

UXPin

A Guide to Influential Design

The Indispensable UX Designer





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Introduction

A quick note from the editor

With more and more engineering-based companies investing in design, designers are now in a position to influence entire product teams. But what does it take to be an indispensable designer?

This e-book collects our best articles, published on our own blog and elsewhere on the web. Inside these pages, you'll find the traits and habits for becoming an influential designer.

We'd love your thoughts on what we've written, and feel free to share this collection if you find it helpful. When you're done, feel free to practice what you learned in UXPin with a [free trial](#).

For the love of UX design and designers,
Ryan Thomas Riddle
UX Content Strategist

10 Qualities That Separate Great Designers From the Rest

By Jerry Cao

What separates the best designers from the rest? What are their secrets? Sure, some were born with it or just got lucky – but most designers learned certain skills and habits that keep them grounded yet above their peers.

We've collected the tips and traits from some of the masters of the craft, and put them together in one quick, easy-to-remember list, so you can break free and enjoy the open-air from up front.

Empathize With the User

This is the difference between designing for yourself, and designing for the person who really matters – and no matter how much you like your design, you're going to need more than one user.

Great designers understand their users: their fears, goals, behaviors, frustrations, tolerances, preferences, and sometimes even favorite colors (when relevant). This is not a concept unique to design; all

business relies on giving the customer what they need (which can be much different than what they want).



Photo credit: "empathy." Sean MacEntee. Creative Commons.

As described in [Web UI Best Practices](#), one of the most practical forms of empathy in design is the [user persona](#): these fictional identities built from real research eliminate a lot of the guesswork in what your users are thinking, and serves as a compass for the entire product team.

Rely on Data, Not Instincts

While empathy alone can get you far, the best designers rely on more concrete facts. Usability testing will pinpoint the tastes of even the most fickle users, and give you a sheet of hard facts to fall back on. This data creates a foundation for user personas, and helps validate designer instincts.

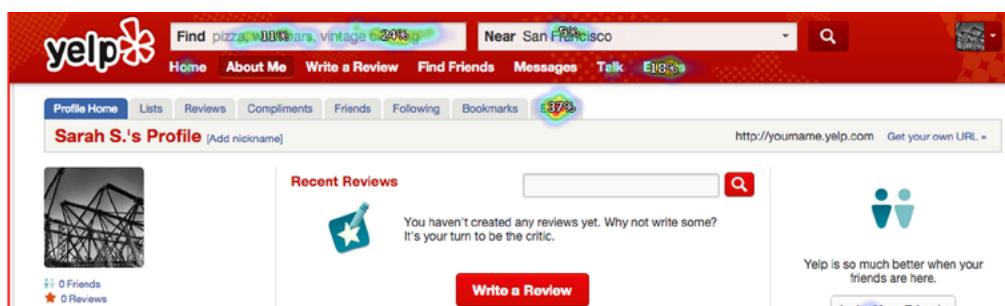


Photo credit: UXPin via Optimal Workshop for Yelp redesign exercise

Usability testing can even reveal new insights you never would have guessed. All too often we get set in our beliefs that a certain way is best, until even a quick [hallway usability test](#) shows us how wrong we are. Moreover, reliable research can even strengthen your instincts to defend a more experimental idea, giving your stakeholders the confidence to move forward.

These test can also highlight the subtle, yet important difference between usability issues and users' habits. For example, we recently embarked on a redesign of [UXPin](#). But before we did, we conducted usability tests with 10 users. We learned that users had a different habitual flow for search than we originally designed. Now we're taking a closer look at search with the beta tests of our new design.

After all, good designers may be sure their designs will work, but great designers *make* sure.

Don't Make Users Think

Steve Krug's seminal book [Don't Make Me Think](#) blew open a revealing door in the world of interaction design. It forever solidified concepts like "[cognitive load](#)" in the designer lexicon and explained the depths of human memory, and how it relates to design.

The more effort a user must put into figuring out how to use an interface, the less they'll enjoy it (even if the system works extremely well once learned).

This holds true for largely confusing (and fairly obvious) issues like buttons that don't function, but has a more direct effect on the interface's subtle minutiae – all the extra milliseconds a user spends figuring out meanings soon add up. The moral is, the more intuitive and instantly comprehensive an interface, the more **pleasurable the experience**.



This challenging
captcha is a doing
a great job testing
my humanity.

Photo credit: "trpdsaya: This challenging captcha..." Wicker Paradise. Creative Commons.

The strategies for doing this vary. One could follow **Hick's Law** – the number of options available to a person increases the time required to reach a decision – which in interaction design means offering just enough options to satisfy the user without overburdening them, (especially in dropdown menus where there's always the temptation to nest out multiple submenus).

You must always consider the limits of human memory. If you absolutely must include a large number of options, try chunking them out so users see blocks of similar content instead of a scattered array of items.

Another strategy is **implementing UI patterns**, so that the user is already familiar with how to use your system even before they start.

Basically, any method that hints at the function of feature without actually explaining it will help you.

For example, grouping items with similar functions together (a Gestalt principle discussed in [Web UI Design for the Human Eye](#)) will suggest they all work the same way. In that same vein, giving features with similar functions a similar appearance, such as the same button graphic, achieves the same result.

Consistency is especially important in reducing cognitive load; or more accurately, inconsistency is notorious for increasing cognitive load. As described in [Consistency in UI Design](#), maintaining visual and functional consistency ensures the user isn't wasting precious time wondering why something is different than before.

Of course, you still need elements of inconsistency to keep the design interesting, but it's more important that your interface is first consistent so that it's usable.

Curb Your Designer Ego

Part of being a master designer is not acting like it.

You don't get far designing for your personal preferences. The design business is, after all, a business, and you need to understand the business needs of whatever project you're working on.

For a start, as we mentioned above, you must know your user, but there's more to it.



Photo credit: "estupid ego." [E. Alejandro O. Creative Commons](#).

You need to put your personal tastes in the backseat and do what's best for the project. There's a time to let your creativity shine (another part of being a great designer), but there is also a time to shelf what you want for the greater good of the project – even if it means creating something you personally think is only second best. To put it simply, user goals (which must always intersect with business goals) trump personal goals.

Curbing your ego helps collaboration. Design is a team effort, and whether you admit it or not, some of your weaknesses might be mitigated by another member's strengths. As [design thinking](#) suggests, keep an open mind to others' suggestions and critique, even if you're the master in the room.

Know When to Yield, and When to Defend Your Ground

A bit of a caveat to the previous point: curbing your ego is not so black-and-white. Listening openly to others' opinions is always a good tactic, but when it comes time to make a decision, great designers stay true to themselves.

If you've successfully curbed your ego, then you'll be able to admit when someone else's idea is better for the project. But what if you still think you're right? Say so.

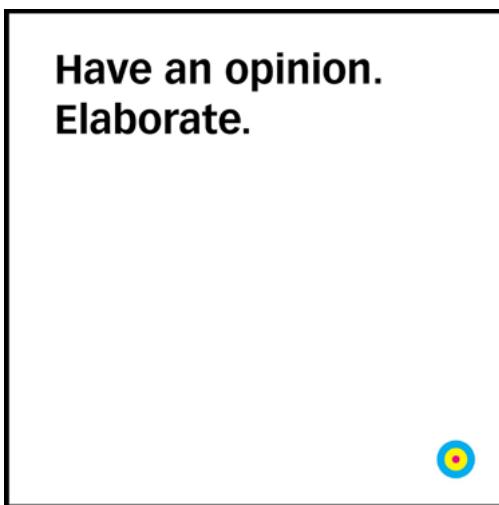


Photo credit: "Have an opinion. Elaborate." See-ming Lee. Creative Commons 2.0.

Even great designers must deal with less-than-grateful clients and stakeholders, but they stand by what they think is best. Sometimes they're able to convince others of their opinions; for this, our above point about relying on data over instinct can be a big help. When it comes to defending design decisions, it always helps to let the user do the talking – stand behind any relevant usability data.

And if push comes to shove, a great designer isn't afraid to walk away.

Use White Space as a Sculpting Tool

Often confused for an “empty canvas” to be filled for a fuller picture, white space – or negative space – is actually just another tool used to fill the real empty canvas, and great designers know this.

Tomasz Wysocki

Work

Profile

Contact

Digital Art & Experiments

Recent projects

01
Neanderthal
Art Direction & Retouching

02
Goverdose - Deck
Drawing & Retouching

03
Wolf Hybrid
Art Direction & Retouching

04
Goverdose - Void
Photography & Retouching

05
Mercedes-Benz Biome
Art Direction & Design

Photo credit: Tomasz Wysocki

White space offers a lot of benefits: it can guide the user’s visual flow by attracting or repelling attention, increases readability, gives elements some breathing room for better comprehension, and it makes the page overall just look better. Great designers have been taking advantage of white space since Ancient Greeks were “designing” painted vases.

Don’t be afraid to leave parts of the screen empty – rather, consider removing some elements to create more emptiness. As recommended

in *Web Design for the Human Eye*, think of white space as a special color, and learn when to paint it on.

Satisfy Maslow's Hierarchy of (User) Needs

Maslow's famous hierarchy of needs has been adapted to represent the needs of a user.

Just like a human being must satisfy the physiological needs like food and air before they tackle more complicated ones like social acceptance, users must also feel secure in areas like functionality before considering the fun factor of a design. Great designers satisfy these needs, from the bottom up.

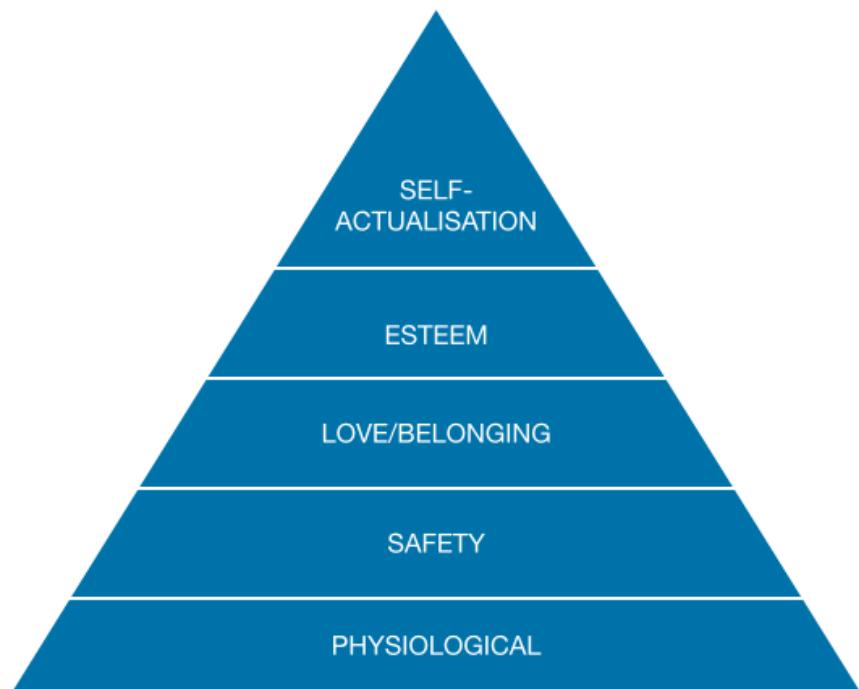


Photo credit: UXPin

Firstly, a site must function, or else all other features are irrelevant. Next, the site must be reliable, meaning it functions with consistency so that the user takes the time to learn the system (and doesn't need to relearn it). Then, a site must be usable, meaning it functions well, and in an intuitive way that feels natural to the user. Last, but often neglected, the site must be pleasurable: aesthetic, stimulating, and capable of creating emotional connections.

