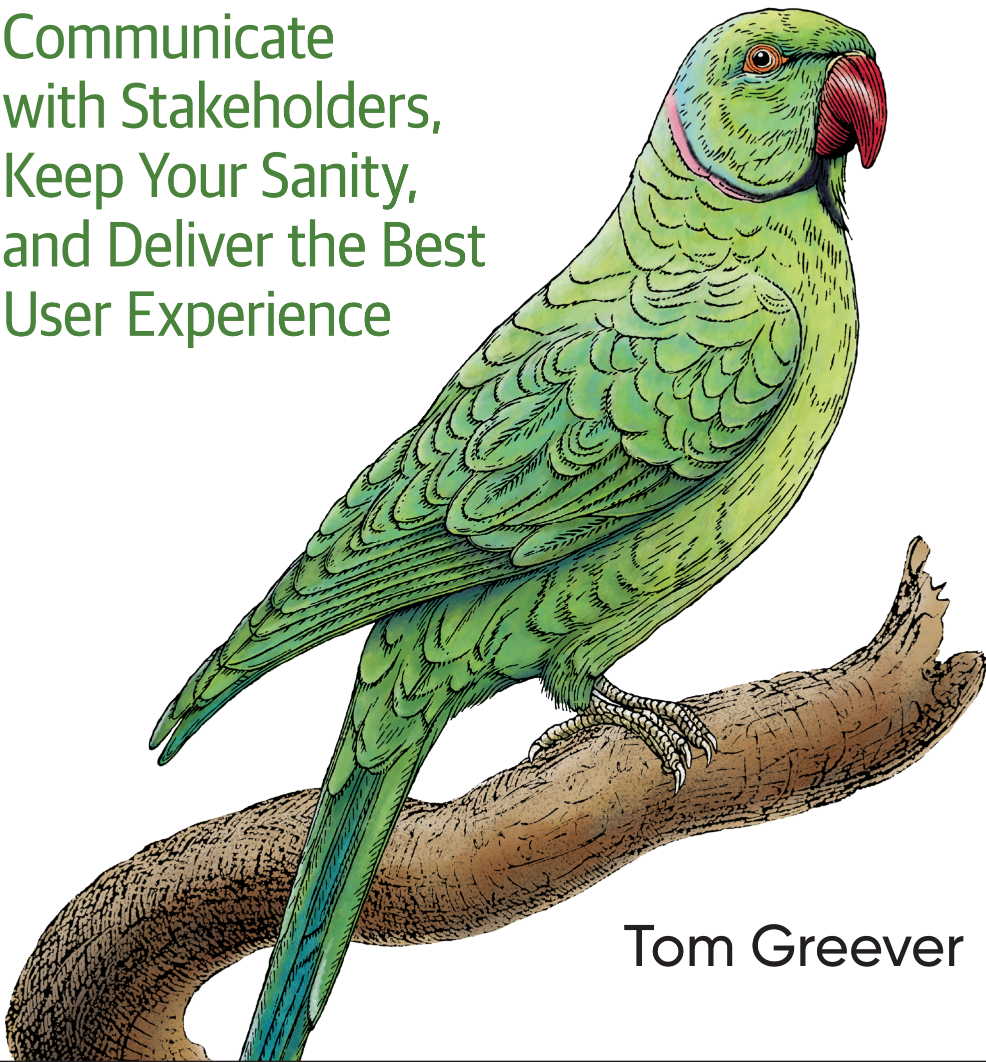
O'REILLY®

Second Edition

Articulating Design Decisions

Communicate with Stakeholders, Keep Your Sanity, and Deliver the Best User Experience



Tom Greever

O'REILLY®

Articulating Design Decisions

Talking to people about your designs might seem like a basic skill, but it can be difficult to do well. In many cases, how you communicate with stakeholders, clients, and other nondesigners may be more important than the designs themselves. Because if you can't get their support, your work will never see the light of day—no matter how good it is.

This practical guide focuses on principles, tactics, and actionable methods for presenting your designs. Whether you design apps, websites, or products, you'll learn how to get support from people who have influence over the project with the goal of creating the best user experience.

- **Walk through the process of preparing and presenting your designs**
- **Understand stakeholder perspectives and learn how to empathize with them**
- **Cultivate both implicit and explicit listening skills**
- **Learn tactics and strategies for expressing the most effective response to feedback**
- **Create the right documentation for your decisions to avoid repeated conversations**
- **Learn why following through is just as important as the meeting itself**

"*Articulating Design Decisions* by Tom Greever will change the way designers talk about design. Get it, read it."

—Tim O'Reilly
Founder and CEO, O'Reilly Media

Tom Greever has been designing interfaces and leading design teams for more than 20 years. His experience as a UX designer, executive design leader, and consultant has given him a broad perspective on how better communication yields great design. He has coached and mentored teams on design practices and communication at both large enterprises and small startups all over the world.

WEB DESIGN

US $44.99 CAN $59.99
ISBN: 978-1-492-07922-4

Twitter: @oreillymedia
facebook.com/oreilly

Praise for *Articulating Design Decisions*

Articulating Design Decisions *is a must-read for anyone involved in design, whether it's product, software, or brand design. And by involved, I mean having any part of it. This is a book that's helpful to engineers, product managers, and executives as much as it is to designers.*

– Christian Manzella, Senior Director and Head of UX, Samsung

Articulating Design Decisions *by Tom Greever will change the way designers talk about design. Get it, read it.*

– Tim O'Reilly, Founder and CEO, O'Reilly Media

Tom has done a great job tackling one of the more difficult aspects of design: talking to others who aren't designers and sharing the how and why of the design decisions that you made.

– Aaron Irizarry, Head of Credit Solutions Design, Capital One, and author of *Discussing Design*

While most books on design mention these communication issues as a sidebar or a footnote, Tom gives us an entire book of tried and tested tools to make designers expert communicators. True to its title it is easy to read and even easier to recommend. I'm thrilled that Tom has given us this gem of a book.

– Richard Banfield, VP of Design Transformation, InVision, and author of *Design Leadership*

Tom's book is essential reading for designers looking to be in control of how their work is consumed by stakeholders and clients. This book is an easy-to read guide with applicable tips to articulating product decisions with authenticity, confidence, and clarity.

– Christy Ennis-Kloote, Design Principal, OpenDigital

Articulating Design Decisions *will give you an applicable framework to learn how to best present your design work to your stakeholders and clients. It is full of real-life examples and stories that makes it very engaging.*

– Cynthia Savard Saucier, Director of UX, Shopify

Being able to "give good meeting" is a superpower. Especially for designers, who too often presume that the most important thing about a meeting with stakeholders is the design work they bring to the table. Tom shows from experience that the success of this kind of meeting, in fact, depends more on stakeholders being able to understand what they're being shown. This book provides the frameworks, planning steps, vocabulary, and (if you need them) ready-to-use paragraphs of well-formed and aptly phrased expressions in the English language that designers need to begin explaining how their work solves real problems, makes things easy for users, and deserves support from the organization.

– Dan Klyn, Information Architect and Cofounder,
The Understanding Group (TUG)

Articulating Design Decisions *elegantly tackles the challenge of communicating design decisions by providing a simple approach that can allow designers (and teams!) to get alignment on their designs. It is not enough to just make the design; you need to communicate the why behind the decision and frame it in the context of the problem it intends to solve. Every designer, and product team member for that matter, could benefit from this.*

– C. Todd Lombardo, VP of Product, MachineMetrics,
and coauthor of *Design Sprint* and
Product Roadmaps Relaunched

Whether you're a designer, developer, product manager, content strategist, information architect, or marketing or sales professional, chances are you've had to present design ideas to stakeholders at one point or another. It's hard. Everyone has an opinion about what you're presenting. And they should—what you're building reflects on the brand and is one of the primary modes for customers or consumers to interact with your company. People you work with care because they have a stake in the success of the things that you design. If you want to get better at talking about, presenting, and getting buy-in for those things, this book is an excellent place to start. Tom Greever identifies tactics and solutions for tackling tough organizational challenges that will help you not just do better work, but get that work recognized and where you want it most: to market.

– Donna Lichaw, Founder and CEO, SuperPowered,
and author of *The User's Journey*

Articulating Design Decisions

Communicate with Stakeholders, Keep Your Sanity, and Deliver the Best User Experience

Tom Greever

Beijing • Boston • Farnham • Sebastopol • Tokyo

O'REILLY®

Articulating Design Decisions
by Tom Greever

Printed in the United States of America.

Published by O'Reilly Media, Inc., 1005 Gravenstein Highway North, Sebastopol, CA 95472.

O'Reilly books may be purchased for educational, business, or sales promotional use. Online editions are also available for most titles (*http://oreilly.com*). For more information, contact our corporate/institutional sales department: (800) 998-9938 or *corporate@oreilly.com*.

Acquisition Editor: Jennifer Pollock
Development Editor: Angela Rufino
Production Editor: Kristen Brown
Copyeditor: Charles Roumeliotis
Proofreader: Kim Wimpsett
Cover Designer: Karen Montgomery
Interior Designers: Ron Bilodeau and Monica Kamsvaag
Illustrator: O'Reilly Media, Inc.
Indexer: Potomac Indexing, LLC

September 2015: First Edition

August 2020: Second Edition

Revision History for the First Edition:

2020-07-31 First Release

See *https://www.oreilly.com/catalog/errata.csp?isbn=0636920378617* for release details.

978-1-492-07922-4

[LSI]

[*contents*]

[*Preface*]

In 2014, I was asked to submit some talk ideas for a regional UX conference in the United States. At the time, I had been working as a design consultant for some pretty large brands and was anxious to share some of the cool work we had done together. I submitted three abstracts. The first two were about design techniques and approaches that I thought were interesting, methods we had used on projects to achieve effective design results. I was excited about those. The other one was on articulating design decisions. That one seemed mundane. Sure, it was important, but it was something I'd done every day of my career. I knew other designers had to deal with this problem too. It's just part of the job, right? It seemed like the most obvious and boring topic, something I did automatically, almost without thinking. Naturally, that's the one they chose.

While I was disappointed that I wouldn't be able to share about the other topics, I put my best effort into trying to come up with a few ideas and principles that might help designers in this area. I spent several weeks thinking about how I communicate to people about design, what sort of approaches I take, and how I could help others improve with practical tips. I never anticipated that this one conference talk would kick off a series of opportunities that has completely changed my career.

That process allowed me to see how my own work was filled with examples where better communication yielded better design. I realized that all my favorite designers were people who could intelligently explain why they did what they did. I noticed that a lot of the feedback I give my own team has more to do with the way they present their work than it does with their skill at creating it. It has since become clear to me that the way we talk about design with others has a significant impact on whether we succeed at creating great experiences. This is a skill many designers (even senior designers) lack. The success of our work depends on our ability to get support from everyone on the team. If we can't do that, our designs will never see the light of day.

Talking My Way Into Design

My path to working in UX began in marketing. I studied business for my undergraduate degree and quickly saw how powerful design was in bringing products to life. All throughout college, I taught myself graphic and web design while doing freelance projects for local small businesses to pay my way through school.

I know it sounds crazy, but I really enjoy interviewing for jobs. In college, I applied for just about anything and said yes to every interview. It was a low-risk opportunity to practice talking about my work. I loved watching people look through my portfolio, comment on what they liked, or ask me questions about why I did what I did. I got a rush from telling other people about my design decisions back then; I still do today. I love to talk about design!

After graduation, I was interviewing for a role as the creative manager on an internal marketing team of about twenty people. My last interview was with the vice president of marketing. She quizzed me on my portfolio, which I easily defended. She asked me about my past experience and ran through my resume, which I gladly bragged about. But then she got down to the point and asked me the most memorable question of my career: "Let's say I have a new project for you. What's the first thing you would ask me about it?"

It seemed like an easy answer. I only had limited experience, but this was perhaps the most common meeting for a designer: the meeting with a stakeholder. Without hesitating, I began what felt like a tried-and-true approach to all my previous work: "Is this a print piece or a website? Will it be color or black and white? Will we use stock photography or original? How many pages would the website or brochure have? And, finally, what is your timeline?"

"You're wrong," she said. "None of that really matters. The most important thing you could ask me...the very first thing you should always ask is, 'What are we trying to communicate?'"

I was stumped. Silent. Not only did I know that she was right, but she had exposed my superficial design ego in a way that made me feel small and completely clueless about the thing that I was most confident in—my ability to talk about design.

The good news is I got that job, and I've had many other jobs since then, but I never forgot that mistake. I was not astute enough to recognize that my stakeholder had a different agenda than my own. I failed to understand what she needed or to address her concerns. To her, the project was about communication. To me, it was only about pixels. In that moment, I realized that my ability to talk to other people about design was critical. I had to take into consideration the needs of my audience. My designs had to *do* something for the client. They had to solve a problem. And if I couldn't communicate that, I was bound to be wrong again. For me to be successful as a designer, I had to figure out how to communicate with my clients what my designs did. I had to answer their questions in a way that made sense to them, not me. I had to express to them the rationale behind a design using words that would appeal to them and meet their needs.

If I could do that, I thought, I would be successful.

UX Is Still Young

A lot of people working in UX today didn't come from a school that specializes in the field nor did we take a class to teach us a user-centered approach. We migrated into UX from other areas within the company: marketing, IT, graphic design, research. Even human behaviorists and psychologists have found their relevance in UX.

Whatever your path, a lot of us UXers have similar stories. Most of us didn't start out in UX, because UX didn't exist. So we have a design industry full of people with backgrounds that are vastly different than their current job titles.

In addition, for many companies, design has always been just a utility. We used to only hire designers to make our stuff look more professional, to be sure the brand was consistent, or to communicate a creative idea. Now, we hire designers because there are difficult problems that must be solved in order for our products to be successful in the marketplace. Great design is the expected norm. Now, designers are at the center of the product development cycle in a way that previously was thought to be unnecessary. Executives, too, now realize just how important design is, and they want to influence the process because their business is on the line. More people in the organization than ever before see the value in designing a great user experience.

What happens when you take an industry full of creative, right-brained thinkers and thrust them into the middle of a product cycle with usability problems and business goals? Well, it's no surprise that there is a disconnect between what a business stakeholder wants and what the designer has so carefully crafted. And so the two meet in the middle, in a meeting.

That's where we find ourselves today: in a meeting with people who don't know how to do our job, yet consistently tell us how they think we should do it. It's enough to drive any designer insane.

This book sits at the intersection of the UX design industry and the digital product business, where previous expectations that design is just about making pretty pictures conflicts with strong ideas about how to solve problems for the business. The growth and maturity of the UX industry has changed our role in so many ways, none more so than the need to explain ourselves to other people who don't share our experience in design.

What This Book Is About

The purpose of this book is to help designers become better communicators—to expertly explain their design decisions to the people who have influence over their project. The entire premise of the book centers around a meeting: a meeting with clients or stakeholders at which we present and talk about our design decisions. Everything is written with this meeting in mind: before, during, and even after this meeting. Everything that we will walk through focuses on this meeting and is meant to help you become better at leading, participating in, and getting support in these situations.

Some of these meetings will involve a lot of other people, but the majority of them involve just a few. Some might take place in a conference room, whereas others are impromptu hallway talks or online conversations. Don't obsess over those details; instead, focus on the overarching principles that you can apply in any situation. The goal is to remain flexible and able to adapt quickly to different situations.

I go into detail about writing down everything, asking questions, honing your listening skills, or making multiple designs. It might seem as if you'd need weeks to prepare to talk to someone about your work! But, in reality, it all happens very quickly. Sometimes you'll have plenty of time to prepare. Other times, you'll need to form a response off-the-cuff and make very quick judgment calls. That's the reason learning these skills and committing them to habit is so important. You want articulating design decisions to be something you can do so effortlessly that you no longer need to spend conscious effort applying all the advice contained in this book.

Let me be very clear: this is not about an "us versus them" mentality suggesting that designers are always right and opposing stakeholders who would otherwise make bad decisions. Rather, articulating design decisions is about creating an environment in which stakeholders can clearly see the expertise and thought process of the designers so that they want to support them. It's about creating trust, demonstrating effectiveness, and doing so in a way that's compelling and convincing.

In fact, one of the assumptions I make going into this book is that your design is the right thing to do. I have to assume that: you've done your research, you've made good decisions, you're solving a problem for the business, and the design you propose is the right choice. If that's not true, then no amount of wordsmithing your way around stakeholders is going to make any difference at all.

Talking to people about design might seem like a basic skill, but it's actually really difficult to do. In my experience, designers have a difficult time adequately communicating with nondesigners in a way that's effective. So, keep reading and learn how to better communicate to stakeholders, keep your sanity, and deliver the best user experience.

Who Should Read This Book

This book is written primarily for designers working with other nondesigner stakeholders: graphic, web, UX, interaction, interface, or visual designers.

DESIGNERS

If you've ever had the experience of a stakeholder insisting on a change that you disagreed with, this book is for you. It's a common situation for designers to feel as if their own expertise and judgment is overruled by stakeholders who know little about design. This book is meant to bridge that gap and help you convince them your decisions are the best choice.

SENIOR DESIGNERS

You might think you've been doing this long enough and you're already sufficiently skilled at articulating design decisions. That may be true, but how often are you applying thoughtful, deliberate effort at presenting your work? Besides validating what you already know, I provide a lot of actionable tactics to make it easier to put into practice.

Articulating design decisions is not something you can learn, become an expert in, and never have to work on again. It requires regular conscious effort and practice. You may be a black belt, but every time you enter the ring you can lose if you're not practiced, ready, and aware.

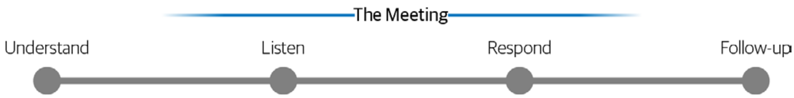
THE WHOLE PRODUCT TEAM

Despite the fact that this book is written for designers, because it is nontechnical and deals with many common problems, many other roles in the organization will be able to relate to, and benefit from, these tips and best practices. I've spoken with many researchers, developers, content strategists, and product owners who all benefited from the concepts and ideas in this book.

How This Book Is Organized

Chapter 1 starts by demonstrating how and why communication is a critical part of the design process in today's organizations. Our designs do not speak for themselves, so we must understand how clear communication is the missing component in many design processes.

Chapters 2 through 10 are organized in a linear fashion, centered around the meeting with stakeholders. We walk through the process of meeting about and presenting design. At each step, you'll see a timeline (such as the one that follows) to indicate where we are in the meeting. Along the way, we'll cover things such as understanding stakeholder perspectives, empathizing with them, and doing the prep work necessary to meet with them. During the meeting itself, we look at both implicit and explicit listening skills as well as learning to get in the right frame of mind before responding. Next, I propose several simple tactics and formulas to help you get support for your designs by forming the best response. Yet, even after the meeting has concluded, it's still necessary to follow up and make adjustments to your work to ensure that you maintain the best user experience. From beginning to end, these chapters cover everything you need to know about meeting with stakeholders to talk about your design decisions.



However, because working with people isn't always a precise linear process, I offer some tips and best practices that will be relevant in many other areas of your work. For example, taking good notes is discussed at length in both Chapter 3 and Chapter 9, but the application for documenting design decisions is relevant in every step of your design process.

Finally, I close the book with Chapter 11, "How Executives Can Help Designers." This chapter is written for nondesigner executive stakeholders and is intended to be a resource for anyone involved in making design decisions. Managers, executives, and business leaders will benefit from learning to work with designers more effectively. Designers are encouraged to share this chapter with their executive stakeholders.

Why I Wrote This Book

I wrote this book because I want to help designers and companies create better experiences, but there is a large gap in communication between designers and stakeholders. To fill that gap, I provide real, practical advice that you can apply to your work right now. I did it, in part, to document and clarify my own thinking on how design is influenced by communication, but I also did it to help me be intentional about the things I do every day. This book is my own personal checklist for how to talk about design, and I am also excited to share it with you. I hope it will be a useful tool for you as well.

I've met so many great people because of this book. The relationships, connections, conversations, tips, and advice have been invaluable. It has been a fantastic experience, and I've loved facilitating this conversation about an important area of our industry. Not only that, but it has given me the opportunity to travel all over the world to speak at conferences and work with teams who I would have never had the pleasure of knowing otherwise. I get messages from people who tell me that this book has changed their career for the better or helped them get a promotion. People will share stories with me about how they applied a tactic and whether it worked or not. I've had the pleasure of leading dozens of teams through workshops where we practice, discuss, and hone these skills in person.

I'd love to hear from you too. Feel free to reach out, follow me on Twitter, add me on LinkedIn, or share a story about how you've dealt with this problem. Mostly, I hope the book will help you too.

Add me on LinkedIn: *https://www.linkedin.com/in/tomgreever*

Follow me on Twitter: *https://twitter.com/tomgreever*

Follow me on Instagram: *https://www.instagram.com/tomgreever*

You can find plenty of articles, podcasts, and videos about this topic on my website: *https://tomgreever.com*

O'Reilly Online Learning

For more than 40 years, O'Reilly Media has provided technology and business training, knowledge, and insight to help companies succeed.

Our unique network of experts and innovators share their knowledge and expertise through books, articles, and our online learning platform. O'Reilly's online learning platform gives you on-demand access to live training courses, in-depth learning paths, interactive coding environments, and a vast collection of text and video from O'Reilly and 200+ other publishers. For more information, visit *http://oreilly.com*.

How to Contact Us

Please address comments and questions concerning this book to the publisher:

O'Reilly Media, Inc.
1005 Gravenstein Highway North
Sebastopol, CA 95472
800-998-9938 (in the United States or Canada)
707-829-0515 (international or local)
707-829-0104 (fax)

We have a web page for this book, where we list errata, examples, and any additional information. You can access this page at *https://oreil.ly/articulating-design-decisions-2e*.

To comment or ask technical questions about this book, send email to *bookquestions@oreilly.com*.

For more information about our books, courses, conferences, and news, see our website at *http://www.oreilly.com*.

Find us on Facebook: *http://facebook.com/oreilly*

Follow us on Twitter: *http://twitter.com/oreillymedia*

Watch us on YouTube: *http://www.youtube.com/oreillymedia*

Acknowledgments

Someone asked me once what I do to relax. Reading? Movies? Exercise? While I do enjoy those things, after thinking about it for a few minutes I said that the best way for me to relax and unwind is to spend time with and talk to my wife, Hannah. This book would not be possible without her support, understanding, and encouragement. Hannah is my favorite human, candid collaborator, and devoted partner. She's much smarter than me and has contributed more to this book than she'd take credit for. I could not have written this book (twice!) without her sacrifices. I love you, schmoopie.

I also owe a huge thanks to the reviewers: Dennis Kardys, Christy Ennis-Kloote, Anthony Armendariz, Heather Wydeven, C. Todd Lombardo, Brad Nunnally, Cynthia Savard Saucier, Dan Klyn, Kate Rutter, and Cindy Alvarez. This book is much more accurate and significantly less offensive because of their help.

Last (but certainly not least) I have to thank all of my existing and previous clients, bosses, managers, and executives. Without you, this book would not be possible. In fact, every person who has ever worked with me is in some way a part of this book. I became good at talking about design because of you. I had to! You gave me no choice! I learned these skills through years of working with *you*, and now it's time for me to share it with the world.

[1]

Great Designers Are Great Communicators

Have you ever had to make changes to your design work you disagreed with? Me too! It's not easy to talk about design, especially with people who aren't designers. The ability to effectively articulate design decisions is critical to the success of a project, because the most articulate person usually wins. In fact, I would say that the difference between a good designer and a great designer is in their ability to not only solve problems with design, but to also articulate how their solution solves it in a way that's compelling, fosters agreement, and gets the support needed to move forward. That's what this book is about: getting support for your design decisions.

Lots of people are involved in the design process. What was once relegated to a visual aesthetic is now the center of everyone's attention. People from all over the organization see the value of creating a great user experience, and they all want to participate. Marketing, executives, developers, product management, even people in accounting will want to tell you how they think it should work. People are excited about user experience (UX) because they recognize the long-term effect it has on the product, the business, and the bottom line. The good news? You're a very popular person!

The Big Meeting

One Sunday in January, I had to catch a late flight to San Francisco for a client meeting the next morning. But this wasn't just any meeting. About a dozen people from different areas of the company were all presenting designs to the CEO of a large retail website. Vice presidents, directors, product owners, and UX designers were all involved in putting together a three-hour event that would lay the groundwork for an entire season's worth of projects, as long as they could get this one executive's support.

After working with several product managers and attending several meetings, I understood the body of work I was presenting and began preparing my slides. The Friday before, I sat in on a four-hour conference call, during which everyone on the team practiced their presentation to a VP, who provided feedback and suggestions for how to best present their ideas to the CEO.

It all centered around one thing: presenting design ideas to a CEO for the purpose of getting his support and buy-in. There were more meetings about the meeting, discussions about what he might say, late nights getting everything just right, and rearranging schedules to make it happen. I personally would spend 16 hours traveling, 2 nights in a hotel, and a full day in a conference room just for this one meeting. Fortunately, the meeting went well. The CEO was very receptive, provided great feedback, and everyone set to implementing the work they had designed.

But that's not the important part of this story.

What struck me about this whole thing was the amount of effort that was going into just communicating design ideas to one person. The amount of time the other designers spent actually creating the mockups was trivial compared to the time and energy that went into finding the best way of communicating them. *Communicating about the designs was more important than the designs themselves.*

You may not be on a large team like this or you may not be working with a large company for which a meeting with the CEO is such a big deal, but the principle is still the same. The way we talk about design to our stakeholders is critical to the success of our projects.

Design Is Subjective…Sort Of

When I interview designers for a role on my team, I always ask them, "What makes a good design good?" The way people answer this question tells me a lot about how they think about design and, in particular, UX. Most of the answers are predictable, but they often tend to sound something like this: "a good use of space," "simplicity," or one of my favorites, "when you can't remove anything else." Now, there's nothing wrong with those answers. They express how a lot of people approach design, but they aren't truly what make a design good in the eyes of a business. It's not the approach I want for designers on my team because they speak to subjectivity—to an aesthetic that not everyone will agree on.

I'm not exactly sure where these designers come up with definitions that sound like something straight out of a Jonathan Ive memoir. I don't think they learned it in art school. What concerns me is that I think they picked these catchphrases up from a social-media design phenomenon where "UX" means "something that looks as cool as an iPhone." They've adopted it from a popularity-contest mentality that believes pretty things are the same as usability. It's the same culture that causes well-intentioned designers to create a "redesign" mockup of any popular website or app without any clue as to what that business's needs are. It's less about solving problems and more about likes.

The truth is, all design is subjective. What one person likes, another person hates. What seems obvious to me might not be obvious to you. What works in one context could fail miserably in another. This is why design is such a difficult thing to talk about, especially with people who aren't designers. There is little common understanding of what design is or should be.

Too Many Cooks

It would be easy to create designs if it weren't for the fact that other people on the project might disagree with our decisions. Actually, they will!

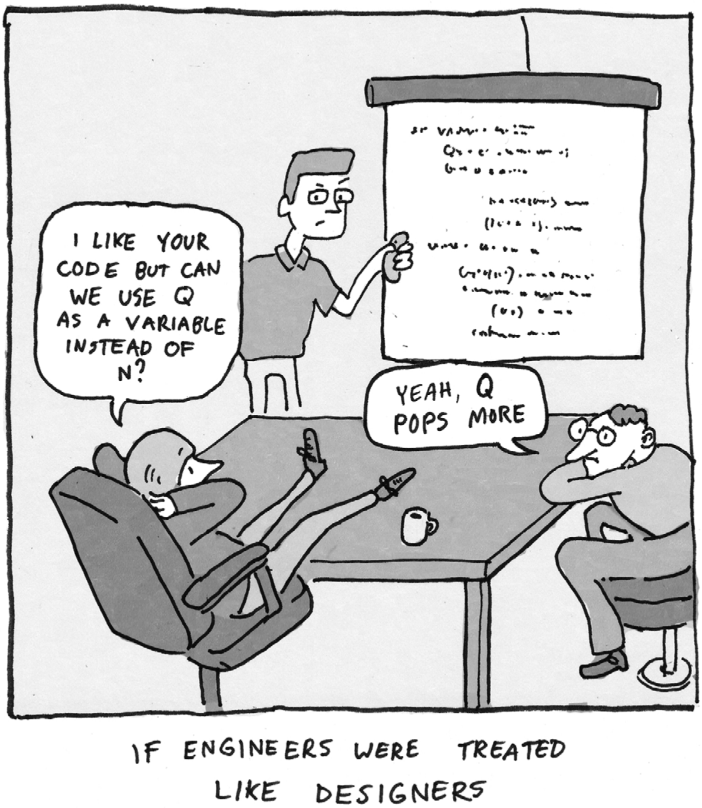
There are a lot of people who may know little or nothing about design, yet who have the authority to oversee and dictate our design practice. They have a vested interest in participating in the conversation, but they aren't trained designers, and they don't have the same depth of knowledge in design or technology that we do.

What's more, these people will often gladly admit that they aren't the experts. They know that they don't know, yet they still insist their ideas and opinions are right. This is one of the most bizarre parts of our relationship with stakeholders! People will readily admit they are not good at our jobs, yet insist on making changes that we believe will be detrimental to the user experience. They say that they trust us as experts and yet frequently overrule us. It can be incredibly demeaning and confusing, but the problem may not lie entirely with them.

These stakeholders have to be part of our process, but we struggle with including them in a way that's helpful and doesn't derail our objectives. This is what we need to figure out.

Everyone Is a Designer!

Everyone knows good design when they see it, even if they don't know how to create it. That sounds frustrating (even ridiculous), but it's actually true. The same can be said for other arts, such as music. I may not know how to play an instrument, but I can decide what music I like (and don't like). Although there may be different preferences, we're all able to choose music we want to listen to, regardless of whether we know how to reproduce those sounds ourselves.



Andy Zelman, Skeleton Claw Comics. (Used with permission: *http://skeletonclaw.com*)

The Interface Is Your Interface

Because design work is so often visual, people care about the part that they see, feel, or interact with. They care about the interface. However, when your job is to create the user interface, everyone is going to care about everything that you do! All of your work is exposed, so it naturally conjures more opinions and ideas than many other areas in the organization.

Our work is critical to the success of our company's products, so we must take responsibility for showing people how and why our work is so valuable. That part doesn't come automatically. It takes work, it takes practice, but more importantly…it takes good communication.

There Is No U or X in Team

Collaboration seems like it should be the pinnacle of great design work: different opinions coming together to form the best possible solution. That's what everyone really wants. The image is of a handful of respectful intellectuals, passionately debating the right solutions, ultimately leading to a collaborative discussion and an ideal design that no one could have thought of on their own. Teamwork at its best! Everyone leaves satisfied, fulfilled, and respected—ready to take on the next design challenge, right? We think we want that kind of collaboration, but it becomes far more complicated when we disagree with one another. When we disagree, we tend to become defensive. When we become defensive, we fail to focus on the real issues. The meeting ends, not with collaboration, but with grumbling compromise and, often, a crippled user experience.

In situations like this, meetings can easily turn into design-by-committee. Everyone has a suggestion for how to solve a problem. We hear different opinions on every side and are unable to defend our own choices against this barrage of feedback. One suggestion evolves into an idea for something else. That idea spurs a thought about something different. Unchecked, the conversation can spiral out of control into a hodgepodge of well-intentioned tweaks that collectively spell doom for the overall goals of the project. The thing we came together to accomplish has been muddied by groupthink and mob mentality. Remember, teamwork always ends with work.

THE CEO BUTTON

Because of this, we see things like the *CEO button*.

> The CEO button is an unusual or otherwise unexpected request from an executive to add a feature that completely destroys the balance of a project and undermines the very purpose of a designer's existence.

It's funny because it's true. You might spend weeks or months building the best possible app. Your team has poured in all the best practices. You've done usability testing to prove it works. And yet, one executive can come in and blow up the whole thing. We want to avoid this.

HOME PAGE SYNDROME

Another common problem is the *home page syndrome*.

> The home page syndrome is a condition whereby the home screen of an application or website becomes a catchall for everything, creating a garage sale of links, buttons, and banner ads that unravels the fabric of usability, causing designers to cry themselves to sleep.

You see, sometimes no matter how hard we try, the home page just becomes a huge mess. Everyone wants their business unit represented on the home page. It's as if something doesn't exist if it isn't on the home page. That new thing we're launching? Put it on the home page. And that other thing that isn't performing well? Maybe if we put it on the home page, it will get better. Sound familiar? We have to learn to deal with this phenomenon.

Communication Is the Job

The good news is that it doesn't have to be this way. It's possible to avoid the disruption and compromise that happens so frequently in organizational design through better communication with our stakeholders. I've found that the majority of issues or concerns that our stakeholders bring to our attention are often just a matter of misunderstanding or miscommunication. The way that we talk to them about our designs is the key to ensuring that we always end up with the best possible user experience.

It makes sense when you think about it. All human relationships are really nothing more than a series of bound-up understandings and misunderstandings. We don't always have control over how other people understand us in the beginning. Everyone brings their past experiences into conversations we have with them on a daily basis. We do, however, have control over how we communicate with them in order to influence those future understandings. The way that we talk to people and the things we say will influence their response.

I know you were told your job was to design stuff, but really communication is the job!

GOOD COMMUNICATORS WIN

Overall, being a better communicator will give you more opportunities. I'm amazed at the number of designers who apply for a job yet lack basic communication skills. People will send me a resume without explanation, forget about interviews, or fail to follow instructions. Ultimately, I'm only going to pursue candidates who can communicate well, and so the poor communicators are passed over very quickly.

It's common for my leaders or clients to express that one of the reasons they hired me was because it's so hard to find people who are reliable and can communicate effectively. I've heard many stories about former designers who simply weren't good at setting expectations, following instructions, or clearly articulating their work. The need to work with other people on the project, particularly developers and managers, is quite often the thing that sets apart good designers from bad ones. It's not about whether you can create the most innovative design, but whether you can work with people in a way that gives them confidence in you and your expertise.

Your job will be easier if you're a good communicator. Strangely enough, that may be all it takes to set yourself apart from other designers—even designers who might be more artistically talented than you. Very simply: good communicators win.

Being Articulate Means Success

It's more than just using words, though. We have to turn those words into something that will enact change or compel people to support our decisions. We have to explain why we did what we did. It's not just using words with a frequency or persistence; it's about using them in a way that is compelling and convincing. It's about being articulate.

The key to being articulate is to understand both the message you want to communicate as well as the response you want in return. If you can learn to craft your messages in such a way that they yield the desired response, you'll find that you're much more successful at getting the things that matter to you.

THE BEST IDEAS (DON'T ALWAYS) WIN

It might seem like the best ideas should always win, or that great design should speak for itself, but that's not how these situations play out in real life. It's too altruistic to believe that the best ideas are the ones that will get picked. They should, perhaps, but this is reality, and humans are part of the equation. The best ideas (unfortunately) get stuffed into an amalgamation of meetings where competing needs vie for attention. The person who can convince the other that they're right is the one who gets their way. Your design might be revolutionary, but an aggressive and well-spoken salesperson is more likely to get support if they can convince your boss that they're right.

Designers lacking the ability to explain why they did what they did end up on the losing side of the argument, forced to make changes they disagree with simply because they were unable to fend them off. This is not to say that the stakeholder relationship is adversarial. No, these discussions can feel very much like good, solid teamwork. But the inability to speak up and articulate your side will often land you in the position of making changes that won't yield the best results.

Alternately, being articulate about our designs:

Imparts intelligence
: You're smart, you know what you're talking about, you have expertise in this area, and you can be trusted with the solution.

Demonstrates intentionality
: You've thought about it, pursued it, and are logical in your approach. This isn't just a random idea; there is purpose and focus.

Expresses confidence
: You know what you want and how to get it done. Having a solid argument shows that you're not wishy-washy and you mean what you say.

Shows respect
: You value everyone's opinions and time enough that you're well prepared. You're not wasting time or disregarding others.

The way to be articulate about design is to offer a message that communicates *why* we did what we did in order to help stakeholders understand our rationale. More than that, we can present our work in such a way that it appeals to *their* needs and expectations too. We build trust with stakeholders by showing our expertise through logic and reason, and by delivering it to them in a way that makes sense to them. So, we need to harness the power of communication, be articulate, and use these skills to help people see that our decisions provide the best possible solution. Being articulate will help us be successful.

Becoming a Great Designer

To hone in on the best practices for articulating design decisions, let's look at what makes a design successful, because that will form the basis for how we communicate about it. Let's boil down UX to its very core. We must understand the fundamentals of what makes a great experience so that we can reproduce that thinking and approach.

THE BIG THREE

Let's return to the question: *What makes a good design good?* We could debate the answer, but when it comes to creating the user experience, a design is really only good when it solves a problem. Mostly, we are trying to solve problems for the business; we're trying to accomplish some goal that will help the business grow. But, if we're practicing a user-centered design approach, we must also make our designs easy to use for the people who will use it.

However, one thing that we often forget is that there are other people involved who have influence over our project. It's not enough to simply create an incredible app; we also have to get the support of our team. Without their support, our project can't move forward.

The difference between a good designer and a great designer is the ability to not only solve the problem, but also to articulate how the design solves it in a way that is compelling and fosters agreement. If you can do that, you're a great designer.

So, I would say there are three things that every design needs to be successful:

1. It solves a problem.
2. It's easy for users.
3. It's supported by everyone.

These are the basics of creating a great user experience that the average person (such as your stakeholders) can understand. Projects that fail are usually lacking in one of these areas. If you can do all three of these, your project will be a success.

Let's look at each one in more detail.

SOLVE THE PROBLEM

Of all the things we're trying to accomplish with our work, we have to solve problems: business goals, engagement, conversion, interaction, feedback. Whatever the problem is, our job is to find a solution and measure its success. How will we know if we've done our job? By looking at the results before and after, tracking some specific metric, and watching it improve.

Hopefully, you and your team have already established these goals, metrics, or key performance indicators (KPIs) for your project. If not, I recommend doing them yourself so that you have a measuring stick to use in all of your conversations. Projects without goals will surely languish because there is no way to convince someone else that you're right if you have nothing by which to measure its success. It just becomes a matter of opinions, and subjectivity will make it difficult to move forward. Therefore, if your team isn't set up to establish these in the beginning, do it now for your own sanity. Find out what the most important factors are for your stakeholders—impressions, conversion, account sign-ups—and then pick one or two measurable issues that you'd like to improve and write them down. Set this as your goal and use it to your advantage when talking to other people.

Although we're certainly adept at approaching these problems to find creative solutions, we're not always in tune with our own thought process to help other people understand why we did what we did. This is where our intuition becomes so vital, and this is what makes us good designers: we know how to solve problems with design. It's often natural for us to see a solution without giving it much thought. Other times, we might wrestle with a solution through trial and error. Either way, we're making changes over time, morphing our ideas into something that will add value. The hard part, though, is figuring out what drives that intuition. What makes this "feel right" so that we can help other people see our perspective? How does this combination of small moves result in the right solution? The practice of solving problems with design must also be accompanied by an awareness that will help us explain our decisions to other people.

When you're working on a design, you need to make yourself consciously aware of every decision you're making and why. You need to be constantly asking yourself, *"What problem am I trying to solve with this?"* Chapter 7 will list some of the most common ways I describe my own solutions, but for now just consider that you need to be aware of all the changes you're making, all the new things you're adding, and all the rearranging that goes into finding the right interface. Those unconscious choices hold the key to explaining your designs to other people and ensuring that your expert perspective remains at the center of the final decision process.

The best way is to write them down. There is something about moving your unconscious thought to a more tangible form that allows you to remember everything you've done. Because you have measurable problems you're trying to solve, write down the problem and then list your solutions next to it. Do whatever it takes to document your own thought process.

I am a list maker, so I love to type lists and sync them across all my devices. Some people prefer to put pen to paper and allow their hand to make the physical movements necessary to connect their thoughts to the real world. You can do this with simple notes or more complex sketches. Make a list on paper of your solutions or even draw a storyboard that demonstrates the before and after effects of your designs. The method you use for writing down your answers doesn't matter. The point is to get you thinking about your decisions in concrete ways.

Here are a few examples from my own work:

PROBLEM	PROPOSED SOLUTION
Users don't realize the filter controls have updated the list of results because it's instantaneous.	• Move the count of items in the list closer to the filters so that the user can see the number change. • Briefly show a loading spinner on each checkbox as the user selects it. • Add a Done button that closes the panel to give the user a sense of completing the task.
Users do not proceed to the next steps from the marketing landing page.	• Move the headline and hero image to the left to make space for the call to action (CTA) on the right. • Change the color of the call to action to red; update the copy. • Remove background image, too distracting. • Position the "Next steps" list so that it will usually overlap on the fold, causing the user to want to scroll to the second CTA.
Users are not adding to their carts from the "search results" list view.	Reduce the number of actions required to add an item to the cart from search. One-tap add: • Tapping "Add to cart" will auto-add the item to the cart first without requiring a quantity or other information • On tap, the button changes to a quantity with an initial value of 1. User can increment quantity as needed. • Remove secondary "Add to cart" confirmation button. • New messaging animates to indicate that the item was added. • "Ready to Checkout?" call to action slides in underneath messaging. • Items with options, such as color or size, will automatically select a default but provide the user with the option to change it within view.

It can also be useful to describe your designs using only words. So much of our work is purely visual that it can be difficult to understand what that "sounds like" in a world without pictures. Because our end goal is to tell other people about it, why not attempt to describe every detail in sentence form and assume that the reader doesn't have the ability to see it? How would you describe your designs to someone on the phone? Or by email? Writing down how you see your work will reveal many of your motivations, some of which you never realized were there. The purpose of this exercise is to help you uncover your thought process and articulate your decisions first to yourself. It's not intended to be a substitute for demonstrating your designs visually.

Here's an example from one of my projects:

> The list view is sorted alphabetically by country by default. The standard sort menu is available in the top right. I made each item in the list exactly the right height for a mobile touch target. On the far left of each item is that country's flag. We thought that would make them more easily identifiable to people. Next to the flag is the name of the country in bold and then a short description of the project directly underneath, in smaller gray type. A quick reference to the report title. On the far right of these controls are two things: (1) a summary of the data for the report type the users has selected. For example, it will show the percentage, like 34 percent for infection rate or the total in short form like 1.5 m. (2) A disclosure arrow to indicate that there is more content "to the right" if the user taps this item. The flag will make it quick for the user to find the right country and the short snippet of data will help him know if he needs to tap for a more detailed report. With this design, users should be able to quickly browse the list to find the correct report.

It doesn't need to be long, and it shouldn't be time-consuming. This isn't busywork. Do whatever it takes to help you identify your thinking. For example, if you find yourself comparing your designs to another popular platform, it's a good sign that your decision was based on solving a problem that the other platform might have already addressed. "When you tap the button, it loads the next set of results the same way that SocialApp does." It's okay to make decisions based on another app, but it doesn't always make the best case. What it will do, however, is allow you to go through a new series of questions to get to the bottom of your thinking: Why does SocialApp do it this way? Is our context similar enough? Does SocialApp have any data? Were they intentional about this choice? Every time you're able to describe your designs, you'll uncover a part of your thought process that can help you find the best ways to talk about it.

