

Negotiating the 'Stupid' out of UX Design




Virgil Carroll

Founder / Principal Architect

info@highmonkey.com • 763.201.6040 • Roseville, MN

about me

- From the great State of Alaska
- Certified Smart Ass / plain speaker
- User Experience Aficionado
- Been building websites since 1998
- Blog: <http://www.highmonkey/blog>
- Twitter: @vcmonkey



CREDENTIALS

- **TITLE:** CEO / Technology Architect
- **EDUCATION:**
 - Instructional Design - M.Ed
 - Athletic Trainer - Certification
 - Physical Education - BS
- **CAREER 'HATS' WORN:**
 - President / CEO
 - Motivational Speaker
 - Programmer / Developer
 - Certified Athletic Trainer
 - Adjunct Professor
 - Instructional Designer
- **INTERESTS:**
 - The Steelers and Star Wars;
there's no better combo.

about high monkey

- Been around since 1998
- Based in Minnesota
- Clients throughout the US and Canada
- Specialize in saving BIG ASS websites and complex structures

agenda

- Why we're not successful
- How can we be better
- A few lessons learned

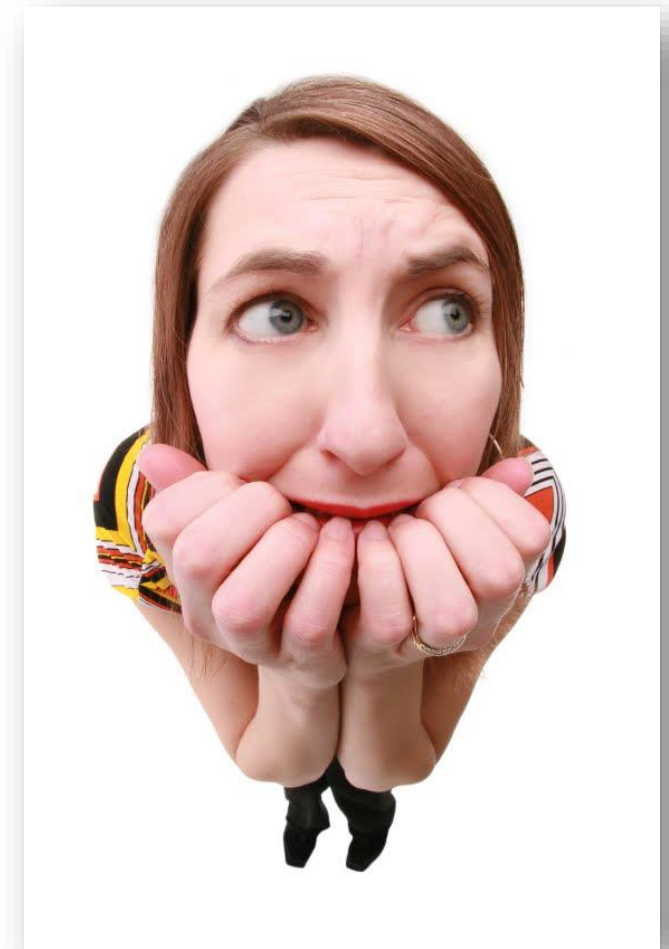
why we're not successful

There's nothing worse than a sharp
image of a fuzzy concept

- Ansel Adams, photographer

people are scared of what we do

- Often UX is about saving...something
- Business people don't understand the process
- We need to play offense, but recognize their defense
- We will always get grouped in with 'IT'



people don't' like change

- Change means different
- Used to being over-promised and under-delivered
- 'Better is good until I have to do it'



people like control

- The mine, mine, mine principle



the higher ed recipe for disaster

4 cups	Lack of administrative support
2 tbsp	Smarter than our users
½ tsp	Bitching without consequences OR You can't tell me what to do
1 pinch	Academic freedom