With these basic needs provided, what more could a user ask for?

Remember Appearance Affects Functionality

Though it may sound superficial, in the realm of designing, it's what's on the outside that counts. Studies like [this one on how users judge a site's credibility](#) and [this one on how users perceive usability differently based on looks](#) prove it.



Photo credit: [Bushrenz via awwwards](#)

Appearance does more than make the user go “that looks nice.” According to Don Norman, an aesthetically-pleasing site actually relaxes the user. This relaxation has a physiological effect on the brain that facilitates learning, decision-making, and the mechanical functions required to interact with the site. In short, appearance actually improves usability.

Furthermore, a website’s appearance directly affect the emotional connection it creates with the user. Your choice of colors, layout, style, and types of graphic will all either endear or repulse your user. Of course functionality and usability are necessary as well, but still a visual makeover can go a long way.

Communicate With the User Through Interface Conversations

User feedback is a conversation between the user and the interface itself. Great designers take this seriously, and build a UI as a suitable mouthpiece for the entire system.



Photo credit: [Worrydream](#)

If user feedback is ignored, the conversation becomes too one-sided. If there's too much feedback, suddenly your system becomes the chatty-Cathy that corners people at parties. A great UI designer strikes a good balance between the two, drawing on their empathy with the user to understand what they'd prefer.

In this way, user feedback makes the entire interaction seem more "human."

Interfaces with excellent feedback stand out in the users' mind and are remembered days later, while lacking interactions will soon be forgotten – much like conversations at a cocktail party. A great example of this are [404 pages](#) – some are so good that they make us laugh out loud, and that's an emotional response you can't trigger from solid usability alone.

To ensure your interface creates natural feedback, follow notable interaction designer Stephen P. Anderson's advice on [creating a mock conversation](#) between the user and the UI.

Don't Underestimate Copywriting

Designers often trust the site's copy to professional copywriters, but that's doesn't give them license to neglect the importance of words in their work. Great designers work in conjunction with copywriters – if they don't handle the writing themselves – to allow both fields to complement each other.

Just as feedback is your side of the interface's dialogue, your copywriting reflects your site's personality, for better or worse. It doesn't matter so much how you sound, as it does that how your tone matches how you want to convey yourself. A light-hearted, casual, and even humorous tone may work great for a social media tool, but for an investment firm it leaves something to be desired.

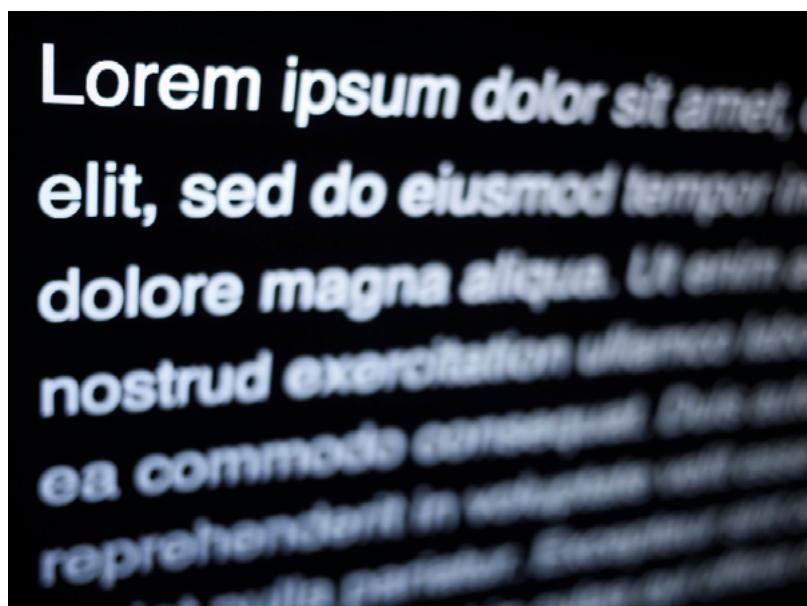


Photo credit: "Lorem Bokeh 1". Blake Burhart. ([Creative Commons](#))

If you are outsourcing your copywriting, try to [avoid lorem ipsum](#) when iterating on designs. While this practice may speed along the design process in the beginning, it will ultimately harm it by treating content as an afterthought (when it should always be the top concern).

Incorporate the copy in as soon as possible so that you can avoid placeholders like lorem ipsum. This will enable you to design while taking the actual text into account, both the tone of the content, and the actual size and typography for how it will all come together visually.

Conclusion

Great designers just don't happen – they are forged through hard work, practice, and dedication to the craft.

The above techniques and tips can help you become better designers, but only if you embrace them and incorporate them into your existing routine. The question of how great you can be depends entirely up to you, and it's never a bad idea to learn from the success of others.

6 Habits of Highly Effective Designers

By Jerry Cao

Design is all about pushing the boundaries of technology and creativity to better solve problems. At its core, design is about people.

When we talk about people, we mean team members as well as users. In the web and mobile app space, successful digital designers must be able to work with different people to create targeted experiences for people they might never even meet in their lifetime. It's an extremely difficult balance between logic, cognitive science, fearless creativity, and plain human empathy.

There's been a lot of trial-and-error over the years, and from the wreckage (some of it our own, admittedly), some common best practices survive. We'd love to share what we've learned from our own experiences (and from excellent designers we've worked with).

Without further delay, let's begin.

Design for Emotional Connections

What a world it would be if everyone behaved logically and users flocked to the sites and apps with only the best functionalities. But this utopia (or dystopia, depending on how you look at it) is far from the world we live and design in, and studies have shown that users generally prefer products that **create emotional connections** over those that just work well.



Photo credit: Frames Collection

Don Norman links this to **human evolution** – thanks to the life-or-death situations of mankind's prehistory, we've adapted to make split-second decisions based on our emotions, or "gut reactions." User research studies have proven the power of emotional connections in design: users determine how trustworthy and credible a site is **based**

on looks and users perceive pleasing products [as being more usable](#), even under identical conditions.

Creating an emotional connection and being inspiring was one of our tenants when it came to redesigning [UXPin](#). We wanted to strive for an aesthetic that would inspire users. To achieve this aesthetic, we looked at some of the best physical products ever produced, such as [Pilot Vanishing Point Matte Black](#) and [speakers Harman Kardon Sound Stick](#).

And as we noted in the previous article and it bears repeating, effective designers design specifically to create an emotional connection. They do this through aesthetics, gifts, discoverables, and feedback conversation (which we'll discuss below). Because perception is reality in user experience design, we can say that emotional design techniques like powerful images and smooth animations makes a product's usability more memorable.

Proactively Work with Developers

Of course, all designers will work with developers at some point, but the key word here is “proactively.”

Handing off fully formed designs to the next link in the chain is the bare minimum of collaboration, if you can even call it that. What's best for everyone is forming a deep relationship with all members of the design team, *especially* designers and developers. Designers

aren't just pixel pushers, and developers definitely aren't WYSIWYG machines.

Get developers involved in the design process as early as possible. Invite them to meetings, user research tests, brainstorming sessions, etc. Their input, after all, determines whether your vision actually comes to life. At the very least, they can warn you if your ideas are a technical nightmare, a diagnosis that saves you time if caught early enough.

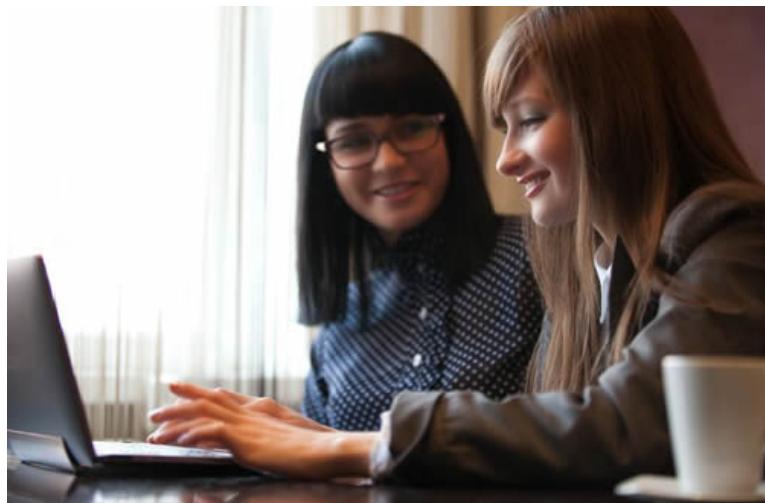


Photo credit: Damian Rees, via Smashing Magazine

Try to understand the developer's perspective, and watch how you phrase things. Instead of asking, "What's not doable?" try, "What's too difficult?" The framing of the question demands less upfront commitment, and creates a more casual atmosphere for honest feedback.

Whether you'd like to admit it or not, you both share the ultimate goal of creating something that makes user's lives better. Developers can't do it without someone to ensure everything is human-friendly, and you certainly won't get far if your idea never gets built.

Never forget that developers are simply designers of code. Get together, think out loud, criticize each other's ideas. Ask hard questions, and give straightforward answers. Whatever you do, just don't assume anything.

Focus on the Right Idea, Not the Best One

We hate to burst your bubble, but digital design is not art. It's *artistic*, and there's a lot of creativity involved, but as long as the greater purpose it serves is business-related, it can never be a pure art form.

Let's say you come up with an idea for the most brilliant, ground-breaking design for an ecommerce site that will change the way people interact with websites forever. If prior research has shown that your older user base prefers the comfort of existing interfaces as seen on Target or Macy's, then you'll have to shelf the work of genius until another day and create something that fits the mold of the [Most Acceptable Yet Advanced principle](#). That's not to say that you need to crush all your creative urges.



Photo credit: UXPin.

How do they know how to fulfill specific needs outside of their own tastes? One of the best strategies is to reference user data. Researching how your users act and what they like will give you solid footing so that you don't have to rely on guesswork or subjective opinions. Building user personas [from reliable data](#) will keep you on track to designing what's right for the project, regardless of whether you (or other stakeholders) think it's best.

Design the Right Details at the Right Time

Different stages of the design process call for different levels of detail.

Being too concerned with the visual details too soon will distract from the matter at hand. Putting them off too long will either delay the project or force a rushed job. Effective designers can pinpoint the right fidelity, then present them in a way that encourages accurate feedback.