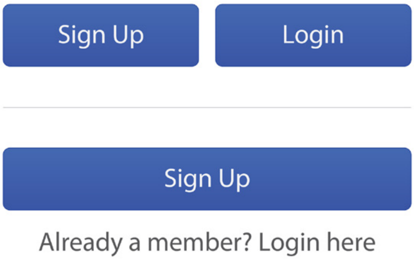
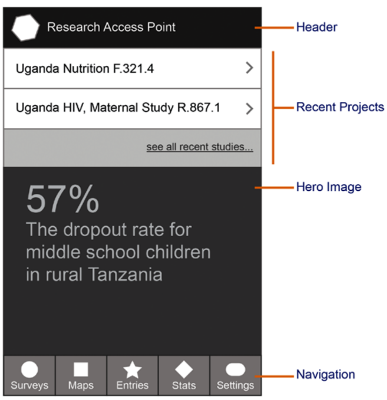
You do not have to share these notes with your client or stakeholder. They may never see them, and that's OK. For now, this is more about practicing being intentional than it is about communicating with others. The takeaway here is that the process of writing about what you create will help your brain to connect the dots between the problem you're working on and how your designs solve it. The better you are at making those connections, the better prepared you'll be to talk about them with others. Whatever works for you, the goal here is to find a way to turn your thought process into something real, shareable, and visible, to uncover the words that will help you to explain yourself to other people in a way that makes sense.

MAKE IT EASY

Obviously, if we're taking a user-centered design approach, we have to create something that is easy for users. While we know that usability is the core challenge with design, it can be difficult to explain that to other people. I assume you already understand something about usability. The purpose is not to tell you how to make your interfaces easy to use, but to help you think through your approach to usability so you can talk to other people about it.

Just as you were solving problems and making yourself aware of your decisions, you must also do the same thing here. At every step of the process, for every decision you make, ask yourself, "How does this affect the user?" The trick to answering this question is that often we simply don't know how our decisions will affect our users. We can only make our best guess, try it out, and then draw conclusions from what we observe. Like the previous section, write it down. You need to be able to answer this question first to yourself so that you're prepared to give that answer to stakeholders.

One way that I capture how my designs affect users is to write a story that is either based on a user session I observed or loosely based on the overall use case. Here are some examples:

DESIGN CHANGES	HOW IT AFFECTS THE USER
	Having two similar buttons for Login and Sign Up next to each other is confusing to some users. We've observed users hesitate when deciding which button they should choose because the buttons are so similar. Because Sign Up is the most common case in this context, I've made that button the full width of the container and changed the Login button to a text link. This should make it easier for new users to sign up while still facilitating easy login for existing users. Most existing users will go directly to their account page by being automatically logged in. This should reduce confusion and increase conversion.
	When researchers are in the field, they need quick access to their data without having to navigate through the app. So, rather than keep the hero image at the top of the home screen, we're moving it down in favor of a "Recent Projects" list at the top. Users can still see this important information, but their reports are more easily available to them because that's their primary use of the app after they've already accessed the projects.

Simplified, usability is about two things: common sense and research. When you're first beginning a project, you may not have much to work with as far as data or user observation. You really have no choice but to make your best guess about what will work for the user. As a usability expert, you have experience designing interfaces, so you're able to make informed assumptions based on what you believe will create the simplest experience. This is where common sense comes to play. There really is no reason to overthink it. Create the easiest solution you can think of. Do what makes sense and move on.

Of course, what you think makes sense and what a user does are quite often two different things. That's why we have research. After we've made some informed guesses, we need to test our ideas by using real people. Research can take many forms, but the most common tools are either analytics or a usability study. We will talk more about this in Chapter 6, but let me say here that the challenge with analytics is that it can only tell us *what* the users did. It cannot tell us *why* they did it. The only way to actually know how your decisions affect users is to observe them. So make your best guess with the data you have, but then verify your designs with real people and make notes. You may be surprised by the results, and you'll be in a much better position to defend your decisions.

GET SUPPORT

It's not enough to solve problems and make our app easy to use, because if a stakeholder won't support us, we aren't going to get anywhere at all. You could have the most innovative design in the world, but if no one on your team understands what you're trying to do, you're not going to be successful at implementing it.

What happens if you don't get support? You'll constantly rehash the same conversations over and over again. When people don't remember why you did what you did (because your explanation wasn't compelling or memorable), they'll bring it up again at the next meeting. "Now, why did we agree to do this again?" When people aren't convinced that you're right, they'll continue to think of alternatives to suggest. The project scope will increase over time as people propose adding more things: a simple control, one more button, a new menu. As a result, you won't be able to move as fast as you need to because you'll be bogged down managing requests. In the end, you might have to ship a product with a compromised user experience, all because you couldn't get stakeholders on board with your solution.

Getting the support of everyone on your team is the primary focus of this book. We aren't going to be able to get anywhere unless we're able to get everyone on the same page and agree to move in the right direction. That's what getting support is all about: convincing people to trust us with the solution. You need to create an environment where everyone understands what you're doing, believes in your expertise, and supports your choices, so that you can move on to the next thing.

I'm intentional about using the word *support*, rather than, say, approval or agreement. We will not get everyone to agree on a specific solution. Approval isn't the point either because it implies a certain amount of consensus. That's okay because that's not what we're looking for. We're looking for their support—of us, our expertise, our solution, or our plan for moving forward. It's possible to get stakeholder support even if they disagree with our solution. In that way, what we're looking for is *agreement to move forward*, not agreement on the solution. Forward momentum is the goal, not consensus. We simply need their support.

To gain the support we need, we have to understand our designs by asking ourselves, *"Why is this better than the alternative?"* Implicit in this question is that we know what the alternatives are, we've considered them or even tried them, and we're prepared to explain why our solution is better.

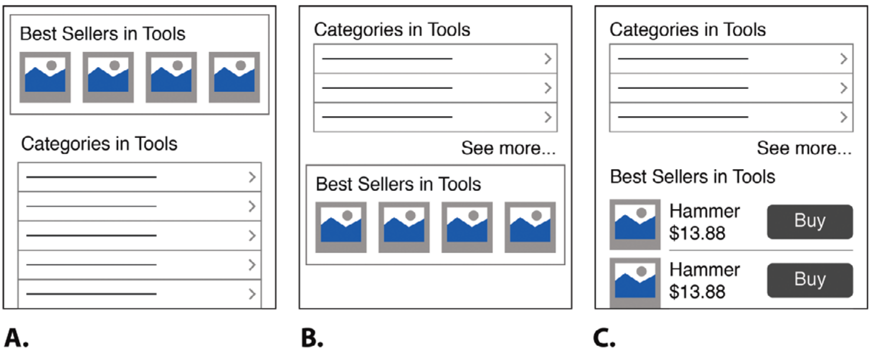
Everything we design has another way of doing it. For each design we create, there is an alternate, often opposing, way of solving the same problem. This is the reason why we have disagreements about the solutions to begin with and a key problem with articulating design decisions. Designers can be really good at coming up with a solution for the problem, but we're less adept at understanding *all* of the solutions to the problem. We become so myopic when we think we've found it.

Eureka! Our solution seems so obvious that there is very little need to waste time considering any other approach. (After all, we're on a tight sprint and need to get something to the client by the end of the day.) Yet, this thinking almost always creates a conversation that we're not prepared to deal with: when the client suggests an alternate idea that we haven't considered.

Ironically, we are usually cognitively aware of some of the other alternatives. We probably tried them, moved stuff around, and eventually landed on the solution we believe is best. But it's all those little movements that we failed to make ourselves consciously aware of, and so we're less prepared to help other people understand our thought process. Likewise, we often know what our clients are going to suggest. If you've worked with your stakeholders before, you can make a pretty good guess about how they'll react (this is addressed at length in Chapter 3). Yet if you can guess how they'll react but you fail to consider those alternatives and understand why your solution is better, you will have a difficult time winning them over.

The point is this: be consciously aware of why your design decisions are better than the alternatives. Just like the previous two questions, write down your answers. Make a list of the other ways that you could solve this problem. Create a bunch of alternative designs, don't throw them away, and have them available if you need them. With those alternatives, make a short list of why you think they don't solve the problem as well as your proposed design. Thinking critically about these other options will help you to be prepared to discuss your decisions with other people.

Sometimes, I create very simple wireframes of the alternatives in addition to my recommendation. When the client begins asking questions about my proposed solution, I can quickly show these to visually demonstrate the differences.



MAKE IT HAPPEN

If we're going to be successful at communicating with people about our designs, we must be able to answer these three questions about our work:

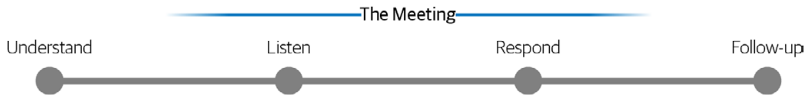
1. What problem does it solve?
2. How does it affect the user?
3. Why is it better than the alternative?

The purpose of answering these questions is more of an exercise in getting you to understand your choices than it is a prescriptive method for documenting them. Don't worry too much about the details of how you write them down. If you can answer these three questions, you'll be well on your way to defending your decisions with the people who have influence over your project. These answers will form the basis of your response to every stakeholder concern about your designs.

Your ability to be thoughtful about a problem and articulate *any* solution is more important than your ability to design the perfect solution every time. When other people realize that you've put thought into it and are being intentional, they're more willing to trust you, even if they disagree. That's how you become a great designer: by describing and expressing your designs to other people in a way that makes sense to them.

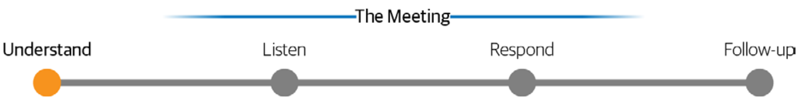
In that sense, being a great designer is just as much about communication skills as it is about design chops. You need to understand your decisions and then articulate them to someone else who doesn't know design as well as you do. Using these questions as our guide, you can find better ways to explain your design decisions for the purpose of convincing people you're right and ensuring the best experience for users.

Even though it's easy to see exactly how being more articulate will help us succeed, in practice, it's far more difficult and complicated than that. Being articulate is more than just learning to say the right things, because nothing we say will have any effect if we don't first consider our audience. Recognizing the importance of communication in design makes it natural for us to take the next step on this path toward being a great designer: to begin seeing things from the perspective of our stakeholders.



[2]

Stakeholders Are People Too



Before we get into the details of listening to and talking to our stakeholders, I want to take a moment to look at the relationship. The single most important thing you can do to improve communication between you and your stakeholders is to improve those relationships, earn trust, and establish a rapport that will speak more for you than the words that come out of your mouth in a meeting.

So much of life and work is built around relationships. It's not just *who* you know; it's the quality of those relationships, too. We need to see the world through the eyes of the people who have influence over our project. We have to get in their heads, find out what makes them tick, and use this information to help us approach them in a way that's productive and valuable for everyone.

What's ironic to me is that UXers are so good at putting the user first, at garnering empathy for and attempting to see the interface from the perspective of the user. Yet, we often fail to do the same thing for the people who hold the keys to our success. Let's apply these same principles to the people we work with so that we can create a better product together. We need to take the time to understand our stakeholders. More than that, we need to engage with them on a personal level and improve the quality of our interactions.

The purpose of this chapter is to take a step back from the process, before we get bogged down in a cycle of meetings. We begin here, with a high-level view of our stakeholder relationships so that we can approach them in the most effective way.

In order to do that, we need to:

See them as human
: Everyone has other things going on that we simply cannot predict.

Create shared experiences
: Finding common ground is important to earning trust.

Develop empathy
: Get to know their viewpoint so intimately that we're driven to action.

Ask good questions
: Understand how their interests outside of the office affect their perspective.

In addition to getting to know our stakeholders, it's important to look at the individuals on our team and work to improve the quality of our communication by:

Identifying influencers
: Based on what we already know about their role on the team, we can understand the values that drive their reactions to our work.

Building good relationships
: Simple things can go a long way in establishing rapport: be yourself, do stuff, and give stuff. Communication is easier in good relationships.

See Their Perspective

In order to approach people and respond to them, we must first see their perspective. We have the opportunity to learn to speak their language, to get to know them better, and to keep our project on track. Ultimately, *our job is to learn how to make our stakeholders successful*, because if we can help them be successful, that will help us be successful as a byproduct. It's not easy, but we can get a better sense of where people are coming from when we remember they're human, find common ground through shared experiences, develop empathy for their viewpoint, and ask questions that give us insight into their world.

SEE THEM AS HUMAN

The trouble with people is that we're all so unpredictable and yet so incredibly predictable at the same time. Often the people in your meetings are dealing with things, in both their personal and professional lives, which are more important to them than your current design project. People are busy (or at least they think they are). “I have too many things going on right now,” or “I have to get to another meeting.” Whatever the case, a lot of people you need help from are not always focused on the thing you want them to be. More than that, their attitudes and responses to your work might have more to do with the things happening outside of your conversation than what you’re showing them.

Before we go any further, stop for just a minute and think about the people on your project. Call to mind their faces, names, and even their role in the company. Now, pause and remember this: they are human. Each one of them is a unique individual. Each person has feelings, emotions, and a past that speaks into their present every single day. They all have relationships outside of work that include friends, spouses, parents, and children. When they’re finished with your meeting, they’re going to go visit their mother in the hospital. One of them has to shuttle their kids to an athletic game. And someone else will go home to have a difficult conversation with their spouse. Despite the fact that we spend so much time together during working hours, all of these people’s most important relationships are somewhere else.

We can’t pretend to ever really know what’s going on inside their heads, but we can take the time to realize that the way they respond to our ideas and work might have (or probably has) nothing to do with us at all. There are just too many other factors, distractions, and problems in the average person’s life for us to ever assume that the thing we want from them is the thing they care about. In psychology, the concept of attribution describes how people see one another, and specifically, how we understand other people’s behavior. Interestingly, most people tend to see other people’s behavior as a reflection of their particular personality traits, whereas we see our own behavior as being primarily situational. You see, we may have an unfair view of our stakeholders’ reactions. It’s natural for us to believe that their personality (“They’re not a designer”) is what causes them to disagree with our solutions, but that’s not true.

Was your colleague short with you in the hallway about the new interactions you made? Maybe she’s dealing with some issues in her personal life. Did that guy in your last meeting throw you under the bus and blame you for a problem that he was actually responsible for? Perhaps he's feeling pressure from his boss. Has an executive ever shown up and declared that everything had to be changed? It's possible he just came from a meeting and his budget was slashed. Stakeholder reactions to our design work often have an underlying situational explanation that we might never know about. I always prefer to believe the best about people, rather than assume the worst about their intentions.

I will never forget the time when a manager came to our team late in the day with an emergency request. Suddenly, everything we were working on had to be stopped so that we could put together some concepts for a completely new, different idea. The only explanation was that it had suddenly become a high priority. I tried to understand the situation, but it just didn't make sense nor did it line up with what we had agreed on previously. We did our best to appease him, but then a few days later he dropped the project and told us to go back to our original work. Later, I found out that he had lost one of his biggest contracts and was on the verge of missing his financial goals near bonus time. This new project was a last-ditch effort to make something happen, but he would never have told us that.

Of course, it wasn't appropriate for him to treat our team that way, but that's not the point. The point is that there was something else going on that we didn't understand at the time. And actually, there are *always* other things going on in the room that you will never know about. There are *always* things that are influencing people's behaviors that we are not privy to. And there will *always* be things that we simply can't predict. Always. The more often you remember that, the better off you'll be.

Our job as articulate designers is to recognize just enough of that reality so that we can talk to the people that we work with in a way that pushes past all the extra distractions and gets down to the core thing we need to know to be successful. We need to recognize that the way people react to our work may not have anything to do with us or our designs at all. So, as often as you need to, stop, take a look at the people around you, and remember one thing: they are human.

CREATE SHARED EXPERIENCES

Our inability to see the perspective of another person often results from a lack of shared experiences. We simply don't have enough in common with them. Why do some people seem to get along better than others? Why are we immediately drawn to some people, but not others? It's because we have something in common with them. When we have shared experiences, we have something to talk about. When we don't have anything in common with another person, it's nearly impossible to talk to them. Everything we think of falls flat. However, everyone has *something* in common with another person; this is why the weather is such an easy thing to talk about. And although the weather is a perfectly fine experience to share, if we want to understand our stakeholders, we need to be willing to go deeper than that.

That's not to say that we should dig into people's personal lives. Actually, there are plenty of ways in which we can create shared experiences with other people on a professional level. It can be something as simple as going to lunch together or grabbing a drink after work. It doesn't matter what you talk about: work, life, or the show you watched last night. The point is that you're removing yourself, your ego, and the pressure of the minute-to-minute business of work. You're out of the office—out of your usual context and experiencing something with this other person that you would not have otherwise.

Many companies organize team building and informal gatherings of employees for this very reason. But, if that's not built into your culture, you can make it happen on your own. Other ways of creating shared experiences include going to a conference, volunteering at your company's annual charity, or asking that person's advice. "Hey, I was thinking of buying a telescope and I know you're into astronomy. What would you recommend?" Finding ways to create connections with other people is an important step toward understanding them.

A Road Trip with Josh

I will never forget how drastically my relationship with and approach toward a colleague changed after I had a shared experience with him. Josh was in a similar role to mine, but in a different department. As a result, we used a lot of the same shared resources, and our paths would cross on projects occasionally. My impression of him was that he was difficult to get along with: he was unorganized, inconsiderate, and I didn't respect him. It was especially challenging to work on a project with him because I knew he would have lots of different ideas, and those ideas always seemed as if they were just creating extra work for me. But by chance, one year we both ended up working at the same conference. We drove together, about three hours one way. We stayed at the same resort, which happened to be a paradise of relaxation. And we spent every day out of our usual context setting things up, talking to people, and eating most of our meals together. Very quickly, I got to know him through our shared experiences.

Almost immediately, my opinion of Josh changed. From then on, his suggestions were innovative! He was no longer inconsiderate, but just a little busy and less mindful of the details. Nothing had changed, except my own perspective of him and our shared experiences. It became much easier to work with Josh and get his buy-in on projects simply because we had those shared experiences. In fact, he became one of my greatest allies.

You don't need to go on a road trip with stakeholders to create shared experiences. Finding that common ground can be as simple as bringing up something interesting before the meeting starts. You might notice that they have the latest tech gadget, are wearing a brand you like, or have a souvenir from Paris on their desk. Anything you can do to identify common ground between you will go a long way toward reminding everyone (yourself included) that you have common interests. We are more than just pixel pushers. We are people. Often, the only thing keeping us from developing good relationships is ourselves.

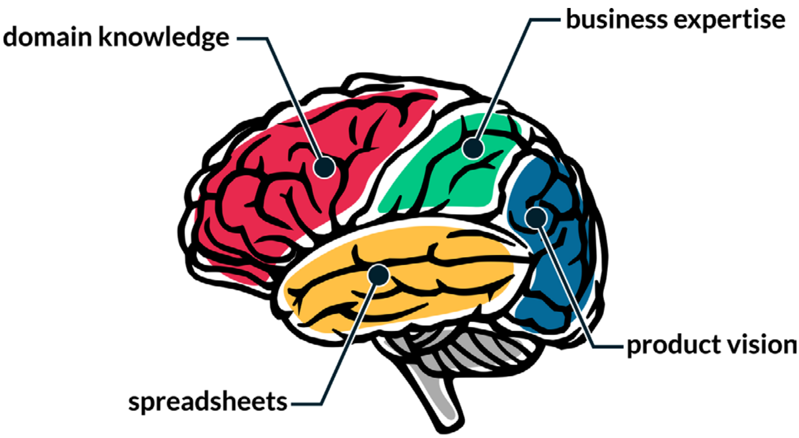
DEVELOP EMPATHY

People in UX talk a lot about developing empathy for users. If we can have true empathy for them, we'll build better applications. But what about our stakeholders? We need to empathize with them, too, if we really expect to get through to them.

Developing empathy for our stakeholders means attempting to look at our project from their perspective so that we're no longer defensive and protective of our own ideas. We realize their reactions and suggestions are based on a reality that, for them, is more important than our own. When you have empathy for stakeholders, you not only understand their perspective but you're actually driven to action; you want to make changes to your designs because you feel their pain.

This is the point at which the script flips for you. When you have true empathy for your stakeholders, you'll see your role as being one of helping them succeed. Your success depends on their success. You'll find ways to solve problems for them, whether that's accommodating their perspective in your design work or simply presenting your work in a way that appeals to their needs. You'll see the urgency of meeting their needs and want to do something about it.

That doesn't mean that you do anything and everything they say. It simply means that your priority for communicating with them has shifted from a position of defense to one of solidarity. You still might disagree on the solution, but at least now you're better prepared to talk to them about your choices. Having empathy for our stakeholders is important to establishing a foundational mindset that will allow us to form the best possible response to their feedback, as we will see in Chapter 5 and beyond. We cannot expect to listen to and respond to their feedback without first empathizing with them.



The stakeholder brain demystified! Our stakeholders have valuable domain knowledge and information about the business that we need to be successful.

Leading with Vision

I once worked with an executive who was a visionary thinker, but we were building a simple minimum viable product (MVP) for the first release. At the first couple of meetings, he was underwhelmed by our basic functionality. He knew the constraints of the project, but we needed him to be on board to get his support. He was always present, but never very excited. In the process of working with him, I tried to see our project from his perspective. As an executive, he always had a high-level, 30,000-foot view of everything going on, yet we were showing him a minute detail that might only be a small blip on the radar of this product. He was looking toward the endgame, a massive release with fanfare, but we were focused on this intermediary step, the here and now.

So, from that point on, I chose to bring two different mockups to each meeting. One was this baseline MVP, which was modest and simple. The other was an innovative, no-limits picture of awesome that we would never be able to pull off, at least in the short term. But I was able to hold his attention by keeping both concepts in front of him. I was able to lead our conversations with this incredible vision of a preferred future, while also showing and getting support for the thing that would allow us to take a step in that direction. He could see where we were going and so he was more likely to support our MVP.

I could not have been prepared with this approach if I wasn't able to empathize with his position. It took more work on my part, but it was worth it in the long run because it meant keeping our designs moving. He trusted us more because he could see the vision. Actually, I've found that it's often a best practice when working with executives to show both what's possible in the short term and what's preferred for the future. This approach creates a buzz that keeps everyone excited and makes it more likely that they'll support you.

ASK GOOD QUESTIONS

Seeing the perspective of our stakeholders requires a lot of patience and work. It's not something that comes automatically; it takes time and practice. You should learn to view things from the perspective of your stakeholders in the same way that you would with users of your application—by asking questions. If we want to see our stakeholders as human, to create shared experiences, and to develop empathy for their situation, the best thing we can do is to just ask.

My brother-in-law, Lars, is one of the most interesting people I know. Everywhere he goes, people like to talk to him. What's funny is that he doesn't seem like a very outgoing person. His personality is a little reserved, he's careful when he speaks, and he never talks too much. Yet it seems as if people are drawn to him. When people see him, they stop to talk. If they spot him across a room, they'll seek him out. Why? It's because Lars is really good at asking questions. People love to talk to Lars because Lars is good at getting them to talk. You leave a conversation with Lars feeling like you just met someone who was really smart, interesting, and intensely interested in your life. He's a great conversationalist not because he's good at talking, but because he's good at asking questions.

Lars' skill at getting people to talk demonstrates that we need to be better at asking people questions about themselves so that they feel valued and are comfortable talking to us. This approach to relationships and conversations will help us build a reputation that makes people want to talk to us more and, as a byproduct, listen to us more when it matters the most.

GET PERSONAL

People love to talk about themselves. Even people who are less inclined to volunteer information still enjoy chatting about the stuff that's important to them. So, take the time to know a little bit about each person so that you can begin to see that their life doesn't revolve around work. Don't ask yes/no questions, and don't get so personal that you overstep normal social behavior. Keep it light, but let them tell you what they're willing to tell. Questions like:

- What did you do this weekend?
- How was your holiday?
- Have you seen any good movies lately?
- So what's new?

These questions are so basic, yet so valuable. They are general enough to be safe with any audience and can create conversation to help you see their perspective. They'll create a path for you to get to know them better and eventually ask more specific questions.

If you know they have kids, ask about their kids. Everyone will talk to you about their kids, and it's something many people have in common. The same goes for pets; people love to talk about their pets. I was having a one-on-one meeting with a stakeholder. While we walked to the conference room, I asked her if she had pets. She pulled out her phone to log in to the remote camera she had mounted in her outdoor cat enclosure. Conveniently, the conversation quickly turned to technology and the app that controls her camera. That naturally shifted to a discussion of the UX. Asking her about pets gave her something she loved to talk about and gave me an opportunity to demonstrate my own expertise in the process, earning some trust and respect regarding the project we were about to discuss. You never know how asking good questions will improve your relationships and help you to earn the trust you need to communicate about your designs.

OFFER YOURSELF

But it's not a one-way street. You should also offer some information about yourself to get people talking. Find something that you're interested in and ask them about it:

- I went camping this past weekend; do you like camping?
- We hosted my family for dinner last night; do you like to cook?
- I saw this great movie yesterday; have you seen it?

Offering people a glimpse into your own life is a great way to create a sense that they are just like you. No matter how they might respond to you in the moment, you may find that you have a lot in common. I was visiting a client in New York who offered to take me to lunch in his car. It was a small car, but I happened to notice that it had an upgraded exhaust system. I asked him about it because I am restoring a classic car myself and was curious about his interest in cars. I told him about my project and we started chatting about cars in general. That conversation turned into a story about him borrowing money to buy a plane when he was only in his twenties. He still owned that plane and loved to fly. I had been working with this guy for several months, but I had no idea he was a pilot! In fact, every time I talk to him now, he always gives me the latest update on flying because he knows I'm interested. Revealing some of my own interests made it possible for us to establish some common ground.

GO PRO

But seeing our stakeholder's perspective requires that we understand how they approach their jobs and our project, too. So, it's important to get to know how people think in our work context, as well. Ask things like:

- What did you think of the meeting last week?
- How's your work going on the other project?
- Do you have a lot going on this week?

If you find that you're butting heads with the people in charge, it's common that the stated goals or priorities for the project actually differ from the individual's. In that case, I suggest being as direct as possible when trying to uncover people's viewpoints and perspectives in situations where they can be difficult to read. For example:

- What's your opinion on this project?
- How does this project affect your job?
- What is your priority for this project?

Allowing people to express their own opinion or perspective may give you insights that differ from company goals or project objectives.

I was having some difficulty with a manager who was pushing us on some priorities, and his suggestions seemed to conflict with our goal of improving conversion. I asked him how our project would affect him, and he told me that his highest priority was migrating off of the old platform as quickly as possible, because during the transition he was paying for the development of both. As long as both platforms were on his budget, he was under a lot of pressure. However, he never could have gotten approval to build the new platform if the stated goal hadn't been improved conversion. So, although our official mandate was to increase conversion, his personal agenda was to replace the platform as soon as possible. Knowing that significantly improved our ability to communicate with each other on the designs and priorities for the rest of the project.

Again, the point of asking questions is to get the other person to talk to you about what's important to them. You want to understand more about their perspective so that you have a better sense for how to respond to them, when needed. That's how you create an awareness of the other person's viewpoint and set yourself up for a better relationship, better communication, and better success in creating the best user experience.

Identifying Influencers

Now that we've considered the best ways of seeing our stakeholder's perspective, let's look at the kinds of people who influence our projects so that we can tailor these approaches to them.

Every project has a variety of people who influence its outcome. To keep it simple, let's assume that there are only three main types of people who you need to understand:

Team influencers
: The people on your direct team

Executive influencers
: The people who oversee your project

External influencers
: People outside of your team

Depending on where the person sits in relation to you, it can be difficult to get to know them well enough to understand them and their perspective. But our job is to identify these people and seek to understand them as best as we can.

TEAM INFLUENCERS

People who are within your immediate influence are the people you see and interact with every day. This probably includes other designers, developers, and project managers or product owners. Researchers, content strategists, and our immediate bosses are also part of this team. It can be more difficult to work with these people on a regular basis simply because, well…you have to work with them on a regular basis! However, the benefit is that you have plenty of opportunities to learn about them, find out what makes them tick, and tailor your approach to them in a way that appeals to their needs.

In general, your team is the best source of people who can help you on your project. You have daily opportunities to build these relationships for the benefit of the user experience. The more time you can spend with these people describing solutions, communicating value, and establishing a foundation of vocabulary, the better off you'll be as far as creating a culture that follows your lead on important decisions. It is hard work because you have to put on your game face every day and find ways to lead, even if you're not the leader. Your team influencers are your most important allies.

EXECUTIVE INFLUENCERS

The people outside your immediate influence but who have a stake in and influence over your project are the executive influencers. Most commonly, this is an executive or manager who oversees your team, perhaps one or two levels removed. This is the boss: the person whose support you most need. On small teams and in startups, this might be the CEO, whom you also work with in close quarters. In larger organizations, it's a director or VP, and you may not have regular access to them. Either way, these people are important for the success of your project. Without their support, you can't get what you need to be successful. In many ways, communicating effectively with these people is the primary focus of this book.

Hopefully, there aren't more than one or two major executive influencers on your project. The difficulty is that we don't usually meet with them often enough to truly understand their perspective. They are constantly switching between topics and projects and may not have much time or brain capacity to devote to your carefully thought-through presentation. In this case, you have to use keen observation in every meeting, get to know the people who know them (like an administrative assistant or direct report), and do your best with the limited information you have. In short, you need to figure them out and respond to them almost instantaneously. Over time, you'll develop a rhythm that can add to your understanding and help you communicate with them.

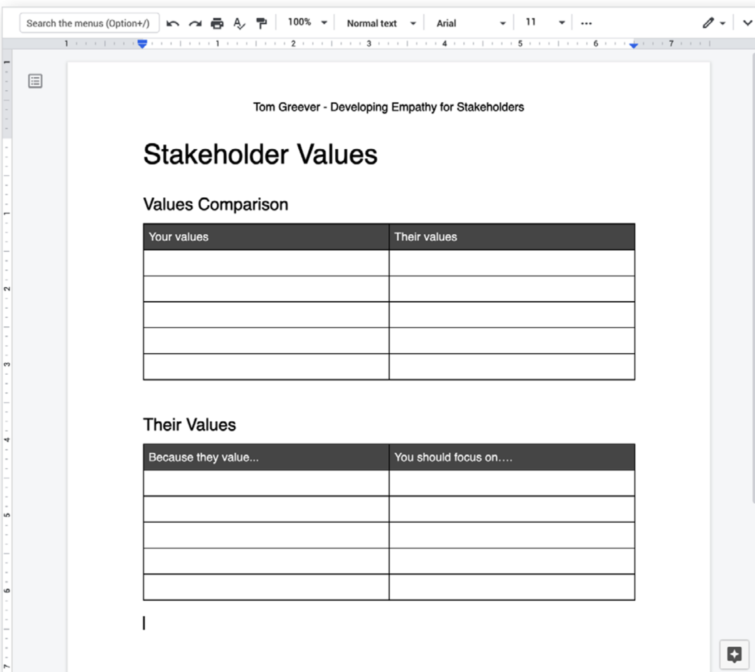
EXTERNAL INFLUENCERS

The third group of people, who matter less to your day-to-day decision making but who can also help or hurt your efforts, are the external influencers. This group lives in a different part of the organization, probably unrelated to your work or project, but they may have the ear of anyone in the other two groups and speak into your project via proxy. Often, we may not even know who the external influencers are because we only hear about them secondhand.

These might be people in accounting and finance, IT, customer service, or HR, depending on the kind of app you're building. They could be people outside the organization, too: a spouse, friend, or former colleague of an executive influencer. It's not uncommon for people in meetings to say things like, "I was showing the app to my friend and they seemed to think the button was not obvious enough." They then expect that we should make design decisions exclusively on this anonymous person outside the organization. Even worse is the external influencer who is deemed to be part of the user base for the product. "I was showing it to my spouse because they're part of our target audience and they didn't like the grid view at all!" It's no small challenge, for sure.

Stakeholder Values

I try my best to see people in different roles as individual *people* and to avoid creating stereotypes in my head based on their job title. Everyone is unique, and you must consider them in different ways no matter their role. Although that's true, our stakeholders' viewpoint of our project is still influenced significantly by how they spend their time and energy every day. To the extent that it's possible, let's look at some of the more common roles on the team, what the people in those roles value, and what that means for our approach. This is just a starting point to help you understand how different roles will affect people's perspective of your project and what you can focus on when working with them.



Tom Greever - Developing Empathy for Stakeholders

Stakeholder Values

Values Comparison

Your values	Their values

Their Values

Because they value...	You should focus on....

Download this worksheet: *http://tomgreever.com/resources*

EXECUTIVES OR MANAGERS

It's no exaggeration that executives and senior managers have a lot on their plate. But it's less about being too busy and more about brain capacity; they're constantly switching between completely different topics, projects, and challenges. Walking into your meeting might even be disorienting if they can't remember where you last left off. Your job is to bring them up to speed as quickly as possible, present your solutions, and solicit their feedback. They want to know that you've thought about it and have made smart decisions that align with their vision for the organization.

BECAUSE THEY VALUE...	YOU SHOULD FOCUS ON...
• Concise information	• Getting to the point
• Growing the business	• Accomplishing goals
• Solving problems	• Describing the solution

DEVELOPERS OR ENGINEERS

Working with developers can be one of the most challenging relationships for designers, and yet developers can also be our best allies. Because they think so differently about our projects, we have an opportunity to get alignment with them, which will help us get more support from other parts of the organization.

Developers are usually looking at a backlog of bugs and enhancements on the one hand, and a roadmap for future development that's bigger than they can manage on the other. They tend to be more analytical, so they don't even "see" some of the UI details you've designed. They may even be concerned with "overdesigning" something that they think is not worth the extra effort. Your job is to help them see the value in everything you've done so that they're excited about the end result, while also demonstrating that you understand the effort involved.

BECAUSE THEY VALUE...	YOU SHOULD FOCUS ON...
• Building it once and minimizing rework	• Understanding all of the use cases up front
• Efficiency and maintainable code	• Maximizing existing scope and reusing UI patterns
• Understanding the effort involved	• Communicating the value for the users or business

PRODUCT OWNERS

If your organization is large enough to have a dedicated product owner, working with them will be one of the primary things you do. The great news is that product owners tend to want their products to be the very best they can be, so they're usually one of our greatest allies and get really excited about the solutions we propose. Taking direction from a product owner is challenging, though, if they don't have a good understanding of design or what's technically possible, or if they have an unclear vision for the product roadmap.

BECAUSE THEY VALUE...	YOU SHOULD FOCUS ON...
• Innovation and creativity • Meeting business goals • The big-picture, long-term roadmap	• Finding new approaches to solving problems • Connecting your designs to the business objectives • How your design moves them forward

PROJECT MANAGERS

Most projects will have a project manager, even if this is a combination of people from other roles. This is the person in charge of ensuring the project stays on track, on budget, and on time. They are accustomed to thinking in Gantt charts, deadlines, and delivery schedules. Your job with PMs is to be sure they always understand where you're at in the process, alert them about any concerns as soon as possible, and allow them to negotiate between everyone else to get stuff done.

BECAUSE THEY VALUE...	YOU SHOULD FOCUS ON...
• Deadlines and staying on schedule • Managing scope and budgets • Keeping everyone in the loop	• Possible efficiencies of reusing design elements • Managing expectations on any changes • Updating them on your progress

MARKETING, CONTENT, AND CREATIVE

I hate to put all three of these roles into the same category, but there is plenty of overlap in these roles from the perspective of a designer. Some of these people, like content strategists, may be on our cross-functional teams. The point, for designers, is that there are people who will be concerned more with the content, look and feel, and copy of your application. There may be branding guidelines, style guides, or a defined design language that drives most of these conversations. Your job is to already be aware of these requirements, find out what the approved content and copy is, and incorporate it into your designs as early as possible.

BECAUSE THEY VALUE...	YOU SHOULD FOCUS ON...
• Brand consistency across the organization • Consistent voice in copy and messaging • Creating a product that provides value to the customer and is sellable	• Creating styles that match the brand or communicating any differences • Ensuring that the copy you use is already approved, or if it deviates, why • Specific value proposition in features or microinteractions

Stakeholder Stories

Writing user stories is a popular method for designers and developers to understand their users, but have you ever written a story like that for your stakeholders? As we seek to understand the people we work with, perhaps it will be useful to write out stories so that we can understand the project from their perspective. Here are a few examples to get you started.

EXECUTIVES

- As an executive, I want to see what my team is working on so that I can provide a report back to upper management.[1]
- As an executive, I want to provide feedback on the design of my products so that I can help you make them better.
- As an executive, I want to provide a vision and roadmap of the future so that my team can be excited about where we are headed.

1 This might be the most common value driving our stakeholders' reactions to our work. They just need to talk to other people about it!

DEVELOPERS

- As a developer, I want to build a solid application so that I can be proud of my work.
- As a developer, I want to write quality code so that I don't have to deal with so many bugs or a lot of maintenance.
- As a developer, I want to understand all the requirements up front so that I can plan my work and maximize my time.

PRODUCT OWNERS

- As a product owner, I want to create the best possible product so that I can create value for our customers and for the company.
- As a product owner, I want to deliver new and creative ideas so that I can make an impression on the company with my leadership.
- As a product owner, I want to make a product that is simple and elegant so that people will want to use it.

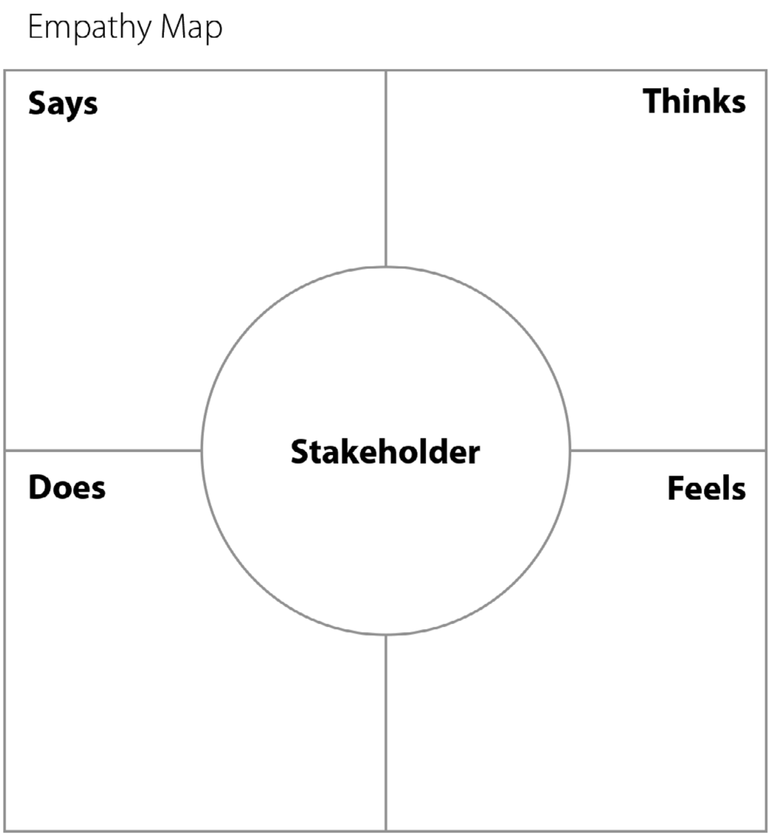
PROJECT MANAGERS

- As a project manager, I want to meet with everyone on the team so that I can ensure that we're on track.
- As a project manager, I want to cut scope so that we can stay on schedule and under budget.
- As a project manager, I want to plan carefully so that I can ensure that we have the time and resources we need to be successful.

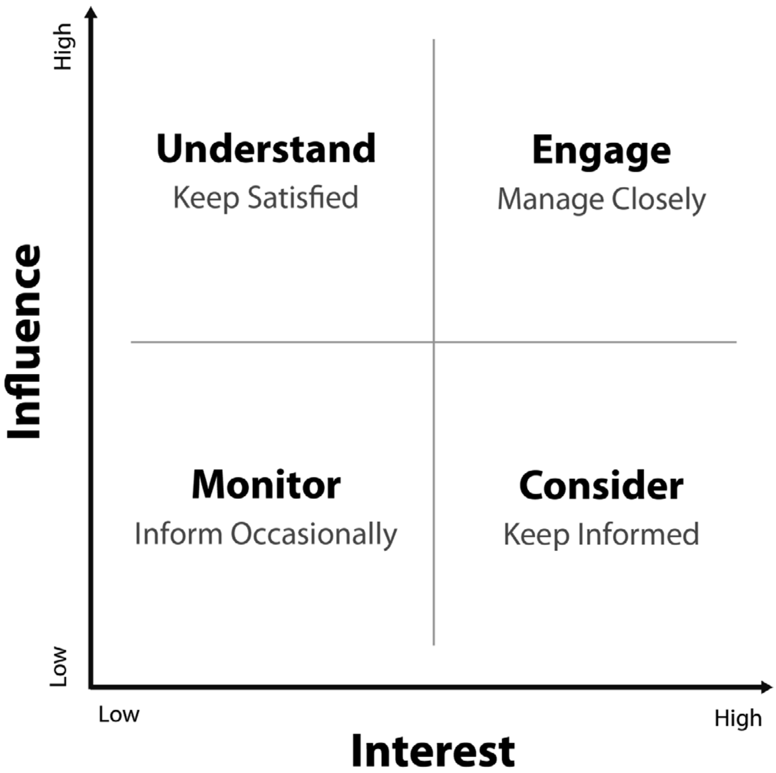
MARKETING, CONTENT, AND CREATIVE

- As a marketer, I want to provide feedback on the product design so that we will have a product that is competitive and will sell.
- As a brand or content strategist, I want to ensure that all of our products communicate the same look or tone so that our customers have a consistent experience across the entire organization.
- As a creative director, I want to be involved in your project's design so that I can ensure that it aligns with all of the other initiatives I oversee.

These are meant to be simple examples to make the point that each person on our team has a different perspective and we should do what we can to understand them. Your team may use other approaches, like “Jobs to Be Done” or personas. You could also create an empathy map or do a stakeholder analysis to form a more mature understanding of the people you work with. The exact tool or approach you use is less important than the value of attempting to understand our stakeholders’ perspectives. The more we can do to get into their frame of mind, the better we’ll be at articulating our design decisions to them.



Creating an empathy map for stakeholders is another valuable tool for understanding their perspective.



Rank your stakeholders according to their influence in the organization and interest in your project. This can help you understand how to involve them.

Download these templates at *http://tomgreever.com/resources*

Build Good Relationships

The overall lesson is this: communication is much easier in good relationships. Good relationships take work. In fact, building good relationships is a pretty basic and straightforward process—you get out of it what you put into it. So, let's take a practical look at some things you can do to improve the quality of your relationships with stakeholders.

Technology has improved the speed at which we're able to communicate, but not necessarily the quality. Messaging tools are incredibly useful for getting work done, but we need to be careful not to limit our communication to only short messages. While it might be necessary sometimes to fire off a quick response, don't let that be the only way people interact with you. Whenever possible, seek people out to have a friendly and casual conversation. This requires more purposeful effort when working remotely, but it's not difficult. Take the time to do simple things that will help you to improve your relationships and, as a byproduct, your communication with each other.

BE YOURSELF

The best advice I can give you is to just be yourself around people. Too often, people are serious about doing serious work seriously. In an attempt to be professional, some people (maybe you) never let anyone see who they really are. We may put up fronts, never let our guard down, and always focus on work, work, work. This is no way to maintain a rapport with your peers and bosses. You need to show people you're human and reveal your own personality, when it's appropriate. There are absolutely times when we have to put on our professional hat and get things done, but there are also in-between times, break times, and coffee times when we can learn to be human with those around us. Finding that balance is important; people appreciate getting to see the "real" you.

