

- What kind of work do I want to be doing?
- What kind of team do I want to work with?
- What kinds of products and experiences do I want to put into the world?
- What do I want my success stories to be?
- Who do I want my allies and friends to be?
- What kind of education do I want to have? How do I want to apply that education in daily life?
- How do I want to work?
- What kind of culture do I want to be a part of and contribute to?

And then, once you've got your list, see if there is anything on it that surprises you. Odds are, you may have put down something that you didn't know mattered to you. But the list never lies. There's something beautifully simple and effective about giving yourself a quiet space and a few moments of reflection to discover some hard truths.

The funny thing is, once you've admitted to yourself that this is what matters to you, it usually doesn't take five years to achieve it. You pretty much get moving on it right away.

APPENDIX

Guide to the Methods in Part II

The table below lists all the methods that are included in Part II. They are sequenced to suggest a logical order for a UX project from start to finish, although by no means do you have to do them all or follow them in order. Refer to the "Method Focus" column to determine when and why to use a particular method.

#	Method Name	Method Focus	Average Time
Planning and Discovery Methods			
1	UX Questionnaire	What do you know about your product and the user experience that it's intended to provide? What do you need to know?	1–2 hours
2	UX Project Plan	What UX practices will you employ to design a great user experience?	2–3 hours
3	Listening Tour	What are the team's priorities? How much awareness and support for UX currently exists?	5–8 hours
4	Opportunity Workshop	What areas of the product are most in need of improvement from a UX perspective?	3–4 hours
5	Project Brief	What are the expected outcomes for this user-centered design project?	2–3 hours
6	Strategy Workshop	What is your team's vision for the ideal user experience? What do you need to focus on to bring that unique experience to life?	4–8 hours

#	Method Name	Method Focus	Average Time
Research Methods			
7	Learning Plan	What do you know? What don't you know? How are you going to learn it?	1–2 hours
8	Guerilla User Research	What concerns are top of mind for users? How do they really behave? How are people using your product today?	About 2 days
9	Proto-Personas	How can you think empathetically about your customers' needs, goals, and challenges when using your product?	3–6 hours
10	Heuristic Markup	How does a user experience the product from beginning to end?	4–6 hours
11	Comparative Assessment	What are the standards and best practices that customers are likely to expect in a product like yours?	4–8 hours
12	Content Patterns	What content and capabilities do users have access to in your product? How is it structured? What is the overall quality?	4–8 hours

#	Method Name	Method Focus	Average Time
Design Methods			
13	Design Brief	At a high level, how would you describe your target design solution? What are the features and personality of the product? Who is it designed for? What activities is it intended to encourage or enable?	2–3 hours
14	Design Principles	What should the experience of using the product feel like to a user?	2–4 hours
15	Sketching	What are some different forms the product design could take?	As much or as little time as you need (as little as 30 minutes helps)
16	Sketchboards	What might the overall system or product look like? What range of ideas is possible at each point in the process?	3–4 hours
17	Task Flows	How will the experience unfold over time?	1–2 hours
18	Wireframes	How will the product look and function in detail?	Hours, days, or weeks, depending on the scope of the system

#	Method Name	Method Focus	Average Time
Testing and Validation Methods			
19	Paper and Interactive Prototypes	Does it work and feel as intended?	Varies based on format of prototype
20	Black Hat Session	What areas of the design could be improved?	30–60 minutes
21	Quick-and-Dirty Usability Test	Can people use this product as intended?	As little as 10 or 15 minutes per person
22	Five-Second Test	What impression is created by a specific screen, step, or moment within the product?	5–10 minutes per screen
23	UX Health Check	Can you measure the baseline quality of a user experience and assess changes in quality over time?	1 hour on a recurring basis
#	**Method Name**	**Method Focus**	**Average Time**
Evangelism Methods			
24	Bathroom UX	Builds awareness of user-centered design and keeps people interested in your work.	1–2 hours
25	Mini Case Studies	Summarizes your work and turns it into compelling, bite-sized stories that you can share with others.	About 2 hours per case study
26	Peer-to-Peer Learning Community	Mobilizes support and knowledge within a community of interested colleagues.	Varies depending on format and role
27	Pyramid Evangelism	Builds relationships and potential opportunities for UX in an organization.	Ongoing

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Leah started her career in the late 1990s as an opinionated Web developer. Through self-taught tinkering, she gradually made the transition to user interface design. Leah spent the early 2000s as a UX team of one in a range of financial and information service companies. In 2007, she joined Adaptive Path, a pioneering user experience design consultancy. There, she learned the secret sauce of high-performing design teams, and began to ponder how this approach could be adapted for UX teams of one in challenging organizational environments.

She writes and speaks regularly on this topic, and is a frequent presenter at conferences such as SXSW, UX Week, UX London, Agile, the IA Summit, and Webvisions. Her workshops and presentations have a reputation for being hands-on, high energy, and a little bit quirky—kind of like her.

Leah is currently a design strategist at Intuit, where she works on the future of business and personal finance. She has a bachelor's degree from Barnard College and a master's in Library and Information Science from San Jose State.

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