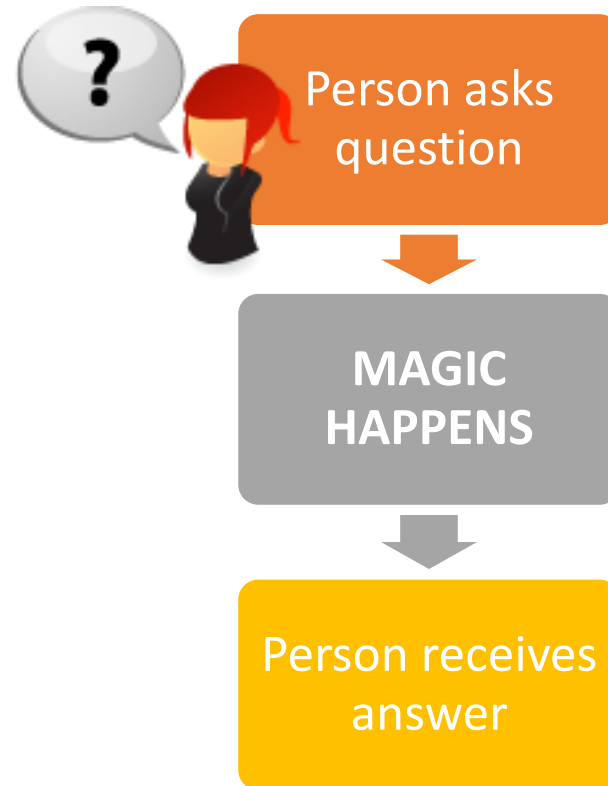


THE CONSEQUENCE



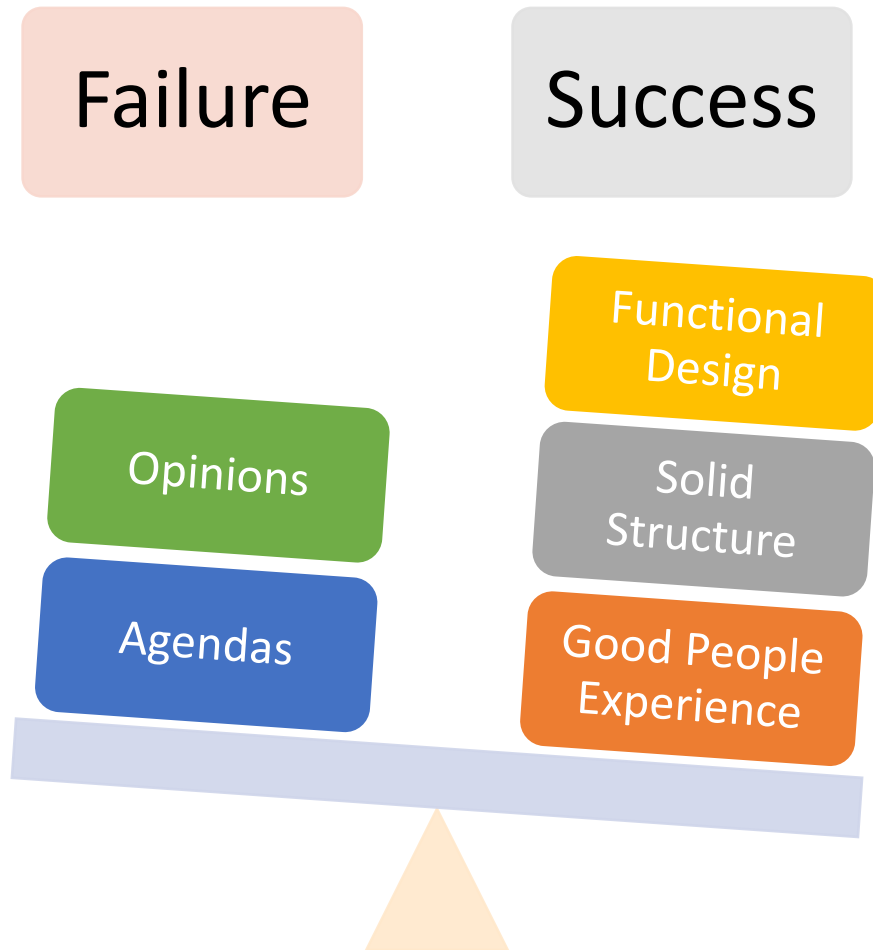
baseline: how people think about the web