DO STUFF

It's also important to do things for other people to make them feel valued. Pretty much anything you do that is outside of the usual way your team communicates and relates to one another will make an impression on people that you care. Typically, this is just checking in with people regularly to see how they are. That might be stopping by their desk, inviting them to coffee, or leaving a note. Sometimes, just saying hello to someone for no reason at all is enough to express this. Any of the questions in the previous section would be a great fit here, but the idea is to express that you're on the same team and you care enough to ask.

When I'm visiting one particular client's office, I always stop by Jennifer's desk because I enjoyed working with her on a previous project. She's almost never at her desk, so I leave a sticky note to let her know I was there. Later, I found out she had been keeping all of my notes because she appreciated them so much. On another client, I sometimes work directly with the CEO, so whenever I'm onsite I always walk by his office even if I don't have an appointment. Once, he was in another conversation but he waved me over, stopped his meeting briefly, shook my hand, and thanked me for being there. Another time, I was reading an article that reminded me of a client I had worked for.

Even though we didn't have an active project together, I texted him the article, and that restarted a great conversation. I want people to know that I'm there to serve them, to help them do their jobs better, and to make them successful at designing great products. Going out of my way to do these simple things helps me to express that to them and makes it easier when talking to them about design.

GIVE STUFF

Taking it a step further, relationships will be improved when you show a genuine interest in people by giving them something useful or meaningful.

Handwritten notes

I sometimes send handwritten thank-you notes or cards to people after we've worked together. Not often, but occasionally. When all of our communication is electronic, a handwritten card is especially notable and always makes an impression. But don't misunderstand me; I'm not much of a letter-writing person to begin with. This is a real stretch for me to remember to do, but I think it's always valuable, and I probably don't do it enough. If you have trouble with something like this, set your goals low: write one handwritten note to a client or stakeholder every two to three months. Create calendar reminders on a recurring schedule. Hopefully, that will help you establish a pattern of staying connected to the people you have the privilege of working with.

Simple, inexpensive gifts

Another way to build relationships is to send simple gifts to people, when appropriate. These aren't meant to be bribes, but just small tokens of appreciation to show the other person that you care. Some companies have policies about gift giving, so be sure you understand the environment and always use good judgment. But as a rule, giving a small gift is a great way to show the other person that you're more than just a defender of mockups.

For individuals, the best gifts are the ones that show you listen to them. One of my colleagues was a hobbyist photographer, so I gave him a coffee cup that looks like a lens. To my client who is a pilot, I sent a license plate frame that said "My other car is a plane"—he still talks about it to this day and has offered me to fly with him next time I'm in New York. I gave a coworker who was getting married a humorous book about what bachelors need to know before the wedding. And my boss who had a reputation for always ordering whiskey with water got just that. I bought one bottle of each, designed a custom label for the package with the title “Joan’s Regular,” and had a friend shrink wrap them together so it looked like a real product. All these things were inexpensive, simple ways to let the other person know that I value them. They were tailored to something specific I knew about them. The sentiment was not in the gift itself, but in the thought I had put into choosing it.

If you’re concerned about showing favoritism or if you’re not good at giving individual gifts, an alternative is to be the person who brings something for everyone, like snacks. If the team is groaning about an early morning meeting, bring breakfast. You can also put a communal jar of candy on your desk to give people a reason to stop by. Offer to make a coffee run during the afternoon slump. This way of giving gifts doesn’t favor one particular relationship, but it still shows people that you value them.

It might seem like focusing on stakeholder relationships has nothing to do with design. Many designers expect their designs to speak for themselves, especially as it relates to user experience. “If your design requires an explanation, then it’s not very good.” As if you could expect to just hand your stakeholders some mockups and wait for them to give it a stamp of approval. Yet, it’s surprising how much a good relationship can affect another person’s view of our work. Having good relationships really does make our designs more acceptable to the people who matter.

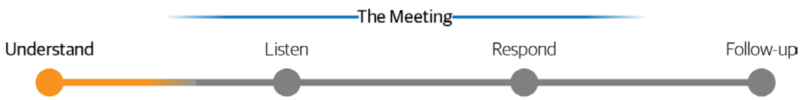
People may view us for the utility we provide, specifically related to our roles as designers. In fact, we are actually making something that they need, and they may, unintentionally, see our interactions with each other as mechanical. It can become nothing more than an exchange of skills. Yet, the more we can show them that we’re people, too, the more value and stock they’ll put into our ideas, suggestions, and proposals. We’re not robots churning out stuff just to get a paycheck; we’re smart people with great ideas working together to create great products. Focusing on these relationships is more than just being nice and making sure people like us. It’s reminding them that we’re people, too, and that we can be trusted to create great solutions. Having good relationships will help ensure that this happens.

STAKEHOLDERS ARE PEOPLE TOO

If we really expect to communicate effectively with our stakeholders, we need to use the same skills with them that we use in identifying with our users. We have to understand people by the roles and position on our team, recognize what's important to them, and make a note of the best ways of approaching them. Part of this process involves remembering that they are human, understanding that they have other things going on in their lives, or being intentional about creating shared experiences so that we change our view of them personally. Finally, developing empathy for stakeholders drives us to act and to want to position our approach toward them in a way that meets their needs, rather than our own. We can't be successful unless our stakeholders are successful, too.

[3]

Design the Meeting



Ah, meetings! Love them or hate them, they are part of how we get work done. Sure, some companies have so many meetings that it's unproductive. Others try hard to avoid them for all the right reasons. Call them conversations, sessions, or one-on-ones, if you want. Regardless of your context, people are meeting. Some take place in-person, while others are done remotely. It doesn't matter if it's a big conference-room-style presentation or a simple coffee chat to look over your work. The principles are the same regardless of the environment, tools, or fidelity of the conversation.

Think about it the way you might design an interface for task completion. Getting users to complete a task depends partly on their available brain capacity: their *cognitive load*. The more clutter, options, or roadblocks we put in front of them, the more difficult it is for them to complete the task. It's the same when meeting with stakeholders. We should try to remove as much of the clutter, options, or roadblocks as possible so that our stakeholders' brains are freed to focus on the primary task of the meeting: supporting our design decisions. To do this, we have to design our design meetings better.

If they are distracted by an outdated mockup, lack clarity on the goal, or just can't get their head out of their last meeting, it will be much more difficult to get support. Our goal is not to just have a meeting, but to make the meeting productive, valuable, and successful. To that end, we have to make our meetings more "usable"—delightful, even.

This chapter looks at how to set the appropriate context, optimize for memory, remove distractions from the conversation, anticipate what the stakeholders might say, and bring in other people who can help us. In addition, we have to do an adequate job of preparing for these conversations. Our goal is to design a meeting that reduces the cognitive load for our stakeholders, our team, and ourselves.

Set the Context

One way to make our meetings easier for stakeholders is to set the context at the beginning. That is, to start the meeting with a reminder of the goal for this project or design, where we are in our process, and the kinds of feedback they can expect to provide. We should also make it clear that the purpose of the meeting is to get their support to move forward, not necessarily for them to riff on whatever they see.

Executives may have a difficult time switching to our project from one meeting to the next. While we may spend every day thinking about these problems, they might not, and it can be incredibly difficult for them to remember why we're here when they're having several meetings a day, all about completely different products or designs. This is a common challenge for our stakeholders, but we can help them.

Here are a few tips to quickly bring them up to speed:

State the goal

The first thing you should remind them about is your previously agreed-upon goal for this project or design. This should ideally be an improved business metric or the outcome we expect, but it might also be framed as the feature or output of your work. It may also be your answer to the question, *What problem does this solve?* Whatever the goal is, state that clearly up front before you jump into your designs.

Summarize the last meeting

Second, briefly remind them of the discussion you had last time or the decisions you made together. This can be a short sentence or several items, depending on the project. Either way, you want to quickly refresh their memory of your last conversation.

Show a timeline

Next, create a visual that will help them understand where you are in the process of your design. Typically, you can express this as a horizontal line where the left side is the starting point (research, low-fidelity mockups) and the right side is the finished design (high fidelity, ready to ship). Highlight where you are on this spectrum and the level of fidelity of designs they can expect to see.

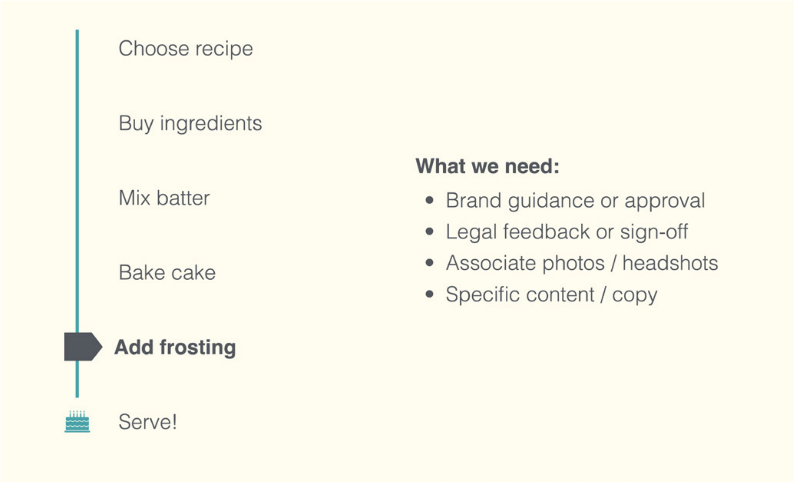
Specify the feedback you need

Also, tell them the kinds of feedback that are helpful at this stage in the project and what feedback is not needed yet. For instance, you might expect feedback on the overall layout and concept, but it's too early for them to comment on specific copy or colors. Helping them understand what feedback is most valuable will help you guide the conversation in a productive way.

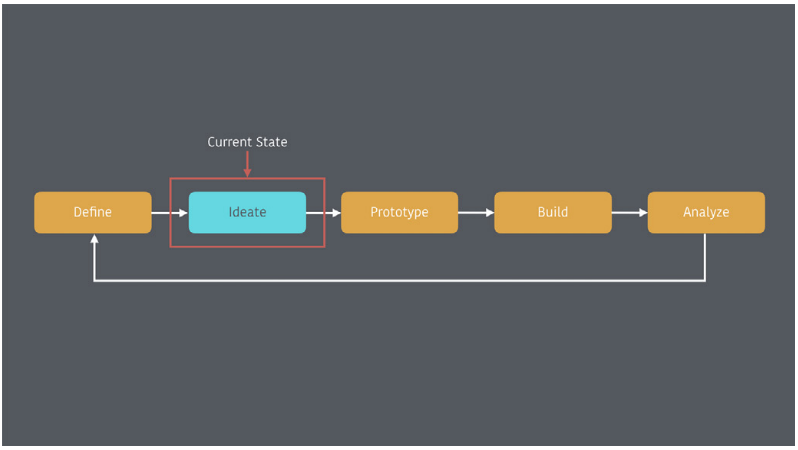
State the goal, again

Lastly, restate the goal. It's important that we are always on the same page about the problem we're solving. Conversations get derailed when people fail to remember the goal or the goal has changed without us realizing it. Repeating it will reinforce this and help everyone remember what we're here to accomplish.

Showing a horizontal timeline of where you are in the process is very helpful at setting the context of the conversation.



One team told me they use the metaphor of baking a cake to help their stakeholders know where they are in the process.



It doesn't have to be linear or communicate a finite end. Create an image that best matches your own team's process to help people know where you're at.

Setting the context doesn't have to be time-consuming. It can be done in a few short sentences or with a single slide. For less formal design reviews, I try to at least make myself a few bullets as talking points to cover these. For official presentations involving more people, I may have as many as three slides dedicated to this. The priority is making sure the people I'm talking with understand why we're here so we can have a productive conversation.

Name the Meeting

One simple way to help set context for stakeholders is to give calendar invitations an appropriate title. Imagine your stakeholder's calendar, filled with invitations bearing their own name or "Design Review"—you don't want them showing up and immediately asking, "What is this meeting about?" The calendar invitation should help them know what to expect.

Instead, include your own name or team name plus the name of the product, project, or part of the interface you're presenting. You also want to convey the content of the meeting without implying the purpose is solely for them to give feedback.

For example, I will send calendar invitations like these:

- Tom Greever, Case Study UX
- Home Services + Concierge Design
- UX Research: Search Insights
- Homepage Content, UX Team

I find that words like review, sync, demo, feedback, or discussion are unnecessary because they're implied—like naming it "meeting." If they're meeting with us about design, they probably assume it's some version of these. Avoid the urge to include these descriptors.

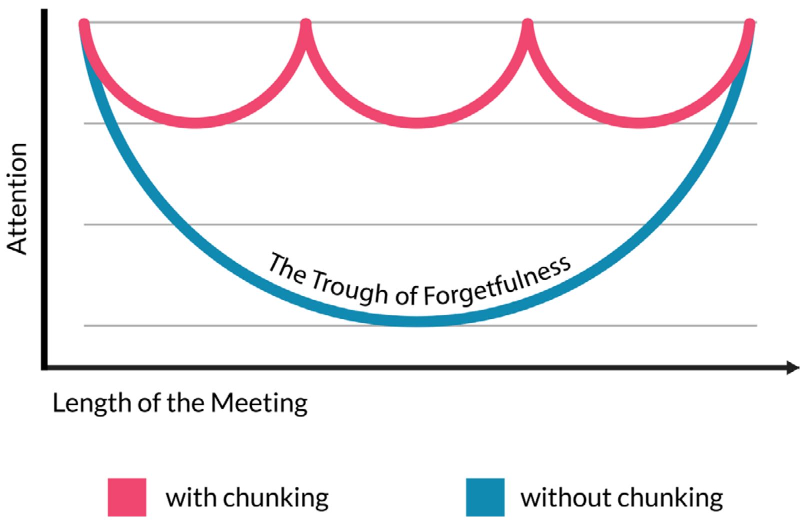
Lastly, include some helpful information in the body of the invitation too. An executive summary of what will be discussed, the agenda, and perhaps links to other documents or design assets. That way, when they're preparing for their upcoming day, they have everything they need from us right there and don't have to go searching for it. That will make them happy, but it will also make our time with them more productive.

Optimize for Memory

Designing a better meeting also means understanding how our brains work and optimizing to make sure our stakeholders remember what we discussed. Here are a few simple concepts we can keep in mind.

PRIMACY AND RECENCY

The principles of primacy and recency in listening and memory tell us that people are more likely to remember the first and last things we say. They drop off completely somewhere in the middle.[1] We can use this to our advantage by breaking up our content into meaningful (smaller) chunks and creating distinct transitions between each part. That makes it more likely that our stakeholders will remember more of the conversation because it registers as several mini conversations instead of one long meeting.

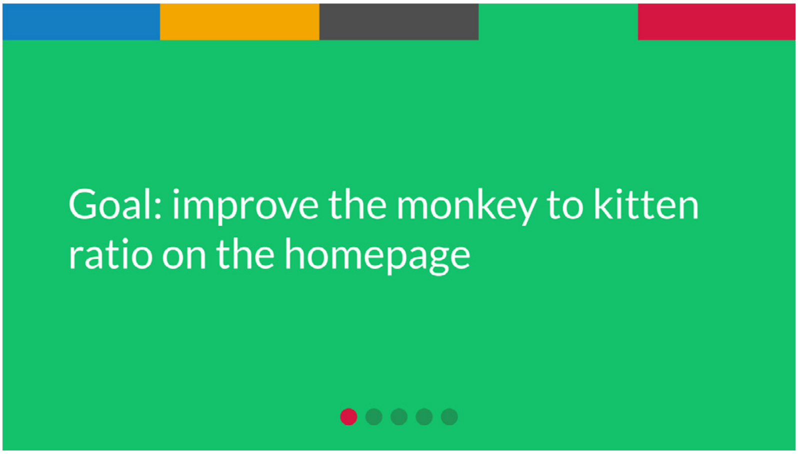


If your presentation is one long lecture (in blue), it's difficult for people to pay attention. When you break up your content (in red), you create more opportunities for people to remember.

A common way of doing this is to create distinct agenda items and make clear decisions for each one, verbally expressing when it's time to move on. However, I've found these can still run together. Creating additional visual cues or breaking the monotony with movement can help too. You could change the background color of your slides when you move from one part to the next. The difference creates a clear visual

1 Pharmaceutical companies take advantage of this in television commercials by putting their medical disclaimers right at the point where people tune out.

separation. You could also take a break, stand and stretch, have people change seats, or pass out snacks. There are lots of ways to create a clear distinction between each part.



I've used tabbed interfaces and dot navigation in my slides to help people understand where we are in the presentation, as well as make a clear distinction between each part or decision.

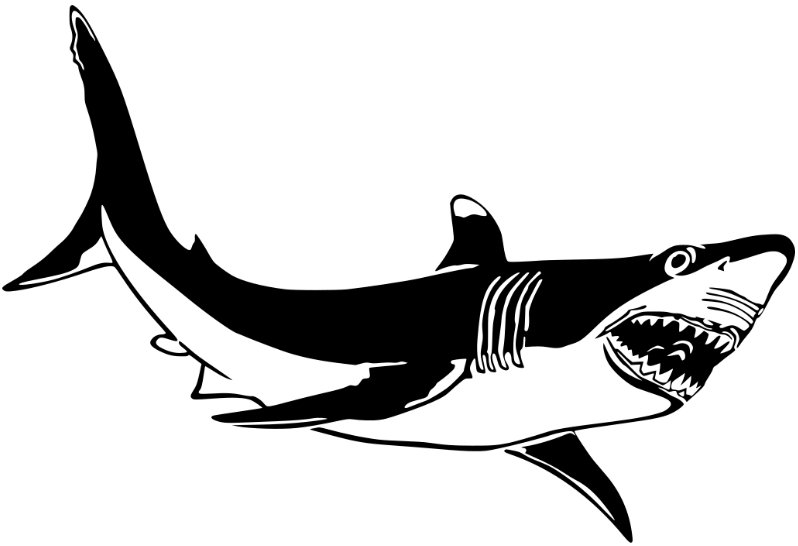
REPETITION

People are more likely to remember something that's been repeated. This universal understanding in marketing and advertising is useful for our stakeholder conversations too. What's the most important thing you want them to remember? The goal or problem we're trying to solve and the decision we made. So plan to repeat these (verbally or visually on a slide) at least three times throughout the conversation. People are more likely to remember something that's been repeated.

SURPRISE

People are also more likely to remember something they weren't expecting. If you can find a way to insert something into your discussion that's not commonly part of your meetings, they'll remember. This can be difficult to do in a business setting where things are expected to be business-y, but I've found that a touch of levity, comic relief, or unexpected surprises can be effective. The simplest technique is a well-timed joke that breaks a stagnant conversation. Remember the point isn't just to surprise them for the sake of surprise, it's to help them remember an important bit of content. Here are a few things I've done:

- I have used images of cute animals (usually kittens) on a slide alongside some piece of data, the goal, or the timeline/delivery date.
- I ran an entire meeting like a quiz-show game where each stakeholder chose the category that determined what part of the project we would discuss. To be honest, I don't think they appreciated it—they seemed annoyed—but I believe it was effective nonetheless because each stakeholder had to read aloud that part of the project.
- Once I printed our goal on a piece of paper along with several fortune-cookie–style messages and taped them to the bottom of the chairs. I opened the meeting by asking everyone to look under their chairs and read the messages.



I bet you weren't expecting to see a shark in this book, but I put it here to remind you that the element of surprise is very effective.[2]

2 "stensil" is licensed under CC0 1.0. Public domain. To view a copy of this license, visit *https://creativecommons.org/licenses/cc0/1.0*.

The challenge with using the element of surprise is that you don't want it to be a distraction. As we'll see later, part of our job is to *remove* distractions. So find the right balance of keeping people engaged with your content without causing unnecessary distractions that derail the meeting.

MIXED MEDIA

Everyone learns and retains information in different ways, too. Some people are verbal processors who need to say it themselves. Others need to hear it said out loud. Others, still, need to see it visually. Since you've taken the time to understand your stakeholders, you may already have a guess about the best ways to communicate with them. I recommend using a variety of methods to see what works. Using a combination of verbal description, visual presentation (slides), and written or printed information covers most use cases.

I had one executive who seemed to prefer wiki page documents with appropriate header levels and bullet points. That's just the format he was accustomed to and comfortable with. At a different company, my CEO responded better when everything was in a slide deck—even if it was an informal conversation. I found if I put my words on a brand-approved slide, he seemed more receptive. Find the right ways of engaging your stakeholders to make it more likely they'll remember the decisions you made together.

Remove Distractions

Staying focused in a design meeting is critical. It's very easy for discussions to go off on a tangent or be taken in an unexpected direction because of one small thing. There's just something about design that elicits so much more clutter conversation than other disciplines. One way to keep focused is to remove anything that you think will be a distraction. A lot of people are easily distracted by things that simply don't matter to the goal of the meeting. They can be so distracted by one thing that they may identify a different, unrelated problem or be unable to discuss the real issues. Consequently, part of your job is to pay attention to those things and remove them from the conversation.

A common example involves the use of placeholder content: stock images and *lorem ipsum* copy. I can't tell you how many times my clients have obsessed over the placeholder content I chose. And yet, here are some examples:

- I was designing a site for an automobile engine manufacturer and chose a product image to use on the home page. The client spent an inordinate amount of time talking about how that particular engine part was not their best seller and, in fact, was being discontinued because of engineering flaws. He then proceeded to educate me on their entire line of engine bits.
- I was working with a retailer who did not have any readily available images of the interior of their stores, so I found a placeholder image online and included it in the mockups. It turns out that I had chosen a photo from their closest competitor. It was difficult for the stakeholder to move past the fact that he was looking at the competition in a mockup for his own store's site.
- On a mapping application I used a Google Maps screenshot as the background placeholder for where the map would be. My client used a different mapping service provider, and he had a difficult time reconciling that the image did not look like the maps they would see in the real application.
- On an app for a pharmaceutical company, my client was confused about why she couldn't understand the *ipsum* copy even though she had studied Latin in college. She spent part of the meeting trying to read it aloud, and I had to explain to her why we use *ipsum* copy in design.

In each case, my placeholder content created an unnecessary distraction.

The challenge is that removing these distractions often requires more work. We use *ipsum* copy because it is easier than writing real copy. We use stock images because a quick search will give us tons of options. In fact, an Agile/Lean approach values fast iterations, MVPs, quick work, and short sprints. The prospect of being required to dig deeper and go two extra steps with your mockups might seem to go against these philosophies. Worse, it might slow you down, right? Not necessarily.

I was working with a guy who was very sensitive to everything being perfectly lined up in a grid. My wireframes were a little messy because, well, they're just wireframes: quick and dirty, just enough to communicate the intent. He began making suggestions for changing the layout: "move this call to action over here, drop this element down there." Not minor tweaks, but overall rework. I began to realize that he was so distracted by how misaligned the elements were that he was trying to make the design feel more balanced. I paused the discussion and took a few minutes to go back and ensure that everything was properly aligned. Almost immediately, his feedback changed. Many of his objections over the placement of major elements had gone away. We could now focus on the real issues. But I learned that with this particular person, it was important that I take the time to clean up my wireframes so that I could save time in a meeting as well as avoid possible rework.

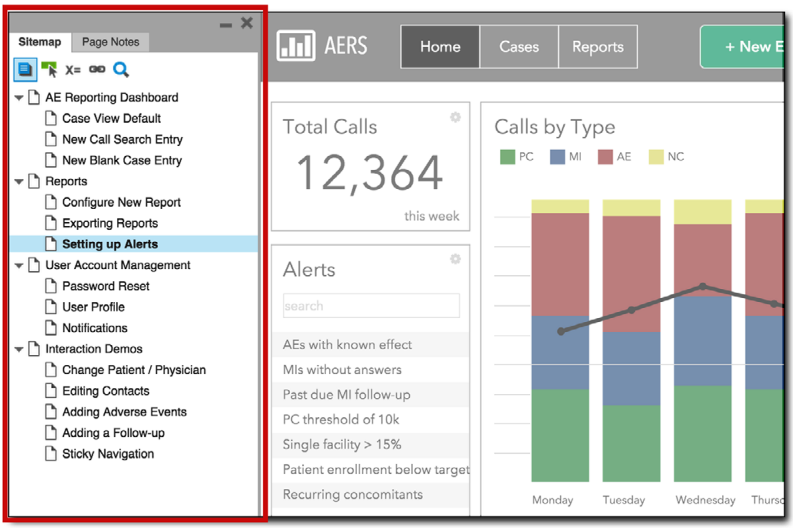
However, it might not be quite as simple as removing placeholder content or aligning elements. Some people are really distracted by any use of color, so it's better to avoid color. Others will be distracted by legacy UI elements that aren't the focus of the meeting, such as an old navigation element that they know shouldn't be there. Everyone is a little different, and our job is to figure out these distractions and remove them.

At this point you need to weigh whether the extra time that you spend removing these distractions will give back time when it comes to getting agreement from stakeholders. I personally think it's worth the extra effort to discover and remove distractions for the sake of keeping the project moving. If your client doesn't discover a missing business requirement because they're distracted by something else, that missing requirement will eventually surface, usually after it's too late in the process. Do what it takes to keep your stakeholders focused even if it takes some extra time and preparation.

One client of mine really loved the left panel that Axure creates when a prototype is generated. It's just an iframe that lists every single page in the prototype, a site map of the entire project.[3] She liked it so much, in fact, that she would comment on it during each of our calls, "Oh, it's so convenient to be able to see all the pages right there." I usually just

3 This was an early version of Axure that did not provide the option to turn off the display of this panel. In more recent versions, you can remove this panel from the prototype.

ignored her infatuation and moved on with the meeting. Finally during one call, she actually suggested we use it as the navigation of the app. "I just love how you can see everything all the time," she said, "We should use that for our navigation, instead!" All of the previously agreed upon design work we had done to create a consistent, meaningful hierarchy for the app was on the chopping block! Again, I chose not to respond in the moment but instead, after that, I began going into the Axure folder structure and sending her the link to the direct HTML file that would open outside of the iframe so that she would not see that left panel anymore. After that, she never mentioned it again.



One of my clients was so distracted by the left panel that Axure generates (highlighted here in red) that she suggested we use that for the navigation of the app we were designing.

One app that I was designing needed an icon for the user's account, and we chose a silhouette of a person. The software I was using had a limited set of icons available, and that particular user icon was really bubbly, a terrible expression of a user. Still, for the sake of time, I used it as a placeholder because I didn't think it was worth creating my own just for these mockups. After the *third* meeting during which a different person addressed how terrible the icon was, I finally decided to take the extra effort to make my own and get that out of the conversation. Had I used a better icon to begin with, I could have saved myself from having to explain it each time.

The default placeholder icon that was easily available to me (left) was so terrible that it was distracting to everyone who saw it, so I finally took the time to choose one that would be better (right), and the conversation went away.

The point here is that as you get to know people, you should be able to identify what is distracting to them and remove those things from the conversation. Too often, people (especially nondesigners) obsess over things that don't really matter for the goals of the website or application. Even after you help them understand that those things are temporary or off-topic, I find that they still keep coming around to it again and again. "I know we talked about this last time, but I still think we need to redesign that menu." Just get rid of the distractions altogether! Distractions should only happen once. If you go to two meetings and the same distraction comes up both times, you're doing it wrong. Take the time to discover the distractions and remove them so that you can focus on the real issues regarding the effectiveness of your designs.

Anticipate Reactions

Based on what you know about the people you're working with, you should be able to anticipate how they will react to your designs. In the previous chapter, we identified the influencers on our projects and some of their values and motivations. When we combine what we know about their perspective with the values they carry in their role, we can make some pretty good guesses about how they'll respond to our designs. The good news is that most people are fairly predictable. That is, they tend to obsess over and react to the same kinds of things every single time. If you've met with them before, anticipating their reaction becomes much easier. It will take a few meetings to really hone in on how people are wired, but I've found that anticipating reactions is much more predictable than you might expect.

Tips for Remote Meetings

Most people don't realize from reading this book that I work remotely, from home, and many of the meetings I describe do not take place in-person. In fact, I've led remote design meetings more often than in-person. Here are some tips for effective remote meetings:

- **Tell everyone to turn on their cameras.** Even if there are a few people together in a conference room, each of those people should use their own laptops and cameras so that everyone participating remotely can see everyone else. People feel left out when someone is off-camera.
- **Share your screen and your video.** You want everyone to see both your face as well as the content you're presenting.
- **Find a good background.** Ideally, sit somewhere with a simple wall behind you and light shining on your face. It's not helpful if everyone else is looking at what's on your bookcase or your face is too dark. I intentionally have an empty wall, painted blue, behind my desk for this reason. Virtual backgrounds can be helpful, but are just as often a distraction.
- **Be an expert at muting.** Your mic should only be on if you're talking. Learn the keyboard shortcut for muting your mic and use it. All the best remote teams are experts at muting.
- **Think about your facial expressions.** Smile and nod just as you would if you were in-person. It can be discouraging to see someone wince in the middle of a meeting, even if they're wincing at something else. Related, use the webcam attached to the screen you're using so it appears you're looking at the people in the meeting. It's off-putting when people use multiple displays and seem to be looking to the side.
- **Turn off notifications.**[1] There are too many distractions, chat messages, and temptations to check your Likes on social media. Shut it all down and focus on the people in your meeting.
- **Mitigate technology risk.** Call in using a phone for audio in addition to using your computer audio. If the internet goes down, you'll still have audio. If you can, use ethernet instead of WiFi; it's tons faster and more reliable. I even use a dedicated router to prioritize bandwidth going to my office so my kids' video streaming habits don't disrupt my meetings.

1 This is also useful so that you, as the presenter, aren't accidentally sharing any inappropriate message notifications that come in while sharing your screen.

The manager who asked about the color you used is going to think more critically about the details of the UI. The developer who wanted to see the analytics for the current app values the use of data to back up your claims. The executive who thought the call to action wasn't high up enough on the page needs to know how your choices affect conversion and sales. We can expect to hear similar ideas, recommendations, and objections from these people each time. What seems like a fuzzy, soft skill might actually be more of a recipe: personality + role / values + observed reactions = predictable behavior! Although it's not actually that simple, it gets easier and more predictable over time.

So go through each of your designs, look at the agenda for the meeting, and decide the best flow for presenting your ideas. In the same way that we create a flow for our users through the application, we also want to curate the flow of our design discussion. Now match up those needs with the people in the room. For each person, ask yourself:

- What do they care about the most?
- What are their personal goals for this design?
- What do I already know they want or don't want?

Think about their particular role and make your best guess about how their viewpoint can help you. If you're not sure, ask them directly what they hope to get out of it or how they see themselves contributing. It's appropriate for you to tell people that you want to be sure you're making the most of everyone's time. Understanding their involvement helps you structure the agenda and sets you up to anticipate how things will play out.

WRITE DOWN OBJECTIONS

Once you've considered all the people involved, write down any objections you expect them to have along with your own response. Until you get really good at responding off-the-cuff, it can be difficult in the moment to remember how you were planning to reply. Make a list, and read and reread that list over and over until you're fully prepared with your best guess about how people will react to your designs. Even if you can't associate each anticipated reaction with a single person, it's still a good idea to make a simple list of objections that you think might come up. These could be in the form of questions that might be asked or opinions you think will be expressed.

Here are some examples of how you might write down anticipated objections:

HOME PAGE	PRODUCT PAGE
• Why did we remove one of the CTAs? • Does the carousel advance automatically? (Justin) • The utility nav is too crowded. (Kristen) • What happened to the Recommended Item feed? • We can't "hide" the Join button under the menu. (Mark)	• Why isn't the image larger like we discussed? • Do we have to use two different buttons? Can we get the CTA above the fold? • Why are Reviews further down on the page? • The fixed nav interaction should automatically add the item to cart. (Kristen) • This flow has more complex use cases than I think you've considered. (Mark)

CREATE ALTERNATIVES

Part of anticipating how people will react is preparing in advance the alternatives that you considered or that you think will be suggested. You'll remember from Chapter 1 that one of the questions we're trying to answer for our stakeholders is: *Why is this better than the alternative?*

Bringing alternatives (especially those that aren't the recommended solution) complicates the conversation because it forces us to have a well-articulated explanation for our choices. Many designers avoid this by not presenting alternatives that they don't recommend. The fear is that the client will prefer the "wrong" concept and insist it be used. Even though this is always a risk, approaching our meetings with this fear actually undermines the purpose of articulating design decisions. If we aren't able to convince stakeholders that our solution is better, either we aren't doing a good job of communicating to them or we don't understand their needs enough to create a design that solves the problem. What we really need is for them to support our solution, even after considering all of the alternatives. We can't protect them from all the ideas that might be suggested. Instead, we arm them with the knowledge and language for why our decisions are best. That's the only way we're truly going to earn their long-term support and get them on board with our solution.

You'll want to have these alternative designs and mockups as evidence that you've tried these other approaches with an understanding of why they weren't as effective as what you're proposing. For example, if you know that someone is going to ask you about the icon you chose, then bring a batch of alternative icons that might also communicate the same concept. It demonstrates that you've thought about it and chose what you believe to be the best one. Sometimes, the design we've come to discuss was suggested in a previous meeting. The stakeholders asked you to make some changes (despite your best efforts at convincing them otherwise), and now you must show them that design. In these situations, bringing alternatives is absolutely critical to demonstrating why your proposed solution is better. However, you still have to lead the conversation with the design that they're expecting. So present the idea they asked for, but also prepare alternatives that you think better address the problem.

More than simply addressing someone's suggestion, bringing alternatives creates a common place to discuss the merits of each option—a place, by the way, that you created and you control. If you come to the meeting with no alternatives, your stakeholders are going to search the Internet from their phone and propose the first option they find. You make a much stronger case if you have a set of well-prepared ideas than whatever they find by spending a few seconds online. Don't toss out all the rejected ideas; bring them with you. We'll look at presenting alternatives again in Chapter 6, but remember that having more than one design always demonstrates that there is more than one way to solve this problem.

PREPARE DATA & RESEARCH FINDINGS

Likewise, prepare data or research findings (analytics, usability reports, user testing results) to support any part of your proposal. It's one thing to make a suggestion, but it's another thing to have the data that supports your solution. Most of the time, it's enough to simply let everyone know that your decisions are based on data and/or research, while giving a cursory overview of your findings. In fact, I don't recommend pulling out the data unless it's necessary to make your case. Using data to bolster your position is helpful when people disagree or when they react to your designs with skepticism. Because you're only anticipating how they will react at this point, have the information available, prepare it in advance, and know that you're basing your decision on it, but don't slap it on the table during the course of your presentation.

Data is very powerful (almost too powerful), and it can have a strange effect on people. Sometimes, it creates an environment in which people feel like they have nothing to contribute. "Well, if that's what the research says, that's what we should do." You may stifle the conversation before it even gets started. And yet, we want and need our stakeholders to be involved in the decision. On the other end of the spectrum, I've seen research be dismissed based on the methodology or "sample size." In fact, a well-spoken "expert" expressing opinions in your meetings may appear to have the same clout as your own research findings. So, be prepared to defend your decisions with data and research, but don't feel the need to use it unless it's necessary to make your case.

During the course of working with stakeholders, your job is to learn what makes them tick, identify what things they care about, and then come up with a plan for how you'll respond to them in the moment. Writing down anticipated reactions, bringing alternative designs, and having data or research available are important parts of this process. You won't be able to do it perfectly each time, but it will help you to be prepared. Often, just knowing what to expect in a meeting can go a long way toward being articulate in the moment.

Create a Support Network

One of the best things you can do to ensure that your stakeholders support your work is to include other people who support your decisions too. That is, you want to be sure there are other people in the room who will back you up, help you make your case, and tip the scales when it comes to the final decision. You need design advocates.

Getting other people to support your decisions is about showing that you're not alone in your ideas. It demonstrates that there are other smart people in the room who agree with you (and who may have more relational capital than you). It's about bringing out the best practices that the experts agree is the right decision. If 9 out of 10 designers agree, why shouldn't your leader? The majority doesn't always rule, but it's definitely more compelling than an individual making his case alone to an unsympathetic manager.

ASK FOR SUPPORT

In design meetings, we want to be certain that there are other people who are prepared to ask good questions, point out specific important elements, or advocate for our proposed designs. We may not remember everything that needs to be communicated, so having someone who can jump in to cover anything we forgot is extremely valuable. They could ask you a question that sets you up to provide a well-articulated answer or they might just reinforce what you already said.

This often happens naturally on close-knit teams. If the rest of your team is familiar with the work, it's common for them to jump in during the course of the meeting when they realize you forgot to mention something important. When your coworker notices, he might say, "Show what happens when you click the button." Or if more than one design is presented, they'll speak up, "The first option is better because..." reiterating what you've already said and demonstrating you have other support in the room.

I recommend being forthright with people about your need for support. It's okay to ask people to support you in advance. The purpose is to build a case and demonstrate that other people agree with you. Be open with people about your need for support, ask them to help you, and tell them to speak up when the situation calls for it.

IDENTIFYING PEOPLE

The process of getting people on board with your vision takes place more in one-on-one meetings than it does in a conference room. People can be reluctant to agree in a group setting if they're aware that the executive in charge has a different idea. Your job is to work with people beforehand and figure out who is on board with your designs before that conversation even takes place. You want to find the swing votes that will build a majority or ask other people to be prepared to help you. Make sure that you build into other people and relationships enough that you already have these go-to people available. It's not something you should expect to pull off right before the meeting.

The easiest place to get this support is your team: other designers or developers who have already been part of the discussion and design process. They're already on board, and they were part of the discussion that led to the decision you'll present. These people should always be prepared to come to your defense if things take a turn that you're not expecting. But it's not enough to just assume that they will. If there is a concept, idea, or design that you think will meet resistance, be up front with them and let them know that you might need backup.

However, your team doesn't have to be your only source of support. It's also helpful to seek out other people in the organization who have a stake in your project and may have some influence that you can leverage. There are almost always other people who understand what you're doing, are excited about the project, and can't wait to see it succeed. This might be someone you used to work with in a different area, or it's the person who stopped by your desk, saw the designs, and seemed excited.

Find these people and involve them in the conversation. Invite them to the meeting, if it's appropriate, and prepare them to speak up if needed. Explain to them what the meeting is about, give them a copy of the agenda and designs in advance, and ask them directly for their support. It's okay to go so far as to tell them you might want them to speak up if there is any disagreement. If possible, point out the specific problem areas that you think will be a point of discussion and talk about how they can help. Give them any data or other rationale you have. You want this person to be your representative, to feel confident in their ability to support you, and to agree that your solutions are the best.

People Get It

I was in a meeting with the president of a large ecommerce site, and we were presenting some recently implemented designs as well as a few new concepts that were in the works. The meeting went well; there were a few questions from him that I was able to address, and we walked away from the meeting with good vibes and a list of items to consider for another round of revisions. Immediately afterward, one of the other executives pulled me aside and said, "Hey, I'm sorry I haven't made myself available much, but I really want your project to succeed and I'd like to help, if I can. Maybe we can go over everything before these meetings next time so that I can back you up and we can all speak with one voice."

Here was someone who understood the value of communicating to stakeholders. Although she was one of the stakeholders herself, she saw that there was an opportunity for us to work together to achieve the best result. She liked our ideas, trusted our expertise, and wanted to ensure that we wouldn't be blocked. Needless to say, she became part of my support network. And even though she wasn't involved in every meeting about the project, I made a habit of keeping in touch with her regularly, pulling her into the loop on our designs, and allowing her to be our advocate in conversations that took place outside of our formal presentations.

Always remember that other people can help you accomplish what you want. Learn to build those relationships and allow them to add value to the conversation. Find the people who can help you accomplish your vision, and set them up for success right alongside you. Having this small group of people who support you in a meeting creates an atmosphere of consensus. It demonstrates that you know what you're talking about because other people agree with you. It spreads the responsibility of the decision across the entire team. This is not just one person's idea, but an idea that is supported by other people, too. More than that, it gives other people the opportunity to speak on your behalf. You may find that you don't have to do nearly as much talking to express yourself because other people will do it for you. It is much more difficult for an executive who disagrees with your solution to insist you change it when the other experts in the room agree with you.

Do a Dress Rehearsal

Now that you understand your stakeholders, have removed the distractions, anticipated their reactions, and gathered a group of people to back you up, it's time to go through the meeting step by step, practice your presentation, and prep everyone involved. The level of importance of the meeting often determines how much practice you need, but I've found that you should still make a habit of doing these things even for less important meetings. Whether it's a daily standup or a big presentation for an executive, each one of these following action items provides structure to guide your conversation. I recommend doing all of them every time, but the degree to which you spend time on it differs in each situation.

What About Discussions by Email or Chat?

It's common for discussions about design to break out via asynchronous communication methods. After all, people are messaging, opening tickets, and sending emails. It's far more convenient than scheduling a meeting, especially in remote companies. I have two approaches to async design discussions.

Approach #1: Don't

Seriously, just don't do your design meetings like this. Avoid it as much as possible. It demeans your work by putting an undue focus on the visuals, while allowing anyone to have a knee-jerk reaction without you to help them understand your thinking. Making decisions this way with your own team can be useful when you all have a shared understanding and vocabulary, but too much gets lost with nondesigner stakeholders. In my opinion, it's not worth the risk.

Approach #2: Use Video

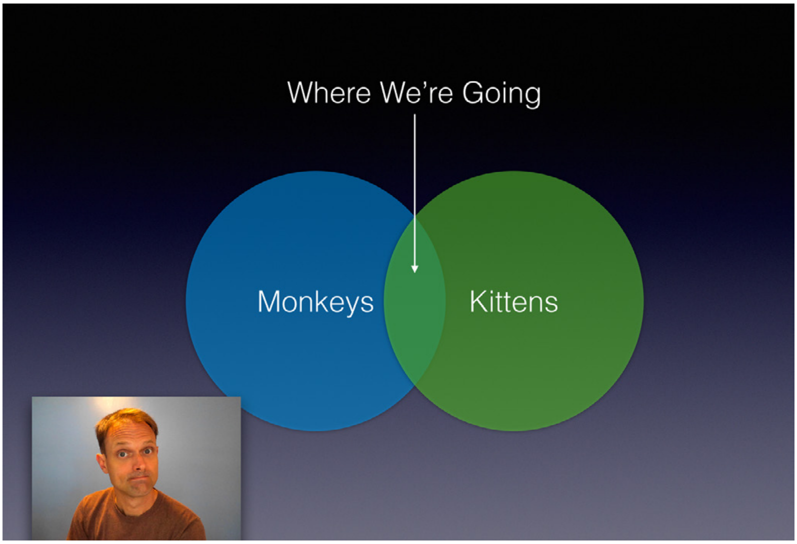
To get around the drawbacks of async communication while still valuing everyone's time and attention, I recommend recording your design presentation and sharing that video rather than using static, pasted screenshots and direct messages. This means using screen recording software and walking through your designs as if you were in the room together.

Using a video like this has two important benefits. First, it allows them to hear and see you. Tone, body language, and presentation are preserved by using video. All of that is missing if you do the same via chat. Second, it forces them to wait until they can watch and respond appropriately. They are less likely to watch it while in another meeting or in line at the airport. They'll wait until they have the mental capacity and space to both watch and respond, reducing the chances of a knee-jerk reaction.