Each designer values the freedom of forming their own unique process, making it individual to them.

However, there are some general milestones to hit. The first stages, like wireframing, should be lo-fi, in order to focus more on layout and structure – decisions here are subject to change, so delving into details like button bevels and background gradients can be a waste of time. Once you've gathered stakeholder and user feedback on the

early design, then you can start hammering out the fine points of the visuals.

That said, we'd like to recommend a process that's worked well for us.

Photo credit: UXPin

We start with a lo-fi wireframe that allows us to focus on the broader structure and overall picture – however we give it limited interactivity by building it in our [UXPin](#). This allows us to test usability very early on, but without having to build something hi-fi that will inevitably be scrapped. Our lo-fi prototypes give us valuable research data going forward, and because they're lo-fi, there's minimal waste in throwing them out and starting over with what we learned.

Balance the Amount of Choices

Freedom of choice is a bit of a paradox when it comes to UX design.

Users want the freedom to choose multiple options and available actions. At the same time, users want simplicity, a clear path, and as few distractions as possible. But somewhere in between those two, there exists a perfect balance, and effective designers know how to find it.

While [Hick's Law](#) may have originated in the 50s, it has since been modified to fit modern design in defense of simplicity. This classic psychology principle states, in simplified turns, the amount of time it takes someone to make a decision increases with the more options they have. In digital design, this amounts to reducing the number of on-screen choices to improve the UX.

In order to avoid the choice paralysis we advised against in [Interaction Design Best Practices](#), Hick's Law can be applied to your interface in a few different ways. First, and most obvious, is to trim the fat. Getting rid of unnecessary secondary content will focus more attention on your primary content. Never forget that overloading your interface just ends up watering down everything.

Spend more time chiseling your layout and content hierarchy. By cleverly structuring your content, you can still offer your users plenty of options, but present them in a way that doesn't overwhelm them.

Elements like size, color, location on the screen, and white space can all influence what gets seen and what doesn't.

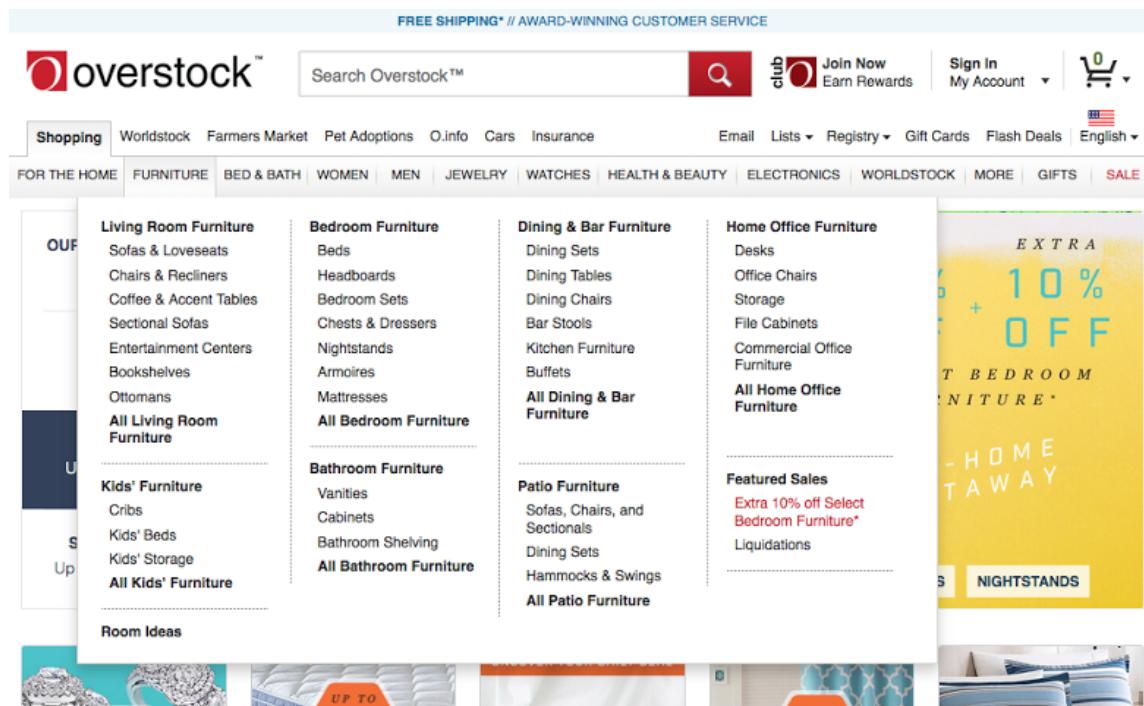


Photo credit: Overstock.com

Just compare Overstock's dropdown menu to Amazon's slideout menu. By saving tertiary information like "Bedroom Furniture" for the actual page, Amazon's slideout menu is less overwhelming. Oftentimes, good UX design is about leading users on a path that feels the most natural, revealing more information only when necessary.

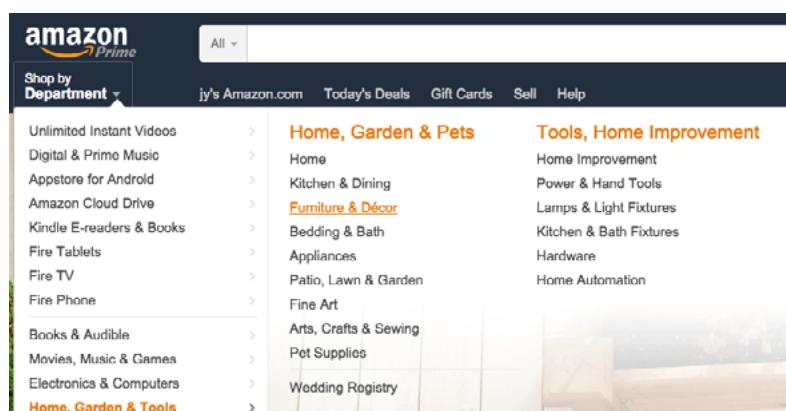


Photo credit: Amazon

UI patterns work great as shortcuts to creating order out of chaos. Applying pre-existing patterns that your users already know how to use (such as the cards layout described in [Web UI Patterns](#) for presenting many content choices) can help you preserve features through better layout and [discoverability](#). The pattern of hover controls (having optional features appear only when the cursor is over a certain areas) was designed for this purpose in particular – until they’re needed, extra options remain out of sight and out of mind.

Think Beyond the 3-Click Rule

For starters, let’s take away some of it’s power by not calling it a “rule.”

The [3-Click Theory](#) states that users should be able to find what they’re looking for within 3 clicks. The theory hinges on the idea that the more a user has to click, the less they’ll like the site, and after three clicks they’ll give up and go to an “easier” interface.



Photo credit: “[Magic Mouse](#)”. Yutaka Tsutano. Creative Commons.

The fact is, this is an idea that's been proven wrong. [Joshua Porter conducted a series of tests](#) that showed no correlation between user dissatisfaction and the number of clicks, and that users were no more likely to give up after three clicks than they were after twelve.

So how did the 3-Click Theory sneak itself into design canon? The heart and intention of the idea is sound. It's the rigid application of limiting oneself to three clicks that went awry. What the three-click rule does right is promote simplicity and convenience. However, these things are not always synonymous with "fewer clicks."

In order to follow the 3-Click Theory, interfaces will have to overload their menus with options to ensure everything is covered – which, as we explained above, would do more harm than good. Instead, good UI design strives to make each click count, as opposed to obsessing about staying under three clicks.

The best methodology is to design each click to bring the user one step closer to their goal, while simultaneously eliminating some of the other destinations irrelevant to the user. [Chas Grundy calls this the “One-Click Rule,”](#) and explains it in more detail on his blog.

Conclusion

We know that what makes an effective designer can't be listed in seven simple steps.

Rather, this article aims to pinpoint some of the strategies successful designers commonly use – the ones that separate them from the rest of the crowd. These aren't, by any means, the *only* habits that great designers have – but taking them to heart will bring you one step closer to being as effective as you deserve to be.

5 Roles Every Great Designer Must Play

By Jerry Cao

All the world's a design studio, and all the designers merely players. They have their log-outs and their log-ins, and one designer in their time plays many parts.

Designers need to do more than just design.

In-house designers are becoming more and more prevalent, and they can no longer work in isolation. That means collaborating with departments a designer might not have worked with at an agency, such as marketing and business development.



Photo credit: Ryan Ritchie. Creative Commons.

The more diverse the roles of your coworkers, the more diverse you yourself have to be.

That's why we're outlining the other requirements for a great designer that aren't listed in the job description. As an in-house designer, try implementing these different roles in your work.

The Leader

At the bare minimum, you implement the design choices you're supposed to and then go home at the end of the day. But great designers understand the reason they're hired isn't so much to design, as it is to take charge of the design.

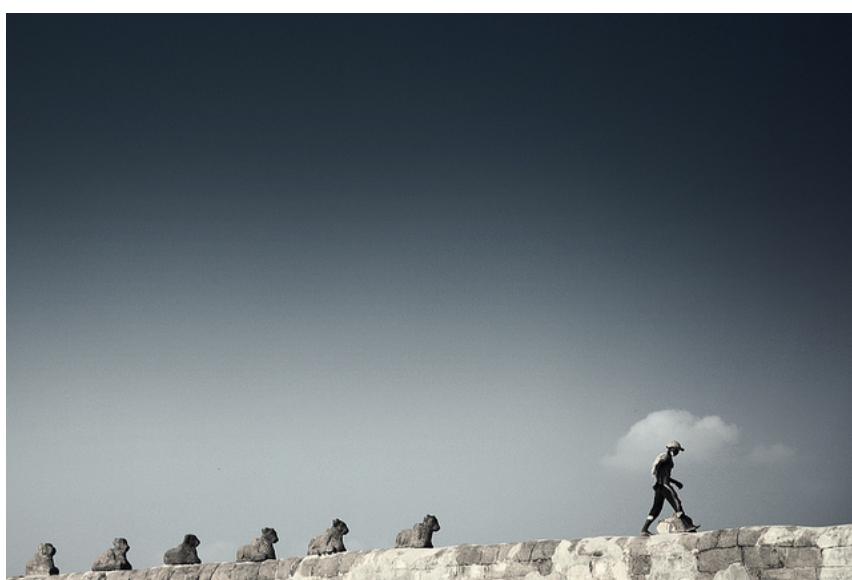


Photo credit: “Follow the Leader!” Vinoth Chandar. Creative Commons.

You are the resident expert on design, but you need to act like it. Take a hands-on approach for every step of the design process. Be proactive and don't simply wait for the decisions to come to you.

Don't confuse this with making all the decisions and bossing people around. Rather, being a leader means guiding the other stakeholders and sculpting their suggestions into something usable. Often this involves instructing them on design fundamentals. [As Jared Spool points out](#), you can't be present for every design decision, so part of your responsibility is to raise the bar of design competence for all team members.

