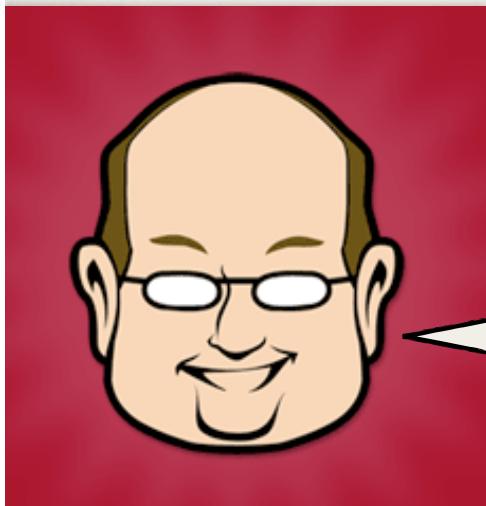


Lean Methods for the UX Team of One

UIE Virtual Seminar · December 9, 2010

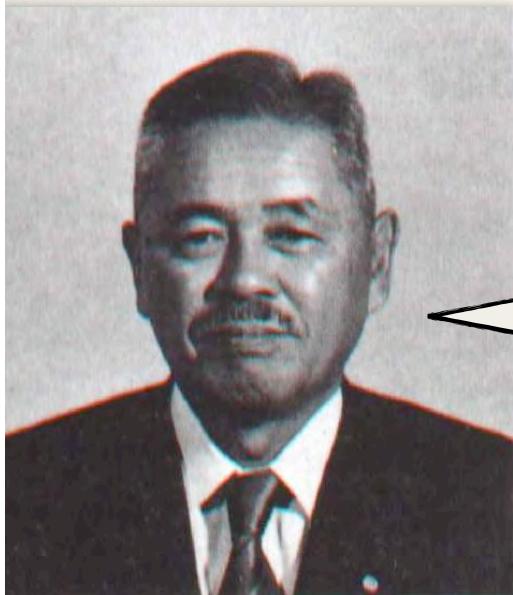
UX Methods



Hi, I'm Jared Spool. Did you know that activity centered design is the most expensive form of design? But it gets results.

(paraphrased)

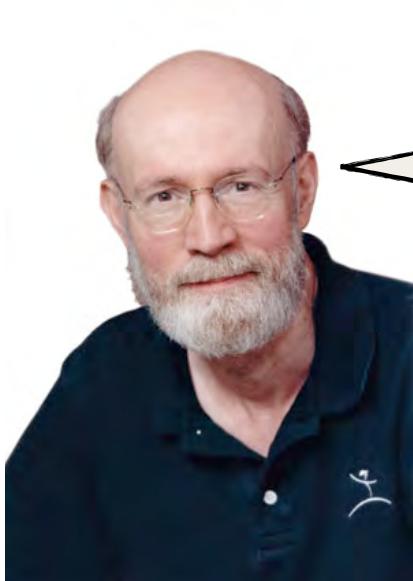
Lean Methods



Hi, I'm Taiichi Ohno. I created the Toyota Production System. How do you like my cool 50's style?
(paraphrased)

Leah Buley | adaptive path

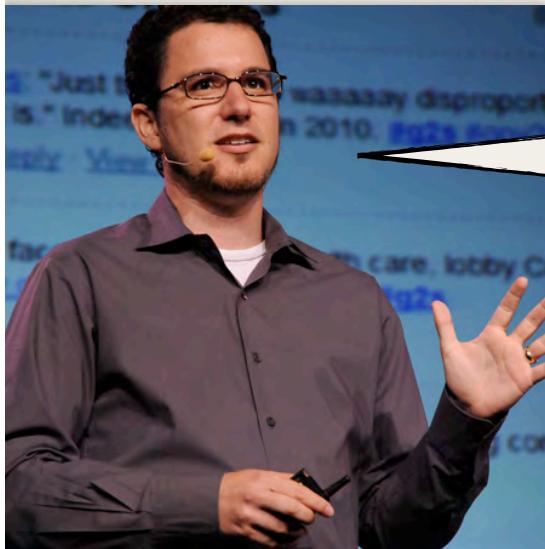
Lean Methods



Hi, I'm James Womack. I wrote The Machine That Changed the World and coined the term "lean" in its modern usage. I'm the patron saint of Agile.
(paraphrased)

Leah Buley | adaptive path

Lean Methods



Hi, I'm Eric Ries. You should test your hypotheses against reality very, very early. Learn, evolve, and repeat.