I've found recording videos like this to be very effective. Not only that, but my stakeholders love them, share them, and ask me to keep doing them. It's a win-win.

Here are a few tips for making your videos effective:

- Write a short script so you know what to say, but don't sound like you're reading.
- Keep it short. 2½ minutes is the perfect length, I've found. As much as 5 minutes might be necessary, but try to keep it as short as possible.
- Include a picture-in-picture of your webcam so they can see your face. Not all software allows this, but if you can do it, it will add a human touch that is beneficial.
- Share the video with a link; don't send it as an attachment. You don't want to clog someone's inbox. Sometimes attachments in email or chat software get stuck. Using hosted or streaming video services (YouTube, Vimeo) are best.



I didn't have permission to share any of my actual videos from real projects, but you get the idea.

MAKE A LIST

Most people understand the value of having an agenda for a meeting, and it cannot be underestimated when meeting with stakeholders about designs either. For an executive presentation, you probably already have an elaborate outline of the content you'll cover in a slide deck. That's good, and it will probably keep you on track. However, I'd still recommend having a separate printed version of your agenda for your own reference. Design discussions naturally wander around topics and can be difficult to keep people on task. I know it's wasteful to print paper agendas, but I've found having a paper copy to be much more effective than a slide that disappears after you move on. Plus, you'll be more confident if you're not fumbling with technology (even a separate tablet or phone) to find your place.

Even for short meetings with your own team, like a daily standup, I still recommend putting together a quick agenda or list of items. It's so easy to forget the thing you meant to talk about or become sidetracked on details about something else. If you're like me, you go throughout your day working on multiple designs (perhaps even multiple projects) at a time. A coworker will stop you to ask you about an interaction, which causes you to rethink it on the spot. In the middle of the night, you wake up to the realization that there is a very important use case that no one had considered. You need a place to write these things down so that you don't forget to review them with the people who matter. I personally like to use a simple notes app that syncs with all of my devices so that even if I'm out shopping, I can add an item to my constantly evolving agenda for the next meeting and then release my brain from the burden of needing to remember it.

You don't have to create an elaborate outline; just a simple list will suffice. Even if your meeting is with one other person, a list like this will be your guide and help you to know whether the meeting was a success. Even the smallest amount of preparation will help. Always make a list!

PRACTICE OUT LOUD

It's also important that you practice for the meeting out loud, beforehand. That's right, like a dress rehearsal for a school play, you need to go into a room, talk through your entire agenda as if there were already people present, and even anticipate and answer mock questions out loud. You've already anticipated how people are going to respond, so play out the meeting in your head and verbally answer their questions to an empty room. Practicing what you'll say gives you the opportunity to hear your words. Hearing yourself speak aloud is very different from how it sounds in your head. Plus, you'll catch yourself saying things that could be worded differently, aren't helpful, or are repetitive.

The idea of holding a mock meeting might seem silly, but it's actually really valuable. The more you practice going through the content, the less your brain will have to think about the agenda and the more mental capacity you'll have to be focused in the moment. You'll commit it to memory. We want to reduce our own cognitive load to the point that holding the meeting is a breeze. But also, design decisions can be particularly difficult to understand and there may be underlying reasons for your choices that you haven't even uncovered yet. I've found that I can identify some of my own motivations for design simply by talking out loud to myself.

I'm not ashamed to admit I've spent countless hours of my career practicing like this: pacing the floor of my office, presenting my content to a picture on the wall, and even answering questions from imaginary audience members. I've done the same thing in my car, while out jogging, or in the corner of an airport waiting for my flight. Any onlooker might think I'm crazy, talking and gesturing as if there were someone else with me. But the habit of practicing for a meeting is one of the only ways you'll know how you sound.

As with agendas, the degree to which you need to practice will vary depending on the importance of the meeting. A big presentation with the CEO should be practiced a lot. A daily meeting with your boss will require less, but it's still a good idea if you're unsure how you might say it. For a big meeting, I might book the meeting room the day before so that I can practice in the same environment as much as I need to. For a simple phone call, I might stand at my desk and talk through the agenda once or twice to build my confidence. You have to decide how much practice is necessary to ensure you have the mental capacity to be articulate in the moment.

Overall, hearing yourself say things out loud gives your words new meaning, commits them to memory, and is the perfect testing environment. Practicing for a meeting is the usability test of being articulate: you get to run through everything and make sure it all works as expected. If not, there's still time to tweak it before the meeting begins. Regardless of the importance, always practice your meetings.

PREP EVERYONE

Finally, before you head to the conference room, have a short conversation with everyone involved in your support network. Some people call it the "pregame" or a "huddle."[4] Whatever you call it, review the agenda, go through each point, and note the items that are of importance. Ask people to jump in at specific points and confirm that there isn't anything missing. This is a great opportunity for a peer to check your work and verify that you're on the right track to getting support for your designs. It doesn't need to be long. Even just 5 or 10 minutes before the meeting will do, but it will help you and your peers to be prepared to present and respond.

Remember that the main purpose of taking so much care to prepare for discussing design decisions is to reduce the cognitive load both for your stakeholders and for you. Just as we would approach the usability of a design, our meetings have the same opportunity for refining what people see, optimizing the flow of the conversation, and testing our assumptions before it all begins. When our stakeholders have the mental capacity to focus on the most important decisions, we're far more likely to have conversations that are productive and helpful for the user experience. When we ourselves have the mental capacity to be free from remembering the agenda, we too can focus more on being articulate and carefully respond to feedback.

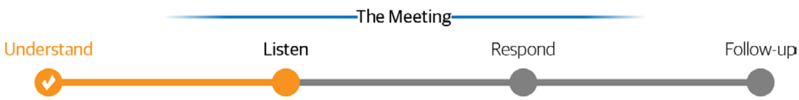
Practicing for a meeting is the usability test of being articulate.

If you find your meeting happening exactly as you expected, that's a good sign that you did your homework and are prepared to explain your design decisions. Allow it to build your confidence in the moment because confidence, too, will help you be articulate and give you the perspective you need to really listen to the feedback that's about to come.

4 I actually hate the overuse of sports references in business.

[4]

Listen to Understand



Now that you've prepared yourself to present your designs and anticipated what the responses will be, you have the opportunity to actually meet face to face with the people who have influence over the project. This is where our skill at communicating really begins, but not because of anything that we say. The first thing we need to do is *listen*.

Listening is an important skill for every relationship, and it's no different when discussing design decisions. Listening isn't just waiting for the other person to stop speaking so that we can begin our response. The entire purpose of careful listening is to ensure that we understand our stakeholders before responding.

An articulate response requires that we use implicit skills such as listening without interrupting, hearing what they're not saying, uncovering the actual problem they're trying to solve, and then pausing before moving on. We also must use more explicit techniques like taking notes, asking questions, and repeating or rephrasing what was said. Using these techniques, we can outwardly demonstrate that we are on the same page. Ultimately, we want to be sure we understand exactly what they're saying so that we can form the best response.

Implicit Listening

Implicit listening is applying skill in understanding what people are saying without outwardly doing anything specific to demonstrate that we hear them. An implicit listener is one who can quickly organize what's being said and derive meaning without any other external clues or further information. For the purpose of listening to design feedback, I'd like to highlight four ways we can implicitly mine stakeholder feedback to get at the core information we need to respond.

LET THEM TALK

The first thing you should do is to let your stakeholders talk. Allow them to say as much as they need to and don't cut them off. People like to hear themselves talk, and they need enough space and time to express themselves without feeling rushed.

This can be difficult to balance since you also don't want the meeting to go off track. Especially if they're saying things you know to be incorrect or uninformed. Besides, we *also* like to hear ourselves talk! It's difficult to hear someone talk about your design work without feeling the urge to jump in. After all, it's *your* design they're talking about. But don't stop them. It is to your advantage to let them finish.

Why? Some people just want to sound smart. It could be that there are other people in the room who they're trying to impress. As I mentioned in Chapter 2, you never know what sort of politics are at play. Other people are audible learners, and the process of talking about something helps them understand it more clearly. In fact, because design can be so difficult to talk about, the process of talking through one's thoughts may allow stakeholders to arrive at their understanding over time. They might even eventually explain your design to themselves in the process without you having to say a word. Whatever the reason, allow your stakeholders to say what they need to before moving on.

There are three benefits to letting them talk as much as they want:

They will make themselves clearer

As people talk, they naturally repeat themselves and rephrase what they mean in an effort to communicate clearly. Because your job is to understand exactly how they see your designs, it's critical that you give them the space they need to describe them. Not everyone knows the vocabulary to use when discussing design, and it can take them a few tries to fully express themselves.

It gives them confidence that they were understood

The more people are able to say what they need to get a point across, the more confidence they'll have that they did just that. You want your stakeholders to know that they communicated effectively so that they can't blame a misunderstanding on their inability to communicate (or your inability to listen). Letting them talk gives them room to have that confidence.

It demonstrates that you value what they're saying

No matter what you say in response, allowing stakeholders to talk as much as they want communicates to them that you appreciate what they're saying and you're listening to every word. When you make them feel that way, it builds trust and they'll be more likely to agree with you later if they know they've been heard.

While they talk, present yourself as valuing their input by maintaining eye contact and nodding your head. Be sure to listen for specific words they use; for example, pay attention to any jargon they use and terms they prefer when describing your designs. Most people won't use language such as UI control, input element, drop list, popover, or tooltip. Part of your job with listening is to figure out what words they're comfortable using to describe your designs so that you can use those terms, too, when you respond. It will be difficult to get their support if you're using a different vocabulary; therefore, adopt the words that they use and also (eventually) find ways to teach them terms that will be more effective in the future. We'll look at this more in the section "Repeat and Rephrase."

Overall, allowing stakeholders to talk freely creates an atmosphere in which your stakeholders know they can express themselves without being interrupted, which makes them more likely to give you the valuable perspective you need to be effective. They know they can express themselves and be heard.

HEAR WHAT ISN'T BEING SAID

Not everything that our stakeholders say will be immediately clear. Sometimes, we need to look deeper than their actual words to derive their intended meaning. So, another important part of listening is to *hear what isn't being said*. You have to try to understand both what they've expressed out loud as well as what never came out of their mouths. What's the subtext? What is the elephant in the room that no one really wants to mention? Often, what people say and what they mean can be two completely different things.

This might be more important in design than other fields simply because design is more subjective and people aren't always sure how to express themselves. Further, your stakeholders realize this is something that you made. You created it. It's your baby. They may be sensitive to that fact and try to tell you about a problem they see in indirect ways. If this is the case, people commonly respond with questions rather than direct disagreement. "Oh, that's interesting. Why did you use the primary call to action here instead of the secondary one?" The subtext might actually be that this person thinks the secondary call to action is a better choice but they just don't want to come out and say it that way. When someone uses the word "interesting" in a response to your designs, that's a clue they may disagree with your approach.

As I've mentioned before, there are other factors going on in every meeting we're simply unaware of. If one person is being disruptive about something benign, perhaps they're trying to make a point to someone else in the room. Or, when your manager didn't care about the dashboard graphs last week but is now suddenly insisting that they be changed, maybe they're reacting to the meeting they just returned from. We can expect that there is often something else going on.

Polite Paula

In one of my previous roles, I pitched an idea for a web interface that was a little unusual. My manager responded with enthusiasm because she knew I was excited about the idea and wanted me to be motivated. She was the kind of person who was always supportive. She agreed to let me spend Fridays working on this side project so that it didn't distract me from my regular work during the week. For several months, I worked on this new idea, and when it was ready I brought it to her. She was so nice, but rather than tell me outright that it was a disaster, she instead asked me questions about it in a way that showed me the flaws in my design. Because it was my pet project, I was naturally a little defensive. I answered her questions as best as I could, but in the end it was unclear to me what she wanted me to do. Looking back, I realize now that she didn't think the idea was worth pursuing. I would have preferred if she had been up front with me about it, but I couldn't control how she chose to respond to my work. We have to try to hear what they're not saying if we want to know the best way to respond.

Discouraging Dan

At another company, I worked on a marketing site for an online service. The site was completely broken: bad links, missing images, and outdated copy. It looked like an abandoned house. As it turns out, an unusual number of support questions were related to simple problems with this site. I knew the product owner didn't have the resources to redesign it. To me, it was low-hanging fruit: a simple five-page brochure site that could quickly be templated and updated. I decided to redesign it while I was in between projects. My thinking was that an improved and functional website would be better than a perfect and infinitely delayed one. The first design I showed to the product owner was met without enthusiasm. "Oh...um, wow, Tom. That's really nice, thank you. It looks much better, but you really don't need to be spending time on this," was his reaction. I assumed he was just being nice. He wasn't my boss and didn't have the authority to ask me for help, but the site clearly needed some TLC. What could it hurt? I finished the designs, created the pages, and put it on a staging server. Again, the product owner wasn't excited. He appreciated my effort and gave me the green light to put it in production, but it seemed like he couldn't care less that I had done him this *favor*.

A few weeks after putting it into production, our group received an email announcing that this service was being shut down immediately, the marketing site would be taken offline, and existing customers would be given a transition period to find a new service. I can only assume that this product owner could not tell me that the service was being discontinued at that time. He tried to discourage me from working on the site, but I was not astute enough to read between the lines. Although I don't regret the time I invested in it (because I am proud of the way it turned out), I could have redirected my effort to something else that would have had a bigger impact if I had been skilled enough to hear what wasn't being said. I should have dived deeper to understand his lack of enthusiasm before blindly moving forward on my own. These kinds of subtle cues are easy to miss and require a keen understanding of our stakeholders.

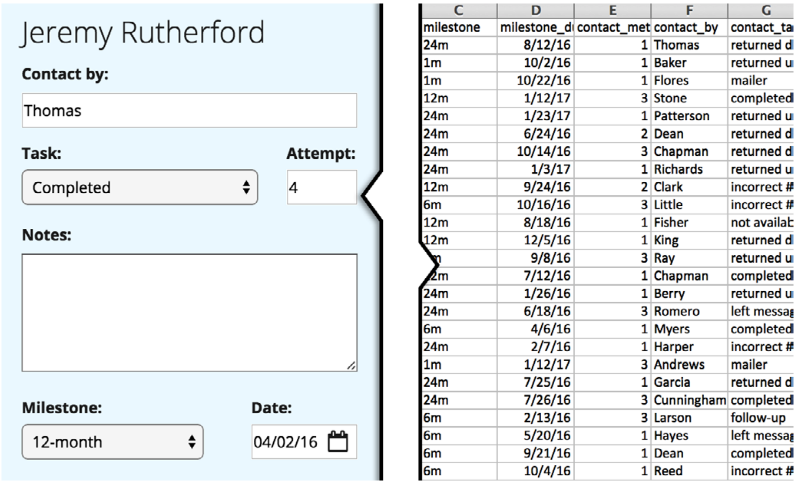
UNCOVER THE REAL PROBLEM

While you're listening to your stakeholder's feedback, work to uncover the real problem they're trying to solve. Often, our stakeholders see a need that isn't being met with our designs, and they may express it with a suggestion that isn't the right solution. So, don't focus on what they think needs to be changed or the specific words they use; instead, focus on the underlying problem they're trying to solve by suggesting that change.

People naturally think in terms of solutions rather than first identifying the problem. It's much easier to say "Move this button over there" than it is to recognize that the problem is the proximity between the button and the date picker. Other times, people use vague language simply because they don't know how to express their reaction to a design. When someone says, "There are way too many colors here! It's like a rainbow," what they're actually expressing is, "The number of colors are distracting, and I don't know where to look or what's important." We can help our stakeholders understand the real problem by asking questions and repeating it back to them. It's okay to ask them directly, "What problem are you trying to solve by suggesting this?"

Reordered inputs

A client once asked me to change the order of some text input fields on a form. It was a simple request, but it was contradictory to what we had previously agreed upon. When I asked her why, her response was nothing more than an expressed preference: she simply preferred that the data be entered in that way. I asked her for an example of another application that did this, and she sent me the spreadsheet that she received as an export from the system, which she used to generate reports for her meetings. In her explanation, she mentioned that the order of the columns in the spreadsheet needed to match the data entered in the system. She thought that the way the user entered the data in the form would be reflected in the exported file. She had no idea that we could customize the order of the data in the report for her, independent of the user's input. Had I made the simple change she originally requested without question, it would have resulted in a less optimal experience for the user. By digging deeper and understanding the real problem she was trying to address, I was able to respond and address her concerns without changing the design at all.



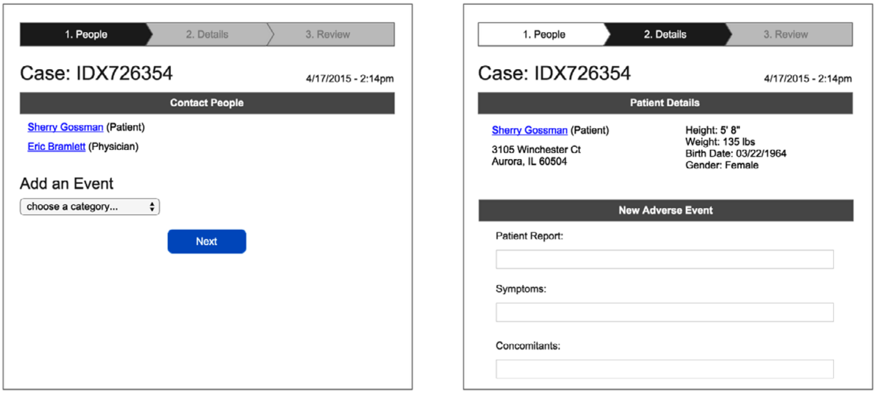
C	D	E	F	G
milestone	milestone_d	contact_met	contact_by	contact_ta
24m	8/12/16	1	Thomas	returned d
1m	10/2/16	1	Baker	returned u
1m	10/22/16	1	Flores	mailer
12m	1/12/17	3	Stone	completed
24m	1/23/17	1	Patterson	returned u
24m	6/24/16	2	Dean	returned d
24m	10/14/16	3	Chapman	returned d
24m	1/3/17	1	Richards	returned u
12m	9/24/16	2	Clark	incorrect #
6m	10/16/16	3	Little	incorrect #
12m	8/18/16	1	Fisher	not availab
12m	12/5/16	1	King	returned d
m	9/8/16	3	Ray	returned u
2m	7/12/16	1	Chapman	completed
24m	1/26/16	1	Berry	returned u
24m	6/18/16	3	Romero	left messag
6m	4/6/16	1	Myers	completed
24m	2/7/16	1	Harper	incorrect #
1m	1/12/17	3	Andrews	mailer
24m	7/25/16	1	Garcia	returned d
24m	7/26/16	3	Cunningham	completed
6m	2/13/16	3	Larson	follow-up
6m	5/20/16	1	Hayes	left messag
6m	9/21/16	1	Dean	completed
6m	10/4/16	1	Reed	incorrect #

My client asked me to change the order of some input fields because she didn't realize that the exported file could be independently ordered from the user's input.

Duplicate data

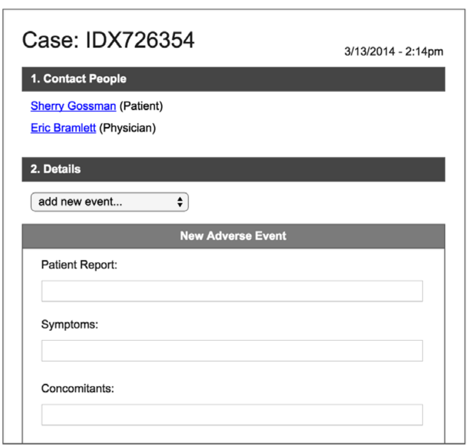
Another project I worked on had a complicated series of forms that were presented to the user as multiple steps. First, the user would enter some information about the people in the report such as name, address, height, and weight and then choose the next form. Because we wanted the user to focus on the task and not be distracted, we decided to take them to a new page without the navigation where their previously entered details were plainly visible at the top of the view.

When our client saw it, she said the user needed to be able to edit the patient's details on this second form as well as the first. I questioned this because the user had just entered that information. Why would they need to immediately change it? Her response was confusing: she went on a tangent about a paper government form she was used to filling out, that she didn't want to train employees, that the details had to be entered correctly the first time, and that sometimes you might want two different addresses for the same person. Paper forms? Training? Duplicate data? None of it made any sense, so I started asking questions.



This is a simplified version, but in my original design, the user moved horizontally from one step to the other; my client expressed frustration at not being able to edit the information from Step 1.

Finally, I began to realize that she saw this app as a digital version of the paper form she had mentioned earlier. I had indeed designed it to be similar and she was distracted by the differences. After some tough choices, we decided that the second form would not load on a new page but would instead simply load inline on the page directly below where the user had entered these details. We moved from a horizontal progress status to a vertical one. It was effectively still the same interaction, but not having to return to a previous step to see the information gave the user a greater sense of control.



In the final design, the user moved vertically, which gave my client a better sense of control over entering the data.

When she saw our solution, she agreed it was better and we moved on to the next design. However, had we made the changes she suggested initially, it would have resulted in a host of other usability problems. Listening to her and working hard to uncover the real problem she was trying to solve helped to ensure that we maintained a better user experience.

In summary, the visual nature of design naturally lends itself to changes in those visuals in order to accomplish the desired result. People make suggestions on how to change those things rather than describe the problem they see. It's hard for most people to think concretely about and express design problems. They only know that it doesn't feel right. Consequently, we need to be adept at listening to their solutions and connecting the dots in order to uncover the real problem.

THE ART OF THE PAUSE

One last implicit listening technique is mastering the art of the pause—when you think your stakeholders are done talking, just wait. Don't immediately jump in with your response. Instead, pause for several seconds (maybe two or three) and allow for silence, however uncomfortable that might seem. This can actually be a little awkward, especially on a conference call or video chat where there are frequent delays and it might be difficult to tell if you've dropped off. To avoid ambiguity, you can add a bit of noise by saying something noncommittal like "okay" or "mm...". Even moving something on your desk will show you're still there. But whether you're on a call or face-to-face, it's worth risking the awkwardness to be sure that your stakeholder is finished talking and that there is a small gap in the discussion. If the silence is too awkward, you can create a gap by saying, "Let me think about that for a second." Anyone will appreciate that you want to take the time to consider what they've said.

The purpose of the pause is threefold:

- First, you want to be sure they're actually done talking and that they haven't just paused themselves. Sometimes people stop and then immediately think of something else or a better way of saying it. If there's a better way for them to give you their feedback, you will want to hear it, because people don't always express it correctly the first time. Give them a chance to be articulate themselves. They need to feel good about what they said so they can't blame a misunderstanding on poor wording.

- Second, it gives you a chance to let the air settle, to let your stakeholders' words sit on everyone's ears for just a moment. You're letting the conversation simmer briefly, which gives you a chance to very quickly consider how to respond. You're not jumping directly into a defensive posture, but instead taking a moment to consider what was said and form an appropriate response. Just these few seconds of waiting will allow your brain to catch up and make you much more prepared to respond.
- The third benefit to pausing is that you communicate to the other person that what they said is important enough for you to really consider it and think about it. Because you didn't jump directly to a conclusion, you create a sense that what they just said was really valuable. People want to be heard (or at least to *feel* that they've been heard), and pausing shows them that you take their feedback seriously.

All of these implicit listening techniques should help you see and hear your stakeholders' feedback. As you listen to them, you're making a conscious, nonverbal effort to truly understand what they mean. These internalized activities give you an opportunity to better organize your thoughts so that you can find the most effective response.

Explicit Listening

In addition to the internalized activities we use to listen to design feedback, there are also several explicit activities we can use to improve listening. Explicit listening includes verbally demonstrating that you're listening as well as doing things that outwardly show you are engaged in the conversation. For design meetings, taking notes, asking questions, and repeating or rephrasing what they say are all important ways to effectively listen to our stakeholder's feedback.

WRITE IT ALL DOWN

The first thing you need to *do* to listen is to take notes. You're not going to remember everything your stakeholders say or suggest. One of the best ways to listen to them is to write down what they say. Record everything, especially the items that need to be followed up on. Even in smaller meetings, it's important to write down the decisions that were made and save them somewhere. I've already recommended writing things down and taking notes at different stages of the process, and you should always have a way to take notes in your meetings. You might never reference your notes after the meeting, but that's okay. Taking notes is more than just having a place to record what was decided:

Notes prevent you from having the same conversation again

Taking notes is the only way you're going to remember what was discussed and create a history that will help you to avoid the same conversations again in the future. I've found that a lack of notes is frequently responsible for miscommunications, repeat conversations, and changing requirements on many projects. Having notes avoids the rework that will prevent you from being successful in communicating about your designs.

When it comes to design, notes are critical because opinions and ideas about the right decision will change over time. If you don't have notes, you don't have a paper trail to understand what logic went into the original decisions. You only have "he said, she said" and a bunch of rehashed conversations. When design decisions are made verbally in a meeting, it can be nearly impossible to remember later why decisions were made. Additionally, there may be team members who aren't present at the meeting. Having notes helps you to quickly bring them up to speed without recounting the entire meeting.

I am, admittedly, not the best at keeping my notes organized, but I do keep them, and there have been multiple occasions when we chose a path for a specific interaction that was called into question after the public release. "Hey, why did we do it this way?" I was able to find my notes from months earlier and follow up with everyone and even remind them of the person who suggested the change, why, and the date. When you can do that, it usually saves everyone time and allows you to move forward.

Notes free you to focus on being articulate

For the same reasons discussed in Chapter 3, writing things down reduces your cognitive load and frees your mind to focus on being articulate in your response. When it's written, you no longer need to think about it. If you allow all their ideas and feedback to float freely through your brain, you'll have a difficult time organizing those suggestions in a way that will yield the best response. Write down what they're saying so you can take the next step and form your responses without needing to actively recall everything from memory.

Notes build trust with your stakeholders

Another benefit to taking notes is that just the act of writing things down will make you look attentive, smart, and, as a result, more articulate. Taking notes makes you look like a good communicator. It makes the other person feel valued because you care enough about what they said to write it down. This gives them confidence that you heard what they said and you're planning to follow through.

When people have that impression of you, they do a much better job of listening to and considering your own response later. It's a shared respect that goes both ways. As a result, I often use note-taking as a way to tell people that I'm listening and bring out the best in the discussion even if I disagree with their suggestion. Verbally saying something like, "Oh, I see your point. Let me write that down," earns trust.

Notes keep the meeting on track

Writing things down is also a great way to ensure that your meeting stays focused by giving you a place to record parts of the conversation that get off topic. People will think of just about anything in a design meeting, and it's easy for it to get derailed by something that isn't the core focus.

Suppose that you're showing the home page to discuss the interaction on the category menu, but when your boss notices that the login form is messed up, suddenly the meeting is headed in a different direction. Because you're taking notes, you can suggest delaying the discussion of the login form if that's not the purpose of the meeting. "Yeah, I noticed the login form this morning, too. Let me make a note of that and I will follow up right after this meeting, but for now let's stay focused on the category menu." Taking notes gives you a natural place to put stuff that might otherwise be distracting.

Writing things down feels more permanent than only saying it out loud. It gives everyone a sense of security that what's being said was important and will not be discarded.

TAKING BETTER NOTES

The best way to take notes is to ask another person to do it for you. This frees up your brain to be focused on listening and being articulate. If you don't have someone to take notes for you, find a note buddy who is willing to help. Offer to swap note-taking responsibilities at each other's meetings. It could even be someone from a different department or project, any willing person who can be trusted to capture the conversation. You can also record audio or video of the meeting, but I've found that I rarely have time to review it afterward to recapture lost notes. The best practice is to document your decisions so that you have an immediately accessible history to reference, even if you do it yourself.

To get the most of your notes from a design meeting, they should be:

Accessible
: Store your notes in a place that everyone can access. As we will see in Chapter 9, following up with your notes afterward is an important part of the process. Here in the meeting, you just need to be sure that everyone can see or has access to them. This might be a wiki page in your project's repo, a separate page on your design mockups, or a shared folder or document. Your notes should always be available to everyone on the team, even during the meeting itself.

Organized
: Write your notes within each agenda item so that it stays connected to the design in question. Usually, this would be by page, UI control, or interaction. Attach your notes to one specific thing. I usually create a bullet list of notes under each agenda item as the meeting progresses.

Specific
: Write down the names of people who make the suggestion you're noting as well as the names of people who agree or disagree. This is not always an exact science, but something as simple as "Cynthia suggests changing the color; Brian isn't sure" is useful later when you're trying to remember who was responsible for suggesting the change.

Definitive

When a decision is made, make that explicitly clear so that you can find it later if you need to remember it, for example, "Final: drop-down control should be a pop-over menu." Items that are still undecided should also be marked so that you can follow up on them later. I add a question mark to anything pending a decision: "Reconsider placement of sort options (?)"

Actionable

Nearly every item should have a follow-up action or person associated with it. Writing down ideas is useful, but if there's no action, there is almost no point. For example: "To do: update prototype w/ new control," or better, "Chad to update prototype w/ new control." If there is a lot of follow-up to be done, it might be useful to create a separate section in your notes just for documenting it so that you don't miss it in the list of other notes. I often create a separate heading below the agenda called "Follow-Up."

Referenced

Add links, URLs, screenshots, or other reference material to your notes so that it's easier to communicate what the point of the discussion was. When people suggest other websites or apps as a reference, add that information to help you remember the conversation. Without references, it will be difficult to recall what you meant by "See how SocialApp does it." Adding inline screenshots or URLs with the agenda makes your notes much more valuable in the long term.

Forward-looking

Aside from the agenda items that you need to cover right away, there are always other design decisions that will come up during the course of the conversation. You need a place in your notes to add items to be discussed at the next meeting, or in a different context. I do this by simply adding a new heading in my notes called "Next Meeting." Having this real estate set aside gives me a place I can quickly organize discussion that might be off topic and note it for the next time around.

INCLUDE THE WHY

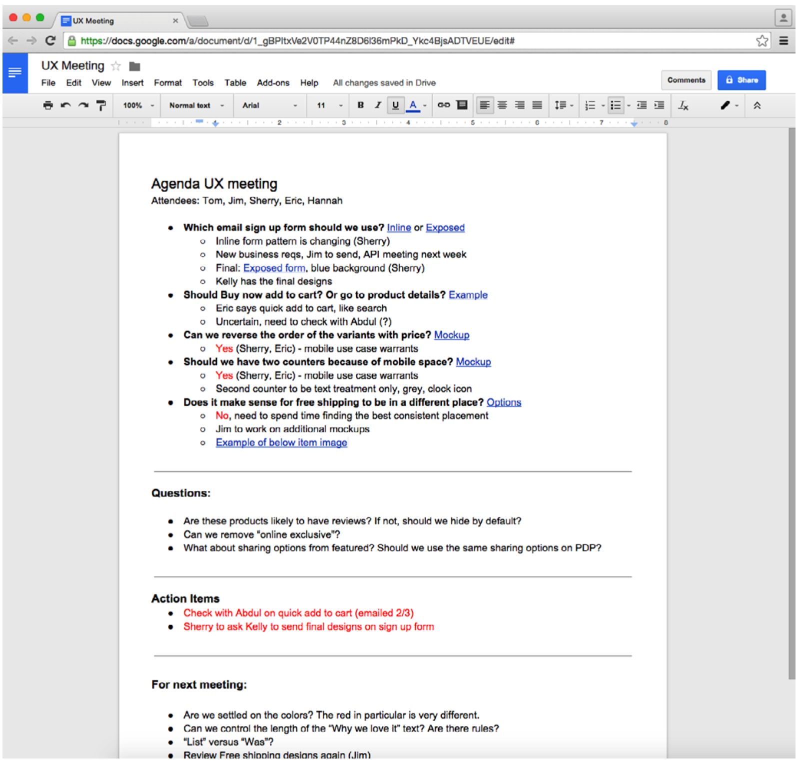
For design conversations, it's important to remember to record not only *what* decisions were made but also *why* we made them. We're trying to create a record of our design decisions that will help us manage future conversations. That must include the thinking behind why we made these decisions, to help us remember how we arrived at this solution in the first place. If you're looking back on your notes and there is no explanation for your choices, it's not going to save you the effort of rehashing that conversation with your stakeholders. However, when you include a brief explanation of your thinking, you create a much better starting point for the conversation. When people question a choice we made together, they rarely ask what was done—that part is plainly visible. Instead, they ask, "Why did we do it this way?" and if your notes fail to answer that question, the conversation starts all over again.

Including the why can be as simple as a single phrase or sentence. It shouldn't be long or detailed—just enough to help you remember why you did what you did:

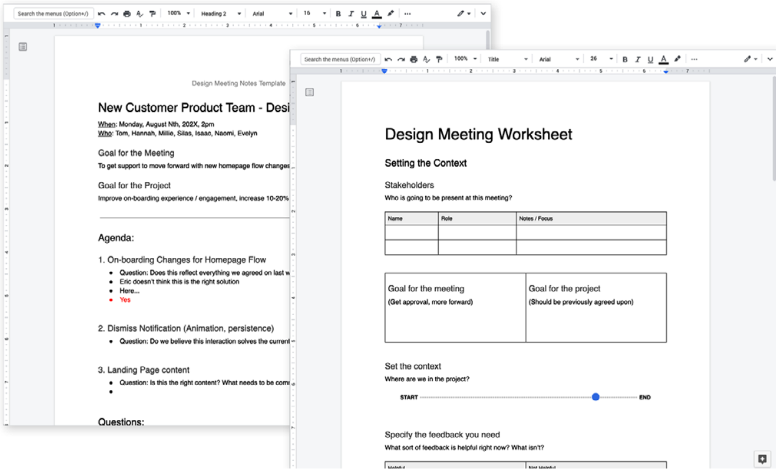
- Button color changing to red to accommodate newest brand standards
- Animation is being removed because it is too distracting
- Copy placement moves above the form fields per legal team requirements
- Drop-down will become a multiselect based on results of A/B testing
- This feature is deprioritized based on Karen's meeting with executive team

In my experience, this is a big missing piece from design meeting notes. One reason is that the people taking notes (project leads or administrative roles) are only accustomed to writing down the what: what was discussed, what decisions were made. If you have someone else taking notes on your behalf, help them understand the importance of including the why. Without it, your notes have far less value in the future.

To summarize, taking notes is a critical part of listening to stakeholders. It's important to write things down so that we have a history of what was decided, know why we decided it, and avoid having the same conversation twice. And as we will see in Chapter 9, they're incredibly useful when following up afterward. But notes are more than just a place to record our decisions; they also allow us to focus more on being articulate in our response because we no longer need to rethink everything that was said previously. With our notes in hand, it's much easier to go through each piece of feedback and prepare the best response. Regardless of the size or importance of the meeting, always take notes.



I don't always take good notes, but when I do, they're accessible (Google Docs), organized, specific, definitive, actionable, referenced, and forward-looking!



Download a template and worksheet for meeting notes on my website: *http://tomgreever.com/resources*

ASK QUESTIONS

One challenge with talking about design to stakeholders is that they often don't know the best words to communicate their meaning. In the same way that we designers have difficulty expressing our decisions to them, they, too, have difficulty expressing their own thoughts to us. Yet, so much of listening is just about getting the other person to talk. We need to pull the words out of them that will help us do our job better. It's not usually enough to just let someone say their piece and then move on. We need to get them talking more, to say it in a different way, and to express their thoughts more carefully. The way that we do that is by asking good questions.

Here are a handful of common questions that are useful to ask in any situation to get people talking more and help you to understand their suggestions or feedback:

What problem are you trying to solve?

Like the previous section, it's okay to be direct if it's not clear what stakeholders are trying to accomplish with their suggestions. Just ask them outright.

What are the advantages of doing it this way?

This gives stakeholders a neutral way of explaining why they think their suggestion is better without explicitly labeling one as better than the other. Giving them a way to express these differences will reveal a lot about why they think it's the right solution.

What do you suggest?

Often stakeholders will say something needs to change without any idea about how that will be done. Even though it's our job to find the solution, giving stakeholders an opportunity to propose something helps us understand their needs and gives them some context to realize the difficulty of the problem.

How will this affect our goals?

Stakeholders often have our goals in mind, but they don't always realize how what they're saying is connected to them. You want them to directly connect your designs to the goals every time. Often, just the process of answering this question helps them see why their suggestion won't work as well as they thought.

Where have you seen this before?

Asking for reference material (other apps and websites) is one of the best ways of seeing your stakeholder's perspective. The point isn't to suggest that their idea won't work if it doesn't exist already, but to find out if it's rooted in a known design pattern from some other app or website.

The main purpose of asking questions is to get your stakeholders to explain what they mean so that you can be sure you understand. Asking questions also has benefits beyond simply getting the other person to clarify what they mean. Even if you already understand what the other person is trying to say, asking good questions shows that you're listening. By repeating back to them what they said in your words and in the form of a question, you're reinforcing that you understand. This creates more trust. The other person feels respected, valued, and understood. Just like letting them talk, they're much more likely to agree with you later when they feel good about being heard now.

REPEAT AND REPHRASE

The words we choose to talk about our designs can make or break the conversation. If we aren't using the same vocabulary to talk about our work with other people, there will inevitably be misunderstanding, confusion, and missed expectations along the way. Our stakeholders don't always know or use the same words that we do. Finding that common ground is a balancing act of meeting them where they are, while also helping them take steps in the right direction by teaching them to talk about design. If we're going to agree on a solution, we need to get everyone using a shared vocabulary that facilitates understanding. Part of listening is identifying the words our stakeholders use to describe our designs and then repeating it back to them in a way that helps everyone get on the same page.

Rephrase: Convert "likes" to "works"

The most important way we can do this is to help our clients move from talking about what they like and don't like (which are their preferences) to what works and what doesn't work (which is the effectiveness of the design). It's too easy for someone to say they simply don't like something. A subjective response like that gives us no way to address our stakeholders' concerns because it's not possible to tell them their opinion is incorrect. We can only have a different opinion.

Instead, listen for opportunities to convert "likes" into "works." Repeat back what they said by rephrasing the statement to focus on effectiveness. You might also consider following up with a question to confirm that's what they intended to communicate or for additional clarification.

For example, "I understand that you want us to move that UI control over there, but why doesn't it work to have it over here?" When people hear their concerns rephrased inside a frame of effectiveness, they often recognize that they're only expressing a personal preference. You might still have to deal with managing their request, but at least we're getting to the core issue and understanding how to respond to them more intelligently.

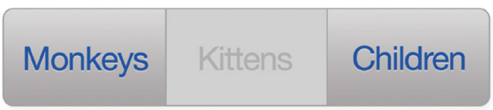
This doesn't mean we should teach our stakeholders or correct them. What we should do is rephrase their response in the form of a question that forces them to talk about it in a way that's more helpful. If you're not sure, ask them directly. Encourage them to tell you what doesn't work about your design. This means that you, too, must work hard to strike the word "like" from your vocabulary and always place an emphasis on the utility and function of the design.

Repeat: What I hear you saying

Another way to help our stakeholders communicate more clearly is by repeating back to them what they said using words that are more relevant to a discussion of design and UX. Because we don't expect that they'll know all the "right words" to describe our designs, we have to listen to what they're saying and translate that into a vocabulary that will become our common ground. Leading with the phrase "What I hear you saying..." is the best approach to accomplishing this because it emphasizes that we are listening to them, understand what they said, and will now confirm it by expressing it in our own words.

Here's an example:

> **Stakeholder:** I don't like how the disabled buttons look. I have no idea why they don't work! We should add some help text or a tooltip or something.
>
> **Designer:** What I hear you saying is that you don't think a segmented control is the best choice in this context, because the user won't understand why the disabled options aren't available to them. Is that right?



Why aren't kittens available? Teaching our stakeholders to call this a "segmented control" without talking down to them can be useful in moving toward a shared vocabulary.

Repeating what our stakeholders say, using terms that will be more helpful to the conversation, is a great step toward a common language without coming across as overtly condescending or alienating them for using the wrong words. You need to find the right balance of helping them without making them feel silly. We can help our stakeholders be more effective by repeating back to them words that are more useful.

Here are some examples of how you might craft your responses in a way that introduces stakeholders to a shared vocabulary:

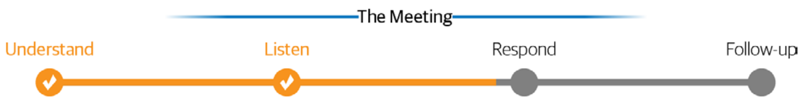
> **Stakeholder:** That button needs to be moved over here.
>
> **Designer:** We purposefully placed the call to action above the fold. Why do you believe it should be moved?
>
> **Stakeholder:** That arrow is too difficult to see.
>
> **Designer:** The disclosure is meant to be subtle so it doesn't distract from the content. Do you think the arrow is necessary for the user's comprehension?
>
> **Stakeholder:** This menu is hard to use.
>
> **Designer:** We're using the system's native droplist, but we could design a custom control.

Remember that an important part of listening is rephrasing and repeating back what our clients have said so that we can confirm we're on the same page and have a solid understanding of the best way to respond.

Let's review what it looks like to listen to stakeholders' design feedback. We cannot communicate effectively with them unless we listen to them and fully understand what they're saying. There are several implicit ways we listen, such as letting them talk as much as they need to, trying to hear what isn't being said, and working to uncover the real problem they're addressing. After that, pause for a few seconds to be sure they've finished talking. But there are also several explicit skills we can apply to be better listeners of design feedback. We take good notes by writing down what was decided. We ask questions to clarify and tune our understanding. And we repeat and rephrase what stakeholders say to help establish a shared vocabulary and common ground. All of these things help us be better listeners, understand what is being communicated, and allow us to form the best response. You might think it's time to tell them what *you* think now, but it's not. First, we need to get in the right frame of mind.

[5]

Get in the Right Mindset



You've poured your soul into these designs. You've taken all this time to think about your stakeholders' perspective. Plus, you just spent the better part of your mental capacity listening to them talk about why your designs don't work as well as you think they do. It would be tempting (even logical) to think that you're cleared now to launch into an epic speech about usability and wax eloquent on design patterns and data, but you're not. Before you go to the point of no return, you should get in the right mindset. You need to put on an attitude that will help you be articulate. It requires you to understand your role, check your ego at the door, and always lead with a "yes." In addition, you need to develop a positive persona that opens people up to trusting you with the solution. Once you have the right mindset, you can set up your response by following a pattern called "Thank, Repeat, Prepare." The purpose of this chapter is to help you be mentally prepared to take on the responsibility of articulating design decisions. Crafting an effective response like this requires a bit of mental exercise to do well.

Understand Your Role

Getting in the right mindset starts with understanding our role in the conversation. I believe there is a common misunderstanding about the role of a designer in these meetings. We usually see ourselves in these meetings to receive feedback. We think we're supposed to take criticism, defend our work, or push back. Many people liken it to sales—we're giving a pitch to someone like a door-to-door salesperson and hoping they'll buy. Other times, people talk about it like it's a war—there are battles, winners, and losers. But none of these is a healthy understanding of our role, and they will not help us get in the mindset we need to be successful.

Our job is not to just absorb what's thrown at us—to prepare for an onslaught of changes that need to be managed—but instead to guide the conversation to a positive place and be a champion for great design. We think we're there for feedback, when really we are there to facilitate a conversation about design. We are there to lead a discussion on solutions, not cram our work down everyone else's throat. We have to take what we hear, analyze it, process it, and turn it into something more useful. We should expect to take what our stakeholders give us, and deliver it back to them better than it was before. A mindset like this allows us to respond more objectively.