In an article for ZURB, Bryan Zmijewski lists some ways to “lead by design”:

- **Rely on research** – Prideful stakeholders can (and will) argue with opinions, but you can't argue with facts. Showing your team the results of usability testing will both prove your points and help them understand how design decisions now affect the end result.
- **Use visual aids** – Don't neglect one of your best talents. Using visuals to explain (and teach) your design decisions will more effectively get your points across.
- **Take a stand** – This is perhaps the more distinct difference between a design leader and design worker. Defend the ideas you feel are right because, after all, you're the expert. You may not always “win,” but developing a habit of conviction in your work will establish you as a leader.

A great designer will proactively work with the stakeholders. This involves interviewing them early on to genuinely comprehend their concerns. The assertiveness not only creates better design, it will

also put you in the position of the go-to for all design decisions. Our *Design Collaboration in the Enterprise* explains more, including the best questions and topics to cover in such meetings.

The Facilitator

As designer, you're in the unique position of being the one person who can bring together different departments. Just as with being a leader, you can choose to ignore this role –but the great designers own up to it.

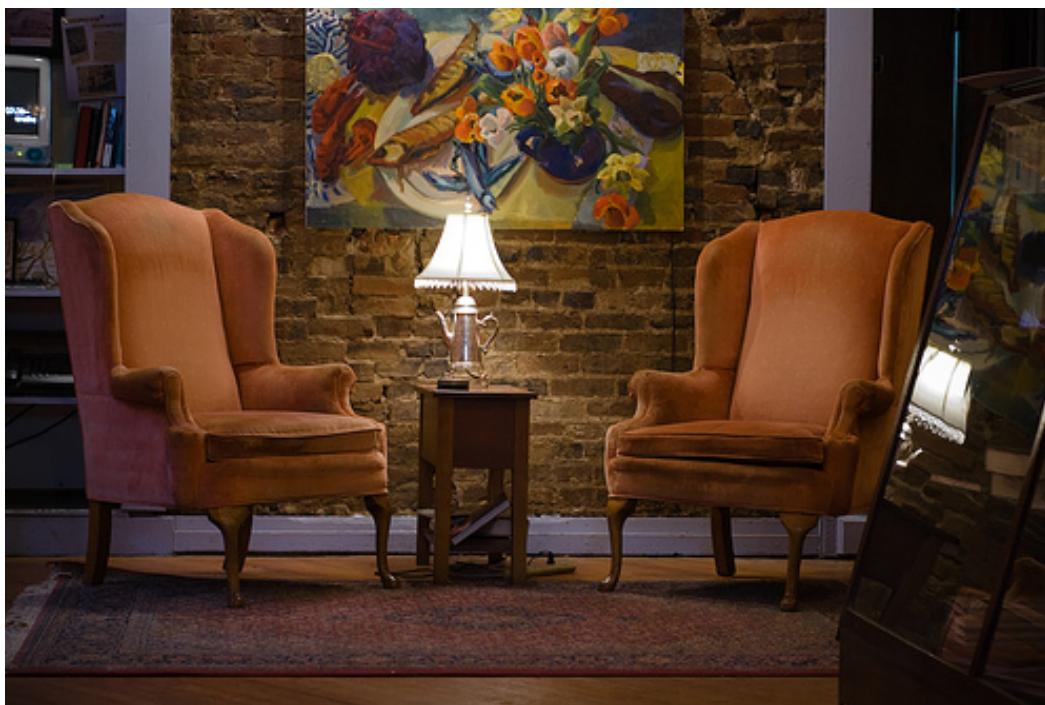


Photo credit: “National ‘Bring Your Tripod to Work’ Day.” Pen Waggener. Creative Commons.

You may be the expert on design, but you're (probably) not the expert of other fields like sales or web development. Getting your coworkers' perspectives on their areas of expertise will flesh out the design to more fully satisfy its goals across the board. In fact, a marketing perspective can actually [help optimize a design](#).

Regardless of the business goals, the closer a design gets to implementation, the more relevant the opinion of the developer becomes. Get feedback early, and get feedback often.

As explained in *Web UI Best Practices*, we find two activities to be especially helpful in encouraging teamwork:

- **Effective kickoff meetings** – Don’t pass off the importance of kickoff meetings. The beginning of a project is the most influential time for a project, and a kickoff meeting is the perfect opportunity to hear everyone’s thoughts, advice, fears, and goals.
- **Design studio exercises** – Great ideas can come from the unlikeliest of places, and **design studios** are the best way to get the creative juices flowing. Invite different departments, present the design problem, then encourage everyone to sketch as roughly as they can. Discuss all the ideas, then iterate on those with merit.

The Generalist

It’s not enough to simply facilitate and listen to other department’s feedback—you have to be open to and understand how to implement them. Thinking like a generalist will help you understand the big picture.

It’s what **IDEO’s Tim Brown calls being T-shaped**. The vertical stroke of the T is the depth to which the designer can contribute creatively

to the process. The horizontal stroke represents the breadth of their understanding.

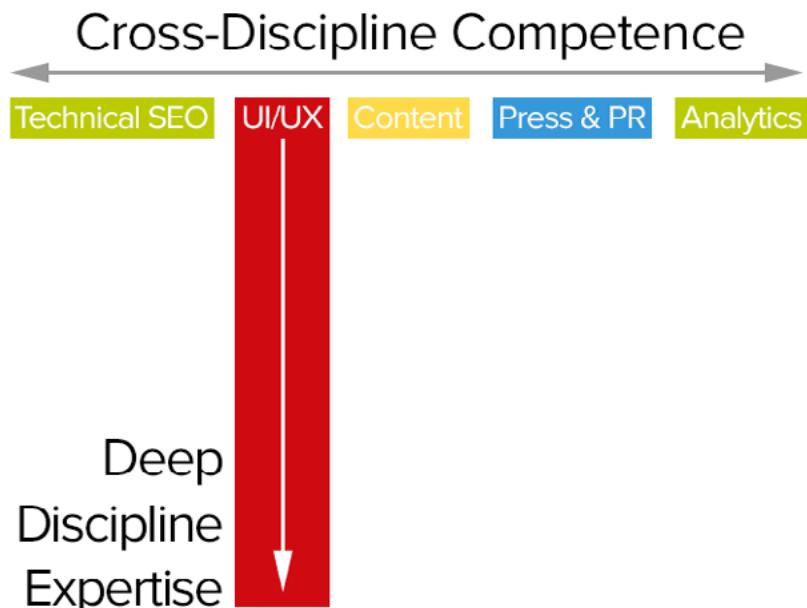


Photo credit: UXPin based on Distilled

Being a facilitator will give you the input from other perspectives, but being a generalist will show you what to do with them. In other words, broaden your horizons.

Writing for [The Next Web](#), Marcin Treder (CEO of UXPin) suggests honing your own business skills so that you understand the deeper goals your design seeks to accomplish. This can be done by taking business classes, talking with business associates, or simply reading up on business news and topics online.

Another helpful way to expand your realm of understanding is to learn code. While it's not always necessary for a designer to code, having some understanding of it will allow you to better collaborate with a developer on a project.

The User Advocate

A designer's understanding of the user is directly proportionate to the success of their design. Designing based on mechanics alone will only get you so far. In order to be great, you need to know your users inside and out.

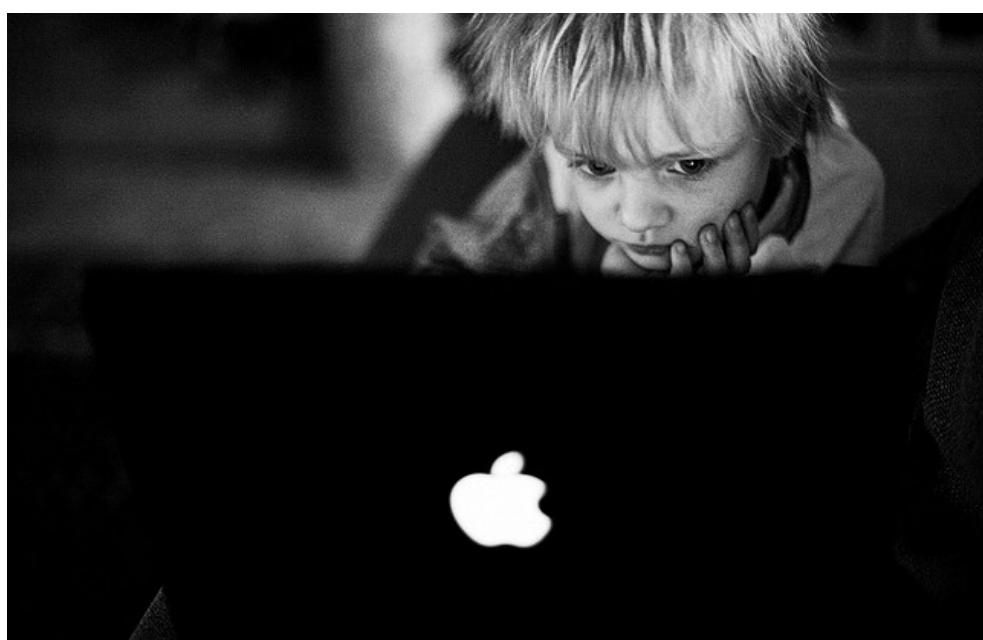


Photo credit: “Advanced Mac User II.” Julija Rauluševičiūtė. Creative Commons.

As Whitney Hess points out, UX designers can't rely on only themselves. Designing based on personal preferences with no reference to usability studies, demographic data, or business goals is ineffectual. Great designers understand their users, and not simply from their instincts or “born talent.”

To genuinely be an advocate of the user, designers research their habits through usability studies. Once you determine the types of tests that are right for you and conduct them, you'll need to turn that data into something usable for the design team: personas and user scenarios.

Personas are fictional characters created to represent your users, for reference during the design process. Asking “which would the persona prefer” will get you better results than “which would I prefer.” User scenarios take personas a step farther. They give the persona a task and analyze the steps taken to complete it.

For example: How would your persona buy a birthday gift for their father on your site? What page would they likely go to first? How can your design streamline their process? *The Guide to UX Design Processes and Documentation* helps explain how to go about creating these documents.

The greater part of this role depends on your empathy – how well you can relate to or at least understand your user. [Jon Burgstone and Bill Murphy, Jr.’s article for Fast Company](#) explains that customers first seek to avoid pain before pursuing pleasure. This means a designer who understands their users’ pain can:

- Alleviate that pain in their designs
- Find new methods of satisfying their user that competitors are unaware of

At every step of the way, great designers represent their user and act as their voice. They anticipate what their users want before they even want it.

The Analyst

Throughout the other sections of this article, we've placed heavy emphasis on user data and usability research. That's because a great designer is also a great analyst – they know how to gather, interpret, and apply data.

