



GYMNASIUM

UX FUNDAMENTALS

Lesson 2 Handout

Take "You" Out Of User

ABOUT THIS HANDOUT

This handout includes the following:

- A list of the core concepts covered in this lesson.
- The assignment(s) for this lesson.
- A list of readings and resources for this lesson including books, articles and websites mentioned in the videos by the instructor, plus bonus readings and resources hand-picked by the instructor.
- A transcript of the lecture videos for this lesson

CORE CONCEPTS

1. Find your user and their goals. One way to do this is use a technique of filling in the blanks: “The user is a _____ who wants to _____”.
2. There are tactical design benefits to liking your customers. Having empathy for users means trying to understand why they might not be getting some aspect of your product instead of blaming or ignoring them. Truly understanding their difficulties and solving them isn’t always easy under the pressures of production, but it is almost always worth it.
3. Talk to real people. Gathering data about your product or service through interviews will serve as a “reality check” by uncovering the true wants and needs of users, not just your assumptions about them.
4. Put it down on paper. Personas, scenarios, and user flows are three deliverables which can help tell you who your customers are, what they want, and how they’re going to get it from your product.

ASSIGNMENTS

This assignment also serves as an introduction to the project you’ll be working on during assignments for the rest of the class. In order to proceed, you’ll need to make some decisions about that project.

First, choose one of the following tasks:

1. Booking a flight
2. Finding a restaurant and making a reservation.

Also choose whether you would like to work on a **website** or a **smartphone app**. (No prior experience is needed for either, though it will be easier to work on a smartphone app if you already have a smartphone.)

Complete the following and keep for your records:

UX FUNDAMENTALS PROJECT SELECTION

Your name _____

Project chosen (circle one)

- Booking a flight
- Finding a restaurant and making a reservation

Medium chosen (circle one)

- Website
- Smartphone app

During the six sessions of this course, you'll be working on researching, designing, and eventually prototyping your own, better version of this interaction (e.g., your own flight booking website, or restaurant finding app, or whatever combination you chose). You'll document the steps along the way, to create a portfolio piece that's appropriate for a User Experience designer.

Now, to the meat of the assignment for session #2!

USER RESEARCH ASSIGNMENT

This assignment is an introduction to user research, and to the value of talking with users and watching them perform tasks. To complete this assignment, you'll need to find **three people** to observe performing a task. They can be friends or strangers, but they should be different from you in some way (different age, job, or interests).

1. Schedule about fifteen minutes with each person. During this time, they will be attempting to do the task you chose earlier (booking a flight or finding a restaurant and making a reservation), and on the device that you chose (website or smartphone). So make sure they will have access to the device and Internet during your time together.
2. When you sit down with them, ask them to perform your chosen task as realistically as possible, while communicating their thoughts to you. Give them the scenario, but try to make the task fit their natural behavior as much as possible; for instance, if their family home is far away, you might ask them to book a ticket home next weekend. You might want to ask them a few questions about themselves before you begin, in order to understand what might be natural behavior for them. Refer to Steve Krug's interview guide (<http://sensible.com/downloads-rsme.html>) for inspiration on how to conduct the interview.
3. Have them complete as much of the task as possible, short of actually purchasing a ticket or a meal.
4. Ask them to talk out loud and describe what they're doing, perhaps as if you don't understand the Internet. Take notes, paying special attention to interesting moments, obstacles they experience, or workarounds they make.
5. When the interviews are complete, review your notes and use them to:
 - List five goals or needs you saw your users had while performing their task. Examples might include:
 - Janet wanted to find the cheapest flight home during the holidays.
 - She needed to know whether she could get an aisle seat.
 - Bob needed to find the best restaurant near the subway for a first date Thursday night.

- Sue wanted to make sure she could get a gluten-free option.
- List five problems you saw your users experience while performing their task.
- If they had no problems at all, try having them perform the same task on a website they're not familiar with. (If they're used to booking through Kayak, for instance, have them use Expedia, or some other site they don't know.)

Complete the following and submit it to the UX Fundamentals forum as a forum post or as an attached PDF file. (Note: PDFs can't be directly attached to forum posts; you'll need to use a hosting service like Dropbox to generate a web address that can be included in a forum post.)

UX FUNDAMENTALS USER RESEARCH OBSERVATION

Your name: _____

Project chosen: _____

(Booking a flight or finding a restaurant and making a reservation)

Medium chosen: _____

(Website or smartphone app)

BRIEF DESCRIPTIONS OF EACH OBSERVATION

Observation #1 (EXAMPLE)

Subject's first name, age, occupation: Chloe, 25, designer

Website(s)/app(s) used: jetblue.com, expedia.com, cheapoair.com

Scenario: Booking a flight home last-minute to see her parents this weekend

Observation notes:

- Chloe started on her favorite airline's site (JetBlue), but then realized her ticket home would be far too expensive. She decided to check other sites for deals. She next went to Expedia because it was the only other site she knows for booking flights. The tickets were not as expensive but she saw that there would be a layover, and she decided she'd rather pay more than deal with that.
- She did a Google search for "cheap flights," and visited Cheapo Air. She found a cheaper flight, but when she tried to purchase her ticket there was so much on the page that she became upset and confused. She realized that while trying to book a flight home the website had automatically save a previous dates of a trip she had booked weeks ago.
- She left the site because it was there was too much unorganized and confusing information and decided to stick with her original flight choice, even though it cost \$100 more.

Trouble points:

- The website had saved the date of an earlier trip she had booked, but it wasn't obvious, and she went far along the booking process before noticing the dates were wrong
- Banner ads were distracting and she left one site because of them

Summary: She was willing to take a more expensive flight rather than be confused by ads or frustrated by how to set the date of the flight.