- The too-easy information seeking model



How can we be better

to build a website



disciplined discovery process

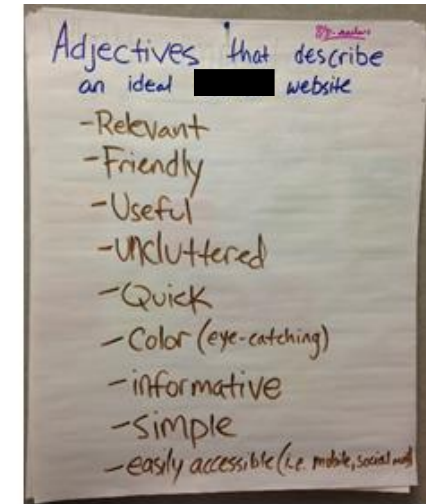


EDUCATE and INFORM

discovery workshop



Website example



discovery workshop



- An alternate format to requirements gathering and focus groups
- Based off the theories of gamification
- Get people interactively involved
- The power of the 'sticker'
- Discussion, discussion, discussion

discovery workshop



- Format:
 - 6-8 people (keep it manageable) – must not be related to efforts
 - 5-10 minutes for each brainstorming session
 - 10-15 minutes of follow-up discussion after each one
- What you need:
 - Post-It Notes (best to have a color for each person)
 - Flipboard (sticky note version works the best)
 - Pens / pencils
 - Enthusiasm and patience

discovery workshop



REMEMBER: Discovery workshops will give you a solid understanding of people's wants and desires, but its only a step in the right direction

OPINION ≠ RIGHT

in-person interviews



- Focus on open-ended question vs. leading down a path
- Get permission to 'ask for clarification'
- Concentrate these on politically challenging OR people you need serious buy-in from
- Educate, educate, educate

personas




- Helps stakeholders know you heard needs/interests
- Great visual explanation point
- Good start understanding language / vocab issues
- Prevents process from being considered too 'IT'ish


Louis Mullo – HVAC Mechanic
55 Year Old Caucasian Male

Louis is 55 years old and works as a HVAC supervisor with Lennox. Louis has been working in HVAC since he was 18 years old in an apprenticeship with his dad.

After graduating high school, Louis attended North Seattle College to get his HVAC tech certificate. He's worked in Spokane, Yakama, Walla Walla, and Olympia but wants to settle down with his wife near his brother in Spokane.

Lennox has promised Louis a promotion if he completes a 2-year degree in management. Lennox will even pay for his classes and wants him to get started right away.

FAMILY SIZE 


FAMILY INCOME  \$37,000

EDUCATION HS Diploma; HVAC tech certificate

NEEDS & GOALS Wants to pull out of field work and go into management; wants to settle near family

HABITS (BEHAVIORS) Hardworking, familiar with technology through work but doesn't use much personally


MOTIVATIONS Get a college degree to get promoted to retire securely with family

SOCIAL MEDIA USE 

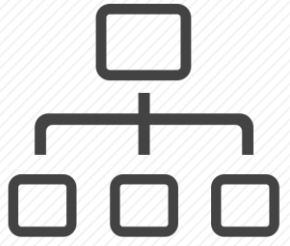
HIS RESEARCH
Louis hasn't been in a classroom since he was a teenager but does use a computer to email with his family and check the weather. But Louis has always wanted a college degree and wants a job where he can retire from in another 10-15 years, so he has motivation to complete this degree. Unfortunately, Louis doesn't know how to get started.

Louis thought about what was worrying him and made a list. Here's what he came up with:

1. What do I need to do before I enroll in my first class?
2. Do I have to sit in a classroom or can I do some things online?
3. Do people really have time to work their job, attend classes, and still have a life?
4. I've learned a lot in my job, does that count for anything?
5. What are the specific costs?
6. Who can help me decide which management program is right for me?

