Week 5 Video Notes and Reflection

# Workiva Edward Cupps

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# Presentation: Workiva Edward Cupps

## Overview Week 5 HCI Presentation - Thursday, February 4th

Edward Cupps will give a walk-thru of how Workiva approaches user discovery and UX design as a discipline focusing on Empathy, Ideation, and Experimentation. The topic of his talk is "The Interaction of Research & Design in the Workiva Discovery Process: An exploration of the application of HCI approaches for empathy-focused lean UX."  
  
After watching the video of seminar with guest speakers from February 4th, write a short reflection (75 - 100 words). You reflection should answer one or more questions below.

* According to the speaker what are some challenges/opportunities involved with UX in the professional world?
* What new information did you learn from the speaker?
* What are some companies' expectations for UX researchers?
* How does UX job is different in academia vs. industry?

## Questions

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Asiri, Omar | What are the tools you are using in Workiva to produce better user experience? | | | | | | | | |
| Behrens, Matthew | When did Workiva begin to incorporate UX design into its software development processes? Was that always a part of your approach or did it emerge out of a specific set of business problems? | | | | | | | | |
| Bell, Daniel | Describe the variety of backgrounds of those working in user experience at Workiva - how has this affected your workflow, and where did the surprises come from? | | | | | | | | |
| Berghefer, Sherry | I typically hear the term "lean" applied to manufacturing processes. Can you explain how lean applies to UX? | | | | | | | | |
| Bonner, Desmond | What key skills that UX Professionals need moving forward as UX evolves? | | | | | | | | |
| Crow, Thomas | How do you go about defining who your users are? Keith Fellger's question was my first choice, but it is always interesting to hear how a company defines who the users are. | | | | | | | | |
| Cunningham, Kelly | Do you use or could you see using any type of linguistic analysis as part of empathy-focused UX work? | | | | | | | | |
| Doty, Karen | How do you promote to your clients the importance of UX? Do you show examples of how UX has promoted success for a company? How can us as UX designers and testers work toward providing UX examples in our portfolio? | | | | | | | | |
| Fellger, Keith | Can you please expand on what 'empathy-focused lean UX' is? Starting with what lean UX entails? | | | | | | | | |
| Finseth, Tor |  | | | | | | | | |
| Garrett, Timothy | How do you evaluate the effectiveness of your UX research and design, and how do you identify that a well-established product requires a redesign? | | | | | | | | |
| Greer, Lawrence | Does your team have members devoted solely to UX, or it is a general expectation of your developers to keep part of the focus on UX? | | | | | | | | |
| Guerra, Anthony | In many ways UX design is an art as much as a science, is there a thought out there about UX that it's just making things more aesthetically pleasing rathern than more functional? | | | | | | | | |
| Guo, Qing | What is the most impartant skill for a UX designer? What kind of UX/UI designers are expected for Workiva? | | | | | | | | |
| Guo, Yuting | Do you agree that the UXer need to get basic programming skills? | | | | | | | | |
| Himes, Calee | Curious how you deal with people who use "UX" or "UI" as a buzzword to sell their skills, but are really just web developers / designers with no experience in UX/UI research. | | | | | | | | |
| Iglesias-Pena, Mariangely | Sometimes UX designers find themselves constantly justifying why they're essential to the team, has this new approach gone through that rough stage or has the UX team been accepted enough and left to do what they think is the best approach to the user experience? | | | | | | | | |
| Jaramillo Cherrez, Nadia | How have your users reacted so far? What kind of research are you incorporating in the discovery process (theoretical, application-oriented?) | | | | | | | | |
| Khawaji, Muath | What are the disadvantages of UX design? | | | | | | | | |
| Kohl, Adam | What is the most difficult aspect of UX design that workiva encounters? | | | | | | | | |
| Kuwaye, Angela | What skillsets and background do you specifically look for in a UX designer? What types of references, portfolios, questions, etc. do you look for during the interview process? Are you more interested in finding someone with the right UX skills or the right soft skills that can learn more about UX? How does your company promote professional development and growth? | | | | | | | | |
| Lilja, Andrew | Workiva serves a wide range of users and usecases — how do you test to make sure your products allow all your users to do what they need to? | | | | | | | | |
| Macallister, Anastacia | How as UX helped Workiva sell its product? | | | | | | | | |
| Nowatzke, Matthew | What cliches in UX research and design do you find that work/don't work in practice. | | | | | | | | |
| Owens, Blaze | In your experience, what is the best way to incorporate designers into the observational research process? Do you find it better to have them there in person, or would you rather have them watch video? If in person, what sort of brief do you do for them? If video, how do you edit it to be digestable? | | | | | | | | |
| Petkoff, Nicholas | Being a product that is primarily aimed for corperation level settings, do you see a lot of individual UX practice? If so, how do you balance using an empathy focused technique against the needs of what some might call an 'cold and calculating' modern day business? | | | | | | | | |
| Saka, Emmanuel | What are some flaws you as a designer currently experienced as a UX? | | | | | | | | |
| Schnieders, Thomas | Would you consider a qualitative approach to UI/UX more important than a quantitative approach in platforms like WDest? If so, why? | | | | | | | | |
| Studer, Jaryn | How did you decide to focus on this approach? What types of research methods do you typically utilize that focus on empathy of the user? | | | | | | | | |
| Toews, Glenn | What mindset is requried of a designer to fully realize the potential of an empathy-driven approach to understanding usability requirements of the user? | | | | | | | | |
| Underhill, Teresa | Who has influenced your process and team members most heavily from the HCI, Cognitive Engineering Community? Do you attend any conferences or does your team attend yearly conferences and if so how has that informed your UX Process? | | | | | | | | |
| Veit, Desarae | What considerations have your team made for 508 compliance and Accessibility testing? (not including performance, I did see it's SSAE 16 Type II compliant and looked at a couple of the case studies - https://www.workiva.com/customers/case-studies) | | | | | | | | |
| Veit, Desarae | How big is your UX/UI team? Who do you consider your stakeholders and what kind of evaluation/testing do you do to ensure ongoing feedback? Is the iteractive container (computer buttons that expand) part of an open source frame work- is that polymer (https://www.workiva.com/content/wdesk-platform-b)? I've included additional discussion items to BlackBoard for anyone who might be interested: https://bb.its.iastate.edu/webapps/discussionboard/do/message?action=list\_messages&forum\_id=\_202297\_1&nav=discussion\_board\_entry&conf\_id=\_135610\_1&course\_id=\_48122\_1&message\_id=\_1886622\_1#msg\_\_1886622\_1Id | | | | | | | | |
| Yu, Jiaqi | What is the special empathy mindset in Workiva? How to organize the team work between UX designer in your team? | | | | | | | | |