Observation #1

Subject's first name:

Website(s)/app(s) used:

Scenario:

Observation notes:

Trouble points:

Summary:

(Bonus) Attach a photograph of the user at work. Don't include faces or identifying features, please.

Observation #2

Subject's first name:

Website(s)/app(s) used:

Scenario:

Observation notes:

Trouble points:

Summary:

(Bonus) Attach a photograph of the user at work. Don't include faces or identifying features, please.

Observation #3

Subject's first name:

Website(s)/app(s) used:

Scenario:

Observation notes:

Trouble points:

Summary:

(Bonus) Attach a photograph of the user at work. Don't include faces or identifying features, please.

OVERALL NOTES

Five User Goals

1. Goal:
2. Goal:
3. Goal:
4. Goal:
5. Goal:

Five User Problems

1. Problem:
2. Problem:
3. Problem:
4. Problem:
5. Problem:

(Bonus) Particularly helpful or useful quotes from your participants:

(Example) “Why is the departure date already set for me? This website is so confusing. Forget this.”

-- Chloe, when she hadn't noticed that the site pre-filled the date for her a few screens earlier

RESOURCES

- (Book) Communicating Design, by Dan Brown: a bible on personas, site maps, wireframes, and lots of other design deliverables. http://www.amazon.com/Communicating-Design-Developing-Documentation-Planning/dp/0321712463/ref=sr_1_1?ie=UTF8&qid=1390110620&sr=8-1&keywords=communicating+design
- (Book) Just Enough Research, by Erika Hall: a quick and solid guide to conducting user research: <http://www.abookapart.com/products/just-enough-research>
- (Book) The User Experience Team of One, by Leah Buley. A set of exercises and tools for developing strategy with your clients; how to conduct client workshops and pair them with user research. Book: <http://www.amazon.com/The-User-Experience-Team-One/dp/1933820187>
Excerpt: <http://uxmag.com/articles/book-excerpt-the-user-experience-team-of-one>
- (Article) A Five-Step Process for Conducting User Research: <http://uxdesign.smashingmagazine.com/2013/09/23/5-step-process-conducting-user-research/>
- (Article) Personas, The Foundation of a Great User Experience: <http://uxmag.com/articles/personas-the-foundation-of-a-great-user-experience>
- (Article) How Your Product Can Benefit From User Feedback. Case study about designing a wristwatch for the blind: <http://uxdesign.smashingmagazine.com/2013/10/01/how-your-product-can-benefit-from-user-feedback/>
- (Article) Avoiding Demographics When Recruiting Participants: <https://www.uie.com/articles/recruiting-participants/>
- (Article) Personas: Are They Dead Yet? <http://www.uxdesignedge.com/2011/06/personas-dead-yet/>
- (Service) Ethnio, an online screening service for user interviews and usability testing: <http://ethn.io/>

RESOURCES USED IN CLASS

- Personas, The Foundation of a Great User Experience: <http://uxmag.com/articles/personas-the-foundation-of-a-great-user-experience>
- An example of “scenario mapping” on a whiteboard: <http://www.uxforthemasses.com/scenario-mapping/>
- Sample user flow diagrams: <http://teehanlax.com/blog/modelling-content-strategy-with-content-flow-diagrams/>
- A more sketch-inspired user flow diagram example: <http://wireframes.linowski.ca/2010/02/tablet-illustrator-and-the-case-for-electronic-sketching/>
- An example of a hand-sketched storyboard: <http://zurb.com/article/1028/the-making-of-a-zurbapp-product-video>

INTRODUCTION

(Note: This is an edited transcript of the UX Fundamentals lecture videos. Some students work better with written material than by watching videos alone, so we're offering this to you as an optional, helpful resource. Some elements of the instruction, like live coding, can't be recreated in a document like this one.)

This is UX Fundamentals, an online course developed by Aquent. Welcome back. This is lesson two. In your last lesson, you had an assignment. The assignment was to sketch a better remote control.

Now, I know what you're saying. This is of course about websites, and a remote control is most definitely not a website. However, it's a great first assignment, because it lets us easily explore user design and user experience fundamentals in an easy way. Here are some of the remotes that you came up with.

Here's the first one. It's a cylindrical remote. Your fingers hit the buttons underneath the cylinder when it's wrapped around, like a toilet paper roll. Here's another one, in which you speak to the television and tell it to change the channel rather than hitting a button. And here's a third one that simple buttons, and then a button to skip ads, or to never show this TV show again, or donate money to a show that you especially like.



I have a question about your designs. Who were they for?

When you sketched these remote controls, who did you have in mind? Who was your target audience? I didn't give you one. So who did you come up with in your head when you were working on this project?

Was it an office worker? Was it a single mom? Was it a retiree? Probably when you were working on this project, the user was *you*. For instance, here's the remote control where you can skip an ad, or never watch a show again. I did this. I would love to have this remote. I would so love to be able to skip ads and to never, ever, ever see Honey Boo Boo come up ever again.

Designing for ourselves is normal and natural. We are self-centered animals, and it has helped us evolutionarily throughout time. However, as designers, usually we are not the customer. We're not the user.

Today's session is about this topic. It's about how to take the "you" out of user. Today's session will be quick. It'll be useful. We'll talk about user experience principles and lots of examples. After the session, there'll be an assignment and a brief quiz. We'll also have a couple of segments called Use It Today. These are things that you can start using with clients in your work today; tips and tricks that you can start using immediately.



This is the first session of our course in User Experience Fundamentals. This session is about users, or customers. I use those two words interchangeably. The next session will be about prototypes, how to build websites and cheap working versions of websites that you can test.

The third session is about content and about writing text that makes sense and supports the business. The fourth session is about design patterns, or reusable snippets of design. And the fifth (and last) session is about how to measure success.