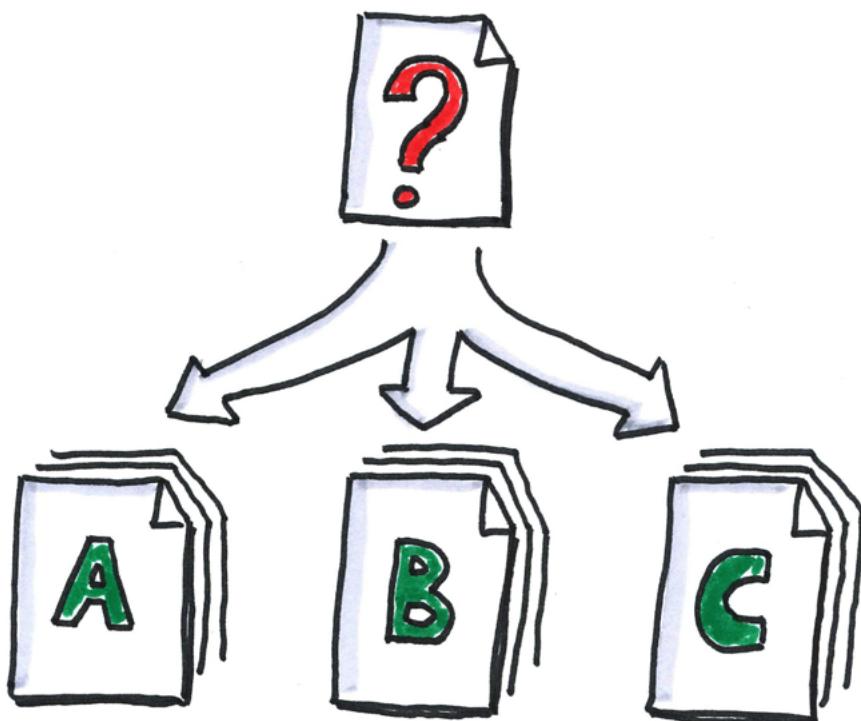


Photo credit: “Oliver Tack.” Creative Commons.

It's more than just directly inputting the results of a test into the final design. Designers should understand how the data fits into the bigger picture, and that individual test variables are only pieces of the whole.

The Nielsen Norman Group points out [three practical uses for analytics](#):

- 1. Discovering problems** – A look at the numbers can reveal where users are getting stuck, where they're not going, and where they're going instead.

2. **Investigation** - Analytics can help you understand the source of your problems. For example, if you notice one page's call-to-action is far more effective than an equally popular page, you can deduce the different factors that are affecting success.
3. **Complementing other data** - Qualitative data like user interviews and surveys give users a chance to express themselves and provide insight – but it's not enough on its own. Users can't always articulate their feelings, and qualitative data is subject to bias. Balancing it out with quantitative data will give you the complete picture.

On the other hand, there's something to be said about the designer's instinct. [Braden Kowitz's article for GV Library](#) reminds us that user data must be filtered through our own common sense, otherwise we might apply them in a misguided way.

Takeaway

To quote a cliche, the difference between "try" and "triumph" is that little extra "umph!"

The five traits above aren't actually necessary for a designer, but they provide that additional boost to spring you from good to great. Doing only the bare minimum will get you a bare minimum career.

How Designers Earn & Keep Their Seat at the Table

By Marcin Treder

It's no secret that good design is good business. In recent years, even the most engineering-driven companies are [snatching up design talent](#) as if it were going out of style.

But the path to better products isn't as easy as just hiring designers by the hundreds. When it comes to implementing design processes, company culture must adapt to the new user-centered strategies. The new breed of designers are equal parts ambassador and problem-solver, helping companies understand that it's more important to solve the right problem than to design the perfect solution.

Designers are quickly taking up the mantle of design leadership as their [influence spreads](#). But as the altitude increases, the air also becomes thinner. Executives crave certainty while designers thrive in ambiguity. Unless designers can think and talk like businesspeople who've mastered design, they might find themselves at the bottom of the totem pole instead of the top.



Photo credit: Jo Quinlan. Creative Commons.

In order to stay atop, designers must deliver results as Mills Baker, Facebook Product Designer, [puts it](#):

In order to avoid losing its place atop organizations, design must deliver results. Designers must also accept that if they don't, they're not actually designing well; in technology, at least, the subjective artistry of design is mirrored by the objective finality of use data. A “great” design which produces bad outcomes – low engagement, little utility, few downloads, indifference on the part of the target market – should be regarded as a failure.

In this piece, we'll explore tactics that help designers earn their seat at the table and keep their new responsibilities.

Understand Business Goals Like a Second Language

Before you can show others the light, you first need to see the world through their eyes. Designers help build products, and the end goal of every product is revenue – there's nothing subjective about that.

We're not saying that every designer must go out and earn an MBA. But, as we mention in the previous article, every designer must understand the larger context of who they're designing for and why the project was initiated in the first place.

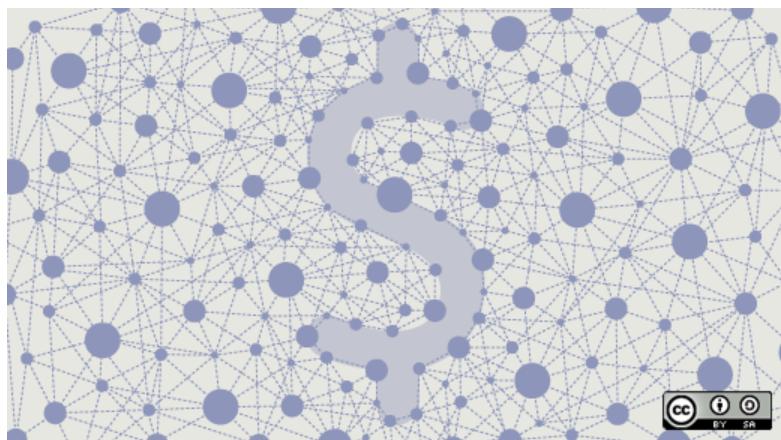


Photo credit: [Opensource.com](#), Creative Commons

What's the market cap of your industry? Where does the current product you're designing fit into long-term goals? Who are the top competitors, and where do they succeed or fall short? You probably won't know the answers right away (and sometimes stakeholders might not even tell you upfront), so it's your responsibility to tease out the information from the right people.

Just as you must empathize externally with users, don't forget to also empathize internally with people on the product team and beyond.

Here's a few tips to get you started:

1. Learn from other departments

Ask if you can sit in on a sales demo for an initial prospect, or a closing meeting with someone further along in the process.



Photo credit: [Opensource.com](#), Creative Commons

When it's done, learn about the buyer and why a certain linguistic approach was used. That way, you'll better understand product nuances, which can help inform your approach to product updates or future product development.

It might sound daunting, but you'd be surprised by how receptive other teams are toward a designer's interest in their job. You'll also be able to strike up a conversation and explain how you approach certain problems, and how you might envision possible improvements based on live customer calls.

2. Interview stakeholders

Like we described in *Design Collaboration in the Enterprise*, you should always interview stakeholders as one of the first steps in a design kickoff.



Photo credit: Nicholas Wang, Creative Commons

Aside from asking technical questions, try to understand them as people. Reassure them that certain questions are off the record, then ask about their fears for the project and what concerns their team on a weekly basis. You rarely get one-on-one time with some of these stakeholders, so use it as an opportunity to make a strong impression.

To learn more, we highly recommend Kim Goodwin's [Stakeholder Interview Checklist](#).

3. Speak the right language

It's easy for us designers to get lost in the world of "clean interfaces," "responsive frameworks," and "fluid interaction design." But sometimes the people making the most important decisions think in terms of "monthly churn," "conversion rates," and "net income."

Don't start spewing business jargon, but try to frame design problems as business problems. Instead of saying that a minimalist interface creates a cleaner impression, explain that it places greater focus on the content and calls-to-action, which helps to persuade and convert users better.

Grigoriy Kogan has some further [thoughts on the matter](#), which are blunt but very true.

4. Stay updated on how design intersects with business

We're big fans of Smashing Magazine's [Business section](#) and Google Venture's [Library](#) because they provide practical design perspectives on very real and pressing business issues. To bring fresh perspectives to your own company, you must learn beyond the daily grind.

How To Become A UX Leader

By Robert Hoekman Jr.

• April 23rd, 2015 • 37 Comments

Let's say you run a UX team. Better yet, let's say you don't. Let's say you just want to do great work. You're a consultant. You're a newbie. You're an intern. Your position is irrelevant. So is your title. What's important here is that **you want great UX to happen**. You want it consistently. You want it now. You want it all the time.

No matter your status or situation, whether director or loner, you are in a position to lead, to raise the bar in a place where it consistently sits lower than you think it should.

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SmashingConf isn't the eighth wonder of the world, but we are pretty close. Join us at [SmashingConf NYC](#) on June 15-18 or at [SmashingConf Freiburg](#) on September 14-16. You won't be disappointed.

Photo credit: Smashing Magazine

Whether it's virtual learning or a real mentorship, seek the wisdom of others.

Once you have a stronger business grasp, you also have a stronger position from which to defend your design decisions. It might feel like extra work in the beginning, but better business fluency always pays off in the long-term for your career. It certainly helped me tremendously when authoring *UX Design for Startups* and the *UX Guidebook for Product Managers*.

Lift the Curtain on the Design Process

At first, you might feel that you're weakening your position by divulging the secrets behind the magic. Don't.

The benefits of collaboration and mutual respect outweigh any concerns your *designer's ego* might have. That ego, which we all experience in some form, certainly isn't easy to overcome. But you must welcome others in the process or else your work dies a lonely death – because no one will be your advocate within the organization.

This happened to me early in my career. At the time, I was a UX designer on an IT frontend team. My work was always being questioned because I was the first UX designer hired and seen as someone who would be interfering with their product development cycles. As a result, I had little influence among the team. I delivered wireframes, prototypes or the usability testing results and it didn't create an impact among the developers. They carried on as they did before I came along.



Photo credit: [Opensource.com](#), Creative Commons

An animosity festered. The developers firmly believed the interface was decoration for technology. Analytics were for business, not to learn more about the users. So the developers had no clue as to what worked and what didn't.

From my perspective, it was maddening, so I fought for dominance. It wasn't until months later that I realized there was nothing to be gained by instigating petty fights. I'd put the developers on the defensive rather than getting them on my side. Bickering between departments and specialists is silly when you're all working toward the same goal of creating an amazing product.

Things turned around when I adopted a more inclusive philosophy. Here's a few activities below that helped me demystify the UX design process.

1. Collaborative usability research

Watching how users interact with your product will reveal many “Aha!” moments for your team. You can have a marketer and de-

veloper conduct **contextual interviews** with users in their natural environment. This will allow them to get firsthand explanation of any problems, reducing the time it would normally take to understand it.

Collaborative testing sessions immerse stakeholders in the user's world, which primes them to better receive your suggestions.