(not paraphrased. he really said it!)

Leah Buley | adaptive path

Lean Methods



Hi, I'm Janice Fraser. Early stage companies need design skills in house, and the best way for them to get it is by training principles to think in terms of UX.

(paraphrased)

Leah Buley | adaptive path

Lean Methods + UX Methods



Hi, I'm Leah Buley. I wonder if lean concepts could apply directly to UX work to help us do better work and do it faster?

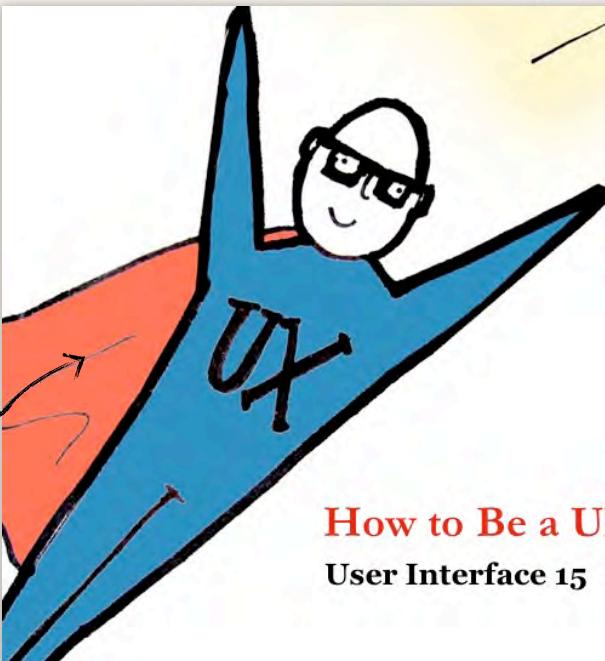
(exact quote)

Leah Buley | adaptive path

Who am I?

Leah Buley | adaptive path

The UX Team of One



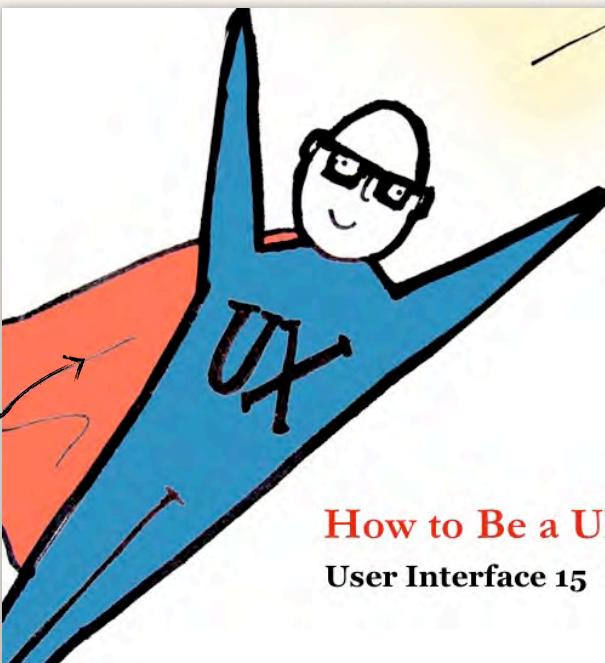
First presented at IA Summit in 2008.

Since then, shared at SXSW, UX Week, UI14, UI15, MIMA Summit and others.