My name is Jim. I teach web design in Washington, DC. And I'm happy to be here with you. Today's session is broken up into four big ideas.

Big idea number one is to find your user and find out what their goals are. Big idea number two, it helps if you like the user, if you have empathy for the user. I'll talk about how this is a useful design tool. Big idea number three, talk to real people. Verify your assumptions about who users are and what they want by talking to actual real-life humans. Big idea number four: Once you've done all this, you've got to put it down on paper, creating deliverables that you can share with your team and with your clients.

BIG IDEA #1

FIND YOUR USER AND THEIR GOALS

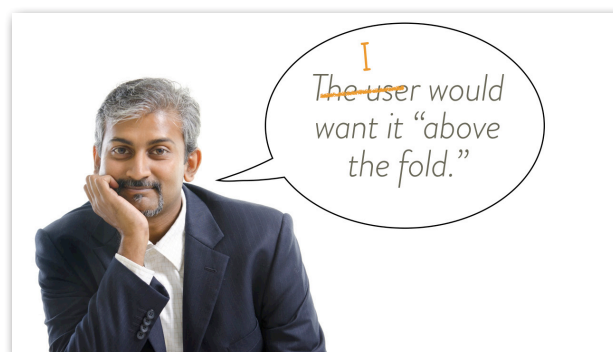
Let's start with big idea number one: Take the 'You' Out of the User. Find out who your user is, and find their goals. When we work on design projects, we frequently talk about the user. For instance, my art director might come to me and say, the user would want this particular thing we're talking about above the fold.

Above the fold means, on a long web page like this one, what you would see in the first screen full. That's what's above the fold. It comes from newspaper terms. Anyway, my art director might say, the user would want this thing above the fold. Or my client might say, you know what? Users hate it when windows open in new tabs.

Well, those two things might be true. It might be good to have things above the fold or not open in new tabs. But maybe that's not true. Maybe users don't mind if windows open in new tabs. You know what's usually going on when people say this? Here's what they usually mean: *They* don't like it when windows open in new tabs, or that *they* would not like it above the fold.

Frequently, we talk about the user. But really we're thinking about ourselves. You know what? That is completely normal and natural. However, we as user experience designers need to combat this, and to find out who is the actual user.

Sometimes, it's easy to do that, it depends on the client. If your client is AARP, the American Association of Retired People, then your customers are retired people. Easy. If you're working for the Boy Scouts, your customers are scouts and their parents. If you're working on a wedding site, like The Knot, you know who your customer is? Brides and their mothers.



Now, don't get me wrong. I'm not saying that grooms don't use wedding sites. I'm just saying with some clients, it's easy. Sometimes it's not so easy. Let's take Taco Bell, or the American Red Cross, or Home Depot. It's harder to know who the users of these websites are. If you ask your client, who are your target audiences? Honestly, they're usually not much help.

They'll usually say something like this: It's for anyone and everyone. That's okay, because clients are running a business. They don't want to shut the door on anybody. It's not super-helpful to you as a designer though. Marketing demographics usually are not a lot of help either. Sometimes gender breakdowns, for instance, can be useful. More often than not, though, they're not very helpful in terms of coming up with a design.

Instead, what we can do as designers is to find out the goals of the people who are using our products. For instance, Taco Bell, which is a low-cost chain restaurant in the United States, and the users of that website probably want to know, where's the closest restaurant and when's it open? Home Depot is a chain hardware store. The user of that website probably want to know where the locations are and whether they're open. They probably also want to know how much stuff costs and whether it's in stock. These are the goals of the users of this website.



Now, don't confuse the user's goals with the client's goals. For instance, a client who wants to build up their email newsletters might say, "Our users want to sign up for newsletters." Really? What user sits around thinking, "I need another email newsletter in my life!" Nobody does. That doesn't happen.

However, users do sign up for email newsletters if they help them somehow. For example, if an email newsletter helps them at their job or saves them money, then they'll sign up. This is an important distinction, especially for you as a designer; the difference between the client's goal and the customer's goal.

The client wants email newsletter sign-ups. Great. The customer does not want that. The customer wants to be better at their job. They're willing to do newsletter sign ups in order to get to their goal. That's an important distinction.

Sometimes during a project, it can be difficult to distinguish between these two. And so, a gift for you, a cheat sheet that helps you determine the difference between client's goals and customer goals. Here it is.

- A client's goal is always going to be around making money and supporting the business. It might also be for doing good, if it's a nonprofit. But generally speaking, it's going to be about supporting the business.
- A customer's goal, however, is going to be about making their own life easier, or maybe saving money. But in some way, it's going to be about them being more awesome at what they do every day. That's what customers want.

CLIENT GOAL	CUSTOMER GOAL
MAKE MONEY	MAKE LIFE EASIER SAVE MONEY BE AWESOME

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So I give you the first thing that you can use today, which is a way to identify your users and what their goals are. It's real simple. It's a fill in the blanks, kind of like a Mad Lib™. All you have to do is complete this sentence. The user is a blank who wants to blank. That's it. That's all it is.

For instance, for Taco Bell there might be a couple of different users. One user might be an office worker who wants to get a cheap lunch. Okay, seems plausible. Another user might be a young person who's got the munchies in the morning. Another user might be a busy mother who wants an easy meal for her children. All three of those are potential users of this product.

Now, do not freak out. I'm talking about stoners and moms, and you're probably going, oh Lord, a client is not going to hear this. This stuff is not for marketing purposes. Simplifying who your customers are and what their goals are provides a very tactical benefit. It gives you focus and speed. The user is a blank who wants to blank.

Here's an example. A very huge website we all know is Facebook. Well, it didn't start off that way. It started off as a much simpler beast back in 2004. Here's what it was. The users of the original Facebook were Harvard students who wanted to scope out hotties. That's it. That's what Facebook was. Now, it grew into this much bigger thing. But being very focused on a single goal got them some measure of success.