GIVE UP CONTROL

No matter what we think, we don't usually have the final say when it comes to our designs. We have a significant amount of input into the process, but at the end of the day, there is always someone else who can overrule us. There may even be an entire team of people who disagree with our proposed solutions! The sooner you realize this, the sooner you'll see how important it is for you to learn to influence people with your words. You can't force them to agree with you. You have no choice but to find a better way.

When we recognize that we don't have ultimate control over the final outcome, we make a mental shift that exposes just how much we need to communicate well in order to maintain the sanity of the user experience. Letting go of control creates an emotional release so you can keep your wits about you and not take everything so personally.

What does that look like in practice? It's nothing more than taking on the attitude that your work is not your own. It's making the simple recognition that you can't control everything. It's admitting that you need help from other people to create the best experience. It's a mental practice of taking two steps back, getting out of your bubble, and walking around to the other side of the table to sit with your stakeholder. Armed with empathy for their perspective, it becomes much more natural to allow their feedback to exist separately from your own personal interests. If you can convince yourself of those things, you'll be in a healthier place to talk about your designs with others.

STAKEHOLDERS REPRESENT OUR WORK

As facilitators of a conversation on design, we also bear some responsibility to help our stakeholders prepare for their own meetings. We are not merely passive facilitators handing the microphone around the table. Our role is also to make sure our stakeholders have what they need to represent our work to other people. We have to give them the tools and vocabulary to succeed in those conversations too.

It's common for someone on our projects to leave our meeting and go talk to someone else about it. Maybe they go to a different meeting with other executives, perhaps they pass someone in the hallway who asks about it, or maybe they go home and talk to their spouse.[1] Whatever the venue, they're asked why we made the decisions we made. If they aren't prepared to explain it themselves, we're likely to get a message asking us to change it. We need to set our stakeholders up for success so they can confidently represent our work to other people.

Taxation without representation

In one of my first jobs as a designer, my manager would take my design work and present it in an executive meeting every week with managers from sales, marketing, and customer service. The pattern I noticed was always the same: she would come back from that meeting with changes, I would go back to my desk to make the changes, and the cycle would start all over again. In the process, it felt like much of my well-intentioned thought was being thrown out—I had good reasons for why I did what I did, and those reasons almost never seemed to be respected in the process. I expressed this to my manager, who suggested I come to the next meeting myself.

What I discovered was that it was a free-for-all where anyone with a pair of eyes and an opinion was giving feedback on my work. Since I was present, I was able to explain why I did what I did and most of the opinions faded. Now, you could argue that my manager failed by allowing a meeting like that to inform our design process, that's true. But what I learned was that if I could give my manager the right vocabulary and understanding about my design, she was much more likely to go into

1 It happens, believe me.

that meeting and represent my work in a way that fostered agreement with everyone else. Without the confidence that she understood my work, she was apt to give in to any and all feedback that came her way.

Engineering confidence

On another project, I was a consultant and my client was the director of engineering. Because he was an engineer and didn't have experience with design teams, I was sure to be up front about our process: we would start by understanding the users and business cases, then move on to creating user flows. Eventually our thinking would transition to low-fidelity wireframes and mockups. He agreed in writing to this process, yet each week he complained that we weren't getting enough done. "*Where are the designs?*" he'd ask. I reminded him of our process again, he'd agree, and we'd move on.

By the fourth week, he got really upset. "You guys have been working for a month and you haven't done anything!" I was shocked. He had been involved in every meeting, approved every user flow, and provided feedback. "*Where are the designs?*" he would ask again. From his perspective, he had hired us to create designs for an app and we weren't delivering. In the heat of the conversation he admitted, "Every week when I go to my senior leadership meeting I have nothing to show." Now, this wasn't actually true—we always gave him something to show—but it revealed that he wasn't confident in his ability to represent things like user flows. We had done a poor job of giving him what he needed to represent our work.

Did he actually care about the designs? Sure, but what he really cared about was looking competent to his peers and superiors in a weekly meeting. Realizing this allowed us to shift our priorities so that every week we gave him something he could confidently present as if it was his own work. If we couldn't do that, our project risked getting cut.

So part of our role is giving our stakeholders the tools and vocabulary they need to go represent our work to someone else. Because if we can give them the confidence to represent our work well—if they really understand our thinking enough to talk to someone else about it—then they're likely to support us as a byproduct. Our thinking is sometimes backwards on this. We go in seeking their approval when really we need to go in there to give them the tools and vocabulary they need to represent our work to other people. This is our role.

Check Your Ego at the Door

Getting in the right mindset is also about remembering to check your ego at the door. We need to separate ourselves from our own ideas and ambitions in a way that allows other people to inform the project without being blind to their suggestions. We can't think that we're the only ones with good ideas, that we have all the best solutions, or that there is only one way (our way) to accomplish the goals. Our egos can get in the way of our ability to respond to stakeholders effectively.

There is tension here, though. Our expertise in design suggests that we should be recommending the best solutions. We *do* want our stakeholders to trust that we know what we're talking about. Our expertise and recommendations are to be taken seriously. At the same time, we can't believe that our ideas are the only way. There's a delicate balance between believing that we have the *best* ideas and recognizing that they aren't the *only* ideas. The challenge is to make solid recommendations while also taking seriously the suggestions and ideas of other people. This is difficult to do.

The trouble with ego is that it's almost impossible to see in yourself. If everyone could easily recognize when they're being egotistical, the world would be a much simpler place to navigate. The red flag is when you find yourself thinking that your solution is *so much better* that you don't see value in the other person's suggestion. In normal, healthy discussions, you can see the value of another person's idea, even if you disagree. When your ego is getting in the way, that value is lost. Any time you think that you're right and they're wrong, you should be cautious. It doesn't mean that you must agree with them, it only means that you might need to reevaluate the situation.

When our egos are preventing us from seeing the value of other ideas, it will manifest itself in the form of excuses for why the other person's suggestion is not valid. For example, you might find yourself thinking, "They don't understand technology," "They're not our target user," or "They don't know anything about design." When you begin excusing other people's ideas with glib stereotypes or by writing off their expertise, there's a good chance your ego is to blame. Be on the lookout for these kinds of subtle reactions in your own mind and find a better way to position yourself so that you can form the best response. If the only logic for disagreeing with someone else's suggestion is "They don't understand my job," you're not going to be able to build your case on that kind of generic (and egotistical) assumption. By removing your ego, you create the space you need to form a response that will be based in reality and logic instead of opinion and stereotypes.

Removing your ego makes you less defensive and therefore better prepared to respond appropriately. I still find it a daily struggle to keep my ego in check. There is no magic pill. It takes conscious effort, reminders from your team, and practice. So, do your best to check your ego at the door. It will allow you to have an open mind and put you in a much healthier place to respond to the people whose support you need to be successful.

Lead with a YES

One of the barriers to effective communication is when people see each other as being on opposite teams. It's easy for there to be an us-versus-them mentality when discussing design with someone who is not a designer. One of our jobs as good communicators is to remember and reinforce that we're all in this together, headed toward the same goals.

There is no better way to foster this atmosphere of collaboration than to always lead with a YES.

The concept of leading with a yes was modeled for me by one of my mentors and former bosses, Dave Ferguson. Dave and I worked together for many years in the suburbs of Chicago. When he was first starting out as a leader, people would come to him with great ideas that he knew weren't possible. Rather than turn them away, he chose to say yes. He found that people were more motivated, empowered, and passionate when their ideas were given permission to succeed. Even if they didn't fully accomplish their goal, it was far better to empower people to do great things than to shut them down. Dave says, "We have learned that if we want to be involved in innovative and creative new things, we have to 'lead with a yes.'"[2] Dave references an article from *Fast Company* magazine titled "My Greatest Lesson" by Katherine Hudson. In that article, she says, "When someone offers you a challenge, don't think of all the reasons why you can't do it. Instead, say, 'Yes!' Then figure out how you'll get it done." This is the foundational principle for leading with a yes.

2 Dave Ferguson, Jon Ferguson, and Eric Bramlett, *The Big Idea* (Grand Rapids, MI: Zondervan, 2007), p. 180. Used with permission.

This principle also has roots in improvisational comedy. One common rule for improv is that each actor must agree with the other: whatever one actor brings, the other must go along with. Why? Because if one actor says no, it will completely shut down the sketch; they'll have nowhere to go. Guess what? Our meetings with stakeholders *are also* improvisations. If we expect them to head in a positive direction, then it's critical that we always lead with a yes.

DEVELOPING A YES REFLEX

Leading with a yes means that you always begin every response with a positive affirmation of the other person's idea or request using the word "yes." It is a mindset that this person isn't wrong. They have just as much potential for good ideas as you, and they're a valued part of the process. Dave calls this the "yes reflex":

> Most of us have a "no reflex" to new and creative ideas that seem impossible. But you can change this…the next time someone brings up a new opportunity, make sure the first word that comes out of your mouth is *yes*.…The yes mindset gives outrageous, seemingly impossible ideas a chance to live and breathe and sometimes be implemented in whole or in part.[3]

The purpose of honing your "yes reflex" is not to give in to every request from our stakeholders or to just let them have their way. It is to create a space where everyone recognizes that we're all on the same team, accomplishing the same goals, and we can work together toward the best solution. As Dave writes, it gives you more time to figure it out:

> Training yourself to have a yes reflex doesn't commit you to actually implementing the idea. Before "Yes" ever commits you to doing something, it actually buys you time to figure out how you are going to make it happen. Often we say yes and then take time to regroup and consider the opportunity's potential benefits and liabilities. Leading with a yes gives you time to figure out if you can really pull it off… We're not making the case for having no boundaries; we're describing how innovation happens. *And innovation happens in places where "No" is seldom heard…*[4]

3 Ibid.

4 Ibid. Emphasis mine.

Leading with a yes is much easier when you agree with the other person's suggestion. "Yes, that's a great idea. I completely agree that this control should be a text link instead of a button." It's even easier when the other person can do the work they're suggesting, like another designer on the team. "Yes, let's make that happen! Please go ahead and update the documentation to reflect this new design. Good idea!"

However, it's not always easy to say yes when you disagree. If you understand the problem your stakeholder is trying to solve, but you disagree with the solution they propose, leading with a yes might sound like, "Yes, I completely agree with you that we need to reconsider the placement of this UI control." We're not saying that their precise solution is correct and that we will implement it in that way. We're only agreeing on the problem because it might still be possible that another approach will solve it.

Leading with a yes is also an effective way to involve our stakeholders in decisions when we expect that we can't do what they want. In these situations it can be tempting to directly say no, but it is usually better to lead with a yes and help them understand the tradeoffs. For instance, the change they're suggesting will take more time or money than your team has, and you know it's not possible even if everyone agrees. In that case, leading with a yes might sound like this:

> Yes, I agree that the interaction for "add to cart" should be updated. With the release next week, we will need to postpone implementing the new search template so that we can get this in. Do you agree?

You've started off on the right foot and allowed them to participate in the process in a positive way. Often, people simply don't understand everything that goes into our decisions. Leading with a yes invites them to be part of the decision so that they can help us navigate the process.

> Yes, you're right that our documentation isn't where it should be, and we need to fix that. If you'd be willing to help me oversee that part of the project and audit the existing docs, I think we can arrange our priorities to make it happen.

It's a common problem for people to offer ideas without any responsibility. People on the outside will criticize things they have a limited view of. But if you give people the chance to be part of the solution, they will either take you up on it or they will see how their suggestion impacts everyone else. In either case, you've remained positive and helped them to see that their opinions are valuable and appreciated.

Sometimes, leading with a yes alone can get you the trust you need to move forward without even having to discuss it further. Often, our stakeholders just want to know that we value their time and feedback. Leading with a yes can have the effect of disarming the person just enough to demonstrate you're listening and open up the possibility that you can be trusted with the solution. Using the word yes can be a life-giving, magical word.

I was in a meeting with several people, including the president of the company. He began nitpicking one specific part of the design. It was an important part of the experience, but his feedback involved very specific suggestions about the placement, copy, color, and interaction. Although I was happy to address his concerns, his feedback seemed misplaced. Why would an executive care so much about these little details? Rather than get into a discussion about it, I said "Yes, I agree with you that we need to reconsider the implementation of this menu." Abruptly, he stopped, and said, "Great, I know you guys will find the right solution."

You see, he didn't actually want to get into the details of design minutia. In hindsight, he was probably "just talking"; he saw something, had a suggestion, and brought it up. He knew that it wasn't his job to come up with all that stuff. So, what seemed at first to be an unusual or concerning series of suggestions was actually just a casual conversation. My agreement with him reminded him that we could be trusted with the solution. He wanted to know that we were listening to him and considering his feedback. After that, he was happy to let us do our jobs. Leading with a yes reinforced this and let us get on with the meeting.

PUTTING IT INTO PRACTICE

Leading with a yes is one of the simplest things you can apply to your work conversations right now. All you do is begin your response with the word "yes." That's it.

People sometimes tell me this feels awkward. I get it. It's not always colloquial to start a sentence with yes when you normally wouldn't. However, as I've practiced this for many years, I can tell you that it feels much less awkward when it is a habit. The awkwardness is felt much more on the deliverer than on the recipient. Once you get used to doing it, those feelings will fade, and it will come more naturally.

People also ask me whether they should actually use the word "yes" or if they can just use positive language to communicate the same idea. My advice is to actually use the word "yes." While you should use whatever language you're comfortable with or you feel is most appropriate for the situation, my experience tells me that the word "yes" is more effective than other similar approaches. It's not that you have to use the word "yes," but I believe you will be more effective if you do.

Lastly, people often ask how they can say yes when they disagree with what their stakeholder is saying, so let me be clear. Leading with a yes is not about saying yes when you actually mean no. It's not a psychological trick to fool people into agreeing with us.

- **Should you agree to make their changes if you don't intend to?** No, absolutely not. That's called lying.
- **Should you make them think you're on the same page when you actually disagree?** Nope, that's disingenuous.
- **Should you tell them their idea is great when you really think it's terrible?** Well, my mom always said if you can't say something nice, don't say anything at all, but this doesn't sound like a great way of leading with a yes to me either.

Instead, leading with a yes is about reminding people of the areas where we agree, before we get to the parts where we don't. It's about demonstrating that we're all on the same team, headed in the same direction, even if we have different ideas about how to get there. And it is very effective at communicating that we value our stakeholder's input, perspective, and ideas.

There are dozens of ways that you can lead with a yes without actually committing yourself to anything. Here are a few:

- Yes, that's a very good point.
- Yes, thank you for sharing your perspective.
- Yes, I agree that we need to solve this.
- Yes, there are definitely some ways we can improve this.

- Yes, we should decide the best path forward.
- Yes, I understand where you're coming from.

One caveat is to avoid following the word "yes" with the word "but"—it turns out that "Yes, but..." is just another way of saying no, and most people will hear it that way. Even "Yes, however..." communicates a similar feeling. I've found that you can often just leave out the "but" or "however" and the sentence still works. Instead of, "Yes, but our team looked into that," you can simply say, "Yes, our team looked into that."

I get more positive feedback from people about this concept than any of the other ideas in this book. So if you take away nothing else from these pages, remember to always lead with a yes. It's low risk. Go try it and see for yourself.

As you develop your yes reflex, remember:

- It reinforces that you're all on the same team and facilitates collaboration.
- It allows you to be open to new ideas, even if you're not sure how it will work.
- It keeps the conversation open-ended, giving you time to find the appropriate response.
- It gives you the opportunity to consider ideas in light of limitations and resources.
- It shifts responsibility for new ideas onto others, making them participants in the solution.
- It builds trust and confidence with stakeholders that you value their input.

Establish a Positive Persona

Working with stakeholders is more challenging if we don't have a good rapport with them. When we go into a meeting, we might assume the worst, prepare for a battle, and put up our guard to protect us against negative feedback. We can become defensive, which is reflected in both our posture and our response. Over time, this can evolve into us having a reputation of being ambivalent, unengaged, or (worse) difficult to work with.

Instead, we need to work on establishing a positive persona so that our stakeholders are interested and attentive when meeting with us. We have to be likable, approachable, and project a sense of self that's appealing to them. Developing this persona is about presenting ourselves in a light that reflects our best qualities and demonstrates an earnest interest in helping the other person. This is essential to getting their support. A grumpy or defensive personality isn't going to woo anyone into agreement. Instead we can smile with confidence, be authentic, not take ourselves too seriously, and orient ourselves toward them and their needs.

HAVE CONFIDENCE, NOT ARROGANCE

Having confidence is important when presenting your work to other people. If you have confidence in yourself and your designs, people will trust you and give you more freedom. When you lack confidence, you convey uncertainty, which leads stakeholders to question your solution. To be certain, having confidence is not about being arrogant, cocky, or asserting that you're always right. It is allowing the knowledge that your skills are valuable to overflow into your tone, body language, and attitude when you talk about your work. Being confident is being proud of your work while also understanding that you're not the only smart person in the room.

To build your confidence, consider this: you got this job for a reason. Maybe it was your detailed portfolio, your extensive resume, or your relevant work experience. Whatever it was, your stakeholders chose you for this job. That conveys a certain amount of trust, belief in your expertise, and a willingness to let you make decisions. Although you will always have to work to earn their trust, you're already in a great position to communicate your message with confidence.

One simple way to communicate that confidence is to smile. Most people think of smiling as expressing happiness, but smiling expresses a lot of other emotions, as well: agreement, enjoyment, appreciation, connection, and yes, confidence. When we smile, we show that we expect to be in agreement with others, we appreciate their time and attention, and we are confident in our ability to solve difficult problems. People without confidence don't smile; they look concerned, worried, upset, or distant. If we want to convey confidence, we should smile as much as possible. When you're meeting with stakeholders, make a conscious effort to smile even if it feels a little awkward. Smiling will show your confidence and build theirs in the process.

JUST BE YOURSELF

It's also important to learn to be yourself around stakeholders. No one likes it when they have the feeling that the other person is being fake. We are at our best when we are ourselves. We are relaxed, natural, and able to think more clearly. Too often, designers put on airs in a meeting. They puff themselves up to protect themselves from negative feedback, but having that attitude will only backfire. Instead, use your strengths to your advantage, relax, and be yourself.

Being yourself helps everyone else relax, too. They can relate to you more easily when they see you for who you really are. Part of what makes us so great as individuals is our own unique way of winning people over. Everyone is different, yet everyone has a way with people. What is it that you do to make people smile? How do you get someone's attention if you need to? How did you win the heart of your spouse or the class election in grade school? Whatever successes you've had in the past, use those same characteristics to your advantage in projecting a persona that is uniquely you.

Some people are witty or funny. Some are good at hospitality and making people feel welcome. Others are great at listening and following up, giving gifts, paying compliments, or remembering important dates. Whatever your thing is, you have an opportunity to use that unique gift with the people who you want to influence. There is no better way to influence people than to use your natural-born tendencies to appeal to the needs of your audience. The point is this: relax and be yourself. You'll be better for it, and your stakeholders will appreciate your authenticity.

DON'T TAKE YOURSELF SO SERIOUSLY

Sometimes, we are so serious about our work, our project, or our task that we're unable to relax and respond with a posture that makes us seem human. We act like robots: unable to grasp a lighthearted comment or show simple kindness. When we get in this "getting things done" mode, it can be really easy to have tunnel vision and become too focused on the tasks. That can be fine (and really effective) when we're heads down creating awesome stuff, but it's much less effective with a group of people whose support we need. Learn to relax: not everyone thinks as seriously about your work as you do.

We should also be kind, lighthearted, and even funny around the people that we want to support us. Put simply, we need to be likable. Using humor is a great way to do this. Humor disarms uneasy situations, and laughter reduces tension. Breaking the ice with a benign joke or lighthearted comment is a great way to get everyone to relax and focus on the purpose of the meeting.

There's a delicate balance of knowing what's appropriate, what's actually funny, and what's completely off-limits. It can be good to poke fun at the elephant in the room, especially if everyone is particularly uptight about it. However, it's not okay to focus jokes on one specific person, no matter how funny or relevant it might be. I find that dad jokes or bad puns are pretty safe and effective, even if (or especially because!) they elicit groans.

As much as I'd like to think I'm a comedian, it's not really my place to advise you on using humor, but with the right exposure and good inputs you can learn to use humor to make people smile, disarm them, and keep the conversation moving forward in an upbeat way. The goal isn't to make everyone laugh, but for you to be amused with yourself and to share that attitude with everyone else. Humor is a great way to not take yourself too seriously with the people whose support you need in order to be successful.

ORIENT YOURSELF TOWARD OTHERS

The last technique we need to apply is to have a posture that is oriented toward other people. When we align ourselves with the needs of others, we create a connection that can overcome any obstacles to our communication.

The opposite, of course, is being egotistical—focused only on ourselves. Just as we are checking our ego at the door, we are also turning our minds to our stakeholders and thinking about what they need to hear to support us. It's not a selfish attempt to pander to them to get what we want, but an honest look at how we can talk to them in a way that will make them (and us) successful.

When I do something to hurt my wife's feelings, I know it can take time for her to forgive me and to move on. However, I can accelerate that process. I have confidence that she *will* forgive me, so I can approach her with a smile and an assumption that reconciliation is possible. I can be myself by being honest about my intentions and provide my perspective. I also don't need to take myself so seriously, so I will always break the tension with a joke or witty reference to my own stupidity. All the while, my response is oriented toward her needs: what does she need from me to reconcile?[5] If I do that, we are usually able to move on pretty quickly and focus on the most important things together.

Getting into the right mindset requires that we are conscious of how we are perceived by other people. Developing a positive persona is important to overcoming the obstacles needed to get support. We can ensure that our stakeholders are working with us to create the best user experience when we smile with confidence, are authentic, don't take ourselves too seriously, and orient ourselves toward their needs and expectations.

Change Your Vocabulary

As you make the transition to a mindset that is positively focused on yielding a great response to stakeholders, it's important to commit some things to memory about what you should and shouldn't say in the process. Before you respond, you need to change your vocabulary.

"YOU'RE WRONG"

Don't say "you're wrong"—no one likes to be told they're wrong (even if they are), and you'll only make them defensive. Remember, your goal is to stay positive and always lead with a yes. Even directly telling them you disagree can be a flash point for the conversation. If you need to disagree, find ways to communicate that disagreement as an alternate idea or a different perspective. Even though there might be times to put your foot down and explicitly stand up for something you believe in strongly, it's almost always better to project yourself as being in alignment with the stakeholders as much as possible. Finding those opportunities for outright disagreement are difficult and probably not worth the risk.

5 Washing the dishes *always* helps.

"FROM A DESIGN PERSPECTIVE..."

Don't start any sentence with "From a design perspective..." because that's usually just another way of saying "from my perspective." Remember, we don't care about *your* perspective; we care about the user's perspective. Plus, this sounds like you're trying to one-up them with your expertise in design. Although your expertise and perspective is indeed valuable, it's not usually necessary to point it out. Our stakeholders understand that what we say is our perspective. Sometimes we use this phrase to mean "the reason we did it this way...." If that's the case, say that. You do not want to create a separation between your expertise and that of the stakeholders. We're all on the same team. "From a design perspective..." doesn't reinforce that, so strike it from your vocabulary.

"LIKE" AND "DON'T LIKE"

Don't talk about what you like or don't like; instead, focus on what works and what doesn't work. Remember, our interest is in the usability and effectiveness of the application, not our own personal preferences. In fact, remove the word "like" from your vocabulary altogether. If you catch yourself saying it or asking other people what they like, stop and correct yourself. It will be worth emphasizing that you shouldn't have used "like" at all.

This is more difficult if you're discussing the visual design of an application, rather than specific flows or general usability. If the express purpose of the meeting is to review the visual design, you still need to find ways to communicate why you think the visuals work or don't work rather than why you like or don't like them. For instance, because specific colors and styles contribute to the user experience, you can keep your comments focused on how the visuals affect branding, perception, or emotion. Our goal is to ensure that the experience is consistent, thoughtful, and delightful. A rightful focus on avoiding the word "like" will help us be effective in our response.

TOO MUCH JARGON

Finally, avoid using industry-specific jargon as much as possible. Instead, find words that the average person can understand so that we're all on the same page. It is easy in our UX designer bubble to become accustomed to referring to specific processes (Agile, scrum, sprints), tools (GitHub, Sketch, Axure), or elements (accordion, CTA, modal). Many stakeholders don't share in our design-web-app culture of vocabulary, so before we respond, we should take the time to filter our response for words that might be unclear.

Instead, use the knowledge you have from listening to them and adopt the words that you heard them use, as we saw in Chapter 4. This is your opportunity to repeat and rephrase what they said in an effort to both communicate clearly as well as teach them to talk about design, too, but you can't start off by using words that are unfamiliar. Always be cognizant of the vocabulary you use and make sure it's something your stakeholders will understand.

Make a Transition

Now that you're in the right frame of mind, you need to provide a transition to your response that will set you up for success. You have the opportunity to get their attention and let them know what to expect. It's critical to ensure that your stakeholders listen to and accept your response in the best possible light. This is the response *before* the response.

However you decide to structure the actual response, remember to keep this transition brief. The point is to provide a transition only, not a long introduction. I recommend a simple approach called "Thank, Repeat, Prepare." Each of these three elements should be part of one quick statement.

THANK

The first thing you should do is thank your stakeholders. It's the most polite way to get from what they said to what you want to say, and it recognizes that their time is both valuable and appreciated. We always want our stakeholders to know how much we appreciate their time and attention. They're the reason we're so fortunate to have this incredible job! As briefly as you can, form a word of thanks as you begin this transition.

REPEAT

Next, briefly summarize what the stakeholders just said if you haven't already. I don't mean that you should go over each point line by line from your notes. Instead, make a statement that describes what they've just done for you in a way that is complimentary. This will naturally build off of the "thanks" that you've already led with and remind them that you were listening.

PREPARE

Lastly, tell your stakeholders that you're about to respond to their feedback. Perhaps it seems obvious (and it is), but the transition is meant to provide a segue for everyone. However unnecessary it might seem, setting the stage in this way will create the right kind of vibe and prepare them to listen.

It's not enough to just tell stakeholders that you're going to respond. You need to give them some insight about the content of your response; you're foreshadowing what's to come. You should tell them not only that you're going to respond, but how and what you plan to say. This is an opportunity to let the cat out of the bag, to clue them in as to what your feedback will be to ensure that there are no surprises. You're trying to avoid beating around the bush by being direct and getting straight to the point.

Here are some examples:

- "Thanks for sharing your thoughts with us about this project. Your insights are really valuable, and I appreciate you going through all that with us. I'm going to go back through all of your points so that we can discuss them, but I'd like you to understand how we came to these conclusions first..."
- "Thank you for sharing your feedback. I appreciate the opportunity to go through all of this with you because it's important for us to be on the same page. I'd like to go back over everything you said because there are some important points where you need to be aware of our decisions in more detail and it will help you to see how we're approaching this problem."

These are somewhat general and can be used in about any situation, but you can see how they all create a similar feeling, reinforce the team mentality, and let the stakeholder be prepped for what's going to come next. In both cases, I've told the stakeholder that our ideas have an explanation worth considering. Maybe it seems like communications mumbo-jumbo, but the practice of telling someone what they should or are likely to think is actually very effective. Interestingly, people will often believe what you tell them, so tell them that they will agree with you! Even if they don't, you've at least set the stage in a positive way.

Here are some other examples that might deal with more specific feedback:

- "Thanks for pointing out the differences between the existing app and our new designs. You're right that there are some important things we should consider, and I want you to know we put a lot of thought into how we designed it, so I'd like to explain to you why we did what we did with the grid views."
- "Thanks for being up front that you're concerned about our implementation of the cart and checkout flow. I'm going to address each of your points because we had some very specific reasons for doing it this way that I want you to be aware of. I think you'll agree that this is going to increase conversion once you understand our thought process."
- "Thanks for your viewpoint on the home page. You've definitely given a lot of great feedback and I'd like to go through it all, if that's okay. Our thinking about the layout had more to do with our long-term vision and some other initiatives that we expect to see down the road, so it's important for you to know why we approached it in this way."

The point is this: it's not enough to just launch right into a defense of your work. You must take the time to get in the right frame of mind, stay positive, and make a graceful transition to what's next.

All this prep work will pay off. It might seem like there's a lot to consider, remember, and do to just have a simple conversation with a stakeholder about design, but the process moves very quickly in real life. Our job is to adopt these practices and make them habitual so that we can transparently navigate the conversation.

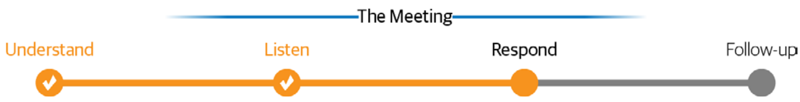
In summary, to get into the right mindset, we need to:

- Realize that our role is to lead a conversation about design solutions, not receive feedback
- Give up control of the outcome so that we can allow other people to provide their perspective on the project
- Check our ego at the door so that we can be open to other people's ideas
- Lead with a yes so that we create an atmosphere of agreement and cooperation
- Develop a positive persona so that we can win people over with our own unique style
- Change our vocabulary so that we avoid tainting our response with potential miscommunications
- Form a transitional phrase so that we can set the stage for what we're about to say

At last, we can now jump into our own response and find the best ways of helping our stakeholders to see our perspective. The best part is that there are already some tried-and-true ways to get the support we need. The next step is to form a response.

[6]

Form a Response



Now that it's time to actually respond to our stakeholders, we need to take everything we've gathered so far and apply it on the spot. Responding to stakeholder feedback is a matter of forming your words in a way that will yield the best response by staying focused on the goal of the meeting: to get support from them and agreement to move forward. To accomplish this goal, we can break down the response into several core parts. That logic will flow together and make it possible for us to present our reasoning in such a way that it will communicate the very best response.

When we communicate with people about design and expect to get their buy-in, it's no different than other disciplines that desire action from the recipient, such as marketing and advertising, politics, or even military campaigns. There is a pattern we can use to mimic these other communications approaches. As with any good communications plan, we need to have an objective or goal, a strategy for achieving the objective, tactics for delivering the strategy, messaging for employing the tactics, and, finally, a way to elicit a response from the recipient. Each one feeds back into the other to help us accomplish the goal.

In this chapter and the next two chapters, we will look at these parts in detail. For now, we'll begin by first defining our strategy for responding. We need to know what we want to say to achieve our objective of getting agreement. Next, we will look at four specific tactics for delivering that strategy. These tactics are tailored to design discussions and give us some options for how to talk about our work in the context of the user experience (UX). In Chapter 7, we will review several of the most common response types used for UX design feedback. These templates will help you identify the key messages that are important for your situation and give you a starting point for your response. Finally in Chapter 8, we will bring everything together by creating a response that touches on all the important areas and then directly asks for agreement from our stakeholders. This is what I call the *ideal response*. If this all seems a little too contrived for the average conversation, stick with me through this process, because we first need to look at all the parts individually for them to flow naturally in a real context.

At a high level, crafting a good response requires that we:

- **Define our strategy for responding.** What will we say to make a compelling case?
- **Employ tactics that will help us get there.** How will we deliver the strategy?
- **Identify common, relevant responses.** What key messages are important in our context?
- **Apply a common framework and ask for agreement.** What do we want our stakeholders to do next?

A UX Strategy for Responding

We already know our objective: to get support from our stakeholders and agreement to move forward. Everything we say needs to take this into account. The way we do that is to employ a strategy for responding that keeps us focused on that objective. Let's go back to the three questions I posed in Chapter 1 that will help you be a better communicator and a great designer. It's important to emphasize that all throughout this process you're going back to your answers to these questions and using them to inform how you respond to your stakeholders:

- What problem does it solve?
- How does it affect the user?
- Why is it better than the alternative?

The answers to these three questions form the basis for every response you provide to stakeholders. If we can communicate these three things, we'll set ourselves up for success. Conveniently, we can craft our strategy for responding around our answers to these questions. That will lay the groundwork for the tactics we choose to use in our response. Let's see how each of these questions gives us a clear strategy for responding.

APPEAL TO A NOBLER MOTIVE

Our first strategy for responding is to *appeal to a nobler motive*. Every time you respond to design feedback, you should always attempt to attach your decisions to a goal, metric, or other problem that you're solving. This is where your answer to the question *What problem does it solve?* comes in handy. This idea of associating your decisions with an agreed-upon metric is one of the steps to effective communication that Dale Carnegie calls "Appealing to a nobler motive" in his 1936 classic *How to Win Friends and Influence People*.[1] I find that this is especially effective in design discussions and is often the missing ingredient from a designer's portfolio of communication techniques. You want to find the thing that you know your stakeholders care the most about and connect it to the proposed user experience.

With any application or website, we have an agreed-upon set of goals, metrics, key performance indicators (KPIs), or other success factors. We are trying to solve problems with our designs, and every decision should reflect that. As mentioned in Chapter 1, having these problems defined in the beginning and a metric for measuring success will be critical to making your case with stakeholders. If you don't have any goals or metrics, write them yourself and present them to the stakeholder. You both need them if you're going to succeed.

Often, design feedback from stakeholders isn't taking these goals into account at the outset. People look at something and react, often without considering the original intent of the project. Art and design, after all, are intended to elicit emotion, to create a response, and so your stakeholders' knee-jerk reaction to your work may not be an indicator of

1 Dale Carnegie, *How to Win Friends and Influence People* (New York: Simon and Schuster, 1936).

failure; they just simply aren't thinking about the original goals. Your job is to keep those front and center, remind them why you're all there, and keep the discussion moving forward.

Increasing add-to-cart rate

I was working on an ecommerce site with a goal of increasing the add-to-cart rate. We had created some great interactions specifically geared toward improving this metric, and the design was tailored to the unique logistics challenges of this particular business. As stakeholders compared the experience to other popular ecommerce sites, a lot of questions arose. "Why was this button so big? Did the interaction really have to use that particular control? Are we sure this is the right copy for the call to action?" Beyond the design, questions came up about other metrics: "What about cart abandonment? Overall conversion? Didn't those matter too?" In these conversations, I could point back at our goal for the phase (increasing add-to-cart) to remind them of that focus and why we believed these decisions would improve that KPI. Without this previously agreed-upon metric, we could have easily allowed the project to morph into a monster of addressing each concern that came up, and the result would have been a mess. Instead, we kept our designs laser-focused on the problem that we were asked to solve.

More than justifying your decisions, though, appealing to a nobler motive can also help you to keep the meeting under control. In another meeting with the same team, the discussion turned to the visibility of the store finder utility and how it showed in-store stock levels in the search results. Although that conversation was important to the business overall and it was indeed an issue that needed to be addressed long term, it was not something that we were trying to solve in that particular phase. Rather than allow that discussion to derail the meeting, I proposed adding this as a backlog item to be discussed for a future phase and delay the discussion. We were able to stay on track.

You see, sometimes the thing you get stuck on is not actually going to help you achieve your goals and so it's appropriate to suggest moving on and addressing it later. If your goal is to improve conversion but everyone is talking about whether the loading indicator should be a spinner or a status bar, that's a good sign that the conversation is not ultimately going to help you. The spinners might be important, but don't get stuck on it. Agree to move on. Any time you can connect your design decisions to the original goals, use cases, or metrics of the application you stand a great chance of making your case.

REPRESENT THE USER

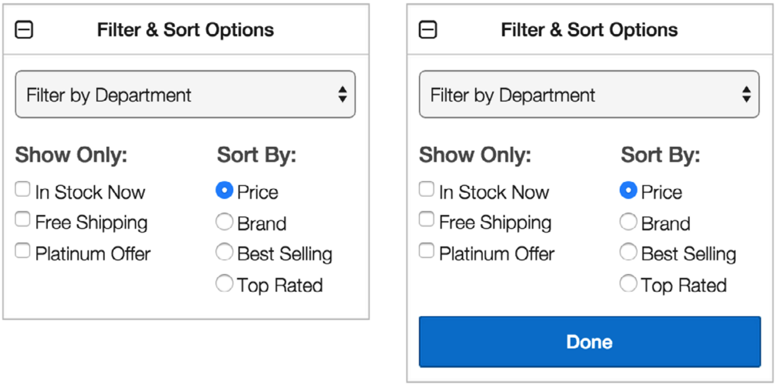
Our second strategy is to explicitly *represent the user*. Perhaps it's so obvious that it's easily overlooked, but our response should always represent the user in a way that is tangible and real—more than just lip service. We have to help our stakeholders understand our decisions by answering the question, *How does this affect the user?*

We naturally think a great deal about the user. We probably even refer to "the user" in our meetings, but it's important to remember that our role in the design process is not just about building things that take the user into consideration; it is actually to advocate on their behalf to our stakeholders. We are the representatives of our users at this meeting.

Your response is an opportunity to bring what you already know about your users and present it to your client in the form of a story that creates the kind of empathy required to drive us to action: to make the best decision for them. Instead of focusing on the mechanics of the system, we create a human connection that demonstrates a real need being met.

Adding a button

One of the great things about modern web applications is that they can update the page without the need to refresh and reload everything. However, I've discovered that this occasionally causes problems with users who expect to see the page change when they choose a different option. If it doesn't, they think the app isn't responding. In one app like this, we had a set of filters that the users could check and uncheck. The page was updated instantaneously, without even the need for a loading indicator, but some of the users we observed didn't realize the search results had been updated, so I added a Done button that closed the filter panel and gave them a sense of completion.



The addition of a Done button gave the user a greater sense of control, but in fact did nothing more than close the panel.

When I presented this change to our stakeholders, I had to justify the addition of a button that seemed unnecessary and did almost nothing, yet took up space in the UI. The easiest way to represent the user in this case would be to talk about my observations in general terms:

> In our usability study, people didn't realize that the search results were being updated automatically, so we added the Done button to give them a way to explicitly indicate that they were finished.

What would be better is to present the same idea as a story (or use case) that describes a real situation for users.

> People are distracted while they shop with the app, and they need to indicate that they've finished filtering. The Done button allows them to do that and gives them a sense of control over the filters.

What would be best, though, would be to tell a story of one user who makes a good spokesperson for others, using human details that encourage a connection to their needs.

> We had a parent using the app in-store with their kids. They didn't notice the results updating and tapped multiple times, becoming frustrated. Giving them this Done button will make it clearer and show them products more quickly.

As I mentioned in Chapter 1, user observation and usability studies are critical to your ability to communicate effectively to stakeholders and make a case for the user. You can't represent someone you've never met or observed. So, do whatever is necessary to make yourself get up and go watch people use your project. It doesn't take very many observations to draw meaningful insights about the design of your application or website. You can then apply this understanding in your meetings with stakeholders to represent the user and make a case for why your designs are the right option for delivering the best user experience.

DEMONSTRATE EFFECTIVENESS

Our third strategy for maintaining the user experience answers the final question *Why is this better than the alternative?* and positions us to get the support we need to move forward. To do this, our response must demonstrate how our proposed solution is better than the alternatives, including any of those suggested by our stakeholders.

As I mentioned earlier, this is the part of the conversation where designers often fail to adequately make a case for their designs. Even though we probably do a pretty good job of solving problems and making things easy for users, we are less adept at helping people understand why and how our designs are the best approach. Being intentional about demonstrating this is important to communicating that value.

Your response is an opportunity to not only talk about why your design is better, but to also visually show why and how your designs will make a difference. Talk is cheap, but a picture is worth a thousand words. Every response should focus specifically on the differences between each design and express why your own solution is best. More than that, you must show your stakeholders precisely why that is the case. Being able to identify and express these differences is an important skill in articulating design decisions.

Prototyping FTW

One of the things that can be really difficult to understand until it's in a usable form is user flows. UXers spend a lot of time putting sticky notes on the wall, discussing the right way to guide a user through the application, and then flesh those out in a series of static mockups. Often, what seems to make sense on the wall of a conference room has a very different feel when you're holding it in your hand.

A mobile app I worked on had a very complicated flow for users signing up for a series of special promotions because there were a lot of variables. Did the user arrive from a special URL or an email campaign? Were they paid subscribers? Did they have an online account? Were they logged in? Depending on the combination of variables, the user might be funneled into one of a dozen or so different paths. Early on it was clear just how confusing these flows were, even to those of us designing them. After the team had agreed on a solution, I realized we were overcomplicating it and suggested a simpler approach, but my stakeholders weren't convinced it would cover all the cases.

Rather than argue about sticky pieces of paper on a wall, I instead jumped into prototyping mode and built a simple frame-by-frame demo of how it should work. The result was immediate support, like light bulbs going off in everyone's head as they saw the difference. The original flow felt confusing and error prone as soon as we held it in our hands. The newer flow was simpler and obvious. So simple, in fact, it was hard to believe that we hadn't thought of it before. In this case, the most eloquent words might never have convinced anyone of the right approach. It wasn't enough to just talk about it; I had to actually demonstrate the effectiveness of my solution. Demonstrating your designs is an important strategy for articulating design decisions.

Tactics Are Actions

Now that we have our strategy well defined, the next step is to employ tactics to help deliver on that approach. When talking about design, I suggest five tactics to shape our response:

1. Show a comparison
2. Propose an alternative
3. Give them a choice
4. Ask others to weigh in
5. Postpone the decision

There is not one way to apply these tactics. You might choose to use one or all of them, depending on the situation. Your job is to decide which of these methods will create the best case for your designs and help you get agreement.

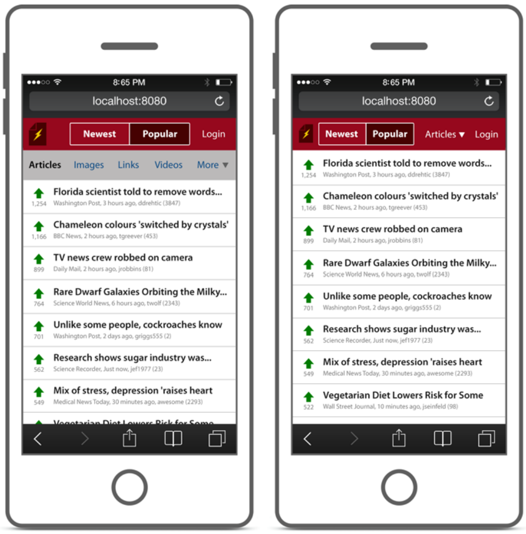
1. SHOW A COMPARISON

The first tactic is to show a comparison. You want to take your proposed design and the suggested changes and show them side by side so that the differences between the two are clear. The purpose is to provide a visual reference that leaves no question about which approach is the best. Too often, we talk about design in meetings using words that cannot adequately demonstrate the effect it will have on the user experience. The idea here is to find a way to make quick design changes and put both options next to each other.

I usually do this directly in design software by taking a screenshot of both ideas and dragging them onto the same canvas with a large dividing line down the middle. I may already know what the feedback is going to be, and I've prepared both designs for discussion. Perhaps my stakeholder insisted on the change at a previous meeting. Now, I'm coming back prepared to make a compelling case with visuals that will show the differences and, hopefully, make my case. No matter how you do it, show both options in the same view so that you can discuss them without having to switch tabs or windows.

Show all the things

One of the sites I worked on had a two-level horizontal navigation, one below the other. The second level of navigation was a set of filters that, although useful, were not part of our goals for the project. They were simply an artifact of the design discussion, "Let's show all the filters!" However, one of our design goals was to fit as much content (in this case, news headlines) within the vertical browser space on a mobile form factor. So, we optimized the design of the content blocks to ensure that the headlines themselves were plainly visible, including removing many other elements that we might normally want to include, such as content tags or the author's name. As I was working on it, I realized that this second level of navigation was taking up too much space, so I redesigned it to make everything fit in one horizontal menu. The way that I did that, though, was by moving the filters into their own dropdown menu and prioritizing a few of the main-level items.