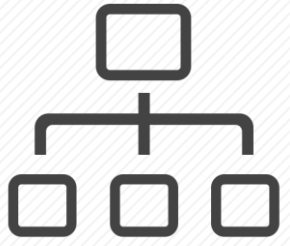
HOW HE CONNECTS


what is information architecture



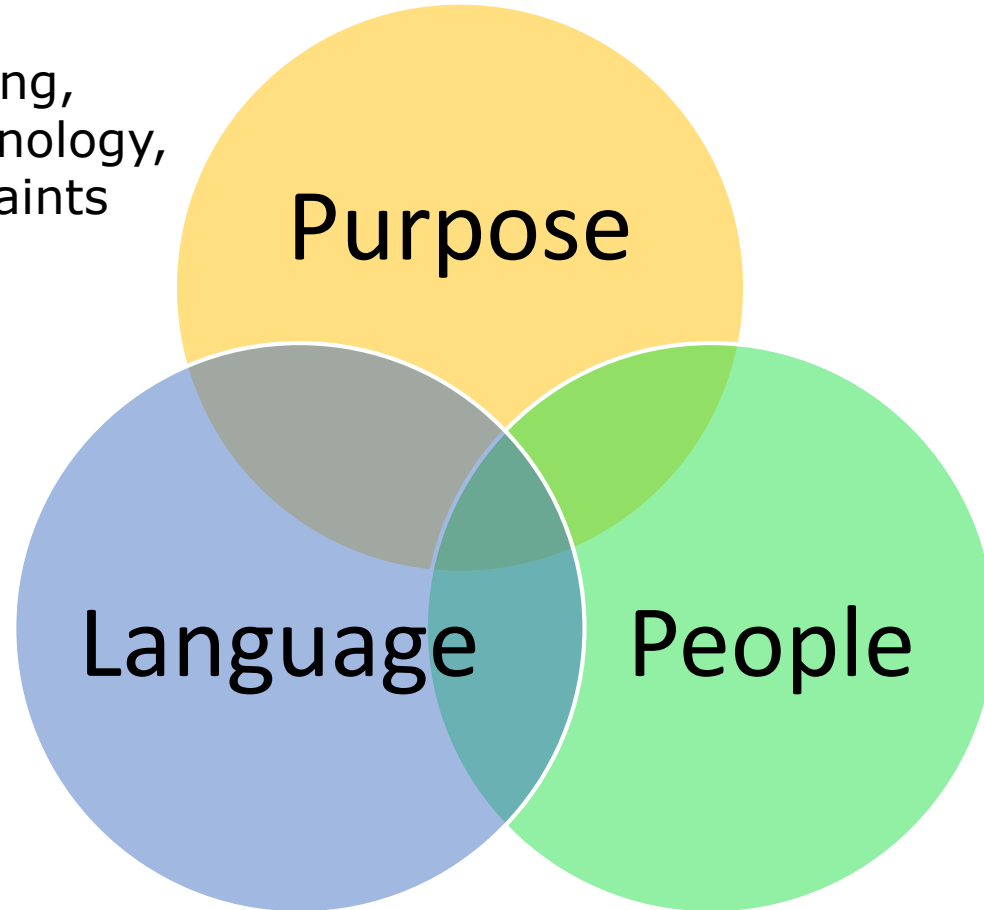
The **structural** integrity of
meaning across contexts

IA breakdown



Business goals, funding,
politics, culture, technology,
resources and constraints

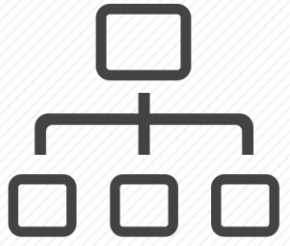
Vocabulary, rules,
content types



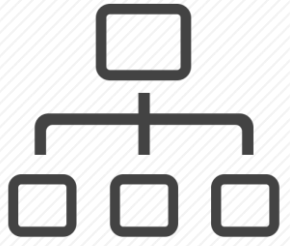
Audience, tasks, needs,
information seeking
behavior, experience

how do we figure out our IA?

- Card sorting
- Tree Testing
- Wireframe concepts

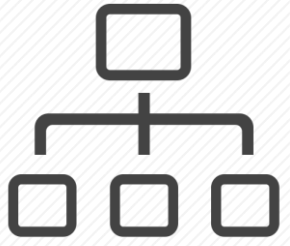


what is card sorting?



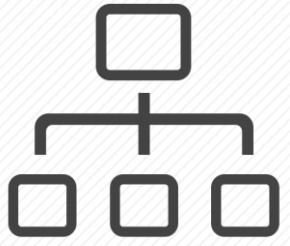
- Card sorting is a technique that many information architects (and related professionals) use as an input to the structure of a site or product.

why use card sorting?



- Card sorting can help you identify trends
 - Do the users want to see the information grouped by subject, process, business group, or information type?
 - How similar are the needs of the different user groups?
- Card sorting is a great way to get your audiences and stakeholder actively involved, but....

types of card sorting



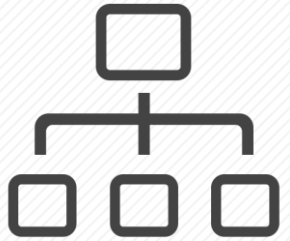
- **Open Card Sorting**

- Participants are given cards showing site content with no pre-established groupings.