The internet itself, the network by which you are watching this video right now, is also an example of this. It did not start off the huge thing that it is now. Here's what the internet was in 1972. It's a series of connections between military bases, and later on, universities. It's a spider web of redundant connections. Why is that? In case the Russians dropped a bomb in the middle of the U.S. It wouldn't cut the communication lines between the west coast and the east coast. The internet itself started off for military bases who wanted to be able to communicate after a nuclear bomb hit.

The user is a blank who wants to blank is a very simple and powerful device that helps you articulate what to prioritize in your project. That's why we start by finding the user and their goals.

THE USER IS A _____
WHO WANTS TO _____

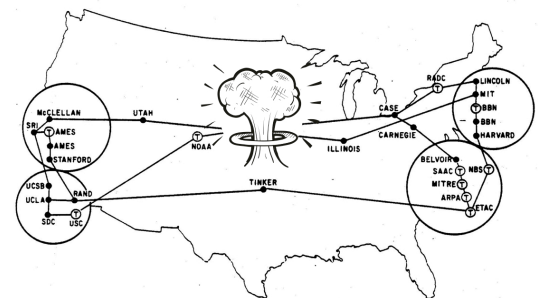
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THE USER IS A
HARVARD STUDENT
WHO WANTS TO
SCOPE HOTTIES.

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BIG IDEA #2

LIKE 'EM.

Big idea number two is an unusual one, in which I'm going to posit that there are tactical design benefits to liking your customers. Here's what I mean. Some people think the best way to sell a product is to tell them how amazing it is. Software is especially guilty of this with all the new features that you can now get if you upgrade.

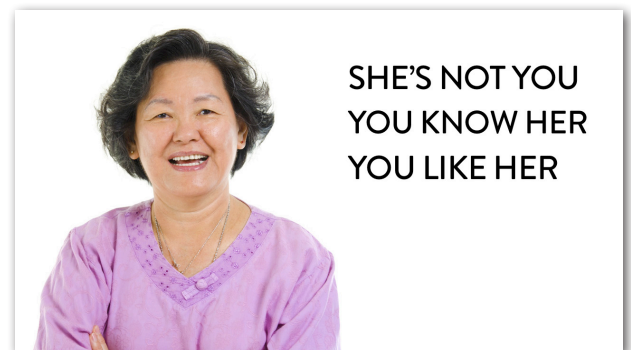
For instance, here's what Microsoft Word looked like back in 1989. See the menu bars here? Well, as time went on, it got more and more features. These were often things that customers requested, but Word would pack them in, adding more and more stuff. Look at this. This looks more complicated than flying an airplane. It's a classic example of saying, our product is awesome.

User experience designers reverse that and say, yeah, our product is awesome, but really, our product makes you awesome. And customers want to be awesome. Client's goals are to make money, remember? But a customer's goal is to make their life easier or save money or be better at what they do. And we, as user experience designers want to help them be awesome.

Why? Because it makes the business money. Microsoft Word realized this, and here's what Word looks like today. So much cleaner. It gets less in the way of users who need to get their work done. Another way to think about it is that you as a user experience designer want to be like the perfect host at a party, who's there and welcoming and keeps your glass filled and keeps the conversation flowing. A good host anticipates their guests' needs, and it helps a lot if you like those guests, or if you like the user.

Here's one way to do that, and it's with the mom user. You may already do this, and it's really simple to do. As a designer, when you're confronted with a problem, merely ask yourself, what would mom do? This is a very valuable tool, actually. If you're thinking about your mom, there are a couple of things. First, she's not you. She's very different. She has different skill sets, different interests. Furthermore, you know your mom. You can predict what she might do or say in a particular situation. Finally, you have empathy for her. Probably, you like your mom, and so it's easier to design something that's got her back.

Furthermore, moms are good bull detectors. If you get a piece of text like this that's full of marketing-ese and hard to understand words, think about how your mom might react to that. It's a good litmus test. If you were to clean up the text and make it make more sense to normal people, like this, Mom's much happier. So Mom can be the person in your



head that keeps you honest. This is something you can use today. When you're working with a client or on a project, simply think to yourself, what would my mom do? If mom doesn't work for you, substitute somebody else that you know and care about but isn't you.

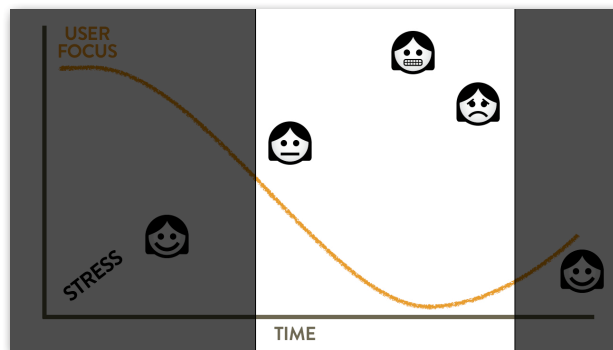
The only challenge with this is that whoever you're thinking about-- your mom or dad, whoever, they're not always your actual customer. Sometimes, they don't have the same needs, goals, or challenges that your customers do, and it's really hard to bring Mom into client meetings to explain why things don't make sense. But having empathy is key here.

Why is having empathy key? Because projects get stressful. If you were to map out the amount of stress that a design team experiences in a project, it might look something like this. At the beginning of the project, the stress is relatively low. You're excited. You're working with a new client and on a new project. You're geared up and ready to go.

Then, work ramps up and things get a little bit harder. Then usually, sort of midway to toward the end of the project, something happens. Some expectations change or the client comes in and changes something or you come in and change something, and everybody gets ramped up. Then, you've got the launch, which is itself very stressful. Sometimes not as stressful as that peak, but anyway, it's really stressful. Then after it's all over, you're happy again and the stress goes down.