I redesigned the navigation to be one level because fitting headlines in the vertical browser space was an important goal for this project.

When my client saw it, he disagreed, asking, "How will anyone know what they can filter if they can't see the filters?" But because I knew that fitting more content within the vertical space was a priority, I decided to simply show him the difference rather than argue about the discoverability. I grabbed screenshots of both designs and put them side by side with a big line down the middle. It was immediately clear by way of the comparison that the new design had helped us achieve one of our goals for the application. Not only was this technique effective, but it saved me the time and energy of having to describe a design decision that was better communicated visually.

When clients or stakeholders make suggestions about how to change your design, it's unlikely that you'll get away without at least trying it out and showing it to them. You have to first address their concerns and then show them a better way. If you only show them their idea by itself, they're likely to believe it's the right choice because there is no reference to your original proposal. They may not remember the differences. However, comparing the two side by side in the same view allows everyone to see what was changed and plainly tells a story about which design solves the problem.

2. PROPOSE AN ALTERNATIVE

The next tactic for responding is to offer an alternative solution that meets the need in a different way. In Chapter 3, we took the time to anticipate our stakeholders' reactions and preemptively prepared alternatives that could be used in this situation. Now is the time to bring these ideas to the table so it's clear that there is more than one way to solve this problem. Maybe you had a similar idea in the moment, some designs that didn't make the final cut, or their suggestion was close but not quite close enough. You might propose something completely different or even suggest something that meets them halfway. Whatever the case, proposing an alternative is a necessity in almost every situation.

It's rare for stakeholders to be in tune enough with the user and with interface design that they'd be proficient at proposing solutions that don't require some level of refinement. Even if their suggestions are really great, be sure to think critically about the implications and add value to the process to make it even better. That doesn't mean we should discount the stakeholders' input as irrelevant or value our ideas over theirs. Our job is to take these suggestions into serious consideration and then apply our own expertise to take it one step further. As the experts on design, this is where we add value the most.

Many stakeholders lack the vocabulary to suggest meaningful changes to our work in a way that makes sense to the end user. It's been my experience that when people use generic terms to describe a solution, it's a sign that they really don't know what the best solution is and that our alternatives are welcome. A common expression of this is with the use of the word "button," and yet a button is rarely the right solution to a complex design problem. Instead of adding the button, choose a more appropriate UI control, move it to a different position, or make it more subtle. There is always a more appropriate way of implementing stakeholder suggestions than to just take them at face value.

> **Stakeholder:** Just put a big button in the header.
>
> **Designer:** Yes, I see what you mean. I'd recommend using a text link instead and adding an icon to emphasize it, rather than a full-size button, which will compete with the other options in the menu. This is also consistent with the other utility links we use elsewhere.

In fact, most stakeholders expect that we will bring our own suggestions to the table and that we're capable of offering solutions to the problems they identify. This is, in fact, why they're paying us. Don't be afraid of reprisal when you take their feedback and apply it differently. Even if they overrule you, you're demonstrating that you're intentional about your thought process and creating an awareness that these decisions aren't to be taken without consideration. A track record of being able to gracefully propose alternatives will win you the respect of your stakeholders as a trusted partner who is always interested in making their product the best it can be.

3. GIVE THEM A CHOICE

A third tactic is to give stakeholders a choice between something you know they want and the new thing they're suggesting. You want to present their suggestion alongside what they'll lose if we go down that path. They have to make a sacrifice. This is very effective if the thing they will lose is more important than what they propose.

In consumer behavior, the fear of loss is more powerful than the promise of gain. This is why we have coupons that expire, early-bird rates, and limited-time offers. The fear of missing out on a good deal overrides our sense of rational thought about whether we actually need what's being advertised. Without attempting to manipulate our clients into making rash decisions, we can use this understanding to our advantage and help people better see the design priorities in light of the entire experience. What is it that they will lose if we do what they're proposing? Capitalizing on this potential loss can be very effective.

This tactic isn't meant to be a grab for control, the way a parent might force a decision on their child at dinner by saying, "You can't have dessert unless you eat your vegetables." Instead, it's an honest attempt to make stakeholders aware of the implications of their proposed choice. We need them to know that every decision affects everything else. Our job is to be attuned to those connections and communicate them when they're relevant to the discussion.

I have often likened this to solving a Rubik's Cube because someone is going to come to our meetings and say, "I want that side to be red. If you turn that here, my side will be red." Our job is to be so aware of these connections that we can respond, "Yes, I love red! I want that side to be red too, but when I turn that side, it affects the other sides too and

I have to solve the whole cube." Because many people want their ideas to be front and center in the design, it's often possible to point out that their suggestion will have a negative effect on the overall experience.

Here are some examples:

- **"If we add that new call to action, it's going to move the login form further down the page."** You know that they've explicitly asked that the login form be higher up, and moving it could adversely affect conversions.
- **"Adding that will require some time, so if we do that, we won't be able to launch with the dashboard graphs."** You know that the dashboard graphs are a priority for this phase and that by comparison the stakeholder's suggestion isn't as important.
- **"If we put that new option in the menu, there will not be enough space for the existing items. We'll need to remove either Preferences or History."** You know that those options are part of the core feature set, whereas the new options add less value or even distract from the experience.
- **"Changing this text link to a button will compete with the other buttons on the page. If we do that, we'll need to remove or change the other buttons to accommodate it."** You know that the other buttons are purposely designed to attract the most attention, and adding another will create too much visual weight.
- **"Moving the messaging to the right column means that we cannot support products with multiple options. Should we remove support for these products?"** You know that we have to support products with multiple options and, therefore, moving the messaging is not possible.
- **"Adding a logo here will distract the user from their profile tasks. If we have to add the logo, I'd recommend refactoring the design of the user's profile tasks to be smaller and more subtle."** You know that the user's profile tasks are the point of this view and that placing a logo in this space won't actually add any value to the experience.

In each case, we are emphasizing the tradeoff. Not only does this allow stakeholders to see their feedback in light of all the other priorities on the project, but it also involves them in the decision process and empowers them with the right information. Any time you can allow someone else to agree with you in a way that makes it seem like their decision, do it that way. Think about what will be lost in the process, be aware of all these connections, and call it out when you know it will negatively affect the user experience.

4. ASK OTHERS TO WEIGH IN

The fourth tactic is to solicit help from other people and ask them to weigh in on the decision. This is where the time and effort you spent building good relationships, creating a network of support people, and asking people to participate in the meeting is put to use. There are other people in the room who will agree with you, and you want to ask them directly to speak up. Creating a feeling of consensus around your designs will bolster your case and help your stakeholders to see that other experts agree with you. This shows your stakeholders that others are already in agreement with you; they just need to join you.

It also helps make your case without forcing you into the awkward position of outright disagreeing with a stakeholder. This is partly because you let other people do the talking and take the pressure off of you. But also, when other people are able to agree with you (rather than directly disagreeing with a stakeholder), you maintain a positive atmosphere rather than a flat-out accusation that one person is wrong. You're deflecting the disagreement with a stakeholder by instead emphasizing the agreement from other people.

When you ask others to weigh in on the conversation, it's important to remember to always ask directly and remain neutral:

Ask directly
: Call on people by name and ask them directly what they think. If you ask the entire group for feedback, few people will speak out in disagreement with the other person. You want to ask an individual person for an opinion. For example, "David, what are your thoughts on this?" or "David had an interesting take on this issue earlier. David, do you mind sharing?"

Remain neutral
: Don't ask for feedback in a way that reveals your true feelings about the stakeholder's suggestion. Instead, ask open-ended (not yes/no) questions using terms such as "opinion," "viewpoint," or "perspective." Ask for people's thoughts or reactions in a general way. For

instance, say "David, I'd be interested in hearing your perspective on this," rather than pitting him against another person, "David, do you agree with Susan?"

Stuck in the middle

At one of my largest clients, two different UX teams were coming together to collaborate on a special project for the first time. Each team brought a unique perspective, and both groups were opinionated. I was stuck in the middle, tasked with managing a conversation of competing priorities. When it came to some of the details of the UI, like specific colors and the placement of smaller details, I found that it was far more difficult to reach a consensus. The leader on one of the teams was more vocal and opinionated than the others. I knew that if I could get his support, it would be easier to make a decision.

I made a point to share my designs with him early on, and we landed on what we thought was the best solution. When it came time to meet with everyone else, I called on him specifically to share his perspective. Because he was in a senior role and also because he was more vocal, he made the case for my design without me having to be involved in the gritty details of outright disagreeing with the other people. He did the hard work of making a case for my designs, I stayed out of the relational complexity, and we kept the user experience right where we wanted it to be. Asking other people to weigh in is a great way to make sure you get support for the best user experience.

5. POSTPONE THE DECISION

Finally, if all the previous tactics have failed to move the conversation in a positive direction, suggest postponing the decision. Before you allow your team to make any decision that will negatively impact the user experience, choose to wait. That could be for just a few hours or even a few days—whatever it takes for you to take a step back, wrap your mind around the problem, and come back with a better solution. Too often, hasty decisions that seem like a good idea in the moment turn out to be poor choices when actually implemented. Anyone will appreciate that you want to take the time to do it right and verify that the suggested solution is appropriate. So ask for that space.

You can postpone the decision by leading with a yes by saying something like, "Yes, I see your point, and we really need to find the right solution. How about I take the next few hours to work on it and then we can touch base again before the end of the day?" The idea that you're postponing the decision doesn't have to slow down your progress. Iterating on your designs is a good practice anyway, so be prepared to pick up your stakeholder's feedback and run with it, even in the moment of a meeting. Don't waste time with this tactic by putting it out of your mind. Instead, seize the moment to capitalize on your own energy for promoting your work and make it happen right now.

Meeting adjourned

I was working on a small team once when one person's suggestion turned into a brainstorm and morphed into a solution that was so far removed from the problem it was hardly recognizable. That's my opinion, of course, but while I was watching the conversation play out, I saw the inevitable conclusion that the group-think generating this Frankenstein of a solution would eventually become something that was far from ideal. It was time to step in and do something about it!

I interrupted the discussion, saying it was clear that we needed to come to a decision and that design-by-committee was probably not going to help. Rather than waste everyone's time by continuing the discussion, I canceled the meeting right there and sent everyone back to their desks, only 15 minutes into an hour-long meeting. Meanwhile, I stayed behind in the conference room and cranked out several alternatives that would be more useful in leading the discussion, without five people looking over my shoulder and touching my screen.[2]

Before the hour was up, I called everyone back together to review the options I had just created. One of them seemed to work, was tweaked, and eventually made its way to production. The end result was a product that was better because I stopped the crazy train before it left the station. Postponing the decision even for a few minutes gave me the space I needed to come back with a solution that would help ensure the best possible experience for the user without diminishing the ideas that had been thrown around in the moment. Plus, I saved everyone the time and hassle of wasted brain space that would only have resulted in rework.

2 Don't touch my screen!

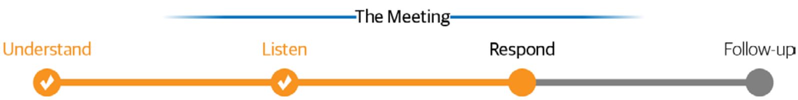
You won't always need to cancel your meetings like this, but the point is that it's better to take your time (even just a few minutes) to get your designs right than it is to let a single bad decision unintentionally force you into a UX dead end. More likely, you can propose postponing the decision until your next meeting, which gives you the capacity to figure out a better solution in time. Don't be hasty, and never be afraid to suggest delaying the decision.

To be an effective communicator, you need to learn to respond to people very quickly, in the moment of a meeting. The only way to get good at it is to practice, memorize your strategy (the answers to the Big Three), and apply these tactics on the fly. This response will form the basis on which you and your designs will be judged, so it needs to be purposeful and actionable. The more you practice, the better you will become.

The good news is that in addition to having a well-defined strategy and these easily applied tactics, many design discussions revolve around similar themes and ideas. You can capitalize on this by remembering and reusing similar, common responses every time. In Chapter 7, I share some of the most common key messages that are used to justify design decisions so that you'll have some premade templates for articulating your response.

[7]

Choose a Message



Now that we're forming our response to stakeholders, let's take a quick look at what we have so far. Our objective is to get support from them. Our strategy for accomplishing that is to communicate that our design solves a problem, makes it easy for users, and is better than the alternatives. We'll communicate that using any of the tactics from Chapter 6. So now we need to identify the messages that will help us to employ those tactics in our context.

Although every project is different and every client has unique needs, I've found that there are some ways of explaining design decisions that I seem to use over and over again. I often say the same kinds of things to explain my projects, and I've compiled them here for reference. Some of them are similar or related to one another, but they should give you a good basis for the kinds of responses that are effective in design discussions.

These are the key messages that you can use to deliver on your strategy and achieve the objective. With our strategy and tactics in mind, find the messages that apply most to your situation and modify them to accommodate your particular context. The goal for this chapter is to give you a list of common ways of describing design decisions that you can use and reuse at each meeting.

I've organized them into four categories (in no particular order): Business, Design, Research, and Limitations.

Business

One of the best ways to make a case for your designs is to directly connect it to the needs of the business. Here are three of the most common responses for appealing to the business:

- "Helps achieve a goal"
- "Facilitates a use case"
- "Communicates branding"

"HELPS ACHIEVE A GOAL"

Stakeholders always appreciate connecting your solution to the goals of the business. This is a solid way to make the case for your design by appealing to a nobler motive. This may very well be your answer to the question "What problem does this solve?" because usually the problems we want to solve with the design are the same as the goals of the project or business overall. Whatever the source of the reasoning, always emphasize that your design is intended to help the company achieve its goals.

It can be difficult to know with certainty how a particular design will affect your goals, especially for smaller interactions that might not affect the overall use of the entire application. The point here is not to know with certainty. If we always knew with certainty what would definitely accomplish our goals, we wouldn't even need to meet. You should have confidence that your experience leads you to believe with all reasonable certainty that this design is at least one step of a larger approach that will take you where you need to go.

To do this effectively, make this connection clear and provide an explanation for how your solution solves this particular problem. Because you've already written down each problem alongside your solution (as I recommended in Chapter 1) and part of your strategy is to appeal to a nobler motive, you should be able to make a statement that clearly communicates these connections. A pattern for expressing this is: "[design] will affect [goal] because [reason]." Here are some examples:

- "Moving 'Related Items' above the product description will increase product engagement because users will have more opportunities to see more products."

- “Putting ‘Recent Projects’ at the top of the home screen will improve data quality because users will have easier access to keeping their data current.”
- “Removing the login requirement will reduce abandonment because users can bypass registration and still see promotions even if they aren’t logged in.”

That doesn’t mean everyone will agree. After all, you might think that using a toggle switch for “Remember password” will improve engagement by keeping users logged in, but I might think that a tried-and-true checkmark will be a more effective solution. The purpose isn’t to expect automatic agreement. The purpose is that we’re being intentional and purposeful with all of our decisions, and this is one way we can communicate that to our stakeholders. As often as you can, connect your design decisions to the goals and objectives of the business.

“FACILITATES A USE CASE”

This might be the most obvious and common explanation for any design decision because everything we do is about designing around a particular use case, user story, or feature set. Depending on your stakeholders, they might not be aware of how we use these techniques to create a structure and logic to our decisions. Pointing out which use cases benefit from the decision is a good way of demonstrating your thought process and will get you talking through the decision in a way that makes sense to them.

Just as often, we try to optimize for one primary use case by minimizing and limiting secondary or edge cases. For example, although any user is encouraged to maintain their account profile information, it is not the main purpose of the application. This informs our decision to put account management functions in a drop-down menu rather than a large call to action. Noting these justifications can help you keep people focused on ensuring that the primary use case is always optimized even in the face of other needs and features.

Even though designing for a use case may seem obvious, it’s surprising how often teams can make decisions in a group setting that completely ignore the main use of the application. Because you’ve already identified that your decisions are tied to that case, remember to do a quick gut check to confirm that you haven’t lost sight of it in the process of moving things around. It’s always useful, even after a decision has been made, to circle back and double-check your decisions against the documented use cases for which you hope to design. When you find your team getting off track, bring them back by reminding everyone what the use cases are and how our decisions affect them.

"COMMUNICATES BRANDING"

I often find myself justifying design decisions based solely on the branding standards of the organization. Sometimes, things are the way they are because the company has a specific image it's trying to establish and our applications have to reflect this as well. This is more true with the use of color, fonts, or language than with specific interactions, but it's important to call out. If you chose that style because that's what the brand guide defines, bring that to the attention of your stakeholders.

Sometimes, application design can be a good opportunity to work with and help an organization communicate their brand identity. Even though it's not usually an explicit part of the UX process, some organizations don't have standards that include styles for elements such as buttons, drop-down lists, and checkboxes. As a result, we might have a chance to help them evolve their standards documentation with our own style guide and move their visual identity in a positive direction. Marketing people often aren't thinking about interface controls. The standards they create will be based largely on their needs, like advertising or from print. Helping them understand where we've run into challenges implementing their standards in the interface can shape the conversation to include other elements that are important to the UX. The end result is better collaboration and a more comprehensive branding guide. That makes stakeholders happy, too.

Design

Often, we have design reasons for why we did what we did. I find there are three common ways of describing my decision for design reasons:

- "Uses a common pattern"
- "Draws the user's attention"
- "Creates a flow for the user"

"USES A COMMON PATTERN"

Many organizations use common design systems, pattern libraries, or style guides that make it easy to match an existing pattern that solves a problem for the business. Ideally, these patterns or components are already built, tested, and have a track record.

Additionally, designers often spend time on other sites, apps, and devices learning about the newest useful design patterns, and so we naturally choose patterns that make the most sense to our audience and context. It can be risky to choose a pattern if we don't fully understand the context in which it was originally designed, but purposefully choosing a pattern because it is widely understood can be a great way to build a case for your decisions.

Your stakeholders may not be aware of the concept of "patterns" in UI design, so you want to be careful not to make them feel like an outsider. Help your stakeholders understand that because this consistency in the experience is so important, changing an expected pattern in one context will have the ripple effect of needing to use the same pattern in other places throughout the app. It's not merely an isolated decision. Using a pattern is helpful to our users, and it's also usually cheaper and easier to develop for the business.

Remember, though, that design patterns are meant to provide consistency and set a user's expectations about what interactions will take place. Beyond that, it's fruitless to argue over which one works without solid research to suggest otherwise.

"DRAWS THE USER'S ATTENTION"

There are parts of our design work that are more driven by intuition than others, and this is one of those blanket explanations that I find seems to explain a lot of my own choices in ways that I otherwise could not communicate. There's a lot of psychology that goes into the thinking about where users look, how they scan (not read), and what makes them move from one place to another. Much of that knowledge is distilled into design practice through techniques such as the use of color, negative space, balance, or type size. These ideas can be incredibly subjective and difficult to justify to the average person, but often it is simple enough to explain that the combination of elements they see on the screen is meant to move the user from point A to point B.

Here are some examples:

- "The headline and call to action are arranged so that the user reads the headline first and taps on the call to action next."
- "The containers overlap to give the user a sense that they are connected as they scroll through the page."
- "The elements are arranged left to right and top to bottom, because our audience tends to scan the page in that way."
- "We used green because green means go or success, and the contrast will draw the user's eyes to that element."

It's important that we help our stakeholders understand the relationships between design elements and user action so that they can see the rationale behind our decisions. We need to communicate that we're not only putting things on the page in a way that looks good, but that we're trying to draw users into the application and lead them to action with an appropriate placement of design elements. Our decisions are based on getting the user to act, which is the ultimate purpose of any website or app.

"CREATES A FLOW FOR THE USER"

A lot of time and effort goes into creating user flows. We can spend days or weeks with a wall full of sticky notes trying to find the best path for our users to navigate the application. That hierarchy is expressed in our work and influences how we structure the entire design. We define use cases, edge cases, error flows, and remove dead ends only to hear a stakeholder suggest a change that disrupts this flow, potentially sending us back to the drawing board. Occasionally, this happens without us even realizing it: we make a change in one place that affects something else down the line. Unintentionally, we've broken the path we so carefully tried to plan based on the whims of a well-meaning, but uninformed stakeholder. You need to pay careful attention to how your decisions will affect the flow you've created. Don't let your stakeholders break that without their first understanding why you did it that way.

- "Our checkout flow was designed so that each successive control for the next step is in exactly the same place and the user moves forward in a linear fashion. If we make the change you're proposing, it will break that flow on step 3 and cause the user to have to stop and go back, rather than quickly completing the step by moving forward."

- "Our signup flow requires only the email address to be submitted first, because we can reduce abandonment by not exposing all the fields at once and allowing the user to progressively add information to their profile later. If we add the additional fields to this step, it will complicate the process with validation rules and break the user flow if a mistake has to be corrected first."

Research

Using data, user testing, and other research is perhaps the most compelling justification for our design decisions. I've found three common responses useful when research is used to inform our choices:

- "Validated by data"
- "Revealed in testing"
- "Supported by other research"

"VALIDATED BY DATA"

Using data to support your design decisions is the golden ticket to getting support because it is the most scientific way of demonstrating that your designs are having the intended effect. The importance of using data cannot be understated. Too often, companies have plenty of data to help them but lack the time or skill to sift through it and draw meaningful conclusions, so find data that is useful to your context and allow it to help you make your case.

Designers sometimes have a difficult time wrapping their minds around a spreadsheet full of percentages and decimals, myself included. Hopefully, you have someone who can help you find meaning in the numbers or maybe you can get access to a slide deck in which the data was presented in a palatable form. Product owners and project managers are usually the ones who will help you with this effort, but it's entirely likely that you will need to do the work of combing through the chaos and drawing connections between elements of your design and the behavior of the user. It's not easy, but the good news is that this effort pays off in huge ways, because almost everyone is convinced by data.

There are two types of data we can use to talk about our decisions. The first is *existing data*, data we already have available that we can use to help us make decisions now. The second is *reflective data*, the data we collected after changing our design and comparing the before and after. With the first, you can make informed guesses. We don't really know if our proposed solution will help us achieve the goal, but we can use the data to make our best guess. The second is what we do after our informed guess: we check our changes and verify that the numbers are better. When you have that kind of information, it is clearer what the "right" answer is.

Using data is really compelling to stakeholders. For that reason, it's also important to recognize that looking at bad data will still yield the wrong choice, so we need to be really careful with this approach. What I mean is that data often tells us what the user did, but not why. We try to infer *the why* by looking at *the what*, and this naturally involves making assumptions. If we make changes based on a wrong assumption, we end up with a design that is likely to cause more problems than it solves. So, keep in mind that making decisions based on data can only be truly effective when taken as a measure of the project on the whole, in context, and without too many assumptions.

One of my former managers was a data-driven person. She and I could discuss different designs for hours, but if data supporting one side ever entered the picture, it was a shut and closed case. I quickly picked up on this and discovered that every time I gathered data to support my proposal, she would agree. It was a strange power because it became tempting to augment the numbers to support my case even if there weren't truly direct connections. This is the problem with data: nearly everyone is convinced by it, yet it can be easily manipulated. The thing to remember here is that our goal is not simply to get agreement and have our way with the designs. Our goal is to create the best user experience and help our stakeholders to achieve their goals. Skewing a perspective on data to selfishly support our claims is not going to be effective in the long term.

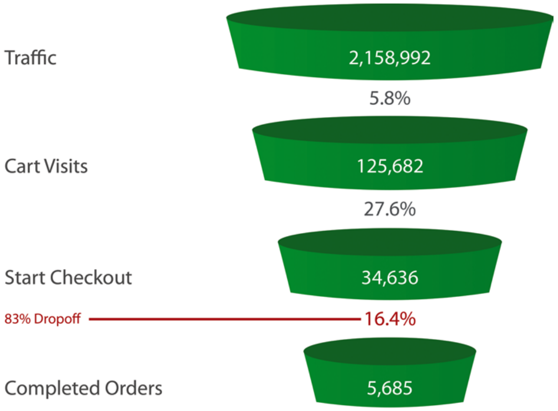
To get the attention of your stakeholders, it's important to begin your response with a phrase that emphasizes your use of data, such as:

- "According to our analytics..."
- "We have data that suggests..."
- "We are tracking this metric and..."

It's usually enough to simply state with confidence what the data shows without the need for further discussion:

- "According to our analytics, 64 percent of users drop off at this point in the user flow."
- "We have data that suggests the phone number requirement is our biggest barrier to conversion."
- "We are tracking this metric and have seen a steep drop in engagement since making this change."

However, you should always be prepared to provide the data that you cite even if you don't have it on hand. I usually have the data in a separate file or report that I saw earlier, and I know I can share it with stakeholders when asked. It's usually enough to tell them you can send the report afterward, as long as you follow up. But it's a best practice to visually show the data in a simple way, right there and then, so that stakeholders can really latch on to the idea. Because many people are visual, showing a chart, image, or simple table will help bring home the importance of the data in this particular decision.



Having visuals available to show the data is a really effective way to make your case.

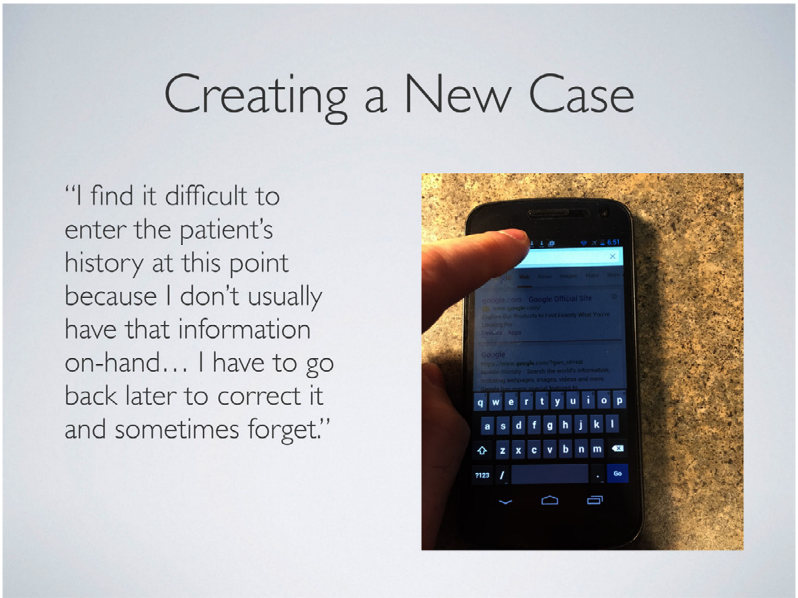
You must decide what kinds of data will be most relevant to your stakeholders and optimize your designs to improve those metrics. Using data to support your decisions is very convincing, as long as you've got an airtight connection and are making the right assumptions.

"REVEALED IN TESTING"

Often, we have experience watching people use our designs, and those insights inform our decision making. Being intentional about realizing when those studies are influencing our decisions will help us to communicate to our stakeholders, when appropriate. Demonstrating good design through a connection with a usability study is a very effective way of making a case for your designs because it shows that your ideas are working with real people. It has a human element to it that creates a story for our stakeholders, rather than the mechanical feeling that raw data provides. Depending on your stakeholders, using real stories of users might be even more effective than numbers and charts. Using the tactic from Chapter 6 for representing the user, tell your stakeholders a story about your users that will get them on board with your decision.

The challenge with user observation as a justification for design decisions is that it can be very subjective, based on what you remember of the session, and difficult to document for the purpose of meeting with a client. Usually, the way we bring these to our stakeholders is in the form of a memory—some special knowledge that might only reside in our heads; for example, "During our usability study last week, we realized that people were confusing the 'Okay' and 'Cancel' buttons because the design was too similar." Even though this statement is based on our experience with users, it is undoubtedly clouded by our own memory and conclusions from the study. Still, it's an effective way to demonstrate that you're interacting with users and improving your designs to accommodate what you've learned. That alone is very valuable to communicate.

The best way to communicate our insights from user testing sessions is to assemble a set of slides with quotes from a few select users and maybe even a video clip showing the problem areas. Edit the video from the session down to a few seconds or create a highlight reel of the most relevant parts from the study. This demonstrates that you value everyone's time by only showing them the important parts while also giving them the opportunity to participate in a real user session. Even though this requires advance preparation to put together, it's the only way to truly show your stakeholders why you did what you did, and it might be more necessary depending on the scope of the proposed changes. I'd even recommend showing them one or two complete user sessions, if you have the time. I find that this is often the first time my stakeholders have ever seen a user session at all! Any time you can get your stakeholders to see real people using their app, you create a connection for them to empathize with and be motivated to act on changes for the sake of the user.



Including a short video clip or quote from a user session in your slides is an effective way to give stakeholders quick access to real users.

"SUPPORTED BY OTHER RESEARCH"

It's common for me to cite other (often external) research that I've seen when discussing design. I spend a lot of time consuming blogs, books, and podcasts. Additionally, I sometimes have access to third-party data sources or even internal data analysts. Often, this information influences my thinking in ways that are almost unconscious. I discover new best practices all the time and begin incorporating them into my work without even realizing it. I often don't even know this has happened until I am talking to stakeholders and parsing through my decision process on the spot. I find myself saying things like, "I read recently that…" and then have to backtrack to find those original sources.

As a result, I've developed the habit of saving useful research in a project folder or keeping a list in a shared document so that I can easily provide it to other people. As I casually browse other research, I copy links, quotes, and data over to a separate file that I can sort through later, if needed. Usually, my notes include the title, author, URL, and a description of the part that's relevant to my project or a short summary of the findings. This makes it much easier for me to make claims about other research because I can quickly send the reference to my client if asked.

It's actually pretty rare that you'll need to provide the original research as proof unless, of course, people disagree. Most of the time stakeholders take these kinds of statements at face value and trust you with the rest. Much like using analytics, this can be a dangerous power because if you're prone to overstate or misremember the data, you will still make bad decisions. For that reason, I don't recommend quoting another study without having the reference available. Sometimes, what you remember about a study and what the actual learning was is heavily influenced by your own perspective.

Other times, though, having all your references is critical to justifying your decisions. When the stakes are higher, it might be the only way to convince people that your design is the best choice. What can be unfair, however, is if your stakeholders aren't prepared to defend their own opinions against your prepared list of research. If you're not careful, it could feel like an attack. In that case, give them the opportunity to think about it and respond another time, send them your research in advance so they have a chance to review it, or bring research with you that presents both sides of the problem for discussion. You don't want them to feel like they were ambushed.

Taking hamburger off the menu

Ah, the delicious hamburger menu icon.

One of the mobile projects I worked on used the all-too-common "hamburger menu" for the primary navigation. During the course of a redesign, I tried several times (unsuccessfully) to convince my client to abandon the use of this icon as a catchall for everything in the menu. My recommendation was based on research indicating that the icon is not as effective as the word "Menu," but simply telling the client this was not convincing enough. For one meeting, I collected as many articles as I could on the subject (a few of which disagreed with my perspective) and opened them in separate browser tabs to make my case. When we reached that agenda item, I presented my proposed design (again) and then carefully clicked through the tabs to give a quick summary of each post. When I was done, the client was impressed with my preparedness, they admitted that they did not have a similar amount of evidence to support their opinion, and we restarted the discussion about changing the icon. The end result was to create an A/B test with our two proposed options in the hopes that it would further inform our decision making. Had I not been prepared with this research, we would not have been able to restart that discussion.

When using other external research to support your decisions, remember to:

- Make a habit of saving research to a separate document as you find it
- Note the title, author, URL/source, and date
- Write a short summary of the post or a sentence about how it relates to your project
- Provide the list of references to your stakeholders when they ask
- Find research to support other viewpoints for a balanced understanding
- Give your stakeholders the chance to consider it or respond with their own

Limitations

As often as we're justifying our decisions based on what we think needs to be done, we are also making a case for times when there are limitations that need to be taken into consideration. We can't always do what our clients want, simply because of other factors that are beyond our control or because we're trying to adhere to standards in design and programming. I've found three common responses for dealing with limitations:

- "Not enough resources"
- "Limited by technology"
- "Complies with a standard"

"NOT ENOUGH RESOURCES"

The unfortunate reality of design is that companies frequently do not have everything they need to realize their dreams for the app or website. There simply isn't enough money or people for everyone to be able to design and build anything they can think of. Taking these limitations into consideration is an important part of the decision-making process because spending too much time on something that's not possible is not an effective use of time. Although limits in resources are usually just a matter of money and people, there are four main areas that seem to affect web and application design more than others:

Support
: There is a lack of support, infrastructure, or internal processes to handle the added requirements. Even if we can build and launch our project, there isn't enough internal support to maintain it over the long term. This could be because customer service isn't set up to handle the additional calls, accounting doesn't have a practice in place for handling the payments, or QA doesn't have the capacity to test another app. It's not as much about people as it is about process. The organization simply isn't equipped to handle what we want to do yet. These support roles are an important consideration for how we design, and factoring it into our decision process is an important point to clarify.

People
: There are not enough designers or developers who can actually create it within the time and constraints given. Very simply, the things that we want to do require a larger staff that we don't have. This may not even be a budget problem, but one of hiring: we can't hire the right kinds of talent or we can't hire fast enough. Perhaps it is only a short-term problem, but not having enough people is a legitimate reason for scaling our designs. Always consider how your designs are affected by the current and future staff.

Money
: The budget is insufficient for acquiring the services or technology needed to make it happen. No matter how much money you have, it's almost never enough. There is always another piece of hardware or a hot new service we can use to augment our product

and take it to the next level. But absent these resources, we must curb our designs to account for a limit in funding. Making this an explicit reason for your design decisions is important.

Time

There is not enough time to implement the designs, given the current requirements. And when we have limited time, we usually scale back our ideas to a point that's doable. It's this perceived "downgrade" that is most important to communicate. Every stakeholder wants to build the biggest, best app as soon as possible, which is why so many teams begin with a minimum viable product and iterate over time. In theory, we should never be forced to tell a stakeholder that there isn't enough time because our process is such that we always create appropriate levels of work during each cycle. In reality, we are always scaling back ideas to fit the current calendar.

Telling your stakeholders that you're limited by resources will result in either sobering agreement or righteous indignation. Either way, it can yield a good outcome. On the one hand, they're apt to agree with you because they understand the realities of the resourcing situation. On the other hand, they might be compelled to work on your behalf for additional resources to make it happen. The point isn't really the final outcome, though, as much as it is your ability to thoughtfully explain the reality and constraints within which you're working. We must always design around our limits in resourcing.

"LIMITED BY TECHNOLOGY"

Although we would like to think that we designers can create anything under the sun, the reality is that we're limited by technology. What's available to us will naturally force us to make design decisions that need to be explained to our stakeholders. Often, these constraints cannot be foreseen when creating the original designs, and it is only during implementation that we have to make these adjustments. Our stakeholders had certain expectations, but when it came time to make it happen, we realized that we had to make some sacrifices.

Sometimes, these limitations are straightforward and there's simply no way to accommodate their request. A common example in mobile app design is the size of the device screen: we simply don't have the space to do everything. Other times, there are more raw technical limitations.

For example, I was working on a mobile web app and the client wanted to access the device camera in the browser. Although this is technically possible, support for it is not widespread and it was an easy decision to remove this from the scope. It might also be that there are other technological factors outside of your control that force your decisions. Perhaps the server simply isn't capable of doing what you need or the technology you want isn't cheaply or easily available. In these cases, it's appropriate to suggest that even though everyone agrees it's a great idea, we can't consider implementing those designs unless we have better technology.

It's not always simple. These can be the most difficult decisions to help other nondesigners (and nondevelopers) understand because the reasons are often highly technical. Stakeholders don't like (or understand) these limitations and might even be put off by the prospect that you can't do the same thing their competitor does. I imagine an executive pulling out their phone, showing you the way someone else does it, and then asking "Why can't we do that?" But these limitations are real, and we have to help our stakeholders see the constraints so they can be part of the decision.

"COMPLIES WITH A STANDARD"

Occasionally, what our stakeholders want us to do will go against the technical or social standards we've set for our application. We want our app to work in all browsers, on different devices, and for all people, so we have to follow the "rules" that are set forth on the development side. This sometimes results in making changes to our design to accommodate these standards.

One example is designing for accessibility. When you're building an accessible application, it will inform decisions about the kinds of controls you choose and how those interactions are implemented in the design. We usually begin with a no-limits design that, as soon as implementation is underway, gets whittled down into what's actually possible, given our desire to make the app work for everyone. Even though nearly anything is technically possible, it might not always be recommended (or it might take too much time to accomplish), and so we must adjust our expectations to account for these needs.

Another common example is with standard HTML control types. Maybe the stakeholder wants a custom date picker, but the prospect of building and maintaining your own is out of scope. It's not always the right decision to "roll your own," so it's better to explain why using a standard control is better for both the user and the bottom line. Sometimes highly interactive page elements require programming hacks to pull off. In that case, you might need to move away from something too complicated if the goal is to build an application that's meant to work on different devices or browsers. In each case, we're trying to demonstrate that the standards put in place for applications have a natural benefit to our development process as well as the portability and accessibility of the application in the long term. These standards inform and influence our design decisions.

Web Versus Native

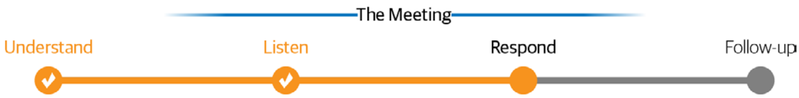
I was consulting with a nonprofit on a web-based mobile app. Although the app would run in every major mobile browser, the client wanted it to behave more like a native application. To that end, their team had designed a series of interactions and design patterns that, while natural for some native mobile apps, would actually have required us to overwrite native browser functionality and potentially break some web standards in the process. Not only did this present technical challenges with the implementation, but it also created a set of confusing interactions. For example, browser users would not be able to scroll up and down (scroll-jacking) and would only be able to navigate the website by swiping left and right. In the end, I was able to convince the client that valuing native browser behavior was more important than maintaining the perception of a native app. For the first implementation, at least, they chose to forgo all the customized gestural events and stick with tried-and-true (standards-based) HTML and JavaScript.

Hopefully, now you can see how design decisions across different projects frequently share a similar rationale and explanation. As designers and communicators, our jobs are made easier when we have this short list of common messages to pull from, using them as the foundation for our response. Use them as templates to help you jumpstart your response, no matter what the context.

Focused on our objective of getting support, we now have a memorized strategy, a set of actionable tactics, and a list of frequently used messages as the basis for our response. The next step is to compile all of these together and plug them into a formula that will finally accomplish our goal. We are only one step away from delivering on our promise to effectively articulate our design decisions in a way that is compelling and fosters agreement. Next, we will assemble an ideal response.

[8]

Lock In Agreement



We've now covered several tactics for forming your response as well as some of the most common ways that we can respond to design feedback. If we combine all of these practices together, we can see how this will form the basis for a standard response to stakeholders that establishes a formula for success.

Every response to design feedback needs to hit on a number of areas if it's going to have the kind of weight it needs to be compelling and convincing. For UX discussions, I have a useful formula to help make our case to stakeholders. This is the *IDEAL Response*:

Identify the problem

We must always remain focused and ensure that our stakeholders are aware of the problem we're addressing; otherwise, the conversation can quickly become counterproductive. Very briefly state the problem that your design addresses for the purpose of getting everyone on the same page.

Describe your solution

This is where your specific design can be connected to the problem that you're trying to solve. Make a clear connection between what you did and how it addresses the issue. Without a clear solution, the design is useless and ineffective.

Empathize with the user

Stakeholders can forget about the people at the other end of our products. Our job is to represent them, to feel so burdened for them that we're driven to action. State how your solution solves the problem for a specific user by calling to mind the people at the center of your design process.

Appeal to the business

It's not enough to just fix stuff. All our decisions must be motivated in part by a need to grow the business or organization. This is where you describe how your decisions are meant to affect goals, metrics, or key performance indicators (KPIs). Bring it up, tie them together, and demonstrate the value.

Lock in agreement

After clearly making your case, directly ask for agreement from your stakeholders. You don't want to leave this conversation open ended, without resolution. Ask them directly, "Do you agree?" Put them in a position of needing to respond to you, and keep the project moving forward.

From IDEA to IDEAL

Getting agreement to move forward is, of course, the entire purpose of this book. Because without that agreement, everything you talk about with your stakeholders is just an IDEA. You can deliver a great presentation, communicate your position, and walk away feeling confident, but without the support of everyone on your team, your project will not be successful. This is why locking in agreement is so critical, because it allows you to move from having something that's just an idea to something that is truly IDEAL.

Throughout the book, we've created a delineation between getting the *support* you need and getting *agreement* from everyone about the solution. You will never get agreement from everyone on a specific solution, but you can get *support* from everyone by getting their *agreement* to move forward with the solution you propose. Whether you agree on the details doesn't matter as much as agreeing to move forward.

BE DIRECT

To get agreement, you need to directly ask your stakeholders for their buy-in. The simplest way is to ask, “Do you agree?” Put them in a position of needing to respond to you before you move on. Further, it should be clear that you’re asking them for a specific response (agreement) and that you expect an answer.

It’s easy for a design discussion to casually devolve into a handful of random ideas until eventually the conversation feels like it should move on. However, if you don’t have agreement yet, do not let the team move to the next item on the agenda. You need to be the one who pauses the chatter long enough to say, “Before we move on, are we all in agreement to move forward with this?” Getting that verbal confirmation is important to make sure this item doesn’t come up again during the next meeting because someone forgot what was decided.

HIGHLIGHT THE BENEFITS OR RISKS

In addition to being direct, phrase your question so that your stakeholders want to provide you with the answer that you need. In other words, make it clear what you believe the right choice is by the way you ask so that they’re compelled to answer with agreement. You can do this by highlighting either the negative effect of disagreement or the positive benefits of agreeing. For example, “Do you agree that we should improve conversion by removing these fields?” In this case, you’re emphasizing and reminding them that your solution intends to improve conversion.

FORCE THEIR HAND

Finally, asking your stakeholders direct questions about whether they agree forces them to also be direct in their response. Sometimes, stakeholders are not forthright in their reaction, and we need them to tell us exactly what they think in order to accomplish our goal. If they disagree, we need to know and there should be no question about it. When you phrase your question to be direct and to emphasize the effect it has on the user experience, stakeholders are compelled to give you an answer that makes their position clear. If they’re unsure, they may agree with you just so they can move on. If not, it creates an opportunity for you to continue the discussion and arrive at the right solution to meet everyone’s needs. Either way, you’ll have a definitive answer.

Putting It All Together

Now we begin to apply everything we've covered so far into one coherent response, which:

- Provides a natural transition using Thank, Repeat, Prepare
- Considers our answers to the Big Three questions
- Applies any number of the tactics necessary to make our case
- Takes advantage of common responses to design considerations
- Encapsulates all of them in the IDEAL Response so that we can get agreement and support to move forward

What follows are several case studies. These are examples of responding to stakeholder feedback using the IDEAL Response. My intent is to provide you with a handful of common situations and their responses so as to further demonstrate how you can articulate design decisions with your own stakeholders. I may or may not have found myself in these situations with my own clients. I can neither confirm nor deny the existence of these scenarios in real life! The names of design patterns and UI controls have been changed to protect their innocence.

For the purpose of simplicity, I avoid providing much context about the product or the conversation. These examples are common enough that you should be able to infer enough from their context alone. Focus not on the specific details of feedback in each case; rather, consider the application of how to communicate value to stakeholders in a way that appeals to their needs.