How to Be a UX Team of One
User Interface 15

Leah Buley | adaptive path

The UX Team of One



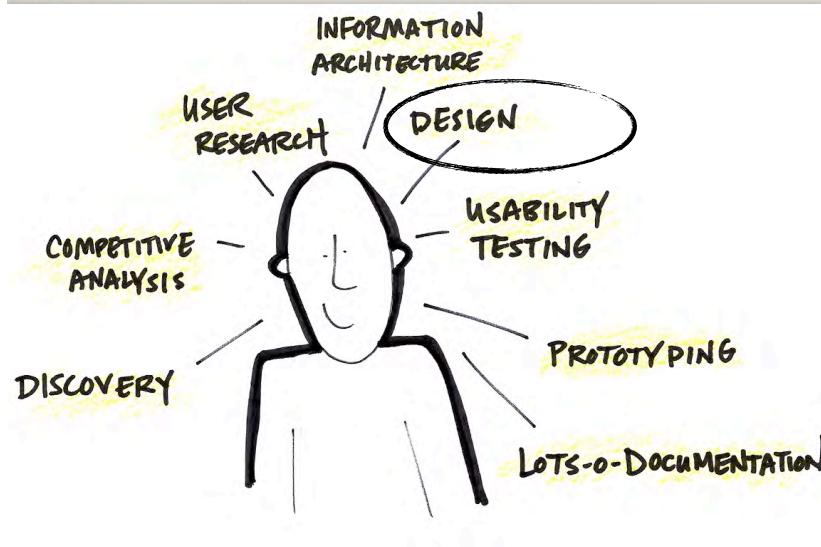
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How to Be a UX Team of One
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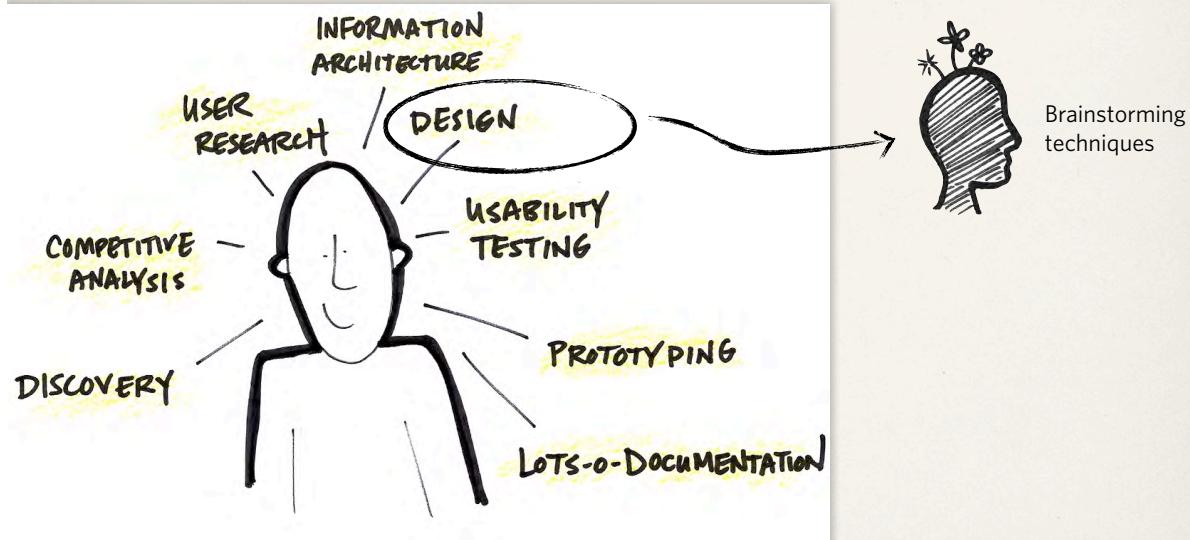
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The UX Team of One