### Presentation Notes

Research and Design in the Workiva Discovery Process.

HCI Alumni, Edward Cupps, works for Workiva as a User Experience Manager. User Research manager, David. They will talk about their approach and day-to-day at Workiva.

Workiva is in Ames located in research park, used to be called Web Filings. Started off as SCC filings, or companies who need to quarterly report financial filings. Everything used to manual and paper based. In the early days, Web Filing’s goal was to just make things better and web based. Since then, they’ve grown and added a design team to build on their portfolio and expand their market niche.

It started off as an engineering culture and expanded into a deeper user experience. Their team was built from the ground up from scratch. The main goal was to track analytics and build user teams.

Do you think there is a growing demand for user practicioners? Yes, the midwest and nation-wide has a large growth market for UX. A lot of great stuff is coming up all the time. User experience is definitely a good field to be in. It is a key differentiator. It is why and how people engage with a product. At the consumer b2b grade of applications it is the difference between a spreadsheet and a beautiful/easy to use product. There is always more to do.

Peter Rams said, “Indifference towards people and the reality in which they live is actually the one and only cardinal sin in design.”

It means ignore people at your own peril.

When you design a dog house, you are designing for the person who owns the dog and the house. Yes, you want to keep the dog happy but mostly you want the dog’s owner to be happy.

Understanding empathy is understand qualitative vs. quantitative methods.

Understanding designers vs. researchers is also understanding the intellectual. Workiva is a data driven organization. Workiva strives to understand users from multiple directions. Understand their behavior, patterns, what are they expressing, what are they doing, why?

A few tools to get to know the user:

* Analytics logs
* Comments and feedback
* Demographic information
* Surveys
* Longitudinal studies
* Expert analysis

A lot of this is driven by comment streams and logs. Getting to know the nitty-gritty. Studies of users long-term over time. There is no end to information that can be applied to get to know the users and improve their experience. Sometimes the designer knows more about what the user is doing in the application than even the user realizes. Thats not uncommon but that is not where the analysis ends.

This is where empathy comes in. You don’t know where they are at until you understand their engagement and pain points. How many post it notes are on their monitor. This relates to the old adage, walk a mile in their shoes.