- **Closed Card Sorting**

- Participants are given cards showing site content with an established initial set of primary groups.

tree testing



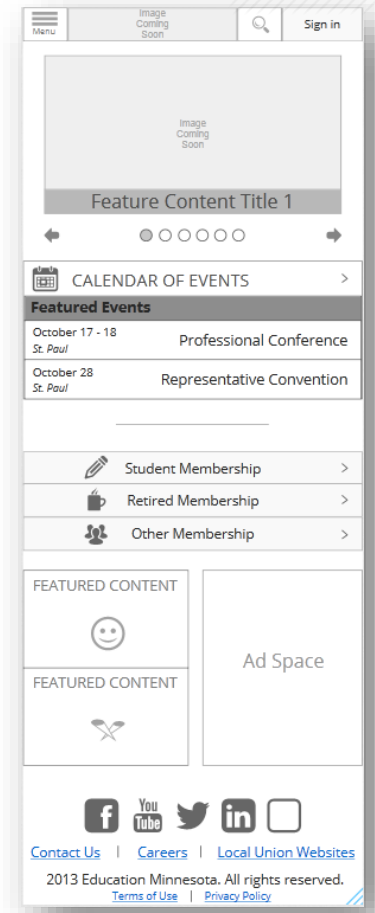
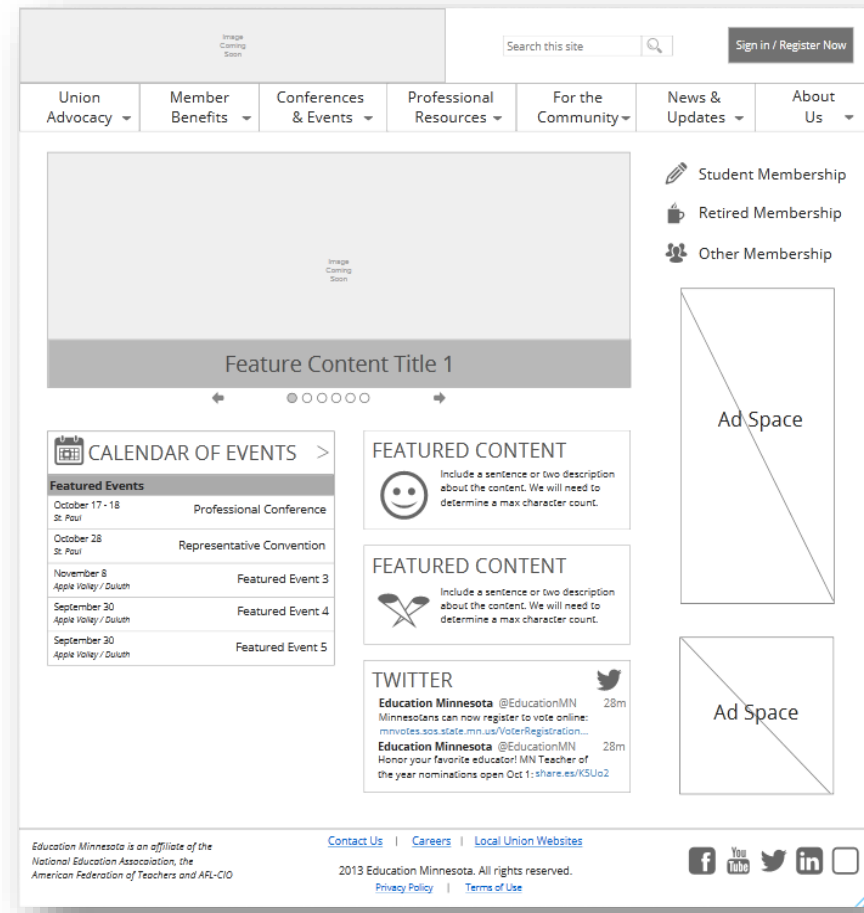
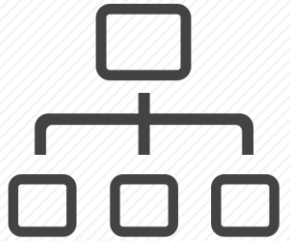
- Does navigation make sense
- Great intermediate step to combine structural and functional
- Best with highly focused tasks
- Get stakeholders to succeed and want you to succeed