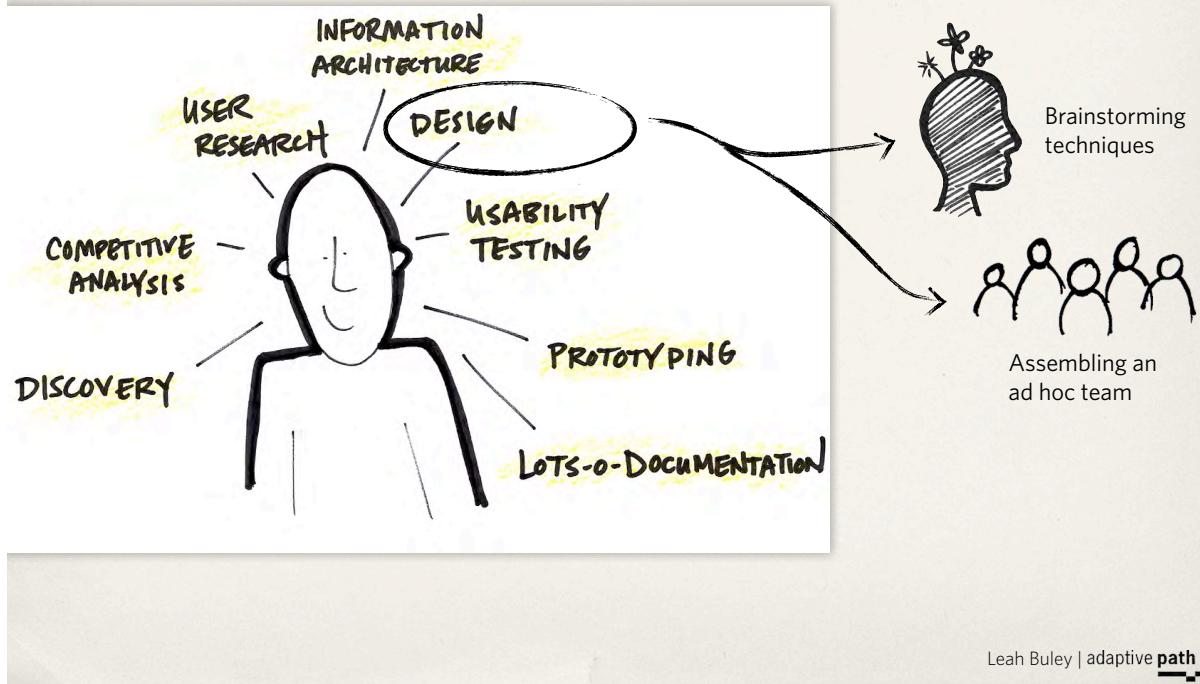
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The UX Team of One