* What are the pain points?
* Observation
* Interviews (listen)
* Site Visits
* Codesign
* User testing/iteration

This requires facilitating the entire development team. They all need to walk in the users shoes and this requires allowing empathy to grow. By creating contextual situations.

Ask how they are feeling, sit side-by side the user, visit the user on their turf and seeing how they work, whiteboard the marker by the user. Nothing is ever finished or complete.. this requires continual improvement.

Empathy is an opportunity for making the users lives easier and to make more money.

#### Design is data informed and experimental.

They discovered their users spend too much time on reports. Sometimes they are stuck in a hotel or a cot at work. Sometimes the users spend days or full weekends working on these reports. A huge part of this is listening and recognizing a problem then finding the opportunities for improvement and improving them.

People will give you signals. This requires design thinking.

Design thinking is combining empathy, creativity, and rationality to solve problems. Creativity is lots of designs to solve problems. Rationality is implementing the constraints, testing, and repeat. Design thinking can not be done alone. Its optimistic. It also needs multiple revisions to work. Failure is good, learning from failure is the best because you can learn and improve.

The classical model of design thinking starts with inspiration from the user.

This allows you to define the problem and set constraints.

* Inspiration
* Define
* Ideation
* Prototype
* Test
* Repeat

Think of everything you can to solve the problem, time box it, and then work towards the solution.

Many UX professionals have an engineering background, and it is very similar process to engineering.

**Get in and talk to customers - Looking for opportunities.**

One of the cool things about Workiva is it’s a tight nit community and they have a lot of access to their users. Users keep designers in line and moving in the right direction.

Look for opportunities.

Look for opportunities!

They go to conferences and talk to 80-90 customers a day about the application and improvements. Users are anxious to tell you their problems. You will get more success by following this.

**Get out of the building.**

**Ethnographic research.**

It can be stodgy and full of paperwork. The methods though can be applied to practical methods and situations to build relationships. Treat the user as a stakeholder. Workiva does not build custom product to spec, but they treat the user as a primary stakeholder to get feedback and make a connection.

**Listen to users.**

Listen to problems. Listen to feedback. Listen to challenges and solutions that they see. In one situation they where changing a linking system and had 86-90 users do a test. Listened to them in aggregate (challenges) this points the designer to solutions. It doesn’t matter though if you can’t share the story.

So after this field test, results need to be shown to the rest of the team. This is where a story map comes in. Map out what the user has told the team, commonalities between multiple users, and why they are problems. It also you to take research and observations or even screens in a linear way. Then you can show need to haves vs. nice to haves.

**Look for pain.**

Make life better. Sometimes the first version is painful. You want it to be worth what the user is paying for. Identify what is causing the pain.

Jeff patten emphasizes you can’t just take orders. There is listening to the user vs. listening to the customer. There is a person saying what all they want vs. what they need.

Be a doctor not a waiter.

A waiter takes an order. Sometimes they have interesting and great ideas.

A doctor diagnoses problems, especially ones shared by multiple users.

People will tell you what they think the thing ought to do. It becomes really important for the design side to know the user is saying one thing, but the user doesn’t always have the background to make the best solution. Sometimes they do come up with one, but sometimes they don’t know whats best for all the users. The little kernels sometimes solve the larger problem though.

**Collaborate as a team.**

Workiva - the user experience designer is normally in 2 teams at a time. It’s a triad leadership with the product owner. Do we want to have this in the product? They determine if it will work as a team. Then the lead developer says is it feasible? This is a balancing act. Sometimes the developer comes back with a solution and sometimes it doesn’t fix the problem, then the product owner says, do we need this right now?

You want to be close enough to the team and users to understand the problems, but you don’t want to be too close that you lose objectivity. Stockholm syndrome (seeing it from the eyes of the prison guards)

Use smart questions to ask, don’t go in cold. Make sure the questions are germain.

**Research should be close but not too close.**

Designers work even closer with developers. The researcher keeps the designer honest. Sometimes designers fixate on designs and prototypes. It has to be ok to throw out designs that aren’t the best thing for the user.

Even if everyone thinks it’s great, what is wrong about it? What side of the story has the negative?

Premortem. If it’s going to die, how will it happen?

It’s important to have a cross section of disciplines. A friend from IBM said, “Great ideas do not know what discipline they come from.” Shepard the most useful ideas.

**Prototype and Test.**

Iteration is the most important thing we do. Address problems. Make mistakes. Protype and test repeatedly. The chief test is the application itself. “USA is the longest running experiment in democracy.” Test even with the live product.

