

EDUCATE, ITERATE, ORGANIZE

HOW TO GET THE FEEDBACK YOU NEED TO
PUSH YOUR DESIGNS FORWARD

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EMBRACE COMPLEXITY

“Will it ever not be hard to explain the value of what we do?”

(what we do being Information Architecture)



EMBRACE COMPLEXITY

“No. What is wrong with hard?”

-- Cat King

EMBRACE COMPLEXITY

“Why are we not allowed to do hard things? Why are our organization trying to simplify, when they should be allowed to explore complexity first? Why is hard something we're avoiding?”

-- Cat King

DAY 0: CREATE MEETING - EDUCATE

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SETUP A RECURRING MEETING WITH YOUR CLIENT

Decision makers,

in a small room,

with you and your teammates for an hour (or more)

BUT I CAN'T!

SET EXPECTATIONS

- This is an iterative process.
- The client will see "finished but incomplete work"
- Explain to them where you are in the design process.

1 WEEK CLIENT REVIEW CYCLE

Design is a series of decisions

“Increasing definition, fidelity, focus, and clarity.”

-- Dan Brown

DAY 1: THE DAY AFTER THE MEETING - ORGANIZE

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BOOKKEEPING

Send out the meeting notes with the action items.

DAY 1: THE DAY AFTER THE MEETING - ORGANIZE

PRIORITIZE

What are you going to work on next? Know your top priority

DAY 1: THE DAY AFTER THE MEETING - ORGANIZE

OUTLINE A STORY

Figure out what story you need to tell.

DAY 1: THE DAY AFTER THE MEETING - ORGANIZE

DETERMINE HOW YOU ARE PRESENTING

In person, over video, via screencast.

DAY 2: TWO DAYS AFTER MEETING - ITERATE

DAY 2: ITERATE

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FOCUS

Work on the top priority from yesterday.

DAY 2: TWO DAYS AFTER MEETING - ITERATE

GET FEEDBACK

Early and often.

DAY 2: TWO DAYS AFTER MEETING - ITERATE

ITERATE

Prepare to show more than one version.

(But only share your recommended version)

PSSST! THEY'LL KNOW.

Don't make crappy variations just for the sake of creating variations. Yes, it takes time to create variations but, they are paying you to produce work.

THIS IS THE WORK.

DAY 2: TWO DAYS AFTER MEETING - ITERATE

CHOOSE THE RIGHT FIDELITY AND THEN TIGHTEN IT UP

The right fidelity is the one that renders your intent the
clearest

DAY 2: TWO DAYS AFTER MEETING - ITERATE

TAKE NOTES ON DESIGN DECISIONS YOU HAVE MADE

Document your assumptions.

Take NOTES on what questions you have for the other
designers & clients.

WRITE DOWN ANSWERS TO GREEVER'S BIG 3

1. What problem does it solve?
2. How does it affect the user?
3. Why is it better than the alternative?

DAY 3: TWO DAYS UNTIL NEXT MEETING - ITERATE

DAY 3: ITERATE. AGAIN.

*“This is the three R's. The three R's:
Repetition, Repetition, Repetition”
-- Mark E. Smith*

DAY 3: TWO DAYS UNTIL NEXT MEETING - ITERATE

**PRODUCTIVE CONFLICT MAKES
DESIGN BETTER**

DAY 3: TWO DAYS UNTIL NEXT MEETING - ITERATE

PRODUCTIVE CONFLICT MAKES DESIGN BETTER

But, ideally that conflict happens ahead of the client review.

RECOGNIZING UNHEALTHY CONFLICT

From Dan Brown's "Designing Together"

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Turn “This sucks” into “Help me
understand some of the decisions you
made.”

Zero in on a
design
direction

RECOGNIZING UNHEALTHY CONFLICT

From Dan Brown's "Designing Together"

Turn “This sucks” into “Help me understand some of the decisions you made.”

Zero in on a design direction

Turn “This is clearly above you” into “Seems like you’re spinning. Which parts can I help with?”

Simplify the scope

RECOGNIZING UNHEALTHY CONFLICT

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Turn “You’re so disorganized” into “Are you having trouble prioritizing?”

Prioritize
tasks

RECOGNIZING UNHEALTHY CONFLICT

Turn “You’re so disorganized” into “Are you having trouble prioritizing?”

Prioritize
tasks

Turn “I told you how to prioritize the requirements” into “How did you interpret the priorities I gave? Let’s get on the same page”

Align
understanding
of the design
problem.

DAY 3: TWO DAYS UNTIL NEXT MEETING - ITERATE

SHOW ME, DON'T TELL ME

Ask for, or produce, a sketch.

DAY 3: TWO DAYS UNTIL NEXT MEETING - ITERATE

CHOOSE WHAT TO PRESENT

1. What you need feedback on to push the design
2. What clients wanted to see

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That order is intentional.

DAY 3: TWO DAYS UNTIL NEXT MEETING - ITERATE

**PREPARE TO DEFEND CONTENTIOUS
DECISIONS**

DAY 3: TWO DAYS UNTIL NEXT MEETING - ITERATE

GO BACK TO USER RESEARCH

DAY 3: TWO DAYS UNTIL NEXT MEETING - ITERATE

Be prepared to defend the short and long term implications of your decisions.

DAY 3: TWO DAYS UNTIL NEXT MEETING - ITERATE

KNOW YOUR STUFF

DAY 4: ONE DAY UNTIL MEETING - ORGANIZE

DAY 4: ORGANIZE. AGAIN.