Now, this is a cute graph, but why am I showing you this? Because I want to lay on top of it the amount of attention that you and your team are able to focus on users. At the beginning of the project, it's quite high. You're paying attention to who the users are. But as things get stressful, you stop paying attention, because users are not the ones in the hallway bugging you. Your colleagues, your clients, and your bosses are the ones bugging you.

Right here in this middle of the project is when it's so important to keep focused on users, but so hard to do. So hard. It's so much easier to get frustrated at them as you get frustrated as a designer, or to blow off steam with your colleagues about how your users just aren't getting it. A much better approach, of course, is instead of vilifying the user and thinking that they're lazy or dumb, instead to try to understand what's going on and why a user might not be getting it. That's a whole lot easier to do if you like them.



BIG IDEA #3

TALK TO REAL PEOPLE.

Big idea number three is about talking to real people, the people who would use your product or website; talking to them. Yes, actually talking. This is user research. And it's not research in the scientific meaning of the word. It's applied research.

It's more like sleuthing. It offers you a reality check about your users and their goals. Talking with users does not mean talking to your client or your colleagues, or even just one person. It means talking to many people, and for a significant period of time. So we're talking somewhere between an afternoon to two days to talk with people and make sure we understand what it is they want.

Now, your client may come back and say, first of all, there's no time for that. And second of all, we already know who our audience is. Well, that might be true. But you as a designer don't know who that audience is. It's worthwhile, because what if your client's assumptions about their audience are wrong?

Here's an example of that. Silvercar is a premium car rental company here in the United States. It's in about half a dozen, to a dozen airports. It's for business travelers who are on the go. They wanted to make car rentals easier.

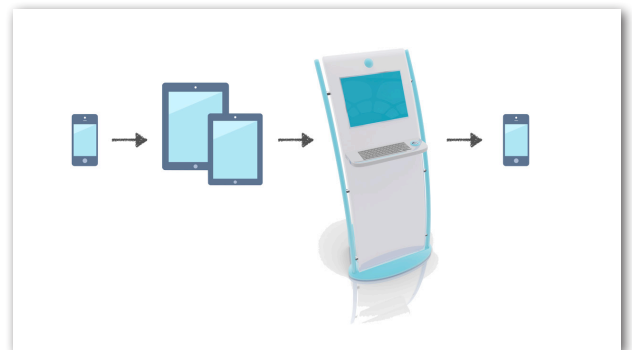
The designers did 12 interviews with potential customers, each of them lasting two hours. They did it not over the phone, but in person. They went to their homes and businesses to find out how they booked rental cars, and the kinds of problems they had doing so.

Well, it turns out the client was wrong about what business travelers wanted from rental cars. The client thought that business travelers think it's a hassle to pick up rental cars, and that business travelers want to reserve their cars by smartphone. It turns out picking up the cars is not actually that big a deal for business travelers, except for one thing; the shuttle bus that takes you to the rental car lot.

Business travelers hate that. Some of them hate it so much, they were willing to pay an extra fee to have the car delivered to the airport so they could skip the rental bus. In other words, that user experience designer just found the company a new revenue stream.

The client also thought that business travelers would use the phone, or a tablet, or their laptop, or a kiosk and they would use that device from the reservation all the way through picking up the car. It turns out that's not true. Business travelers can switch in between different devices and modes. They expect to be able to follow their reservation from start to finish, no matter what kind of device they're on.

This is not what the client was expecting. But knowing this ahead of time, before development began, gave the client a chance to reconfigure the workflow of the app before coding started. These user interviews saved the client money, made users happier, and the project launched on time.



Have you ever heard the axiom measure twice, cut once? It's a carpenter's axiom. It says, once you cut, it's more expensive to fix it. So make sure it's right. Coding is expensive. You know what's even more expensive than coding an app? Recoding it if you get it wrong. That's why it's important to get it right.

Frank Lloyd Wright, the architect, said this. "You can use an eraser on the drafting table, or you can use a sledgehammer on the construction site." Same thing. Interviewing users helps you with this. How do you find them?

A couple of different ways. The cheap and dirty way is friends of friends, or coffee shop folks, or places where your customers might congregate. The only key here is that they have to be people that would be potential users of your product. They don't have to be current users, but they do have to at least be potential ones.

If you've got more budget, online tools like Ethnio are really helpful. For that, and I'll include a link in the classroom, surveys and screeners, and even recruiting firms that specialize in bringing you people that fit a certain profile. So you've gathered folks. Now, what do you ask them?

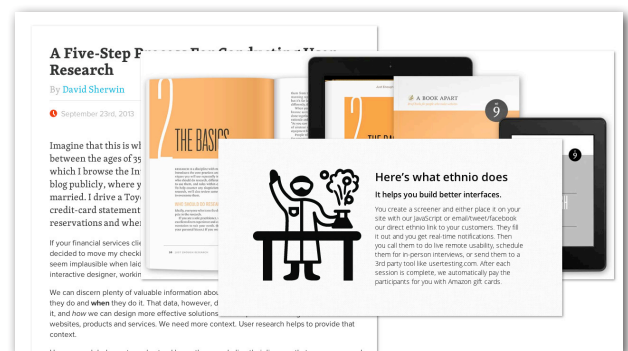
You're in a one-on-one interview. Your job is to sleuth what they want. One important thing to know, what people say is not always the same as what they do. People fib all the time to make themselves seem better, faster, or stronger. When my dentist asks me how often I floss, I might kind of fudge the truth a little bit. So we need to be like observers of wild game, not disturbing our prey.