2. Design studio workshops

Invite your team to a collaborative brainstorming session that relies on sketching. These design studios help generate a lot of ideas upfront and clear the air with everyone involved. You might encounter some resistance (e.g. "You're the designer! You draw!"), but remind people that you care about their ideas and not the artistic execution.



Photo credit: "IMG_8298." [jeanbaptisteparis](#). Creative Commons 2.0.

Rough and dirty is actually preferred. Grab some pen, paper, and people and follow **Kevin Hoffman's process**. Don't think that this will devalue your position. Instead, this exercise will solidify it because you'll be explaining why certain ideas have merit based on the business rationale, human psychology and design principles.

Not the easiest concepts for anyone to master, but that's why you're on the team.

3. Weekly/monthly “what we solved” emails

Don't waste words on vanity metrics, such as the number of prototypes tested. Focus on insights gained from analytics or user testing.

Did last week's usability test reveal a huge flaw in the form completion process? Did your team fix it and do the analytics show an increased conversion rate because of it? That's what you should include because it'll get the attention of the higher-ups and demonstrate your value to the business.



Photo credit: Jonny Hughes. Creative Commons.

The goal of all these activities is to show that “design processes” are really just good business processes. Designers don't retreat to darkness and emerge with brilliant mockups in hand. We analyze, we question, we iterate, and we validate ideas with users and other team members to make sure we're solving the right problems.

Show others the real process at work, involve them in some collaborative activities (even if they only have time for one), and they'll see you less as a visual designer and more as a product problem-solver.

Analyze and Present the Right Data

Data is the language of business – there's just no getting around it. To be a good designer, you need to be a good scientist.

You need to collect the right data and explain it in the right context. But don't go overboard and fall into the trap of data fetishization (like Google did with their [41 shades of blue test](#)).

Understand that user data is the single strongest source of evidence for design decisions. Furthermore, being data-focused makes others perceive you as the same category of more “traditional” disciplines like marketing and finance, and nobody really questions their value.

Here's some tips that have helped me explain design decisions in a more empirical format:

1. Go beyond A/B testing

A/B testing is probably one of the most familiar data-oriented exercises for designers, but it's not the end-all solution. A/B testing is tactical, and you can easily hit the limit of the [local maximum](#).

Instead, triangulate your results with other forms of data: customer surveys, product usage metrics, user interviews, etc.

2. Ask users the right questions with the right people

At some point, you need to get out of the office and talk to potential and current users. The process, however, shouldn't be conducted in isolation.



Photo credit: “2014-04-30 17.09.22.” Nicholas Wang. Creative Commons.

When [UXPin](#) first moved to the United States around 2012 to build our web app, we conducted over 50 user interviews with designers. But before that, we met with marketing and development people, then spent three-four hours determining knowledge gaps before coming up with a list of 20 questions. Input from other teams prevented us from needing to follow up with interviewees due to missed information and made the interviews feel more like a product exercise instead of a “design exercise”.

The difference seems petty, but perceptions are very powerful – especially in larger corporations where design is still perceived as a black box.

3. Think in terms of assumptions and hypothesis

Alissa Briggs, Director of UX at [Brigade](#), told us a [powerful story of experimentation](#) at Rosenfeld Media's Enterprise UX conference.

When she was at Intuit, the UX team conveyed customer feedback suggesting that they simplify multiple tiers of products into one license. Executives resisted, until the team tested their assumption on a small set of users using the [experiment grid](#) and found the single license sold better. With the quantitative data in hand, they sold the executive team on the idea and that single-license product now outsells everything else.

Experiment Grid

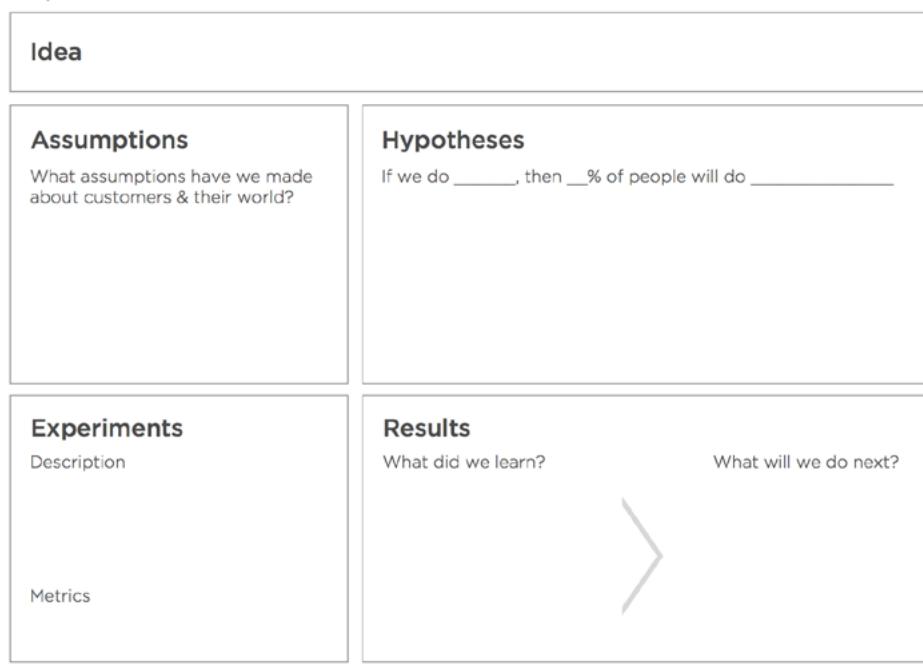


Photo credit: [Alissa Briggs](#)

Moral of the story? Learn [hypotheses-driven UX design](#).

But it isn't enough to just present that data. You need to weave that data into a narrative that executives can relate with and digest quickly. Because, as [Google's Daniel Waisberg points out](#), the combination of data and meaningful story engages people on both an emotional and intellectual level.

Don't Let Others Drive Design

A final word: don't let others drive design within the organization. Remember you're the expert, you have the domain knowledge.

But don't think that you're the only who can design. If you think that everyone on the team has the ability to participate in the design process, you'll be able to help them see the true power of design. And that also allows you to create design through them rather than just implementing it.



To get something done,
a committee should consist
of no more than three people,
two of whom are absent.

Robert Copeland

Photo credit: "Bored Room." Brett Jordan via Compfight. Creative Commons 2.0.

As Jared Spool highlights, play **the role of design leader rather than designer**. In other words, be the driver, not the passenger – but make sure everyone still knows where you’re going.

5 Tips for Design Feedback That You Won't Hate

By Jerry Cao

Understanding the psychology behind social interactions is a job in itself, but when you're focused on icons, grids, interactions, it's easy to overlook that other people have feelings that need protecting – and that you do, too.

Feedback is a necessary evil for creating the end product that satisfies users, but it serves its purpose more efficiently with a proper procedure in place.

Below, we've collected some feedback tips from design experts on both sides. We've listed them out to help you draw out the beneficial points of feedback while minimizing the harmful ones. Without further delay, here are five tips for design feedback that people won't hate.

Don't Shy Away From Follow-up Questions

Feedback should open a discussion, not just be given and then everyone moves on. This makes it seem like a command, which proper

critique is not. Asking follow-up questions creates a dialogue that accomplishes several goals. For starters, it draws out the critique – by understanding every corner, the recipient better comprehends the problem, and if and which parts of it can be solved.



Photo credit: “Question Everything”. Duncan Hull. Creative Commons.

Additionally, probing with follow-up questions can challenge critiques that are suspect. In settings like this, feedback isn't always honest, there are hidden agendas and personal motives at play. Follow-up questions help sift through what is valid and what falls apart under pressure.

There's not always a devious undertone, though. Sometimes, the critic actually has a valid point, but can't, for whatever reason, articulate it. In this case, asking follow-up questions will aid the speaker in ac-

tually voicing what they want to say. Some people simply need help expressing themselves properly.

Dustin Curtis recommends [forcing yourself to ask the critic at least three questions](#). He points out that the act of formulating those questions will help you change your own opinion, making this an advantageous tactic for everyone.

Always Stay Goal-Oriented

As we described in [*Design Collaboration in the Enterprise*](#), a lot of the trouble with feedback comes from confusion over the end-goal.

Who is this product designed for? What does it hope to accomplish? The same design element can be either a perfect choice or an awful choice depending on the answers to these kinds of questions. If the same goals aren't understood by everyone at the beginning, the feedback will be misguided and ineffective.

Ideally, the goals are decided at the start of the project, but if these were never uniformly addressed, the sooner the better. Once everyone is on the same page about the target users, strategies, styles, and criteria for success, the feedback will be more focused and helpful. Otherwise, everyone's pulling the design into different directions, and you'll end up with something that tries to fulfill every criteria and satisfies none.

Take the time to reiterate the project goals beforehand. If anyone goes off track, you can more easily bring them back this way. Moreover, clearly established goals will more concretely weed out the valid comments from the opinionated ones, and help in clearing up some disagreements.

Provide Proper Context With Framing

If implemented by everyone, proper framing can resolve a good portion of feedback problems. What we mean by framing is the approach or angle in which a comment is presented. The same problem can be framed from a variety of angles, but some are more helpful than others.



Photo credit: “[Frames](#).” Bart Everson. [Creative Commons](#).

Yotam Troim suggests [presenting a problem instead of a solution](#). By framing a critique as an issue, feedback sessions take a whole new feel.

Let's take, for example, something simple like color choice.

A proper way to frame the comment would be something like, "I'm not sure the color scheme fits the mood of the product." What this does is open a discussion to the group: does this color scheme actually fit, what is the mood of the product, which color scheme would work best, etc. These are all important questions brought to light by the way in which the comment was posed. Furthermore, now the entire group is able to give their opinion on the color scheme instead of just the first person, and an impromptu brainstorming session begins that incorporates everyone's expertise.

Compare that scenario to one where the comment was framed only as a solution, "I think the color scheme should be green-blue." All the helpful discussion from the first scenario is bypassed, and it now becomes only a question of whether or not green-blue would work. Now, let's say the table immediately agrees that green-blue does not work and everyone moves on. The heart of the comment – the color scheme isn't working – goes unaddressed simply because the speaker framed his critique from a perspective of personal opinion.

Phrase Your Feedback Strategically

Just as with framing, the same critique can be interpreted any number of ways depending on its phrasing. Minor details like word choice can make a world of difference to the person on the receiving end, not the least of which is whether or not they choose to accept it.

There are two important concerns to keep in mind when phrasing your feedback:

- the feelings of the recipient
- the accuracy of the comment

The first is the same lessons of playing well with others that we learned in kindergarten. Proper phrasing incorporates respectfulness and tact. Using softer phrasing like “I didn’t understand this part,” will soften the blow far more than, “I hated this,” or “This part makes no sense.” This may be common sense to some people, but others seem to lack this empathetic filter, and so extra care should be placed on wording.