CONTROL OVER MY CONTENT	
Thank, repeat, prepare	Thanks for coming to me with your idea for being able to manually sort the content on your page. I know that you'd like some more control over how your posts are displayed and we're intentionally limiting the amount of control we're giving content creators to help maintain some consistency, so let's talk about the best way to help you.
Identify the problem	Our challenge is that each view is supposed to be sorted chronologically so that users know to expect the most recent content at the top. This keeps the list of posts fresh and ensures that all the content creators are submitting new content each week.
Define the solution	Rather than give you the ability to manually sort all of the content, I would suggest adding a feature with which you can "pin" one article to the top of your stream at any time. If you were to pin a new one, it would replace the existing one. We'll add a special icon or visual clue to show that it's been pinned.
Empathize with the user	This will maintain the user's understanding of our content streams being sorted chronologically. The visual clues will help them know that this one pinned piece has been removed from the regular stream of content.
Appeal to the business	For you, it will highlight that single post out of all the others, giving it extra exposure for a longer period of time. Plus, it gives you a greater sense of control over how things are displayed without running the risk that everyone will start reordering their content.
Lock in agreement	Is choosing one featured article at a time an acceptable solution for you? Or do you still think it would be better to allow everyone to sort their own content?

“ADD TO CART” INTERACTION	
Thank, repeat, prepare	Thanks for sharing your thoughts with us about this project. Your insights are really valuable, and I appreciate you going through all of that with us. I’m going to go back through all of your points so that we can discuss them. Some of the things we decided on are rooted in an explanation that I think you’ll agree with when we start talking about it. First, I want to review the new “Add to Cart” interaction.
Identify the problem	The issue we’re trying to address is that when a user sees this interface for the first time, they’re confused by the presence of two buttons and don’t really know what each one means or which one they should tap.
Define the solution	Our solution is to consolidate those into one button labeled “Add to Cart.” Tapping on the single button reveals more options and gives the user the option to make the second choice after committing to the first rather than having to make all those decisions up front.
Empathize with the user	Keep in mind that our users are frequently ordering at their place of business. It could be a busy manager walking down the hall who notices that a light bulb is out and needs to order a new one on the spot. We don’t necessarily have his full attention and need to present him with really simple options that don’t require too much thought.
Appeal to the business	We believe our solution is going to increase conversion, because even though it creates an extra tap for the user, it makes the choice of adding an item to their cart much, much simpler. There is no question about what “Add to Cart” means because it relates to standard commerce. Very simply, more people are going to tap “Add to Cart.”
Lock in agreement	I know the company has preferred the existing language, but we believe this new approach should be put into production with the next release. We might even consider A/B testing it with the existing implementation so that we can directly compare the results. We’d like to see conversion increase dramatically this year, and this is one of the most important ways to make that happen. Do you agree?

OVERBRANDING	
Thank, repeat, prepare	Thanks for your input on the logo and colors. I agree with you that we could adjust a few things to improve it. The challenge is that the marketing department is driving this effort, and we've had little input in final decisions. However, I think there are some points of discussion here.
Identify the problem	Marketing would like to brand this initiative separately from the rest of the product to create a campaign and awareness around it. The problem is that, in my opinion, our users will not understand the difference between these sub brands. They use the application for its utility, not for its branded add-ons, and placing these extra elements like logos and taglines gets in their way.
Define the solution	My suggestion is to avoid the use of a logo in this space and instead focus the branding effort on the use of color and copy to communicate the message. In this particular view, we could work with small icons to identify the add-on services or add a line of copy in a new color to highlight the value. This will save us a significant amount of space with minimal impact to the user. To do this, we'll need to go back to marketing and work with them on this solution.
Empathize with the user	From the users' perspectives, a sub brand like this is meaningless. They are primarily interested in completing their tasks and getting their job done. By putting a logo in their way, we are hindering their ability to use the application efficiently and therefore slowing them down. This is not only potentially frustrating to our users, but also risks conversion for paid services when users aren't able to get into the flow as quickly as they could.
Appeal to the business	Our goal for this initiative was to create a new revenue stream for add-on services when the user enters the flow. Although I know marketing wants to capitalize on this opportunity to create a new product with these add-ons, I believe that a branded approach does not provide value to the user (at best) and confuses them and slows them down (at worst). In other words, it might actually dampen our efforts at creating revenue from this channel.
Lock in agreement	I'd like your help working with marketing to remove some of the requirements for branding. I'm happy to coach them on some alternatives and help them understand the user's perspective. Do you agree that we should do our best to reduce the amount of branding for add-on services?

MAIN MENU MESS	
Thank, repeat, prepare	Thanks for your input. I really appreciate your viewpoint on these changes, and I understand your suggestion about needing to add these new options to the main menu. However, I think there's a better solution we can discuss to make sure these new features have visibility.
Identify the problem	The problem I see is that we frequently add new options to the main menu and it's becoming a catchall for links that we don't know what to do with. Also, these are time-based promotions rather than permanent offers, so it's unlikely that a user will explicitly look for them in the menu since they don't view them as a constant feature set.
Define the solution	My suggestion is to focus our effort on highlighting these promotions in the content slots that we already use for other important messaging, like system alerts or the search suggestion text. When these new offers are available, we can display them in those content areas and have even more space for images and other content.
Empathize with the user	We don't want our users to be overwhelmed by the number of options in the main menu. Instead, we can provide more value to them by adding appropriate context-aware messaging that's relevant to their current task.
Appeal to the business	If we put these items in the main menu, it could backfire because the people will be less likely to find it in that menu. Strategically placing them on the page in our existing slots, though, could actually increase visibility for the offers and improve engagement for this initiative.
Lock in agreement	I'd like to move forward with the idea of using our existing slots and can mock up some examples for our next meeting. Do you agree that this will provide greater visibility as well as improve the experience? Or do you think it would be better to add to the menu and risk it getting lost with the other options?

BRANDED BANNERS	
Thank, repeat, prepare	Thanks for your suggestion to add the logo to the header of the app. I know you want to brand the experience and I agree that's important, so let's talk about how to best accomplish that.
Identify the problem	The challenge with an application like this is that we have a limited amount of space for the user to have access to everything in the navigation. Plus, we want them to remain focused on their tasks with as few distractions as possible.
Define the solution	The reason we chose not to include the logo in the header is because it does not actually provide any functionality for the user. By not including it, we have more space for the navigation options and a simpler interface for the user.
Empathize with the user	The logo doesn't directly provide value to the user after they're in the app. It only serves to reinforce the brand of a service they are already consuming. The user can more easily focus on using the application efficiently because they have one less visual distraction. The more we can remove from the interface, the more the user experience will be improved.
Appeal to the business	Branding is important, which is why we've worked the brand into our colors, language, and interactions throughout the app. We're also providing an "About" page that has the logo and links to our other products. It's also worth pointing out that users are already invested in our brand because they signed up for the service. The login view also prominently displays the logo.
Lock in agreement	The marketing site is really the best place to communicate the brand with a logo, whereas the application itself is the best place to keep the user focused on the tasks. I'd like to propose we keep the user focused on using our application while logged in, but allow for more explicit branding elsewhere when it matters more. Do you agree?

PHONE NUMBER COLLECTION	
Thank, repeat, prepare	Thanks for your time and for sharing your thoughts with us on this new design. You made several suggestions for changes, which I've noted, and I'd like to go through each one so that we can be sure we're in agreement.
Identify the problem	The first thing you mentioned was the need to add a phone number field to the sign-up form. Our focus with this effort is to increase conversions on the form, so our design is optimized for that goal.
Define the solution	We removed the phone number field for a few reasons. First, it's a best practice to contact customers using the same medium that they contacted you. So, an online form submission warrants an email, rather than a phone call. Next, fewer fields on any form typically boosts conversion because users can complete it more quickly and don't need to think as much about what they're entering. But finally, I have some research showing that just the presence of a phone number field on a form will hurt conversion by more than 30 percent, even if the field isn't required.
Empathize with the user	The reason for this is because many users are wary of sharing their phone number for fear of being added to a telemarketing call list. Further, the presence of the phone field alone makes them skeptical of the company that is asking for it. Many wonder, "Why would anyone need my phone number for an online form?"
Appeal to the business	I know you'd like to have the user's phone number for your records, but it will be better for our goal of improving conversion if we remove it from the form. After a user has converted, we'll have plenty of opportunities to follow up with her, engage her in a relationship, and progressively add information to her profile. This will create more meaningful relationships with new customers and establish trust right from the beginning. Removing the field is the best balance of creating a great user experience while also achieving our goals for the business.
Lock in agreement	Do you agree we should not include this field in the form? Or do you think it's worth the risk of lower conversion?

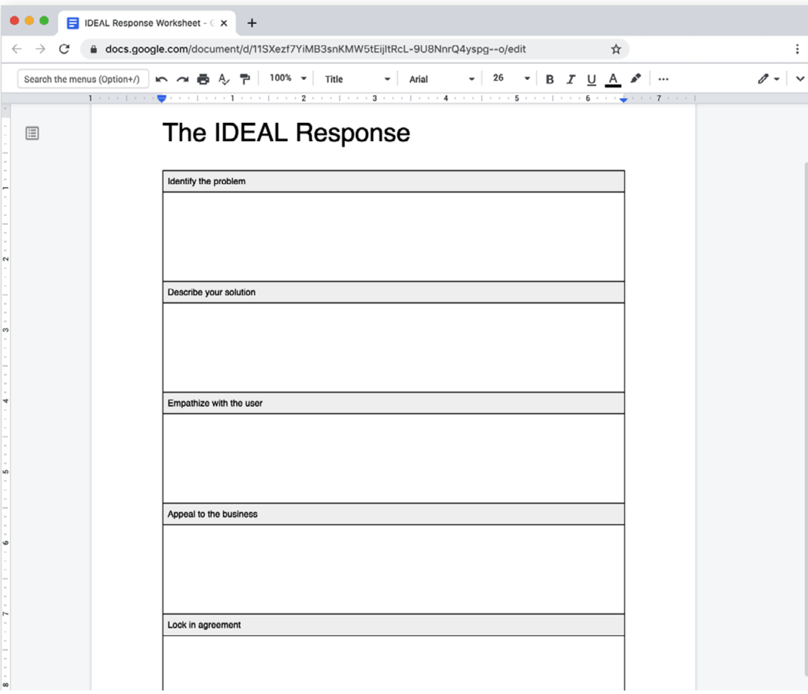
TOO MANY MESSAGES	
Thank, repeat, prepare	Thank you for your time today. I appreciate your input on our project. You have a unique perspective on the business, and I'd like to discuss some of your concerns as well as bring up a few of my own. I think we're on the same page, as far as what we need to focus on.
Identify the problem	The problem we're trying to solve with this design is communicating the savings value to the shopper. Our approach is focused on highlighting just how much people can save on these items without them having to think about it too much. The challenge with this current implementation is that the business has defined too many messages to communicate those savings all in one small space. Here we have the list price, percentage savings, dollars off, free shipping, and a "Great Value" flag. In addition to that, we're also tasked with including messaging around urgency with a timer, quantity available, and "Limited Time Offer."
Define the solution	Our solution is to apply some logic and rules regarding what messages are shown and when, so that we don't overwhelm the user with too many messages at once. For example, we should always choose between showing the percentage and the dollars off, but never both. In this case, we show the savings percentage because it's greater than 30 percent and communicates the value more than the number of dollars off, which is only $3. Next, we will show the timer only if the value will expire within 24 hours, and we show the quantity available only when it reaches a certain threshold. Structuring our messages around this logic is the best way to communicate that value to the shopper, without creating a jackpot of showing all the messages at once.
Empathize with the user	Shoppers do not have time to read all the details, do the math, and figure out which items represent the best value. Showing them too many messages will only confuse them more because they won't know which message to focus on. Our approach allows us to have some control over which messages to present to them so that we can remove the burden from them and they can focus on purchasing the item. This will result in faster purchase decisions.
Appeal to the business	If we focus only on the most important, relevant messages for each item, we are more likely to increase sales and revenue on these items because they will be easier for the shoppers to read and purchase. Reducing the number of messages the user sees frees them up to make the purchasing decision faster, resulting in better conversion.
Lock in agreement	Having a laser-focused value proposition by not including so many different messages is the way to go. Do you agree that we should focus our messages in order to simplify the value for our shoppers?

CUSTOMIZE REPORTS	
Thank, repeat, prepare	Thank you for your perspective on the case list view. You have some great feedback, and I'd like to go through everything to be sure we're on the same page about what needs to be done.
Identify the problem	You mentioned that you'd like the ability to customize each report directly on the view of the graph itself. I agree that would be a great addition to the app.
Define the solution	We purposefully left out this idea because it wasn't within our scope for this phase of the project. The concept requires adding quite a bit of functionality and design effort to really implement it well.
Empathize with the user	We understand that although this feature would be useful for some users, the majority of people using the application do not require this level of customization. For the time being, the interface will be simpler without it.
Appeal to the business	If we stay focused on finishing the case view in its simplest form as is, we'll be able to complete this core feature set within our timeline and get this view to users sooner. Afterward, we can collect additional feedback from users and make a plan to implement your idea.
Lock in agreement	Are you comfortable with us moving forward without that feature for now? Or would you prefer we reprioritize our tasks and adjust timelines to accommodate this feature?

I WANT A NEW WIDGET	
Thank, repeat, prepare	Thank you for your thoughts on the dashboard. Yes, I agree that a new widget showing the overall totals would be useful. That wasn't in the original designs, so let's discuss the best solution.
Identify the problem	The problem is that the graphs need to take up the full width of the application because we have less control over the display, given that it's a third-party solution. Also, we already are including widgets for the current status as well as follow-ups, so there just isn't very much space available to add another one. The current arrangement of widgets is designed to optimize the application for reducing late follow-ups.
Define the solution	I would recommend replacing either the Current widget or the Follow-up widget with a new Totals widget, if that is the priority now. We can use the existing slots for the new widget without modifying the design, and we keep the interface simpler by not adding one more thing.
Empathize with the user	The challenge with this approach is that we've already reviewed the needs with our internal users, and they agreed that our current widgets were the most needed in this first version. I don't want to add one and create clutter or information overload for them. At the same time, I want to satisfy the request for what they expressed they needed from this dashboard. I know Hannah is expecting to train her staff based on our current designs.
Appeal to the business	To be practical, even just swapping one widget for another will slow down our progress because we don't have a design for the new widget and it will need new support from the developers. From our perspective, that could delay the release a week. Maybe more. And even though the Totals widget is nice, it does not help us accomplish our goal of reducing late follow-ups. If we remove one of the existing widgets in favor of a Totals widget, I'd suggest modifying our objectives, too, because we'll need a new target to focus on with a different arrangement of widgets.
Lock in agreement	Would you like to add this Totals widget by swapping out one of the others? If so, I can adjust our timeline, go back to our users with this change, and then we should discuss what our new goals are for this phase.

USERS TOLD US	
Thank, repeat, prepare	Thank you for your time today and for sharing your feedback with us on these new designs. I've taken notes on everything you suggested, and I'd like to go through each one to be sure we understand. With all of our designs, we are taking into consideration both the needs of the business and the users. I think it will help the discussion for you to understand our thought process on some of these areas.
Identify the problem	Your first suggestion was that we change the input fields on the medical history form. This is an interesting part of the application because it has the highest abandonment rate compared to the other parts of the app. About 40 percent of users drop off before completing this section. We'd like to solve getting users through this step so that we can make sure they make it to the subsequent steps and complete the process.
Define the solution	Our solution was based on an assumption that the field labels were confusing to the average person, so the first thing we did was to update the names with more user-friendly language. But next, we spoke with some of the call-center associates who helped us understand that many users simply don't have the details of their medical history with them at the time, so requiring all these fields before moving on forces them to abandon the site.
Empathize with the user	To make it easier for our users, we've removed many of the required fields on purpose and allowed them to indicate which information they have and which information they will provide later. This allows them to complete this step for now, even if their data is incomplete. We can prompt them to complete it the next time they log in or send them an email notification after a few days. The user will have a greater sense of control and be more likely to get to the next step because of these changes.
Appeal to the business	What that means for us is that we will see significantly higher submission rates because more people will be able to make it to the next step. Not only that, but we'll have more accurate data because some users were filling in fake information just to move forward. But the bonus is that we'll see fewer support calls because users will be able to complete the application now without assistance. That will save us real money in the call center. We're already storing the data as it is entered, so we can still go back and complete their profile with them when they're on-site, if needed. There's no risk of losing information.
Lock in agreement	We'd really like to see huge gains in the number of clients that are able to complete their profiles and believe this is the best way to accomplish that. Do you agree that this solution will help accomplish that?

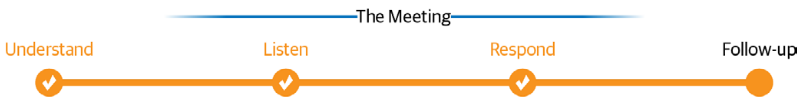
Following a formula for responding to stakeholders might seem like a contrived way of creating a natural conversation. The purpose of the IDEAL Response is to provide a framework and structure that reminds us to hit on all the important parts in our reply. It is not meant to force you into a way of talking that comes across as mechanical or is too strict to be normal speech. I've found that keeping the IDEAL acrostic in my mind is a memorable way of making sure that I've covered all my bases. Whether you form your response in the exact same way each time is less important than making sure you've addressed everything you need to. Remember, the point is to respond to stakeholders in a way that appeals to their needs and makes the best case for your design decisions. Use this framework as a tool to help you communicate to stakeholders, keep your sanity, and deliver the best user experience.



Download a blank worksheet to write your own IDEAL response from my website: *http://tomgreever.com/resources*

[9]

Follow Up Afterward



When the meeting is over, you still have plenty of work to do. The time immediately after a meeting is nearly as important as the meeting itself, so don't rush off and leave everyone behind. Wait and talk to people afterward to debrief and gain insights that weren't apparent at the time. Informally have one-on-ones with people who can help champion your cause and then follow up quickly while it's still fresh. This time immediately following the meeting is your best defense against making a decision that could ultimately spell disaster for the user experience of the project. Plus, you might be able to correct some concerns even if you think the decision has already been made. Let's quickly review some of the things you'll need to do immediately after the meeting:

- Stick around to chat with people.
- Follow up quickly with your notes.
- Apply filters and remove the fluff.
- Seek out individuals who can help you.
- Make decisions when there is ambiguity.

The Meeting After the Meeting

For whatever reason, people don't always speak up and say what they're thinking in front of a group. Often it's because the purpose is to allow the boss to have his or her say, but sometimes it's because what people are thinking might be unpopular or risky and they don't want to upset the status quo. And so they'll wait until the meeting is over, pull you aside, and tell you what they think. It is amazing how many decisions are made immediately after a meeting is dismissed. This is a great opportunity to wrap up any unfinished business and work with the influencers to get the support you need.

POST-MEETING POPULARITY

Sometimes, the hallway outside a meeting is the most productive place. I was in a meeting with an executive to review the implementation of a design that had been previously agreed upon. The meeting itself was fine. There were no huge hang-ups and nothing major to report. But immediately afterward, once the executive had left, everyone stuck around specifically to talk to me.

One person asked me to keep her in the loop in the future so that she could back me up during our next meeting. She wanted to help me succeed and was willing to be direct about it. Another person wanted to rewind to an earlier decision and give me permission to move forward, even without explicit approval from that executive. He wanted the project to move forward and was willing to stick his neck out for me. And a third person apologized for being absent from my other meetings, asked to meet with me directly to share her concerns, and promised to be more involved going forward. All three of these conversations might not have happened with the same degree of urgency if I had rushed off somewhere else.

Always make plans to stick around for a few minutes after the meeting, chat with people, thank them for their participation, and see what happens. If you work remotely, you can stay on the call for a bit or even message one of the participants and ask them to debrief for a few minutes. I promise that just as much will get done outside the meeting time as it did during the actual meeting itself.

Follow Up Fast

As soon as possible (preferably within an hour or at least within a day) send a follow-up to the entire team. It doesn't need to be written perfectly; the purpose is more functional than poetic. You need to follow up while it's still fresh on everyone's mind, including yours, before anyone has a chance to forget and disagree with the decisions they've already made.

A quick follow-up demonstrates that the meeting was a priority to you, so much so that you're not going to do anything else until it's settled. Second, it values the participants because it shows that you're doing the legwork, keeping them informed, and making the best use of their time. Next, it shows that you're listening. You're not just going to throw away all of their feedback: you wrote it down, are taking it seriously, and are concretely communicating it to the entire team. And lastly, it gets everyone on the same page about what was decided so there is no confusion going forward. You're creating a record for everyone to see and giving them the opportunity to reply if they have any additional insights.

This written record has proven to be invaluable to me months later, when new people on the project want to know who or when we made decisions. A quick search reveals my notes or communications, and I'm able to avoid a rediscussion. I've also had managers hang on to these communications and use them in other meetings to update different stakeholders. Some might even copy and paste it into a different communication to their own boss. The use and reuse of the follow-up cannot be understated.

The follow-up should include a few things:

- First, thank the meeting attendees for their time and participation. People have other things going on, and we need to appreciate that they're taking the time for us.
- Second, recap everything that was discussed. This can just be a simple bulleted list with the decision noted. Having a simple list makes it easy to share with other people.
- Last, focus on actions, next steps, or expectations. You want to always (as much as possible) communicate what's going to happen next. This helps people see that the meeting was a good use of their time because it's moving things forward. It also offloads the burden from you and allows the entire team to participate in the next steps.

Don't be afraid to assign tasks to other people, even those outside your immediate influence. It's common in meetings for one person to volunteer to investigate something, seek information from another person, or agree to take the conversation elsewhere. The follow-up is the perfect place to remind everyone who is doing what. Be as specific as possible. Note the item in question, mention to the person who will be responsible for it, and provide dates or a general timeframe for when we will know more. Ask direct questions, too, so that there's no ambiguity about what items are still open. List important decisions and make it clear why the decision is being made.

Here's an example of what a follow-up might look like:

> Thanks, everyone, for your time today! It was a very productive meeting, and I appreciate you all being available. Here is what we decided:
>
> - The transition on the homepage moves too fast. Jon is going to change it to 100 ms.
> - The price for items in Best Sellers seems too small. I will check to make sure it's consistent with the others and adjust as necessary.
> - The category tree appears to be using the wrong data. We have an email out to Abdul to address this.
> - Stan is concerned the CTA for membership is too large and uses the wrong copy. Jennifer is checking with content for the correct copy. I will forward the usability study that informed this.
> - The release date has been approved, pending QA. Jon is going to email us tomorrow with a status update.

The important thing here is to keep your update as short and specific as possible without leaving out any important information. Your stakeholders should be able to quickly skim without becoming bogged down in the details. If they need more information, they should be able to link to your full notes and documentation too.

Apply Filters

Another post-meeting strategy is to use your best judgment to filter out all the unnecessary information that isn't worth repeating to the entire team. This can be difficult to assess, but it's necessary if we expect to communicate without too much clutter. There are plenty of things that are said in a meeting that do not need to be reconsidered, rediscussed, or rehashed again. Much of it will be obvious, but some of it is more difficult to discern.

For example, when most of the people in the room nod their heads at the right solution, but one or two people still have questions, allow them to speak their minds. Let them talk, listen to them, apply all the same skills you have learned so far. But, when it comes time to write your notes or create the follow-up, use your own discernment to decide if it needs to be documented. Some stuff can safely fall off the radar, and that's okay.

Other times, you may have a colleague or stakeholder who is saying or suggesting things that aren't totally relevant. Related to the idea that people like to hear themselves talk, some people will just riff on an idea. That's fine. It happens a lot. Some might call it brainstorming, but it's often clear that this person is going off on a tangent. It's okay, though. Allow them to speak. Value their input in the process. The important thing is that you recognize these situations and account for them in your follow-up by discreetly excluding any information that's just going to add clutter to the conversation.

IGNORING "INNOVATION"

Once I was in a meeting with a client, discussing the idea of an interactive map of the client's retail stores. The existing map was nothing more than a static image with labels that the user could pinch and zoom. While reviewing some of the map designs, the project manager went off on a tangent about how these maps weren't innovative enough, that he would have expected more from us, and wanted to know where our "out of the box" ideas were. He then began pontificating on a 3D map in which the user could walk down store aisles and, using augmented reality, see all the details of each product on shelves with popovers and animations. Although he meant well, I knew better than to spend time on this idea, and I was able to remove that part of the meeting from my follow-up notes.

To help you understand what information you can safely filter, you need to quickly assess several things about the person providing the feedback:

What are this person's intentions?

Some people are just throwing out ideas casually and don't actually have any intention of them going anywhere. They're comfortable with the idea that it never progresses beyond the initial suggestion.

Do other people agree or disagree?

It's often clear that no one else agrees with this person, and even if there isn't a decision, you can safely move on without adding their idea to your documented notes. Read the room and make a judgment call.

Is this person influential or not?

Some people are more influential and important to our decision making. Figure out who's who and then use that to inform your decisions for following up.

Is this person likely to bring it up again in the next meeting?

If so, you'll need a way to politely defer the decision and follow up later. If you actually don't want it to come up again, be sure to address the idea before that happens.

The point here is that it might be possible to pass over some of the information in the meeting and not allow it to cloud your documentation or the project. We need to learn to understand when people's comments don't align with the objectives of the project. If they aren't an influential part of the decision, no one else agrees with them, and they aren't likely to bring it up again, it's a safe bet you can filter it out.

NEVER MENTION IT AGAIN

I was in a meeting with five or six people, and there was one person who was particularly charismatic. He wasn't from the same team, but he was an influential person in the company and asked to be included in our conversation. Overall, I'd say that although everyone enjoyed working with him (he was a fun person to be around), he also had a reputation for having too many wild ideas.

During the course of the meeting, another person was commenting on an interaction when he jumped in with an idea. His idea took shape as something completely off the wall, virtually impossible to pull off or at least incredibly unrealistic, and the entire conversation shifted briefly to this wild brainstorm. I didn't participate; I just took notes and asked questions. Others chimed in, but it seemed clear to me that no one else really thought this was a priority. His idea was outside the scope of the project, although quite creative and definitely forward-thinking.

After the meeting, when I was writing my follow-up, I came to the section of my notes with this idea. Rather than have it live to see the next meeting agenda, I chose to simply leave it off the follow-up entirely. I emailed everyone in the room, including him, a bulleted list of what we had talked about, but that idea was intentionally missing. After that, I never heard another thing about it. No one else on the team mentioned it, and he never brought it up to me either.

In this particular case, I had to understand the dynamics of the relationships at play in the room; otherwise, I might have stumbled into a request that had the potential to completely distract us. Yet, it's important to point out that I did two things to make him feel good about it in the moment: I asked questions and I wrote things down. He had no idea *what* I was writing down; it didn't really matter. What mattered was that I respected him enough to listen and take notes. I made him feel valued. Even if he had noticed that I left the idea off the follow-up, he knew that I had at least considered it. I don't know for sure, but my guess is that he either didn't read the email at all or never even noticed that the idea was missing.

Overall, you must learn to filter out all the cruft that can cloud your decision making. It's too easy to think that everyone's opinions and ideas need to be incorporated into our designs, but that's not true. It's actually a dangerous path. Use your skills in listening and relational discernment to remove the stuff you don't need, keep the most important things, and follow up quickly with what's being done.

Seek Out Individuals

Just like the meeting after the meeting, there might be some people you'll want to talk with afterward. You could offer to follow them back to their desk, invite them to continue the conversation later over coffee, or direct message them to debrief afterward. It's important that you ask right after the meeting, while everyone still has their brains in gear and is thinking about your project. When they get back to their desks, it will be a lot more difficult for them to make time for you.

The purpose of these one-on-ones is to give people an opportunity to share their thoughts and opinions outside the constraints of a meeting where other people are listening. You can use these interpersonal relationships to collect more information about the project, gain insights about team or company dynamics that you might not otherwise know about, and build new relationships that can help you get what you need in the future. These people are the influencers on your project, and they can become part of your coalition for influencing the next meeting and the next round of design revisions.

Meetings are usually a good time to see people who you don't normally interact with regularly. They might be from another department or team, so they don't get to see everything you're doing. I find that I'm always pleasantly surprised when someone I don't know well comes to my aid and expresses support for my proposal. You want to always be intentional about seeking these people out and finding ways to connect with them more regularly to keep them in the loop so they have the opportunity to help influence your work.

Do Something, Even If It's Wrong

When I was a kid, my dad and I built a treehouse together. I remember one time while he was holding up a board, he dropped his tools. He was standing on a ladder, holding this heavy piece of wood in place, and unable to do anything himself. I didn't know what to do and just stood there looking at him in indecision. Should I try to help him hold the board? Should I jump down and get the tools? What should I do? After a few seconds of agony, he yelled to me, "Well, do something! Even if it's wrong!" This was actually a common phrase of my dad's. The sentiment is that sometimes it's not clear what we should do, but it's almost always better to do *something* rather than nothing.

I wouldn't suggest applying this logic to too many of life's important decisions, but it's often the case that meetings end without any clear resolution to some of the most important questions for our designs. Sometimes, even when we press hard to get people to make decisions, we still can't get agreement or move forward. Perhaps no one is willing to speak up in front of other stakeholders. Maybe no one really cares about one particular element. What's common is for no obvious solution to appear to be the right course of action. No one is really sure what to do, and so no one does anything at all.

In these cases, I recommend simply making a decision yourself and communicating it to the rest of the team in your follow-up. It's better to do something (even if it's wrong) and give your team the opportunity to speak out for or against your choice rather than deal with stale decisions and a stagnant design process. Sometimes, you just need to decide and tell everyone else what you're going to do to get them to speak up.

There's a similar idea called the McDonald's theory, proposed by Jon Bell. If you've ever had the experience of standing around with friends trying to decide where to go eat, then you know this feeling. Everyone is trying to be polite, and no one seems to really care which restaurant you go to. As a result, you all continue to stand around and not go anywhere. According to Jon's theory, you should suggest eating at McDonald's—make the decision for the group—and suddenly everyone will have an opinion about where to go. Jon Bell says, "Anne Lamott advocates 'shitty first drafts,' Nike tells us to 'Just Do It,' and I recommend McDonald's just to get people so grossed out they come up with a better idea."[1]

A developer friend of mine, Mark, does the same thing with styling CSS in his projects. Because he's not a designer (and not very good at CSS), he wants to be sure the designers will make it better. However, he's had too many experiences when his CSS was seen as "good enough" and never polished to the degree he knows it should be. Rather than have to explain to everyone what needs to be done, he simply applies appalling colors to every element: bright red, hot pink, or putrid brown to be sure that anyone who sees it will insist that it be restyled appropriately. Often, the best way to get people's attention is to make an obviously bad decision.

The same thing happens with design decisions. No one is quite sure what the right solution is, and everyone wants to be polite. These are your designs, after all, and they may not want to hurt your feelings. If you're faced with indecision or ambiguity, take the lead and make the decision for everyone. Find the choice that you believe is best and then communicate that to the team. Be specific, provide examples, and give them a deadline. Say something like, "If I don't hear back from anyone by the end of the day, I'm going to move forward with this design." You may not hear from anyone, but sometimes people will suddenly have

1 Jon Bell, "McDonald's Theory," April 29, 2013, *http://bit.ly/1EnqiOD*.

stronger opinions and allow you to discuss the right solution. It's not a perfect science, but it's a great way to keep your designs moving forward. Remember: do something, even if it's wrong.

It's important to keep in mind that even when the meeting is over, your work is not done. Often, the most productive parts of the meeting happen after everyone has left the conference room. Don't miss out on this opportunity to finalize decisions and get buy-in from people after the fact. Keep these tips in mind for when the meeting is adjourned:

- The time immediately after the meeting is a great opportunity to hear what people really think.
- The faster you follow up, the more you communicate urgency, value, and decisiveness. Do it now.
- Filter out any clutter or unnecessary recommendations from your notes that you know do not need further action.
- Stick around to chat, follow people back to their desks, and get the last-minute buy-in you need to move forward.
- If there's ambiguity, make a decision and communicate it to everyone else. That might be the only way to move things forward.

The thing with meetings and design decisions is that they don't always go the way we want. Even with the most eloquent response and the best follow-up, we might still need to make changes to our designs that we disagree with. But if you walk away from a meeting feeling like all is lost, don't worry. It's still possible to save the day and rework your designs to meet everyone's needs without totally losing it. You need to learn how to deal with changes.

[10]

Dealing with Changes

After everything we've covered, I want to be honest and say that sometimes no matter how much we try, we will still need to make changes to our designs that we disagree with. It could be that the people we work with are not willing to budge on their opinions despite our expert suggestions. Or, it's possible that we just haven't done a good enough job of making a compelling case for our designs. In this chapter, I propose some options for dealing with changes.

We'll cover the following:

- Common explanations for why this happens
- Seeing the opportunity in these changes, no matter how terrible they might seem
- Deciding to choose your battles and earning a deposit in the bank account of trust
- Learning to recognize when you're wrong and correcting yourself
- Setting expectations properly about what our stakeholders can expect going forward

First, let's talk about why we ended up in this position.

Changes Are the Purpose, Right?

As we noted in the beginning of the book, there is something about design that seems to elicit subjective opinions from everyone. Everyone is a designer! But more than that, the very presentation of our work to nondesigner stakeholders appears to be all about giving them a platform to suggest changes. Often, these meetings have calendar event titles like "Design Review" or we verbally tell our stakeholders that we want their feedback. As a result, they show up with an expectation that telling us something to change is the entire purpose of the meeting! If they have no changes, there'd be no point in meeting. Right? This phenomenon has given rise to a few very interesting ideas:

Parkinson's Law of Triviality
: This problem is heavily influenced by *Parkinson's Law of Triviality*, which states that people in a meeting will spend a disproportionate amount of time on issues that are not central to the project. According to Wikipedia, "Parkinson observed and illustrated that a committee whose job was to approve plans for a nuclear power plant spent the majority of its time with pointless discussions on relatively trivial and unimportant but easy-to-grasp issues, such as what materials to use for the staff bike-shed, while neglecting the less-trivial proposed design of the nuclear power plant itself."[1] This is where the term "bike-shedding" comes from in software development. Sometimes, people give feedback and spend an inordinate amount of time on a relatively small issue because it is visible and accessible to their understanding.

Painting a duck
: This problem has also opened opportunities for designers to find creative ways around these situations, like *painting a duck*. According to Jeff Atwood, a duck is "a feature added for no other reason than to draw management attention and be removed, thus avoiding unnecessary changes in other aspects of the product."[2] The concept comes from a story out of Interplay Entertainment. One of the designers on an animated chess game was tired of all the changes his stakeholder asked for. It seemed as if no matter what he did, they always had one more change. To avoid having to make more changes, he created the queen character and animations exactly as he wanted them to be, but also gave the queen a pet duck. The duck was obnoxious and overdone, flapping around on the screen. According to Coding Horror, "Eventually, it came time for the producer to review the animation set for the queen.... When the animations were done, he turned to the artist and said, "That looks great. Just one thing: get rid of the duck.'"[3]

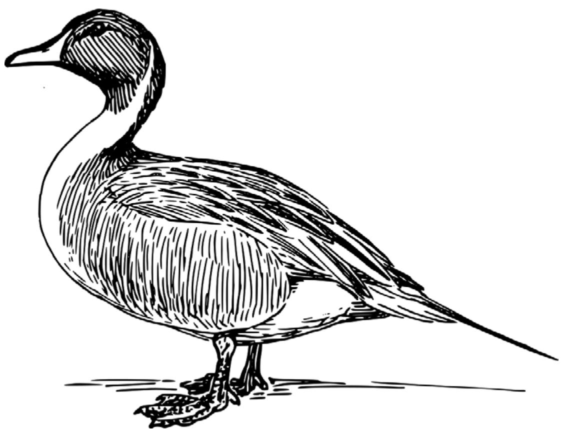
1 Wikipedia, "Law of triviality," *http://bit.ly/1iuD1dW*.

2 Jeff Atwood, Coding Horror Blog, "New Programming Jargon." July 2012, *http://bit.ly/1JfEtrg*.

3 Atwood,"New Programming Jargon."

Hairy arms

But wait, there's more! Ideas like this have been around for a long time. In the 1940s, Disney animators came up with a similar solution. Their art directors liked to suggest changes, and it was a painstaking process to draw and redraw each character. So to avoid having to make changes they disagreed with, they began adding hair to the arms of the characters that they did not want to be approved while leaving their own recommended designs clean. In the 40s, people didn't want a cartoon character to have body hair, and this unconscious bias led their art directors to reject those characters. Since then, the phrase "*hairy arms*"[4] has become widespread as a tactic for getting someone else to agree with you using purposeful distractions.



I apologize if you're so distracted by this duck that you're unable to focus on reading.[5]

DESIGN BETTER CONVERSATIONS

Obviously,[6] we shouldn't deceive or manipulate our stakeholders in these ways, but there is truth to these stories that bears considering for our work. Some people aren't going to be happy no matter what we

4 Melissa Block, All Things Considered, "What's With All Of The 'Hairy Arms' In Graphic Design?" November 2014, *https://n.pr/39azjRt*.

5 "tail" is licensed under CC0 1.0. To view a copy of this license, visit *https://creativecommons.org/licenses/cc0/1.0/*.

6 It *is* obvious, right?

do, and we need to find a way to help them without compromising the integrity of the user experience. Hairy arms and painting ducks may make amusing stories, but they also make a good point: that all relationships are about give and take. We need to be able to recognize patterns in which it's appropriate to offer solutions and use methods to keep our conversations focused on the task of getting support.

Often, these sorts of issues can be avoided simply by designing better conversations through properly setting the context and fidelity of our work, plus telling our stakeholders what sort of feedback is useful and what is not. As we saw in Chapter 3, setting the context for them up front is important to avoiding this. If you find yourself fending off unwanted feedback, this could be the reason why.

What's Really Going On?

Yet, being asked to make changes that we disagree with is the very thing we're trying to avoid. We've gone to great lengths to listen to and understand our stakeholders so that we can appeal to their needs with our response. If they still disagree or insist that we make a change, there are a few reasons why.

THERE IS A MISUNDERSTANDING

If you're confused about your stakeholder's insistence on changing something that you've recommended against, it's possible that you're simply not on the same page. There could have been a miscommunication: your stakeholder didn't understand what a carousel was, wasn't listening close enough, or misunderstood the context. Clearing up the miscommunication is usually sufficient. Other times, the stated goal of the project has changed and morphed over time, and we're now solving different problems than the ones we originally set out to solve. This is quite common, and a stakeholder's suggestion for changes is often a reflection of these moving objectives. Getting to the root cause and clearly redefining the goals will help guide you back to a healthy place.

YOUR DESIGNS ARE NOT THE BEST SOLUTION

I know it's hard to swallow, but it's possible that your design is actually not the best choice. In fact, you could be totally wrong. We will look at understanding when you're wrong later in this chapter, but it's important to realize that our stakeholders and leaders have been placed in authority for a reason, and they are usually ultimately responsible for our successes and failures. They have expert knowledge in different areas and insights into the business that we don't have. In the same way that our stakeholders extend trust to us for recommending the best solutions, we also must learn to extend that same trust to them when it comes to the final decision. It may not be easy, but it's our reality.

THEY HAVE A NEED THAT ISN'T BEING MET

Some people—especially executives—simply want to know that the thing that's important to them is there. I know this isn't user-centered in the way we would like it to be. Perhaps it's something that high-profile clients or other executives request. As long as they know where it is, they're usually satisfied. They might even be perfectly happy to jump through a few hoops to get to it, if they know what to expect. I worked with one person who loved to look at all the social media chatter about the app and insisted that we add it to the home page. In reality, he just needed quick access to it. Helping him to bookmark it with a vanity URL that he could remember addressed his needs.

However, it's not always that simple. Understanding our stakeholder needs was the goal of Chapter 2. If you suspect there's an underlying need that your stakeholder isn't expressing, you'll need to work harder to uncover their motivations and find a way to address their needs.

THEY ARE COMPLETELY UNREASONABLE

Are they just unreasonable? Maybe, but probably not. Yes, some people are unreasonable, and no matter what we say, they will insist that we do it their way. Some people will act in their own best interests, even unintentionally. It's been guessed that 4% of the population are clinical sociopaths.[7] That means that 4% of all people use dishonesty and manipulation to control the people around them. But what really sets sociopaths apart is that they do so without remorse. They behave in this way without a moral compass, no empathy or concern for how their decisions affect others.

What's more is that sociopathic personalities are four times more likely to occupy corporate executive roles.[8] I'm not saying your CEO could be a mass murderer, because sociopathic tendencies don't always

7 Martha Stout, *The Sociopath Next Door* (New York: Broadway Books, 2005, p. 8).

8 M.E. Thomas, *Confessions of a Sociopath* (New York: Crown Publishers, 2013, p. 184).

manifest themselves in violent ways. Think about it. These are people who are task and success driven, maybe at the expense of others. It's difficult to make important business choices if you have the empathy to carefully consider how your decisions affect everyone else, right? Sure, some people might be on the extreme, manipulative and lying, but a lot of people in executive roles got to where they are because they were able to successfully remove the emotion of relationships from the equation. The side effect is that their decision making doesn't always seem rational to us. Knowing this means we might need to use some caution when working with them.

However, this is actually less common than you might think. It's unlikely that your stakeholder is totally unreasonable. Usually when we think that our stakeholders are being unreasonable, it's actually that we just don't see things from their perspective, and it's possible (even likely) that we would make the same decision if we were in their shoes. Often one person's supposedly unreasonable suggestion is rooted in something far simpler: they just want to be heard.

THEY WANT TO KNOW THEY'RE BEING HEARD

Believe it or not, this may be one of the most common (and unspoken) reasons why people insist on making changes. Our stakeholders simply want to know that their ideas and suggestions are being heard and taken seriously. Many people who appear unreasonable actually just don't have the confidence that we heard what they said and so they don't see any other solution than to push their own agenda or play the boss card.

You see, people in authority expect to have authority![9] They expect that their opinions are just as valid as yours, so when you shrug off their ideas with an explanation for your own choices—it sounds like excuses. It sounds like you're invalidating their perspective. If you refuse to make changes, even indirectly, then you're not listening to them. It's no surprise they appear unreasonable and insist on making changes you disagree with. You've not given them any other way to be heard.

9 I know, right?

I don't mean to suggest that our stakeholders would be so arrogant that they'd purposefully push their own agenda. I think this can happen unconsciously when they don't feel valued in the process. If this is happening, we need to communicate to them how much we value their input and feedback. They might have felt like we shrugged off their suggestion without taking it seriously. But more importantly, we did not help them understand why our solution was preferred. You'll need to go back and ask them to explain their perspective again.

Making Lemonade

It's not always the case that one person's "bad idea" will turn out poorly and ruin everything. Usually, it's our poor execution of that idea that causes these changes to create chaos. Rather than try to fight it or do the difficult work of making it better, we often just give in, shrug our shoulders, and add the thing that person wants exactly as it was proposed. However, when we do that, we're missing a huge opportunity to improve the design in a way that we had never thought of before.

All design has constraints and limitations. Our challenge has always been to build websites or apps that are easy to use, yet are required to support a certain feature set, user story, or major constraint such as the limited viewport size of mobile devices. We relish these challenges. This is what gets us out of bed each day: making great stuff with constraints. If our projects had no constraints at all, it might be theoretically easier but it would not be nearly as rewarding. The fact is that these constraints make us better designers. They are the reason we have a job; other people can't figure out how to make it all work given the same requirements. And so, when directed to implement a design decision that we don't support, it's important that we don't give up and just paste it on top of the interface—tempting as that may be.