We do that through open-ended questions. If we're asking a mother of four about Taco Bell, we might just ask, what does your family do for dinner? How would you find a restaurant? What we would not ask is, do you like Taco Bell? That doesn't give us good information. Asking her how she finds a restaurant might give us good information. This is different than a focus group.

We would never ask about a design feature like horizontal or vertical nav. The answer we get back is not going to be useful to us, because users are not designers. Instead, we use these interviews to listen for clues. The mom might say that they've got a diabetic son, and they've got to plan his meals. That might give you an idea as a designer. Oh, I bet other moms have this problem too. I should design something that helps.

*You can use an eraser
on the drafting table,
or a sledgehammer on
the construction site.*

Frank Lloyd Wright, Architect



Or, it's really hard to use my phone and juggle the kids. That's probably true of other moms, too. We need to make the design such that you can do it one-handed. Better yet, if you with a user in person, ask them to show you how to do something on the internet, either with your product or a competitor's. Like, how would you find a place to eat? Show me. Then sit back and watch. If they get stuck, you just say, what would you do next? Sit back and listen.

In the classroom, I'm providing links to articles, books, and online tools for doing user interviews. It's a fun process. Can be challenging at first, but it's fun and enlightening. Validating our assumptions about who our user is and what they want is the whole reason to talk to real people.

BIG IDEA #4

PUT IT DOWN ON PAPER.

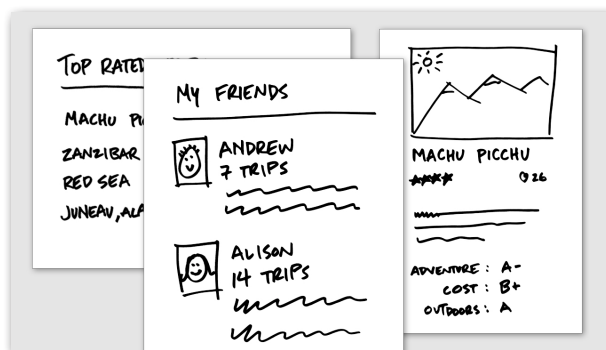
Finally, big idea number four, the last step in the process, putting all this stuff down on paper. I'm talking about the deliverables that have to do with these UX tasks. I'm going to talk through three deliverables for you that are very common: personas, scenarios, and user flows. These three deliverables tell you who your customers are, what they want, and how they're going to get it from your product.

Let's explore this through a project. Our clients came to us and said they have a great idea for a social travel app called Travelly. It lets you find a vacation, rate the places that you've been, and tell friends about the places that you've been or want to go to. It might look a little something like this. You can look at destinations like Machu Picchu in Peru, and see how they're rated on different scales. You can see the top-rated trips around the globe, or in an area you're interested in. You can also see what your friends on Facebook or Twitter have done and where they've gone.



The client has laid out four essential features of this app. The first is finding a trip you want to go on. Then there's rating trips that you have already been on. There's booking a trip, and then there's sharing trips with your friends.

Of course, as with all projects, we're limited on time and money. So we need to focus our effort in the place that gives us the biggest bang for our buck. So the first question we ask, naturally, is who's the user?



Let's say the client comes back and gives a standard client response, that everybody is the user. We want our app to be open to as many people as possible. Again, not very helpful for us, as designers. So, we use our old trick; the user is a blank who wants to blank.

Let's brainstorm a bit about travelers. How about, I don't know, 30-something couples who have a little bit of disposable income and want to use it traveling the country, or the world? What about backpackers that are looking for an interesting adventure, or families with kids? Or teenagers who want to go out on their own? Or

business travelers who are looking for a vacation away from the normal? Retirees have disposable income and like to travel, and so do young single people. Lots of different kinds of travelers.

Let's match them up with things that they might want to do. How about the user is a teenager who wants to plan a camping trip? Okay, that seems maybe reasonable. Or how about a business woman who wants to plan an adventure vacation, or a retiree who wants to show off?

We're going to take these "user is a blank who wants to blank" exercises and develop them into our first deliverable: personas. Personas are biographies of fictional customers. Let's take the retiree who wants to show off. Let's flesh him out a little bit.

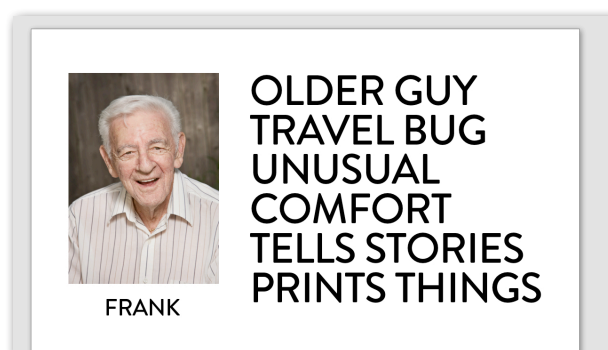
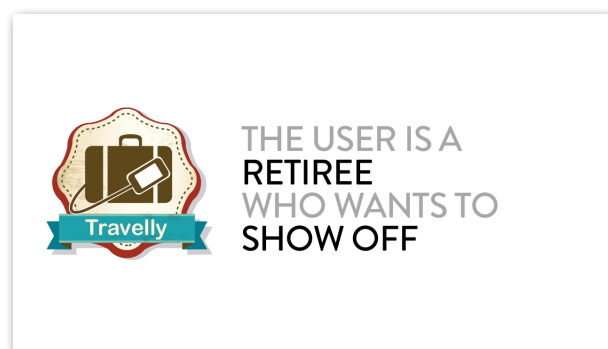
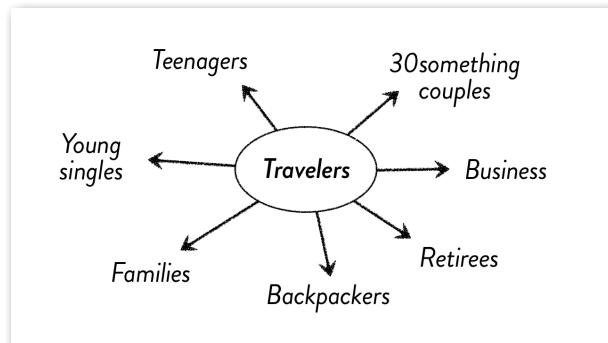
Let's say he's an older man, and he likes to travel. That makes sense. Let's say he likes unusual places but he's a retiree, so he likes to stay comfortable. He's not looking for a backpacking adventure. He likes to tell stories about the places that he's been. He's savvy and computer literate, but he likes to make printouts of things and carry those with him.