DAY 4: ONE DAY UNTIL MEETING

CHECK BACK IN ON OBJECTIVES

DAY 4: ONE DAY UNTIL MEETING

REFINE YOUR THOUGHT PROCESS

DAY 4: ONE DAY UNTIL MEETING

KEEP MESSING WITH IT

DAY 4: ONE DAY UNTIL MEETING

ANTICIPATE QUESTIONS

DAY 4: ONE DAY UNTIL MEETING

POLISH YOUR STORY

DAY 4: ONE DAY UNTIL MEETING - ORGANIZE

SET EXPECTATIONS WITHIN THE TEAM

If it is your meeting run it. If not, play a role.

Properly represent your teammate's work.

DAY 4: ONE DAY UNTIL MEETING - ORGANIZE

STACK THE ODDS IN YOUR FAVOR

DAY 4: ONE DAY UNTIL MEETING

**BALANCE THE MEETING ATTENDEES IN YOUR
FAVOR.**

DAY 4: ONE DAY UNTIL MEETING

GAIN ALLIES

Reach out to your team and the wider team.

DAY 4: ONE DAY UNTIL MEETING

IDENTIFY THE RESISTANCE

Meet with individuals one on one.

DAY 5: THE MEETING - STAND & DELIVER

DAY 5: STAND & DELIVER

REMOVE DISTRACTIONS

Turn off Notifications, IM & email.

KEEP THE AGENDA ON THE SCREEN

With time estimates.

DESIGNATE A NOTE TAKER

Have the note taker keep time and review the notes at the end.

EVERY STAKEHOLDER IS A SPECIAL SNOWFLAKE

Each client is a unique situation that requires you to adjust.

START WITH THE POSITIVES

1. Highlight what you've addressed from last week's issues.
2. Highlight accomplishments, research, slam dunk decisions.

⚠ DO NOT APOLOGIZE!

SHARE YOUR STORY

1. Show your recommended design solution.
2. Only show alternatives to address specific questions.

❗ DO NOT RESORT TO THE TOUR!

BE THE PIG

1. Here is what we are solving
2. Here are the ways it helps users

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1. Here is what we are solving
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“In a ham and egg breakfast the chicken is involved but the pig is committed. Be the pig.”

-- Jim Barksdale

GET THE ANSWERS YOU NEED

1. Use the notes you kept all week to explain your decisions.

TELL THEM WHAT YOU WANT FEEDBACK ON

1. Tone
2. Technical feasibility
3. Does it make sense for those you are building for?
4. Flow: Will users get where they need to go?
5. Simplicity

TELL THEM WHAT YOU WANT FEEDBACK ON

“A good designer finds an elegant way to put everything you need on a page. A great designer convinces you that half that shit is unnecessary.”

-- Mike Monteiro

AVOID THE SUBJECTIVE

1. Avoid like/dislike. Use works/does not work.
2. If you have the data commence smoking it.

❗ DO NOT SAY "IT LOOKS GOOD THERE"!

“If we have data, let’s look at data. If all we have are opinions, let’s go with mine.”

-- Jim Barksdale

SHOW THE CONTEXT

1. Show contexts (pages, views) and states (open, closed).
2. Show responsive work in DevTools or iOS Simulator.
3. Show wireframes at different breakpoints.

SHUT UP AND LISTEN

1. Give your client a chance to talk.
2. Pause, probe, paraphrase.

⚠ DO NOT UNLEASH A KNEE-JERK RESPONSE!

WHEN THINGS GO WRONG

Paint a picture: Ask them to describe the outcome.

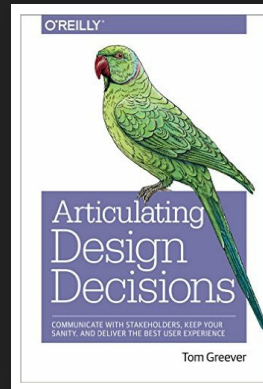
WHEN THINGS GO WRONG

Draw a picture: Sketch

WHEN THINGS GO WRONG

Expose your belly: Help me make this better.

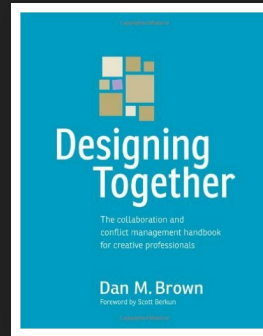
SOURCE MATERIAL



Articulating Design Decisions

Tom Greever

SOURCE MATERIAL



Designing Together

Dan Brown

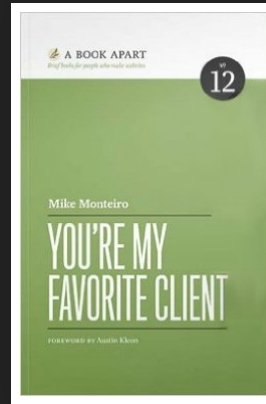
SOURCE MATERIAL



Surviving Design Projects

Dan Brown

SOURCE MATERIAL



You're My Favorite Client

Mike Monteiro

SOURCE MATERIAL



13 Ways Designers Screw Up Client Presentations

Mike Monteiro

SOURCE MATERIAL

I know precious little for how long it took to get here

- 10 years in Silicon Valley failing upstream from customer service to service operations to dev ops to engineering to developer.
- 5 years as a lead developer & designer's apprentice.
- 3.5 years at [EightShapes](#)
- 5 months at The Lab @OPM leading the design team on [USAJOBS](#).