**Build Measure Learn Repeat**

It’s a loop. It’s lean. This is Workiva’s working model. Nothing ever ends. What does success look like? How do you measure it? How do you repeat it? Learn how it happened.

They do run on Agile.

1. **Question:** How much do you need to evangelize Agile and UX. Answer: None, everyone loves UX. You need to have the grassroots level where everyone believes in supporting the user. You will hit a wall if senior management doesn’t support UX it will not be successful. Workiva’s upper management supports it. IBM is smart about using good ideas. You can tell it is something that is being added on to something else that has had a long track record of success but obviously it was an add on. Whereas Workiva grew with it from the start.
2. **Question:** You can’t do Agile without paying attention to the customers needs and wants. How much of a challenge is it for a company using waterfall? Answer: Agile is not a process it is a philosophy and a mind set. Dual track is where the UX team is 2 to 3 sprints ahead of the developers. The developers are involved but the researchers are thinking ahead before it’s being done. So the hopper is constantly being filled. Workiva is Agile through and through. The process and tool has to be built for the product and not the other way around. A short term app for example.
3. **Question:** Can you do Agile without UX and vice versa? Answer: **They implied no. I would disagree. It is absolutely still possible, even in Waterfall.** There is a lot to say for the challenges and successes.
4. **Question:** When hiring what skillsets are you looking for, and what is the advancement opportunities? Answer: Design looks for 4-5 good projects, failures, wireframes, problems statements, and be able to explain everything. Show the process and how you engage with the user. The portfolio is essential. You are a leader on the team and need to discover your own work and evangelize it. Researchers need to identify what kind of researcher they are. Are you qualitative? Quantitative? What are your methods? What kind of person are you, know your strengths and weaknesses. Skills: what discipline and what skills, synthesize information, know when it’s important to apply statistics or formal analysis, pay attention to art of crafting research questions and plans, the level of validity and trustworthiness is the difference between a layman and a researcher.   
     
   Everyone needs a mentor. Find a mentor. Be able to give and GET feedback successfully. Speaker training is good. Search for outside consultants. Conferences are important. Never stop training. Speak at conferences. Be a leader in your field.

# Workiva Discussion

I’ve added the details of this document to BlackBoard so that we can continue the discussion and collaborate as a class if anyone is interested.

<https://bb.its.iastate.edu/webapps/discussionboard/do/message?action=list_messages&forum_id=_202297_1&nav=discussion_board_entry&conf_id=_135610_1&course_id=_48122_1&message_id=_1886622_1#msg__1886622_1Id>

## Questions for discussion

These are my questions from the Week 4 Google Docs, in case they are not included in class maybe we can discuss them here?

* How big is your UX/UI team?
* Who do you consider your stakeholders and what kind of evaluation/testing do you do to ensure ongoing feedback?
* Is the iteractive container (computer buttons that expand) part of an open source frame work- is that polymer (https://www.workiva.com/content/wdesk-platform-b)?
* What considerations have your team made for 508 compliance and Accessibility testing? (not including performance, I did see it's SSAE 16 Type II compliant and looked at a couple of the case studies - https://www.workiva.com/customers/case-studies)

#### Reviewing Workiva's Website

* + I noticed that their primary site is missing key components of accessibility compliance and web standards. I scheduled a demo, but doubt I will be able to do it before Friday's class. This may or may not reflect on the Workiva product line, but would be a consideration for me as a corporate client.
  + The site is responsive
  + The site is written on HTML5
  + Uses http://ogp.me/ Open Graph Protocol
  + I'm curious why they choose to use IE=Edge
  + The site appears to use a framework
  + They use Google Analytics on their main site, I wonder what kind of analytics they use for their products and how they integrate results.
  + Built on Drupal
  + Google Tag Manager Integration
  + Using Clicktale

#### Other Topics for Discussion

Since we are on the topic of empathy in relation to UX, I found this article the other day ([Seung Chan Lim, 2014](https://uxmag.com/articles/what-is-empathy)). It's a well written piece that starts off with a story that leads into scientific research and evaluation of empathy.

# References

* Workiva (2016). Case Studies. https://www.workiva.com/customers/case-studies
* Seung Chan Lim (2014, Article No :1338 ). What is Empathy? UX Magazine. Accessed 2016. <https://uxmag.com/articles/what-is-empathy>
* Tutorials Point (2016). Software Development Lifecycle. <http://www.tutorialspoint.com/sdlc/sdlc_overview.htm>
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