Let's even find a stock photograph of this guy and put him with this description. Let's give them a name. Let's call them Frank. The reason for all of these details is to help with empathy; to help us be able to internalize who this user is, and the kind of motivations they might have. We could imagine Frank saying something like this, that he wants to find something unusual but still comfortable. He doesn't want to mess with a whole bunch of extra stuff while he's doing it. Just let me find my trip.

I feel like I know who Frank is. You know, I've got an uncle who's like Frank. I kind of get him a little bit. We can internalize Frank and even empathize with him. In fact, he's like the mom user we talked about earlier, the one that you can have empathy for, except it's a different kind of customer than your mom.

So, if over the course of your project, your colleague or a clients or somebody else comes to you with a feature, like, let's make animated maps, or let's include links to Pinterest, we can ask ourselves, what would Frank do? What would Frank want?

Something like Pinterest, Frank might have no interest in Pinterest. Frank doesn't care about Pinterest. He wants to find his trip, and he wants to tell stories in person. Now, a colleague may come back to us and say, but I think Frank would want Pinterest. The way we work with that is because we've interviewed folks.



Remember we talked about using interviews as a way to validate your assumptions about your customers? You can also compare those with the personas. Often, UX designers will create multiple personas for a project, and then interview representative people to validate whether their assumptions are right or not, and to try to understand what they want and need.

Again, this is not for marketing or advertising. This is a design tool. Here's an example of a Microsoft set of personas for Office 365. You can see it has stock photos and descriptions of each of those characters. This is the executive summary that's nice and short and sweet.

Here's another one that's a little bit more detailed. This is a big, long poster about Tina, who's a teacher in Georgia. It's even got a quote from her, and talks about where she has a job, and the sorts of things that she likes to do in her free time. We can take these personas and create charts like this, a Consumer Reports-style chart of all the different features that we might want to have in our product, and which personas would like them. It gives us a very clear picture of the stuff our product should focus on first.

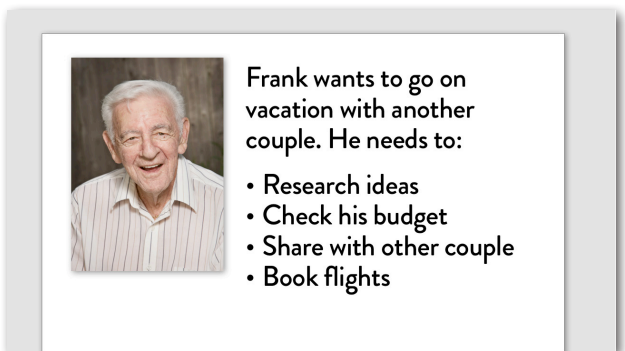
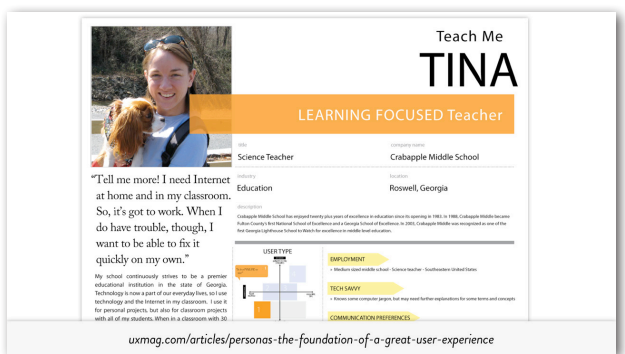
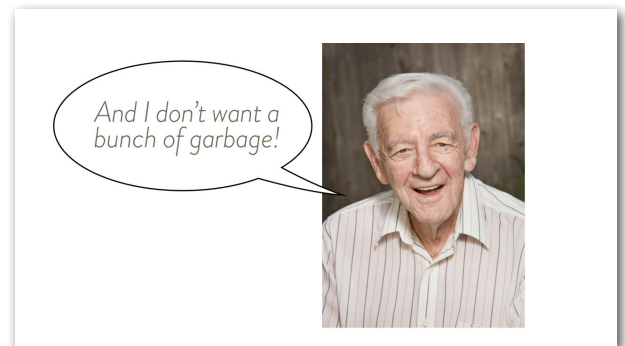
How do we get this level of detail about the products? By pairing personas with scenarios. Scenarios are deliverables. They're basically just paragraphs of text, or Word documents, that are stories about what these users need, and what the personas need.

Here's an example. Let's take Frank, our retiree persona. Frank wants to go on vacation with his wife and another couple. What does he need to do? What would he want from our product?

He'd need to research ideas about locations. He'd want to make sure he could afford the places. He'd want to share those ideas with the other couple before they actually book something. Then eventually, he'll want to book the trip. This gives us a story about what Frank might need from our product.

There's obviously more than one scenario, though. Let's say we've created another persona for this project. How about Jess? Jess and Ben are a young couple. They're planning their honeymoon. What does Jess need to do? She needs to research ideas too. She needs to check her budget also. She needs to share those ideas with her husband. Eventually, she's going to want to book their flights.