The second concern about accuracy deals mainly with exaggeration. “No one is going to understand that,” is a bit inaccurate, not to mention extreme. “I didn’t understand that,” or “I’m worried a lot of people won’t understand that,” are more accurate, and more helpful.

Grounding your comments in reality will make them much more actionable.

Back it up with Facts

Opinions can be discussed and argued all night long, but facts are either right or wrong. Whenever possible, back up your criticisms with facts. This will cut down on time wasted in fruitless debates, but

it will also create a better end product because it's built on something substantial.

Draw on any user studies or relevant research to explain why your criticism is valid. In fact, before the feedback session even begins, present the right context by explaining the rationale behind the design in terms of usability data. If you haven't yet conducted any research for the project, reference others' research – there's certainly enough of it out there.



Photo credit: "Facts Not Opinions." John Lord. Creative Commons.

Even the more abstract topics such as visuals have scientific backing. The Gestalt principles lend validity to claims about layout and spacing. Numerous studies on the psychological effects of colors can help settle disputes on which colors to choose. And the science of aesthetics we described in the free e-book *Web Design for the Human Eye* can determine in concrete terms the proper look of a design.

Ultimately, the opinions of your peers don't matter nearly as much as the behavior of the users. Try as best you can to model your feedback on what's best for them.

Conclusion

Yes, you should hurt other people's feelings as little as possible. But feelings aside, collaboration is better for business.

A smoother feedback routine helps ensure the right criticisms get implemented, along with less feelings getting hurt. Like all other aspects of design, how to critique is its own skillset with its own guidelines. Taking the time to work on those will have positive effects on the project just like improving any other design element.

Doing the Dirty Work of User Testing

By Alex Gamble

We've all heard the old adage: test early and test often. Yet user testing can be a daunting task for some. After all, there's gathering the participants, doing the actual test, documenting and analyzing the results. Not to mention, making sense of the feedback, figuring out what to prioritize before taking action. And that can feel like dirty work.

In this article, we'll breakdown how to make sure that what you've discovered during testing is properly documented and turned into solutions that create a better user experience.

Now this isn't a "how to" guide on user testing. If you want to know more about performing a user test then check out UXPin's free e-book, [*The Guide to Usability Testing*](#).

Formal vs. Lean Methodology

When I started my career, everything was documented in a very formal way with big reports, which were presented to clients in hour-long presentations. To me, formal documentation and multiple-paged deliverables encourages discussion rather than action – but I'll get to that later. That was how I did things back then. Nowadays I'm all about action rather than discussion rather than action.

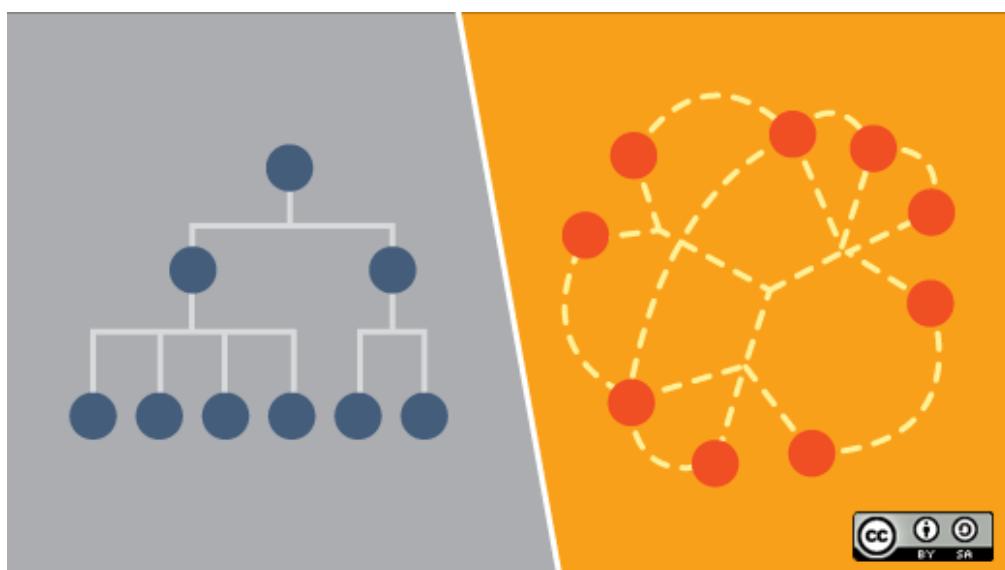


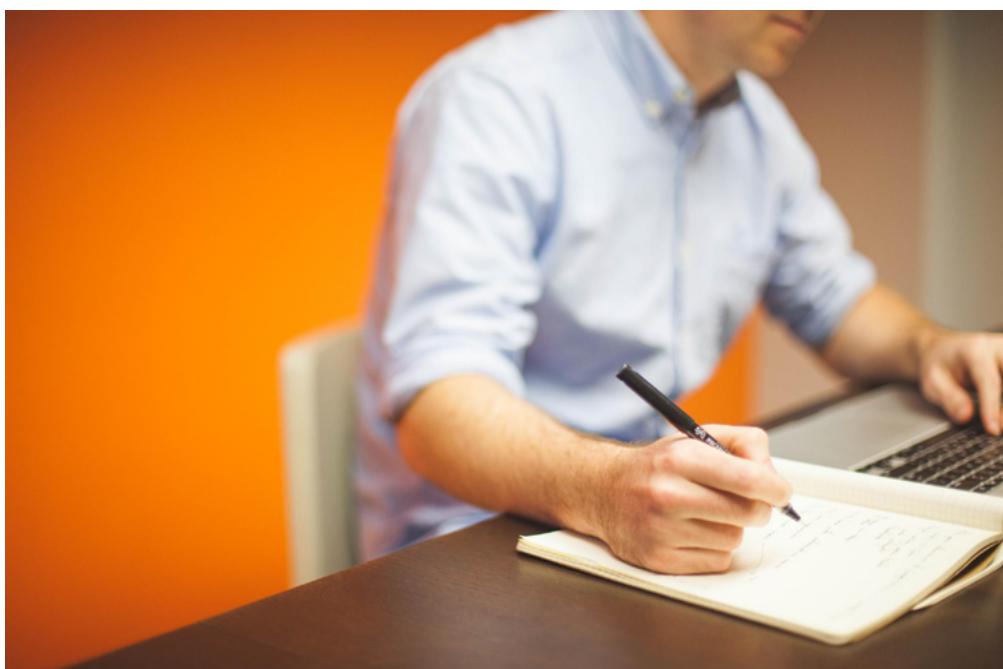
Photo credit: [Opensource.com](#), Creative Commons

After my time at Trade Me, I moved to [Optimal Experience](#), NZ's leading UX design consultancy, which has recently been acquired by Price Waterhouse Coopers. We have recently moved away from formal approaches towards our adaptation of [Google Venture's design sprints](#). No one in New Zealand seems to be doing this type of work, which has allowed our team to pioneer the way these sprints run. We've discovered new ways to do things and the best way to create action over discussion. A lot of the time it's "load, fire, aim" instead of "load, aim, fire." ut doing things this way allows you to learn quickly.

With that, let's look at how we "do the dirty work" in both formal and lean environments.

Great Testing Documentation Takes Preparation

Creating great documentation and solutions begins when preparing for user testing. It's like a great meal. You can't have something that tastes amazing if you don't prepare the ingredients, trim the meat and cut the veggies ahead of time. Same with user testing documentation. If you don't have everything lined up beforehand, you won't have anything spectacular to document.



First things first,, you need to organize the roles of everyone involved. The types of people involved in a user testing session include:

- **The participant:** This is the person who represents one of your user personas that you want to test. If you want to learn more

about creating user personas, you can check out UXPin's [previous blog post on the subject](#).

- **The facilitator:** The person who is in charge of facilitating the process with the participant. The facilitator asks the questions, probes to discover the true problem, and makes the test feel as realistic as possible.
- **The scribe:** This is the person who is in charge of noting everything that happens during the testing session, such as what participants say, what participants do and the questions the facilitator asks. This is really important because it's the safety net. These notes are the first place anyone looks if someone wants to know what happened and when.
- **The clients:** It's really important to have your clients observe the user test. This is so they can see first hand how participants struggle with the product. This will motivate them to improve their product.
- **The designers and developers:** You definitely want the designers and developers who have created the product to observe the test. Seeing their creations fail will bring them back down to earth and motivate them to design and develop from their users' perspective.
- **The wrangler:** Have someone to wrangle the clients. The wrangler's job is to ensure the clients leave their discussions until after the session, keeping everyone concentrated on noting down as many findings as possible.



Obviously you can't fit all of these people into the same room, so it's a good idea to arrange screen sharing software to stream what's happening on the participant's device to an observation room where the clients, the wrangler and the scribe sit.

What You Need to Document During the Testing Sessions

When the session is happening, the clients and the wrangler will be taking down as many findings as they can on Post-it notes. Each note should be color coded, based on the type of finding you're taking down.



Let's take a look at how this works.

- **Positive = green:** For example, participant registered for our service without an issues.
- **Negative = pink:** For example, the participant couldn't find the shopping cart.
- **Observations (neither positive nor negative but something interesting) = blue:** For example, the participant browsed to find a product instead of searching.
- **Number the Post-its based on what participant the finding was for:** This will help you track this finding back to the notes to see what exactly was happening. It will also help you identify what finding relates to what persona. For example, all the participants who don't shop online couldn't find the shopping cart.
- **Only put one finding on each note:** Once you write down your finding, stick it up on a surface dedicated to findings. Big foam boards are good for this.

Here's a few other things in mind:

- **Record the session:** You'll want to record the session using screen-capturing software, such as [Silverback](#). This is another safety net and can be shared with clients and stakeholders who can't make it to the session. If you have a good dedicated note taker., you won't need to go back to the video. We recently did this as part of our redesign process, watching hours of video to learn how users were habitually using [UXPin](#).

- **Cluster notes:** In between sessions, start clustering the notes based on findings. For example, there may be a cluster of findings relating positives, negatives and observations in the onboarding process. Discussion of the findings can also occur between the sessions.
- **Don't rush into changes:** Clients will probably want to make changes to the designs based on one or two sessions. It's your responsibility to remind them that more evidence is needed before making changes. Four participants is the minimum you'd want to test with before making changes. If you were to make changes after the fourth participant then the finding will have to be really clear. For example, 100% of our participants found this issue so far. To find out more on confidence levels of findings and when to make changes read [this article](#).

At the end, you'll have a bunch of formal notes that the dedicated note taker has taken down, video recordings of your participant's sessions, and a surface full of Post-it notes that are clustered into similar findings.

As we said, there's two approaches you can take after the sessions are complete, which will dive deep into next:

- **The formal approach:** a document handed over to the client with a summary of findings.
- **The lean approach:** an iterative process that delivers working prototypes as documentation.

The Formal Approach

In a formal approach, all the findings are summarized into a document with the impact of the findings and the consultant's recommendation.