Making these changes is an opportunity to find the best possible way to implement that idea. It's a new constraint that you are tasked with incorporating into the project. Our stakeholders expect that we'll "figure out the best way to do it" because that's what we're being paid to do. In fact, our goal should be to take this constraint and actually use it to improve the experience rather than muddle through and hope we don't break it. We need to flip this attitude on its side and see the opportunity in the mess. We can improve the app and manage the conversation with clever solutions and creative thinking.

In my experience, one person's suggestion is a gold mine of other ideas waiting to be excavated. The changes your stakeholder proposes should spark a conversation that leads to an even better solution. Your job, as a communicator, is to lead that conversation to a place that will yield the best results for your application. You can do that by asking questions, understanding their perspective, and listening: all the skills we've covered in these pages. Involve other people. Ask them how they would solve the same problem. Propose an alternative; even a bad alternative should start a conversation about solutions. You see, this is an opportunity for you to both practice your skills as a communicator as well as effectively lead a discussion on maintaining the right user experience.

UNCOVERING OTHER PROBLEMS

Occasionally, having a stakeholder insist on a change can lead you down a path to improving the app in a way that you never expected, solving problems you might not have uncovered otherwise. A mobile app I designed displayed demographic data in both a list view and a bar chart view, controlled by tabs. Originally, the two views were distinctly different, but over time as the team moved things around, the two views unintentionally became similar without us even realizing it. Finally, the client asked us to add an additional field to the bar chart, and we realized that we could combine both views into one. What started out as two different ways to show the information merged into one consolidated view and a simpler experience for the end user. Had we argued against all these changes, we never would have arrived at a better solution.

On another project, one of my stakeholders requested changes to some interactions on form validation and messaging. Although her intentions were well placed, I thought the changes would degrade the experience for the user. Rather than blindly comply, our team did some quick user testing to ensure that what we were doing would work. By observing users perform all the tasks end to end, we discovered a completely different flaw in the user flow. As it turned out, neither my suggestions nor those of the client would work. Being open to changes in one part of the app revealed a flaw in another. Because of our timeline, we might not have uncovered that problem as soon if I hadn't been open to the suggestions from my stakeholders.

Seeing stakeholder requests as an opportunity for change or a challenge to solve for is a much healthier approach than groaning accommodation. Plan for these changes, *because they will happen*. If you already know how you're going to address them—for example, with preplanned real estate, an extra user study, or a reevaluation of the approach—you'll be in a much better position to ensure that you're creating the best user experience even in the face of difficult changes. Your stakeholders will appreciate your effort, your attitude will help you stay on track, and in the end the user will thank you for it.

The Bank Account of Trust

As you consider the different ways to approach stakeholder feedback, it's important to realize that every relationship involves some give and take. It's simply not possible to have a healthy relationship with other people if that relationship is only one-way. You can't expect that other people won't suggest changes. Consequently, you must be prepared to deal with them. It's much better to anticipate these changes and know how to react before they even occur.

Purely from an economic standpoint, your job as a designer is already established as a give-and-take relationship. You receive money in exchange for providing designs. Beyond that, for the relationship to not only function but to thrive, you also need to keep your stakeholders happy. That's more than just a purely economic transaction. This happens by building trust, demonstrating your expertise, managing their expectations, communicating effectively, and (of course) delivering what they expect. In those areas, there is also give and take. Think of it like a bank account: every positive experience working with you is a deposit and every negative one a withdrawal. In his book *The 7 Habits of Highly Effective People*, Stephen Covey calls this the "Emotional Bank Account."[10] Your goal is to maintain a positive balance with them at all times.

For every time you agree with your stakeholder, you make a deposit. When the metrics improve as you promised: deposit. When you show them an incredibly beautiful design they love: deposit. But when we

10 Stephen Covey, *The 7 Habits of Highly Effective People* (New York: Simon & Schuster, 1989, p. 188).

disagree, we begin to see withdrawals. When you miss a deadline or fail to follow up on feedback? Withdrawal. You refuse to make a change because you believe it's in the best interest of the user? You might end up being right, but at least temporarily, it's a withdrawal of trust. At the end of the day, your relationship with stakeholders can be measured by the balance you have in this bank account of trust. Their willingness to trust you when it matters most is dependent on having a positive balance.

As a designer, that means that sometimes you have to relent and allow your stakeholders to make changes even when you're opposed to them, maybe only because you need to make a deposit. The important thing is that you're learning which battles are worth fighting. You're taking stock of the big picture and choosing to only make a fuss about the ones that matter most. You're focused on your goals, the problem, the users, and seeing to it that the areas where you disagree can still allow you to deliver on your promise of building the best possible interface. It's a balancing act, for sure, but one that you will always be learning to manage. You must constantly be balancing the needs of the user with the needs and requirements of your stakeholders. When those two things collide, you have to make difficult decisions about where to draw the line. But realize that you always have a choice about where that line is. In many ways, as the designer, you get to draw (and redraw) that line at every meeting and in each conversation. The outcome of the project is dependent, in large part, on your ability to effectively manage these conversations and find the best solutions, given the constraints of working with real humans.

The long-term goal of building trust with stakeholders is to come to a place where their default response is to assume that our choices are right rather than questioning our decisions from the beginning. My clients know that I have opinions and can express my perspective. Over time, they learn to trust me and shift from a position of assuming that my choices are questionable to assuming they have purpose. On a phone call recently, one of the stakeholders questioned a design element but then deferred to me: "I know Tom usually has good reasons for his choices. Tom, what's the reason you did it this way?" When you can get your stakeholders to approach your work with this perspective, you set yourself up for long-term success in building great user experiences you can be proud of.

When You're Wrong

One of the keys to good communication is building trust with the people whose support you need. It's not enough to only be good at telling people why you believe you're right, although that's important. You also have to build rapport, create trust, and develop a track record of making good decisions. The more people see that your designs accomplish their goals, the more likely they'll be to defer to your judgment when the time comes. This only comes with experience and by building good relationships.

However, something strange happens when you're wrong: there is potential for that trust to be broken. The metrics don't improve like you'd hoped, you miss a target deadline for the release, or your designs are found to be ineffective for users. It's difficult when you express confidence in your decisions and then watch as your assumptions come crumbling down. Hopefully your decisions won't cause critical damage to your product, but in any case when your designs are shown to not be the right solution, it creates a tension that can be awkward to handle. You have a choice: own up to your decisions, or ignore, deny, and absolve yourself of any responsibility.

Although being wrong might seem like it would tear down trust, it's actually an opportunity to build more trust by admitting you made a mistake. It seems counterintuitive: we've let them down, and now we're supposed to admit it. How does that build trust? In a court of law, admitting to a crime means that you are prepared to bear the punishment. You've broken the trust of the people and now you have to pay for your mistake. But in the world of relationships, people are far more forgiving than you might expect. People appreciate honesty more than smoke and mirrors. They prefer transparency over a cover-up. The way they know they can trust you is when they see that you'll own up to your mistakes. Honesty is truly the best policy. It may be tricky at first: it will create difficult conversations. But in the end, you'll almost always come out on top when people realize you're a trustworthy person—that even when you screw up, you're there to admit it, fix it, and move on.

In a worst-case scenario, your mistake will cost your company money. It's possible you could lose your job for a major blunder, but I don't believe you should ever fear that sort of reprisal for being honest about what happened. As a manager, it's really challenging to hire and keep good people. If you've done a good job of building relationships and establishing value at your organization, there's very little chance you'll be let go just because one of your designs didn't meet expectations. So don't fear your job and try to protect yourself, because you'll only end up creating a self-fulfilling prophecy.

MOVE ON

The best thing to do is just get it out of the way so that everyone can move on. Rip off the bandage of your pride and set things in motion to fix it. Be direct and clear about what happened. You need to clearly state, "I was wrong" or "I made a mistake," but also be quick to get to the solution and focus on action instead of excuses. Tell your stakeholders what needs to be done to correct the problem and outline a clear plan for doing so. Most stakeholders are results oriented, so quickly admit your mistake but jump directly to the solution. When you make yourself part of the solution, you're also making yourself indispensable: they need you to help correct this problem. And because the blame lies with you, communicating a sense of urgency and willingness to go above and beyond on correcting the issue will help establish the trust you need to move forward.

The reasons why something went wrong are not nearly as important as fixing the problem. Don't obsess over rehashing history. This usually sounds like excuse making. Instead, gloss over why it happened and get straight to the fix. If people want or need to know the history, they'll ask and you'll have the opportunity.

THE BLAME GAME

It's also important to recognize that often people just want to know who to blame for the problem. It might seem unfair, but some people want a scapegoat so that they can talk about it with their bosses if it comes up. A good stakeholder will own the mistake with you, as the person who oversees the decisions on the project. But even if they don't, you'll get a swifter resolution if you own up to what happened and move on. As soon as the source of the mistake has been identified, everyone usually feels better about moving on.

FALL ON YOUR SWORD

There are also cases in which you, as a leader, will need to own up to mistakes that might not have been completely within your control, just for the purpose of moving on. Teams can get so hung up on asking

“Why did this happen?” that it derails the project even more. Although it’s unlikely that you’re solely responsible for a failure on a project that involves a team of people, it’s still worthwhile to admit your part (however small) in getting the team to where it is now. This can sometimes result in you falling on your sword and taking the hit for the team. It’s not always advisable, but in tense situations in which everyone is pointing fingers, it might be the best way to move on.

KNOWING WHEN YOU’RE WRONG

The most difficult part of admitting when you’re wrong is even being aware that you’re wrong in the first place. It can be easy for our own arrogance to get in the way of seeing the problem. As designers, we see our designs as our creation—this perfect thing that we made and are sending out into the world. It’s really difficult to see the flaws with it, even when people point them out to us. We are often in denial about the fact that our work doesn’t work. How, then, do we know when we’re wrong? There are three red flags, and they all conveniently line up with the three things you need to be a successful designer. How to know when you’re wrong:

The problem still exists

While we try to solve problems, it’s not a given that our designs will always work as expected. If we find that the problem still exists, we’re wrong and we need to change something. I’ve actually witnessed designers who were in complete denial that their designs were to blame for an unsolved problem. “I redesigned it and it’s much better now. If conversion hasn’t improved, there must be some other issue.” No matter how great *you* think your designs are, if the problem still exists, you’re wrong.

Users don’t get it

Because we want our designs to be easy to use, we need to see that they’re actually making it easier for people. If not, we’re wrong! I’ve worked with designers who were so convinced that their interface was easy to use that no amount of failed user testing would have convinced them otherwise. They usually blame the users. “This interaction is common on mobile devices now. If the users don’t know how to use it, they must not be familiar with modern design patterns.” Guess what? The user is not to blame here: your designs are.

You don't have support

> We can be really arrogant about how elegant our solutions are, especially if we're the only designer on the project. We feel justified that "no one else knows good design," and so even in the face of opposition, we insist we're right. But when a majority of people disagree with your decisions, it's a sure sign that you're doing it wrong. "I know you all disagree with this decision, but *from a design perspective* this makes the most sense..." Although we do want everyone to trust us with difficult decisions, it's not true that you're always right just because you're a designer. Take stock of the room and be smart about how you're perceived when you push for something. When you own the company, you can take those risks. But until then, allow other people to influence the project, too.

However it comes about, when you see that you're wrong and you're willing to admit it, go straight to the business of reconciling the project. Focus on action, propose a solution, communicate urgency, and be willing to hustle. Your reaction to a mistake will speak volumes about you as a person and set you up to build trust with everyone on your team going forward. Recognizing when you're wrong and proposing a solution is one of the most important ways you can deal with changes to your design.

Managing Expectations

An important part of your relationship with clients, leaders, and stakeholders is managing their expectations of you, of the project, and of the outcomes. *Your ability to properly set, adjust, and communicate expectations is more important than your ability to create the perfect solution every time*. This is especially true when you're faced with making unexpected changes or taking the project in a different direction based on stakeholder feedback. More than just making their changes, you must help them understand *how* it will be done, *what* your thought process and approach will be, and *when* they can expect it to be finished. Setting those expectations at the outset (and all through the process) is important to getting stakeholder support and buy-in over the long term.

I mention this in a chapter about dealing with changes because it is in these moments of trying to right a wrong that we most need everyone to understand the situation. I've seen projects fail, not because the designers had bad ideas or didn't work hard enough creating innovative solutions, but because they didn't communicate expectations and eventually lost the support of everyone who mattered most.

The most memorable example was Jim. I had hired him to lead the design effort of a new product. As a concept, this web service had no track record, little internal support, and virtually no budget. Our job was to build something out of nothing, to create value in an area that hadn't been explored before. It was new, exciting territory, but we faced an uphill battle of helping other people understand and support our vision for the product.

Jim was young and inexperienced, but he had good ideas and was a talented designer. He understood the vision, had related experience, and had a ton of energy. Jim was also extremely opinionated, sort of immature, and quite arrogant. Despite caution from my leaders, I hired him anyway. I could always coach him on these things, I thought. It was a huge mistake.

When the new platform was being tested with both internal users and potential customers, we got a lot of great feedback. While most people were interested, many didn't understand the need. They were willing to try it, but were skeptical. Complicating matters was the fact that this new platform would replace the content management system on our website. Not only did we have a problem of helping people understand a new product, but we also had a lot of people inside the organization concerned about how their workflow would change.

Jim's approach to addressing these challenges was not ideal. When someone would express concern or ask questions, he would become defensive and basically tell them that they were wrong. In one case, he told a manager they didn't understand because they were old. His attitude was: "This product is easier to use! Don't they understand that? The things we're doing are innovative! They just can't deal with change." Because he was unable to reconcile these questions, he was usually perceived as writing off other stakeholders. It was a disaster.

I did my best to act as a mentor and coach. We had frequent conversations about how to better manage everyone's expectations. He seemed to agree that it was a problem of communication and alignment, but his actions never seemed to value it in practice. He just wanted to make more stuff and thought that would make people happy. His work habits eventually devolved into a cycle of pumping out as many new features and fixes as possible. He was working more hours, but actually talking to people less and less. The problem only got worse.

In the end, I had to let Jim go. The environment had become draining and counterproductive around him. In hindsight, I should never have hired him against the recommendation of my own leaders. I believed (naively) that Jim's talent with design would overshadow his immaturity or that I could fill those gaps with my own skill. I was wrong and now I had to deal with the consequences.

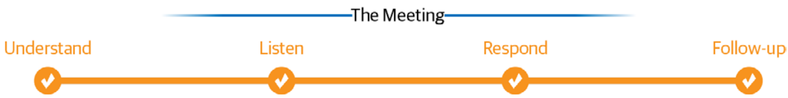
With Jim gone, I took over the project myself, but I saw it as a matter of managing conversations. I immediately started pursuing everyone who had been put off by Jim's attitude. I listened to them, made notes of their suggestions, and created a publicly visible list for everyone to see what was on my plate. I invited several key people into different conversations to help prioritize the needs in a group setting; this way, everyone could see how each person's changes affected others. I attached priority values and time estimates to each task. In some cases, where it was appropriate, I chose not to pursue an idea at all.

The end result was visibility and alignment: everyone was on the same page, everyone knew where we were going, and everyone supported my effort to make it happen. As people saw that I was making good on my promises (even if it was at a slower pace than we would have liked), they learned to trust me and I quickly regained their support. When I couldn't deliver, I let them know ahead of time and let them help me reprioritize things. They were part of the decisions, they had visibility into the project, and they felt ownership with me.

Whereas weeks earlier people had been complaining about the changes, now they were excited about the direction even though it would take much longer without a full-time person dedicated to it in the short term. Because it turns out that delivering more stuff faster wasn't really what people wanted. They wanted to have confidence in the product, to understand the approach, and to feel valued in the process. They needed appropriate expectations.

I don't know for sure, but I suspect that Jim (like many other designers) believed that his designs would speak for themselves. That interpersonal communication, as a skill for designers, was wholly unnecessary because our designs are, in and of themselves, a communication medium. He was the expert, but his arrogance clouded his ability to value the stakeholders on the project. He was good at solving problems and he was very user-centric in his thinking, but he failed to realize that without the support of everyone else on the team, he was not going to be able to succeed. In an extreme sense, he lost his job because he was a terrible communicator. This is a lesson that every designer needs to learn, though hopefully you won't have to be fired to learn it. *The way you communicate with and manage relationships with stakeholders is critical to your success as a designer.*

Over, but Never Done



Our journey of meeting with and communicating to stakeholders has come to an end, and yet it is a process in which we are constantly involved. By now, the meeting has concluded, you've already done a great job following up with everyone on the team, and you're well on your way to executing your vision for building an incredible user experience. Hopefully there aren't too many changes that you're concerned about, but even if there are, you're well equipped to find solutions that will benefit both the user and your clients. The culmination of everything we've covered together should prepare you to articulate design decisions, communicate with stakeholders, *keep your sanity*, and still deliver the best user experience.

Before we close this book, though, I'd like to provide one more thing for you to use in your design practice that can help you succeed in building great products. Chapter 11 is a resource for your stakeholders, leaders, or clients. It was written for nondesigner executives and is meant to help them understand and work with us more effectively.

[11]

How Executives Can Help Designers

There are other people in the organization besides designers who are interested in learning to talk about design. Stakeholders from every level see a gap in communication with their own team and seek out resources to help them work with us and make better products together.

I've had teams ask me, "How can we work together more effectively?" Executives ask me, "Can you teach me to work with our designers?" These people understand the value of having good working relationships, and the key to maintaining it in a technology-driven sector is to focus on clear communication. Most often, people become upset and projects become difficult when two or more people fail to communicate. Miscommunication results in missed expectations. Missed expectations lead to disappointment and distrust. We want to prevent this from happening!

Even when communication doesn't appear to be constrained, the way you approach and talk with designers has an impact on their productivity, attitude, and creativity. More than just clear communication, you need to be sure that you're getting the very best from designers.

This chapter is devoted to helping the other people in the designer's path to better understand, communicate with, and thrive on teams with designers. Whether you're a developer, executive stakeholder, product owner, project manager, marketing type, or customer advocate, this chapter is for you. If you're a designer, tear out these pages and hand them to your boss or favorite developer. (Or you can read along and pat yourself on the back as I affirm you and call out your suspicious quirks.) The goal of this chapter is to bridge the gap and help everyone on the team be more effective at communicating with one another. *We want you to learn how to get the very best out of us.*

To do that, we'll:

- Identify several key areas where stakeholders can help us be more successful.
- Provide a list of tips for working with designers on a regular basis.
- Make a checklist of questions that most projects need in order to start off on the right foot.

The King and the Blind Man

Once there was a king who had a blind man as an advisor. When the king was returning from a hunt with a large party, he became very thirsty and spotted a field of watermelon. He called to his servants to fetch some to quench his thirst, but the blind man began to laugh.

> "Why do you laugh?" asked the king.
>
> "Good king, there are no watermelons here!" he replied.
>
> The king was surprised. "You're blind! How do you know there are no watermelons? I can see them with my own eyes. You cannot!"
>
> And the blind man responded, "My lord, one does not require eyesight to know these things. The season of watermelons is over. There may be some left rotting in the fields, but all the good fruit has already been harvested."

You see, the king saw watermelon, and that's what he wanted, but the blind man knew better. It seemed so obvious to the king that this was the solution to his thirst. It was also so unlikely that the blind man could understand the situation enough to help him with his problem. Yet the blind man's perspective allowed him to help the king and ultimately spare him from collecting rotted watermelon. I suppose there are worse fates!

Obviously, this is an amusing story, but the point is this: you have people on your team to make you successful, to help you do your job better, and to provide a perspective that you don't have. There might be times when it seems like the designers don't know what they're talking about or couldn't possibly contribute meaningful solutions to difficult problems, but that's not true. Designers are problem solvers, whether it's addressing business concerns or proposing coding solutions. I've seen designers turn heads when they make suggestions that everyone else thought was outside their realm of understanding. So in order to make the most of your time with designers, you need to remember the Four "izes":

- **Realize** we have expertise in this area.
- **Prioritize** our needs so that we can get to work.
- **Authorize** the entire team to move quickly.
- **Recognize** that we are people, too.

REALIZE WE HAVE EXPERTISE IN THIS AREA

One of the biggest challenges we designers face is with other people believing and trusting that we're actually good at what we do and that we make good choices. What's strange is that so many of those same people will also compliment our work when they like it. However, when people disagree or question our design decisions, there can be a lot of distrust—or at least a lack of complete trust. Many people see the designer's role as merely to make things look nice, and they often aren't afforded the opportunity to have a seat at the table when it comes to decision making.

As you work with the designers in your life, realize that they have expertise in design and that their job is more than just making your project look pretty. They are equipped to find design solutions to business problems. You hired them and have them on your team for a reason: because they're experts in design and are better at it than you are. They have expertise in understanding what makes things easy for users. They're trained in usability techniques and best practices. They know the right patterns and design elements. You need to trust them to do their jobs without telling them how to do it.

In fact, design is really difficult. It seems easy and simple to you because you only see the final result. There is a lot that goes into the design process: defining use cases, mapping flows, writing requirements, and a ton of ideation and iteration on wireframes and prototypes. You aren't seeing everything we threw away or the time and angst we put into finding the proper solutions. By the time our designs get to you, we've been working diligently at checking all the different angles. There's far more to it than just putting some elements on a page.

If we're coming to you with our proposal, you can assume that we believe it's the best solution. You don't need to ask us if we like it or not: we do! We made it! If you disagree, it's absolutely appropriate for you to engage us in that conversation, but don't begin with a posture of skepticism about whether we know what we're doing. Instead, draw out our decision process, seek to understand our perspective, and ask a lot of questions to be sure you're on the same page.

Also, because design can be complex and many elements are interrelated, realize that any changes you suggest will affect the rest of the project. There's a ripple effect that may require us to rework the other parts. It's not isolated. Many stakeholders make well-intentioned suggestions, expecting the changes to be simple or only take a few minutes. It's not unusual to hear, "All you have to do is move this over there, right?" But the process of updating one part of the design requires that we step back and evaluate our decisions. Moving one thing requires that we also move another. Sometimes, changing elements can break the flow of the application. Not always, but often.

So, you need to realize that your suggestions are more than they seem and that they may not be as easy as they appear. Even simple changes will require a certain amount of rework. I'd suggest first asking about the impact of the changes you're suggesting. Try to understand how your recommendations affect the team before insisting that changes be made. Getting alignment on the effort involved is an important part of the conversation.

PRIORITIZE OUR NEEDS SO THAT WE CAN BE SUCCESSFUL

Easily the biggest blocker on any project is not giving designers everything they need to do their jobs. When you ask us to design something, we need a lot of things from you to be able to do that effectively.

It's much more than you expressing your vision and letting us loose. We need business requirements to be documented and timelines to be established. Technical needs, too, are critical: access to servers, contract approvals, or sharing your analytics and data. Often, we need permission and access to other people within the organization: gatekeepers, domain experts, and customer service advocates. We can't work unless we have these things from you, so make it a priority to track down what we need. Let us help you be successful by equipping us with what we need to get the job done. Do the work necessary to set things in motion so that we can hit the ground running.

This means that you have to prioritize our needs in order for us to get stuff done. You should be prepared when you meet with us. Review the designs we sent you in advance so you know what your feedback is. There's nothing worse than someone showing up, saying they didn't have time to review our work earlier, and then riff on a handful of knee-jerk reactions from seeing our work for the first time. No, we need you to be better than that. Value our time in the same way we value yours by being prepared.

You should have already jotted down your list of questions or concerns. You might even find some reference material, like other apps or data from a different project, that will help us understand your perspective so that we can deliver what you need. Most importantly, do this within a reasonable window of time. If you take too long to review and respond to our work, it might shorten the time we have available to implement your changes. We lose time waiting on you, and then we're rushed to get it done. You're not going to get the best from us in that scenario. Please value our role on your team by prioritizing our needs so that we can be successful.

Usability testing and research

One resource that we often need but don't get is permission and budget for doing usability testing. We need to check your project with other people to verify that it will work as expected. This isn't a focus group; we're not asking users what they want. This is taking the time to observe people using our website or app, and then taking notes about ways we can improve the experience. It's task based and mostly observational. We don't do this enough because we often don't have permission to spend our time on it. It's not expensive, and the result will more than pay for itself in uncovering problems earlier or optimizing tasks for a better app. Give us permission and the budget for usability testing, and even encourage us to do more of it.

AUTHORIZE THE ENTIRE TEAM TO MOVE QUICKLY

Projects become stale or move slowly when decisions aren't made quickly. The best thing you can do for the project is to make quick decisions, stick to those decisions, and empower other people to make decisions on your behalf. This will allow your entire team to move quickly and deliver the best product with a great user experience. I can't emphasize this enough. The main difference between a scrappy startup and a bureaucratic behemoth is how quickly they make decisions and move forward. It has little to do with talent, resources, or ideas, and everything to do with the team's momentum. Projects fail or languish when the leaders don't make decisions or don't stick with the decisions they made. This is completely within your control.

You can make us successful by being decisive: make decisions, stick to them, and move on. Being wishy-washy or delaying a decision will cost you real time and money. Either we will be waiting idle for you to make up your mind or we'll be working and reworking our designs to accommodate the changes. It might seem like waiting a few days for the next meeting is completely appropriate, but in those few days we could be already working on the next thing or finding the flaws with our current thinking. The best projects I've worked on were those where we met with stakeholders *daily*. That's right, *every day*. I would spend the day designing, show my work to the client in the afternoon, get immediate feedback, and then do it all over again. That sort of rhythm is empowering and exciting. Sometimes, I propose daily design reviews with larger clients and they groan. Why? Because they already have too many meetings and can't seem to wrap their minds around a process that iterates and moves so quickly. Yet, it is these projects that always take longer and yield inferior results. When stakeholders are involved only once a week (or less!), I can anticipate that it will take almost twice as long as needed.

The better you are at making good, fast decisions, the better off we'll be. Not just more productive, but also happier and more satisfied with our work. We feel good about what we do when we know things are moving forward. It would be better to do something (even if it's wrong) and keep the project moving rather than do nothing and flounder in ambiguity. Indecision and changing decisions are the killers of an effective design process, so authorize your designers and your entire team to move as quickly as possible. I promise that whatever you risk in the process of empowering them with decisions will be made up for in morale, speed, and momentum.

Empowering the team

One of the best ways you can keep your project moving quickly is to authorize us (the designers!) to make decisions and extend a reasonable amount of authority to us. Let us make some of the calls. When you're unsure what to do, allow us to inform the decision. Trust us when we make a good case on our decisions, even if you disagree. Ask us what we would do and then let us make the final call. This level of empowerment will result in a better product, happier teams, and quick movement.

I recognize that not every product decision can be entrusted to the designers. There are other factors, business considerations, and even other teams or people involved. However, often those other considerations cloud your own judgment and prevent you from seeing that the simpler, more obvious solution is really the best. In my experience, the designer's recommendations often come back as the solution we eventually land on anyway. I've worked with large clients whose multiple teams and executive meetings slow the process for weeks at a time. We might toy with a handful of ideas, perhaps even implement the one that the VP liked best, only to eventually (months later) rework the design to accommodate our original recommendation. What seems like a great idea in a meeting isn't always what works best in practice. Not always, but frequently enough to be a memorable waste of time.

One of the most rewarding websites I ever built was one in which I convinced my boss to let me focus exclusively on this one project, and to also make the final decisions. It was risky. Other stakeholders in the organization were concerned I didn't know enough about their areas. People were worried I would screw it up. I had been at this organization for several years and understood many of the needs, but not all of them. However, it was enough to create the next version of the website, even if imperfect. After three months, I presented a finished product that was significantly better than the existing site.

Were all the stakeholders happy with what I did? No, but some were. Did it solve all of the problems we had? Somewhat. But that didn't stop us from putting it in production and then immediately iterating on making it better. We were able to get an improved experience online very quickly and then expand decision-making authority on the next version. You see, if I'd had multiple decision makers telling me what to do, it might have taken me a year or more. Instead, we chose to value making quick decisions. We refused to let perfect be the enemy of good. That kind of trust and empowerment is rare, but you'd be hard-pressed to find a faster way of getting things done.

My challenge to you would be to purposefully allow your designers the freedom to make design decisions. Start with some low-risk decisions at first but quickly work your way toward the larger overall product vision. Begin by agreeing with them as frequently as possible, until you feel you can let them decide on their own. Find the level at which you start to be uncomfortable giving over control, and then push past it just a little. I believe that the sweet spot of good leadership empowerment in decision making is just past your point of comfort. Leaders should always be just a little uncomfortable giving over decisions to their team.

RECOGNIZE THAT WE ARE PEOPLE TOO

One big missing ingredient from stakeholder–designer relationships is the recognition that we're all people. We need to remember that the people we work with are human. We need to focus on the relationship and communication. But mostly, we need to be kind, use helpful language, and create a conversation that yields positive results.

This is going to seem obvious, but designers are people, too. In business culture, projects and deadlines are often (unintentionally) valued more than the people delivering on them. Remembering that your team is made up of people who have lives, families, and interests beyond the conference room is important in any organization, and it's no different with designers. All of us have different personalities, original ideas, and a unique perspective on life. There are other things going on in their lives besides this project. Someone is caring for an ailing mother, another has to shuttle kids from school to sports, and someone else will go home lonely. This human-centered leadership approach is nothing more than remembering and recognizing that the people you interact with are real. They have feelings—they can be built up and encouraged or they can be torn down and discarded. You can ignore them or you can show an interest in them. As you can imagine, you'll get the best results when you approach people with a mindset that recognizes their humanity. So as often as you need to, stop, look around the room, and remember one thing: they are human.

After you've done that, the next step is to focus on building good relationships. Although it's important to recognize how our specific roles as designers shape our identity, the foundation of good communication is a good relationship. No amount of organization, management, or empowerment is going to make up for a personal/relational disconnect. Too often, meetings are about projects, projects are about tasks, and tasks are tedious and unhuman. The end result is a robotic approach to projects that has no flesh, no excitement, and no life. So, in addition to being organized and making projects a priority, you also need to work hard to establish a rapport that will speak more for you than the words that come out of your mouth. Be kind and get to know us. Show a genuine interest in us by asking questions about our hobbies, pets, or favorite sports team. You don't need beanbags and foosball tables at your office; you need to be nice and interested in people. It doesn't take much to create a sense that you truly care about the people you work with.

Use helpful language

Recognizing that we're all human, then, naturally leads us to a place where we are better equipped to use language and communication styles that are helpful when discussing design. When you provide feedback for our designs, focus on the designs themselves and not the designer who created them. Don't be terse and don't attack our work. Instead, ask lots of questions in an effort to understand our perspective and approach. Be direct but be kind. Focus on the problems and potential solutions, not on the people and their decisions. Design is already a difficult thing to talk about because people (designers) can get wrapped up in their work. When you criticize people for their decisions, you back them into a corner and cause them to become defensive. Design, more than many other disciplines, has the propensity to be divisive and polarizing. Recognize this at the outset and strive to use words that will help the conversation along rather than pit people against one another. The way you choose to talk to designers about their work will have a dramatic effect on their ability to be agreeable and productive for you.

Also, be patient when things change. We can't always know how our designs will work in the real world, so it's natural that we need to modify our work even after it's in production. It's common for us to believe we've made all the right choices with our designs, but when we test it with users for the first time, we find that we made the wrong assumptions. Those kinds of challenges are part of the process. In fact, I always feel a little self-conscious and sheepish when I have to go back to the developers and ask for a change. Even though this is part of the design process, I'm admitting my mistakes and taking the blame for something I caused. Because it's my fault, it can be hard to own up to it, but that's necessary if we're going to create a great user experience.

You should expect, even encourage us, to embrace these unexpected challenges and help us to prepare the rest of the team for the changes. As much as possible, support us through these changes and clear the path so we can feel good about doing the right thing for the user and the product.

Ten Tips for Working with Designers

To briefly summarize, here are 10 short tips to help you work with designers more effectively:

1. **Focus on what works.** Remove the word "like" from your vocabulary and always talk about what works or doesn't work. Your personal preferences are less important than the needs of the user or business.

2. **Don't provide solutions.** Tell us about the problem you see and describe the issue that needs to be addressed, but don't tell us what to change first. Let us find the solution.

3. **Ask lots of questions.** This is the key to seeing from our perspective and understanding our motivations. Ask questions to uncover our thought process.

4. **Don't claim to be the user.** The truth is that every user is different, and you don't represent the target market any more than the designer. Claiming to be the user of your app or website does not add value to the conversation.

5. **Let us explain our decisions.** Don't offer your own perspective and walk away. Allow us the time and space to form an adequate response.

6. **Empower us to make decisions.** Even if you disagree with our choice, learn to trust us in areas where we have expertise and then hold us accountable for the results.

7. **Use helpful language.** It can be difficult to receive feedback without becoming a little defensive. Avoid harsh or extreme language and focus your feedback on the designs, not the designer.

8. **Ask if there is data.** We should all use data to support our decisions, but just because the designer doesn't have data doesn't mean he's wrong.

9. **Be prepared.** Review our work in advance and have a list of questions or concerns ready. Don't wait and provide knee-jerk reactions in the moment. Your feedback should be purposeful and thoughtfully considered.
10. **Give us what we need to be successful.** Whether it's logins, access to analytics, or permission to do usability testing, we need things from you to work effectively. Make it a priority.

Design Project Checklist

To help everyone be better prepared, here is a checklist of the most common web and product design needs. If every stakeholder provided these things at the beginning, projects would move faster and create a better-quality experience every time. I use this list with my own clients to ensure that we have what we need at the beginning of every project. Following a checklist like this ensures that everyone is on the same page and makes ongoing communication about the project much easier. It establishes a good foundation for talking about design decisions going forward.

This is just a tool and should be used with a degree of flexibility appropriate to the project, company, or team. Some of these aren't necessary for every project; some projects might have additional needs, and throughout the life of a project, these things naturally change as the team settles into a rhythm. Use this as a guide, but don't be afraid of changing it (or your answers) as the project progresses.

MANAGEMENT VISION AND GOALS

- ☑ What is the purpose of the product, website, or app? Define the primary use or need. Why does this exist?
- ☑ What is the overall vision for the product, website, or app? A clearly defined vision helps us understand how this project affects the future roadmap.
- ☑ What are the short-term goals for the business overall? What does the business want to accomplish, and how does this project fit with those goals?
- ☑ What metric can we track? How will we know we've succeeded? We need a way to measure our success.

- ☑ What is the strategy for accomplishing the goal? This is *what* needs to be done to accomplish the goal: the tasks, tactics, or deliverables for the project.
- ☑ What are the business requirements for this project? Having documented requirements at the beginning is important, but we can also work together to create them.

USERS OR CUSTOMERS

- ☑ Who are the users? What do we know about them? This could be a starting point for writing personas and user stories.
- ☑ What is the primary problem we want to solve for them? What are the biggest pain points for users right now? This might not be the goal of the project right now.
- ☑ How do users interact with the site or app? What is their context/location, device type and size, entry and exit points, or frequency of engagement?
- ☑ What is the plan or budget for usability testing and/or user interviews? We need to work with real users in order to design for them.

WORKFLOW AND COMMUNICATION

- ☑ What tools should we use to communicate? What is the best way to get answers? Everyone has different preferences for email, text, video, and phone.
- ☑ What should our meeting cycle look like? We'll want both short, frequent updates, as well as longer, in-depth progress reports. For example, 30 minutes daily, plus a weekly hour-long (or more) design review.
- ☑ What is the timeline for the project? How frequently can we release? Establish a pattern for when tasks should be completed. Take the deadline and work backward on the calendar. This can inform resourcing or scope, too.
- ☑ Who makes the final call on decisions? Identify one person overall and/or assign one individual per role, for Business, Product, Design, Engineering, or Content. No committees.

ACCESS TO INFORMATION AND PEOPLE

- ☑ What technical resources will we need? Who can provide us with access? This includes login credentials, email accounts, VPN, or access to servers.
- ☑ What existing data is available? Access to analytics, usability studies, A/B tests, or any business reports or slide decks.
- ☑ Is there an existing website or app that we can use for reference? Is there another product that we can use as a basis for this project?
- ☑ What is the org chart for the company? What people are important for our project? A list of relevant people, including names, titles, relationships, and areas of expertise along with contact information.
- ☑ Do we have permission to work with these people? Necessary introductions or permissions need to be given for us to contact other people in the organization.

DESIGN AND TECHNICAL REQUIREMENTS

- ☑ What design guidelines already exist? Branding guidelines, logo standards, design language documentation, style guides, or visual UI libraries.
- ☑ What is the tone or style of the design? This might be defined by the design guidelines. If not, we can discuss.
- ☑ What are our ground rules or design goals for guiding the design? A short list of limitations, best practices, or focused priorities to guide design decisions.
- ☑ What other websites or applications are similar or relevant? A list of competitors, similar or unrelated products that are of interest.
- ☑ What technical requirements will influence the design? Accessibility, browser/operating system version, device or viewport size support, responsive/adaptive/mobile.

Download this checklist at *http://tomgreever.com/resources*

A Seat at the Table

The way that businesses approach design has changed dramatically. Design used to be something that only made the company look professional or projected an image for the product or brand. Today, design is being used to solve real business problems, and more and more companies are seeing that value. Entire organizations are pivoting to make design the center of their process because they recognize it's good for the bottom line. The most famous and popular products now are those that are well designed and provide a superior user experience.

To meet this demand, a lot of companies are hiring designers, building teams, and modifying their processes to more clearly value design—yet, a lot of these same companies still fall short when it comes to delivering a product. Initially, it might seem like their designers aren't talented enough or there's a disconnect between customer needs and the design team. This is what leads managers and developers to seek out resources (like this book) to learn how to better talk about design or to improve their communication and working relationships with designers. I wrote this chapter because difficulty working with designers is a real concern, and every stakeholder can benefit from understanding their designers. But when it comes to overall business practice, there is an underlying issue. Better communication will help, but it's not the main problem.

Companies that struggle to incorporate design thinking into their organization have one problem: they don't have designers at an executive level. The problem of delivering poorly designed products isn't one of talent, but of design leadership. These companies lack a vision that's inclusive of the user experience. They have talented designers, but not design-thinking decision makers. Companies that consistently fail to deliver the products that they believe they should offer need a new seat at the table: a designer.

Think about the most popular products, websites, or apps with which you're familiar. Who started the company? Who is its CEO? In most cases, the people leading the organizations that create great products are people with a design-centric mindset, even if they aren't technically qualified as a designer. They are designers in their own right, but they surround themselves with other talented designer-types, too.

These organizations don't need to "pivot" to make design the center of their culture, because design is already valued at the highest level. They simply *are* organizations that value design.

If you're serious about wanting your company, product, or service to be known for great UX, put a designer at an executive level. It's no longer adequate to hire a contracted freelancer through a sales manager to create your website. You can't just invite the designers to a meeting, inspire them with your vision, and then wait for them to bring back the best product ever. You are going to fail if the only designer you have sits at a desk with the marketing people down the hall. Designers need to be involved at the highest levels of the organization if you expect to succeed in a marketplace driven by design. They need to be empowered to make difficult decisions, they need the autonomy to create the best product, and they need the trust and support of the other executives.

How can you do this? In an ideal world, you'd have the authority, money, and time to create an organizational structure that reflects these values. Create a role for chief design officer or vice president of design. Involve them in all the details, let them decide on product and design direction, and give them a team. Unfortunately, that's not something every company can do easily. More practically, designers and executives need a deeper level of engagement and trust. The people designing the products, website, or app need to be meeting with the CEO. They need frequent communication with other executives. This might just be about proximity: give them a desk in or near the executive suite. It's amazing how much easier design and communication are when a VP walks by your desk occasionally to say hello. This is "management by walking around" (attributed to Hewlett-Packard[1] and described in the book *In Search of Excellence*[2]).

One of the best (and simplest) models I've seen was a former employer who moved the creative director to a desk with the other executives in an open-office environment. Just sitting next to one another greatly improved their thinking, made a political statement about their values,

1 *https://en.wikipedia.org/wiki/Management_by_wandering_around*

2 Tom Peters and Robert H. Waterman, Jr. *In Search of Excellence: Lessons From America's Best-Run Companies* (New York: Harper & Row, 1982).

and firmly established the organization's vision. The designers weren't off in another room; they were integrated into the senior leadership team.

The only way to truly incorporate design thinking into your company values, processes, and products is to put designers in positions of authority. Everyone says they want to be like Apple, but few are willing to make the leadership choices required to create that kind of environment. If you find that your team isn't living up to your expectations for creating great products and designing incredible user experiences, take a look at your own part in that process. Before you go through another reorganization or replace your design director, take a serious look at the people in authority (yourself included) and ask if they're really equipped to lead a design-centric product company. If not, you have an open seat at your next meeting that needs to be filled.

The fact that you've read this chapter speaks volumes about your desire to work more effectively with designers. When you follow these best practices, you create an environment in which designers are free to create, are comfortable expressing themselves, and feel empowered to design great products. Whatever your role, I hope that you'll apply these principles in your practice on a daily basis so that you can get the most of the designers on your team and deliver the best possible user experience.

[*Index*]

D

E

V

W

Y

[*About the Author*]

Tom Greever has been designing interfaces and leading design teams for 20 years. His experience as a UX designer, executive design leader, and consultant has given him a broad perspective on how better communication yields great design. He has coached and mentored teams on design practices and communication at both large enterprises and small startups all over the world.

He is available for in-person workshops, online training, or motivational keynotes for your team or conference. He lives in Illinois with his wife and five kids. He is probably cleaning up the house right now.

Add him on LinkedIn: *https://www.linkedin.com/in/tomgreever*

Follow him on Twitter: *https://twitter.com/tomgreever*

Follow him on Instagram: *https://www.instagram.com/tomgreever*

You can also find articles, podcasts, and videos about this topic on his website: *https://tomgreever.com*

[*Colophon*]

The animal on the cover of *Articulating Design Decisions* is a rose-ringed parakeet (*Psittacula krameri*). These medium-sized parrots are native to South Asia and central Africa, but their popularity as pets, along with their strong adaptation skills, has allowed them to establish feral populations around the world. While they are known to inhabit a diverse range of climate zones like deserts and rainforests, they have also created large, stable communities in metropolitan cities like London and Tokyo. Made up mostly of escaped birds, these populations seize on the higher ambient temperatures and food availability of their new urban environments.

The rose-ringed parakeet is covered in green plumage that is punctuated by a reddish beak, and has a pointed tail that is longer than half its body length. As a sexually dimorphic species, only the males exhibit the rose-and-black neck rings that give them their name. Besides their physical features, these social and raucous birds can also be identified by their sound, as they often travel in noisy flocks and let out piercing, squawking calls. In fact, they show their aggression towards predators by letting out a soft "purr" sound, which is their only defensive adaptation.

The history of the rose-ringed parakeet in aviculture goes as far back as the ancient Greeks and Romans, who are recorded to have kept certain subspecies as pets. Nowadays, their popularity as pets remains because captive breeding makes new color mutations available, and their ability to mimic human speech continues to intrigue and entertain.

The cover image is a color illustration by Karen Montgomery, based on a black and white engraving from *English Cyclopedia Natural History*. The cover fonts are URW Typewriter and Guardian Sans. The text font is Scala; and the heading font is Gotham.