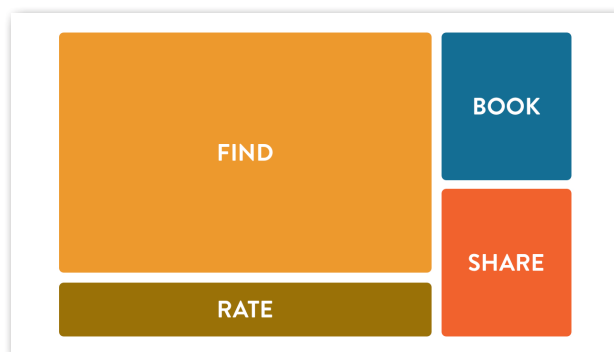
You might come up with multiple scenarios for each of your personas. The goal here is to find the overlap in what your customers want. If we think that our customers might want to do these four things equally, through the process of personas and scenarios, we might quickly find that most folks coming to the site for most purposes might want something more like this, might be much more focused on finding than they are on rating, booking, or sharing.



Heck, this could even be the page layout for the home page. That's how much those personas and scenarios can help. It offers us focus and speed. Scenarios are paragraphs of text. They're that tell us what our users need.

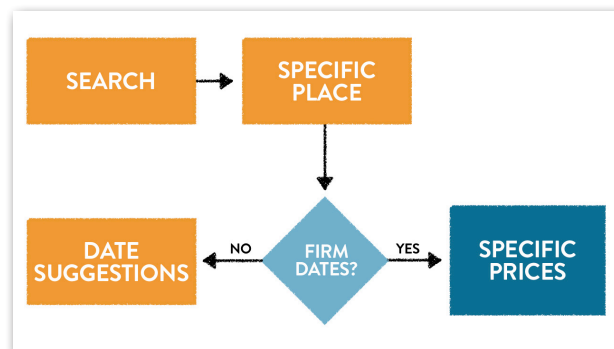
Scenarios are often paired with the third UX deliverable. That's user flows. User flows are about how users accomplish tasks using the product. Typically, they're done in flow chart form, like this. Anybody remember these from school? They describe the path that a user might take with decision points along the way.

Let's take Jess and Ben and their honeymoon scenario. A simple user flow might say that Jess is going to search for honeymoon spots and find a specific place. Then she's going to book it. That's the order it's going to take. Well, this is a very simple one.



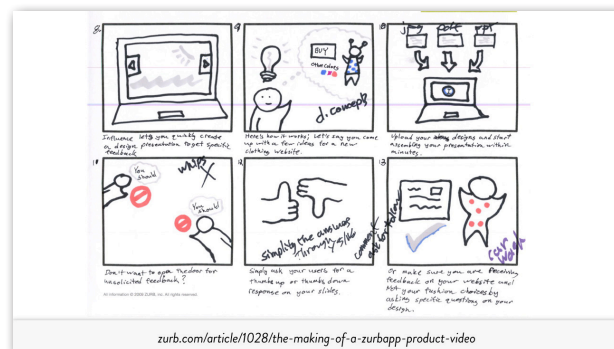
But let's dig down a little bit. Let's say Jess has done a search and she's found a specific place. Now we want to help her out. So we want to ask her, hey, do you know when you're going to be traveling? If she knows when she's going to be traveling, let's go ahead and give her prices for those date ranges. If she doesn't, well, we could get her back, and we could give her some suggestions for dates that might be cheap, or the most beautiful.

User flow diagrams help you map out, before you do design and code, the paths that your users might take, and what they need to do along the way. They can look like flow charts like this. They could also look like diagrams with arrows and little descriptions. It's totally fine, a completely valid way of doing a user flow diagram. Or they could even be a storyboard with little miniature cartoons. These can be very effective for communicating with your team about what needs to happen during a process.



So these are the three deliverables: personas, scenarios, and user flows. These three together help you identify the who, the what, and the how of your users. Personas are who your users or customers are. Scenarios are what they want. User flows are how they get it.

These three together can be a beacon in the darkness of project chaos. They can help you internalize the customer, have empathy for that customer so you'll design for them in a more effective way. They'll help you defend choices to your client and to your bosses. They help you focus on what's most important on the project; getting things done faster. That's why it's so important to put the user down on paper.



ASSIGNMENT

That's it for this session. So now it's time for today's assignment. Today's assignment is in two parts. You'll find the complete instructions for today's assignment in the classroom files, but I'll go over it very briefly here.

The first part is for you to choose a project. The project you'll be working with for the remainder of the class. You can choose between one of two projects. The first option is booking a flight, some kind of a project around a better way to book an airline flight. The second option is finding a restaurant and making a reservation, so some sort of a better way to find a restaurant.

You can choose either of these, and it's up to you. When you choose, you'll have to also choose a medium you want to work in. You have two choices here as well. You can design a website, or you can design a smartphone app. So you'll need to choose both a project and a medium that you'll work on for the remainder of the class, which means you could choose, say, a website for booking a flight or a smartphone app for finding a restaurant. But you've got to choose both.

The second part of today's assignment is to do some user research. That involves talking to actual people. You'll need to find three people to talk to, and schedule about 15 minutes with each of them. When you talk to them, make sure there's either a computer or a smartphone nearby, depending on your medium, and ask them to do your task.

For instance, you might ask them to use a website to book a flight. They can use any website they want, whatever's comfortable for them. All you're doing is understanding how they would do it naturally. You're like a biologist trying to understand what happens in the wild.

As they're doing this, take notes. Ask them to talk out loud, and write up what you see and hear. I'd like you to write it up in a particular way. I'm providing complete instructions for that in the classroom files. When you're done with the write-up, submit it in the forum. I'd love to see it and your fellow students would too.