Support centre

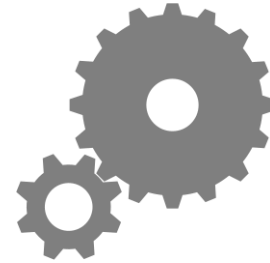
- > Using Yelp
- > Reviews and photos
- ▼ Updating business information
 - > Reporting incorrect business information
 - > Reporting business changes
 - > Adding a business to Yelp
- > Yelp for business owners
- > Claiming your business page

wireframing

- About structure and language
- Test audiences around if order makes sense
- Hard spot to involve stakeholders



audience matrix



- Map personas to actual web patterns
- Find commonalities across groups
- Track testing and success against

Audience	Type of Person(s)	Reason for visiting	Challenges faced	Related Personas
Navigating College Life	Current student well into their college life	<ul style="list-style-type: none"> • Register for classes / access relevant materials • Access student-focused resources • View relevant news and events • Keep up-to-date in activities I'm involved with • Prepare for graduation and life after college 	EXTERNAL <ul style="list-style-type: none"> • Not always sure what resource to use for what need • Inconsistency of information around programs and classes to make an informed decision • Filtering through the 'noise' of information on the website not applicable to current students • Understanding the multi-college experience and timing of their educational lives 	<ul style="list-style-type: none"> • Henry Cho
Just Getting Started	New student during their first year of college	<ul style="list-style-type: none"> • Learn about campus events and activities I can get involved with • Get comfortable with the college, including locations of classes, resources, and parking • Register for classes / access relevant material • Access student-focused resources • View relevant news and events 	<ul style="list-style-type: none"> • Figuring out what services are available to help be successful in college • Finding comfort in the way college works • Navigating through the online systems that need to be accessed as a student • Setting a schedule for success • Filtering through the 'noise' of information on the website not applicable to current students 	<ul style="list-style-type: none"> • Amy Rihnaken
Looking for a Career	Prospective student looking to earn a degree from a institution	<ul style="list-style-type: none"> • Figuring out whether the degree interested in is offered • Understand costs and financial assistance opportunities • Researching college reputation and gain confidence about attending here • Understand curriculum path, timing and career opportunities post graduation • Learn how to get started 	<ul style="list-style-type: none"> • Navigating through the various options for financial assistance, including financial aid, grants, & scholarships • Understanding the different options to complete degree, including single college, multi-college, online opportunities • Having the right information / assistance around the process to register for college • For those returning to school, how they will get back into the college mindset 	<ul style="list-style-type: none"> • Louis Mullo • Charlie Hunter • Anh Sin • Nykaela Clarke • Curtis Gertz • Kyle Barker
Get In and Get Out	Prospective student looking to attend here to take their basic curriculum and transfer to a 4 year institution OR a person looking to take a single course or community class	<ul style="list-style-type: none"> • Figuring out whether your basics will transfer to another school • Understand costs and financial assistance opportunities • Researching college reputation and gain confidence about attending here 	<ul style="list-style-type: none"> • Confusion around the transfer process and what classes can be taken here • Having the right information / assistance around the process to register for college • How to just take class and not go through the entire college registration process • Navigating through the various options for financial assistance, including financial 	<ul style="list-style-type: none"> • Anh Sin • Nykaela Clarke • Curtis Gertz • Margie Canner

usability testing



- Types of Testing
 - Task-based usability tests (desktop & mobile)
 - Eye Tracking
- Tie to audience tasks
- Greatest win with stakeholders (*before project even better*)



usability's 5 quality components



- **Learnability** - how easy can the user accomplish basic tasks?
- **Efficiency** – How quickly can tasks be performed?
- **Memorability** – After a period of non-use, how easily can a user reestablish proficiency?
- **Errors** – How many errors does the user / system make? How severe? Can the user recover?
- **Satisfaction** – How pleasant is it to use the design?

a few lessons learned

tell them why



Photo Courtesy of Shutterstock

find the underlying resistance



win some / learn some



questions??

Virgil Carroll, President

High Monkey Consulting

virgil@highmonkey.com

763-201-6040

Blog: <http://www.highmonkey.com/blog>

Twitter: @vcmonkey