One of the main pain points with formal reporting is ranking findings. It's easy to prioritise findings into two groups; those that prevent participants from achieving their task and those that just trip them up, but it's difficult to rank them beyond that.

We usually categorize findings based on three different criteria.

- **Minor:** Issues that cause irritation/confusion or rarely occur.
- **Major:** Issues that make it difficult to use the site, but users might recover.
- **Severe:** Issues that prevent participants from achieving a task.

The way that findings are categorized completely depends on the perspective you're categorizing them from: do you categorize them by what's important to users? What's important to clients? What's easiest or hardest to fix? This is a major pain point because you can't take all perspectives into account in a formal report.

Another pain point is categorizing the findings into the three categories. You can still get one category with 20+ findings. Surely some of those 20+ findings are more important than others, but how do you know?

The Downside of the Formal Approach

In a formal document, you have to prioritize the findings for the developers and designers. This will give them a starting place before implementing a solution. And because time and budget are often short, you'll have to also prioritize the solutions. Why? Because you can't simply hand a client a document that has just findings – they won't know what to do next unless you offer a game plan.

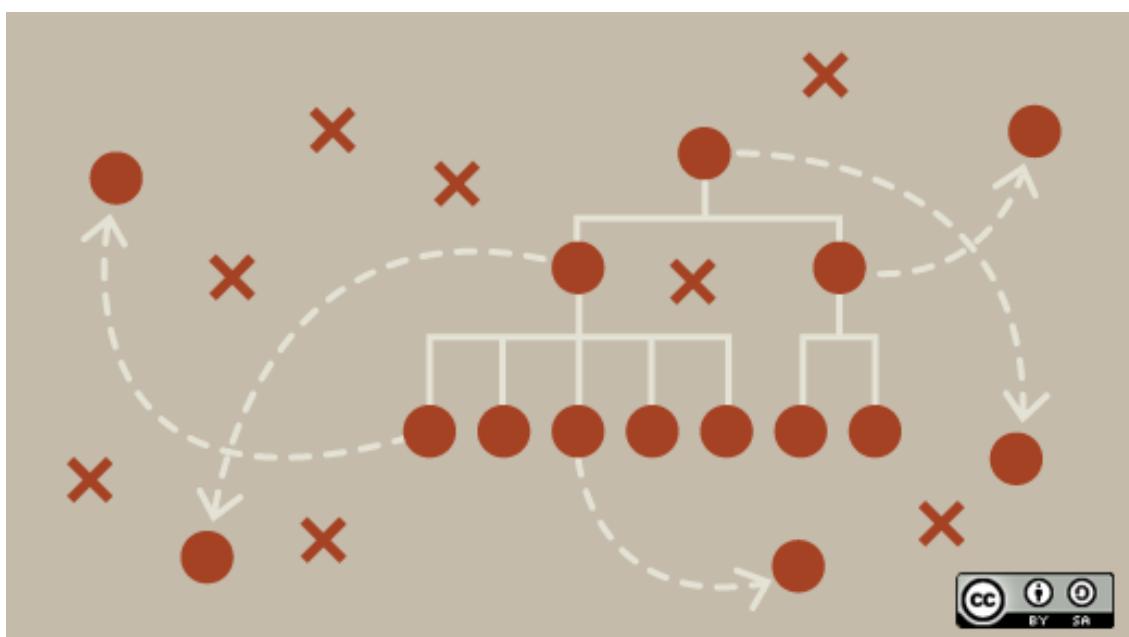


Photo credit: [Opensource.com](#). Creative Commons.

This is where your UX and interaction design knowledge comes in handy. At Optimal Experience, we get two members of our team to recommended solutions.

However, the big downside is that these are solutions coming from the consultant's perspective, not the client's or user's. Sure, you can attempt to put these hats on but there's no way you can design from the same perspective as these people.

The final issue with formally documenting is that quite often the clients read the document once, file it away for future reference, and then forget about it.

The Lean Approach

The lean approach is far more effective than formally documenting your user testing findings because it favors action over documentation, and the end result is a working prototype instead of a formal report. The difference between the lean and formal approach happens after the testing sessions. Let's walk through this.

- **Go over the notes:** Once the sessions have been completed, everyone except the participants, will go over the Post-it notes and ensure all the findings are accurately clustered and that none missing. This gives the team a chance to have a good discussion, that will help build their knowledge of what's happening with their current design and why.
- **Come up with solutions:** The next step is to come up with solutions to your findings. The process used to do this is called co-design, which is a collaborative way to design solutions. The key reason to use the co-design approach is to generate solutions from different perspectives, by involving different types of people. For example, you'll get much better solutions if you involve UX and IxD consultants, clients, customers, customer support staff for your product, and other industry experts.

Diverging and Converging on a Problem

Let's take a closer look at co-design. This collaborative method works by diverging and converging on a problem. In other words, creating as many solutions as possible and narrowing down on the best ones.



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You begin this process by diverging on a cluster of Post-it notes from the user test. Each member creates as many solutions as possible and then presents them back to the group. After hearing everyone's presentation, the group writes feedback on Post-it notes and sticks them on the idea the feedback relates to. Next, everyone votes on what they think are the best ideas by sticking a red dot on them.

The group then converges on the solutions with the most votes. The team starts by refining their designs based on their feedback, what was voted on, and stealing other people's ideas. Once this is done, the group votes again to settle on the top one or two solutions for that cluster of findings. This process is repeated until all the clusters of findings have gone through a divergence and convergence.

This type of session takes between one and two days depending on how many clusters of findings you need to design solutions for. If you want to know more about this process then read this article by the [Google Ventures design team](#). Although, we've also just started playing with the new qualitative research tool called [Reframer](#), which can also help ferret out trends in user research.

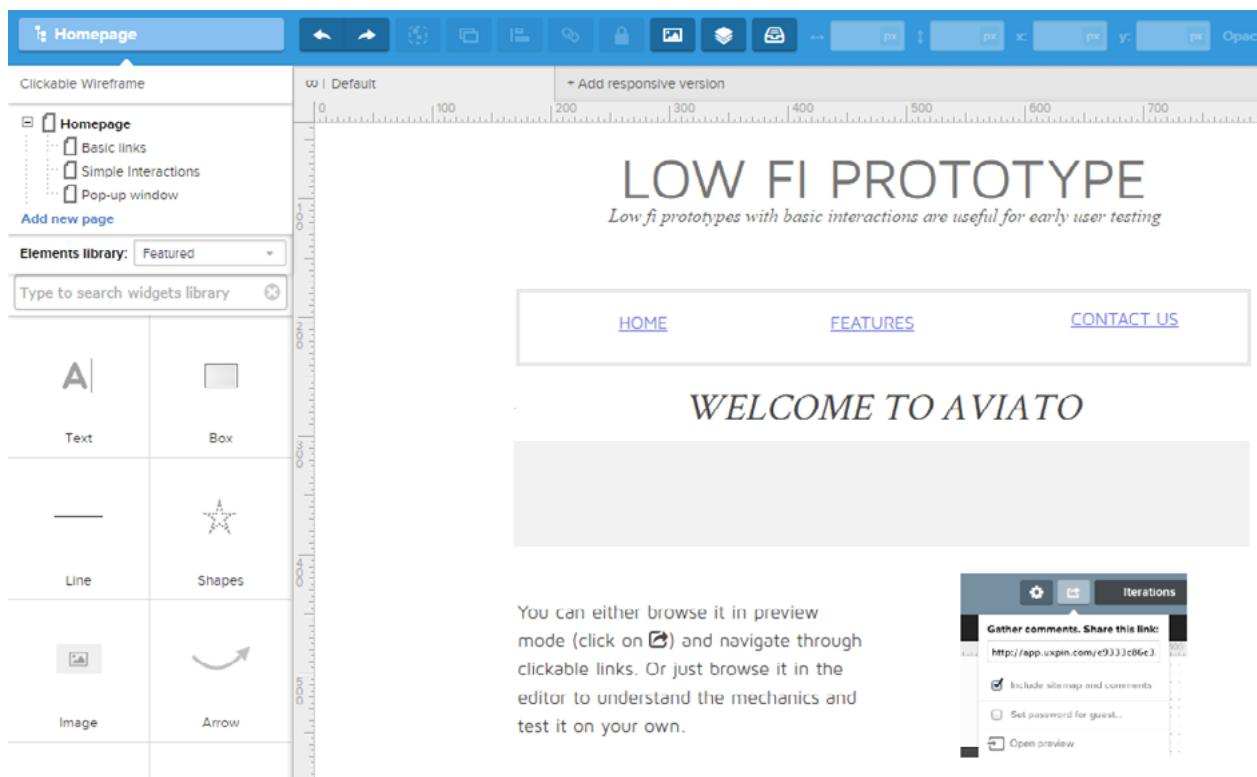


Photo credit: UXPin

The next step in this lean process is to turn the converged solutions from the co-design session into a working prototype. This can be done using tools like [UXPin](#). Creating a prototype gives a working example of how your solutions should work. These wireframes are annotated with notes to give an explanation of the interactions and key changes. It also gives your clients something to hand over to their designers and developers for them to create.

The Value and Downside of the Lean Approach

Processing findings using a lean approach is far more effective than documenting findings in a formal way. Firstly, because all the findings are already documented on Post-it notes, meaning putting them into a report will basically be repetitive data entry. Secondly, because you can have a cross functional team of people who have different perspectives creating solutions.



Photo credit: Rosenfeld Media, Creative Commons

However, this method isn't without its downside. Let's look at them.

- **Post-its can become lost:** Sticky notes can easily be lost. They don't stick forever and often go missing after a session. Take photos so reference them later, just in case. Be warned, however, that photos aren't a great means of documenting sticky notes. The photos can often turn out blurry.

- **Hard to prioritize notes:** Also, it's hard to prioritize your findings with sticky notes. This isn't so bad because you are able to tackle a cluster of findings during co-design sessions. For example, if there is a cluster relating to on-boarding you can co-design the entire on-boarding process, covering off all findings in that particular cluster, compared to prioritizing individual findings in the formal method.

Another thing to remember: the process doesn't stop at creating the working prototype. If you were to run through the full lean process properly, you would user test the prototype to see if your proposed solutions solve the findings. The first test won't be 100% effective in solving all of the findings, so you will need to repeat the process of user testing, co-designing and prototyping again. Ideally, this process will be repeated until the best solution for the product is found.

One last caveat. With many iterations, it may be hard to keep track of what solution relates to what finding. So if a stakeholder asks why a change has been made, be prepared to clearly explain your design decisions.

Takeaway

Neither approach is perfect. And hopefully with tools like [Reframer](#) by Optimal Workshop this process will become a lot less painful. In the meantime, it'd be best to go with the lean method because it favors action over documentation. At the end of the process, you'll have a

working prototype that teams can implement instead of a document that gets filed away.

To start wireframing and prototyping collaboratively, go ahead and start a free trial in [UXPin](#). You'll also be able to test your prototypes using the [built-in usability testing tool](#).

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