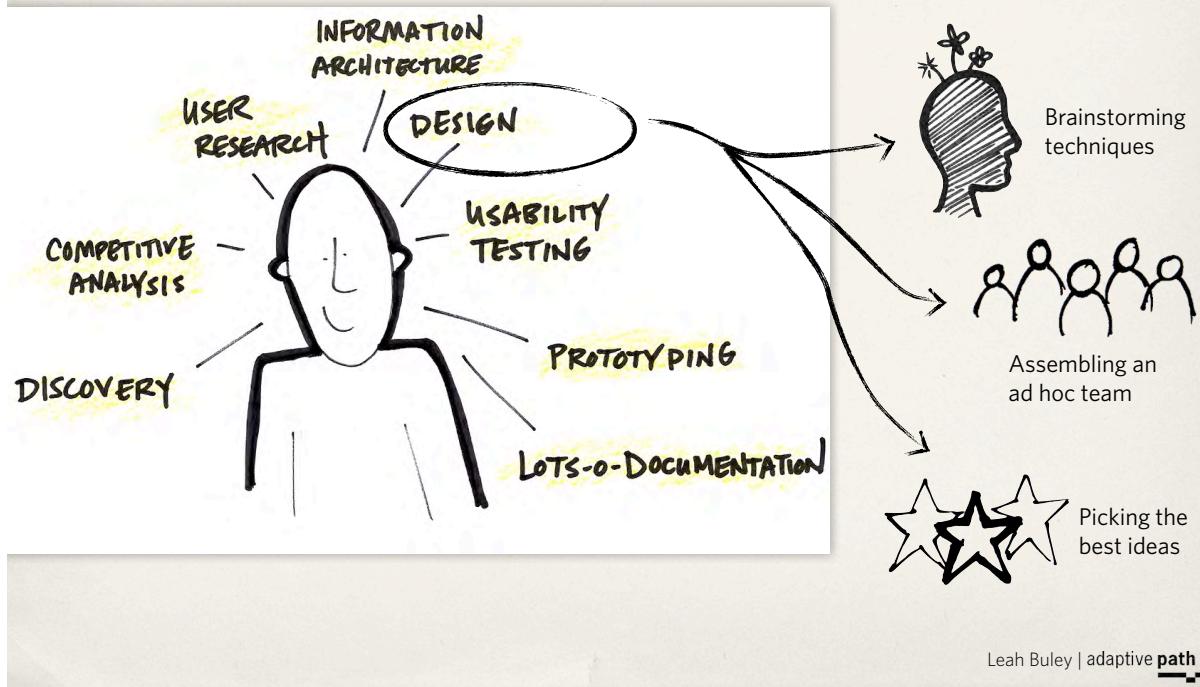


Leah Buley | adaptive path

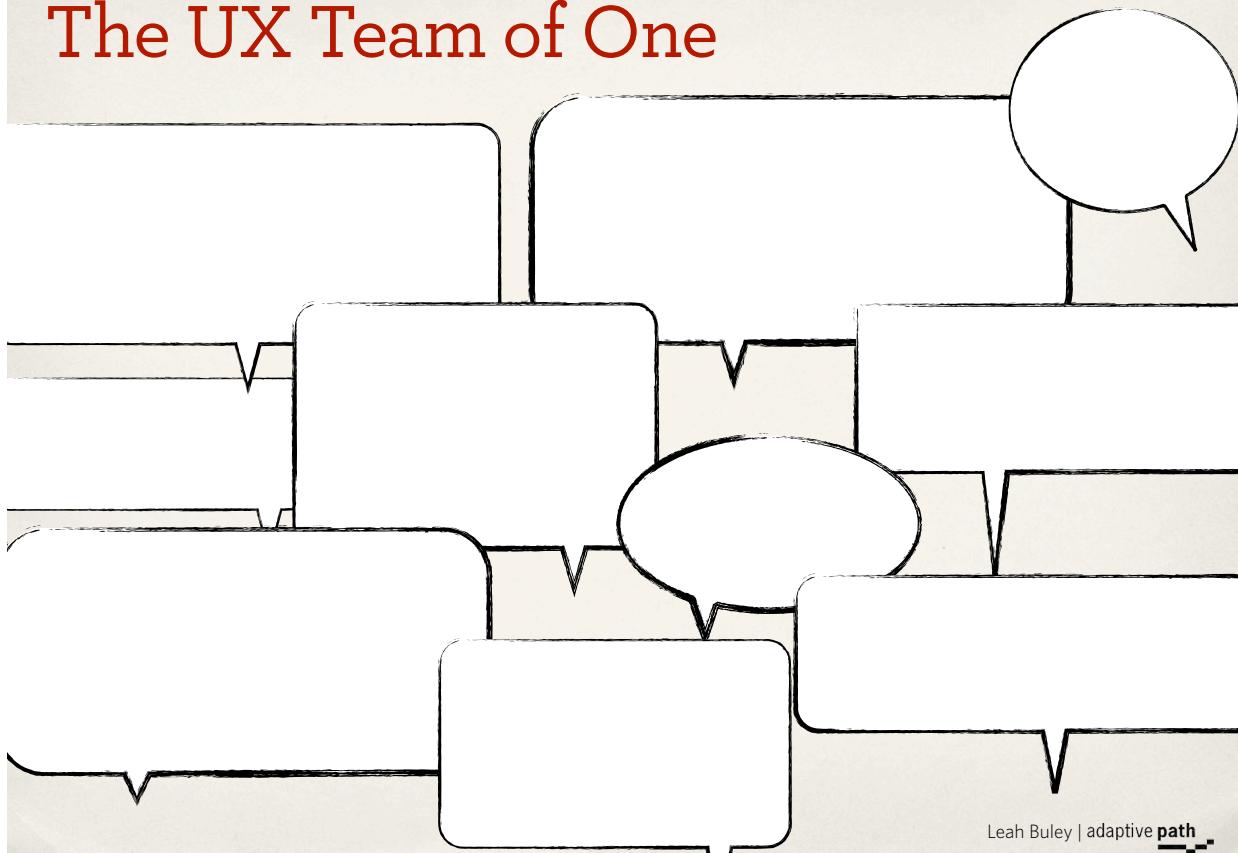
The UX Team of One



The UX Team of One



The UX Team of One



The UX Team of One

It's hard to find the time to do everything I think I should be doing. Hard to make the call for when it's 'enough' on each activity due to time pressures.

I'm still just trying to prove that what I do adds value.

People are challenging me and defending their opinions based on unfounded usability. They don't test a thing. It's their personal choice.

Convincing management to allow time and resources to follow a UX methodology is hard.

After all these years, it is the same fight over and over: proving your worth and fighting for the 'right' and need to do User Centered Design and testing.

Knowing where to start is hard.

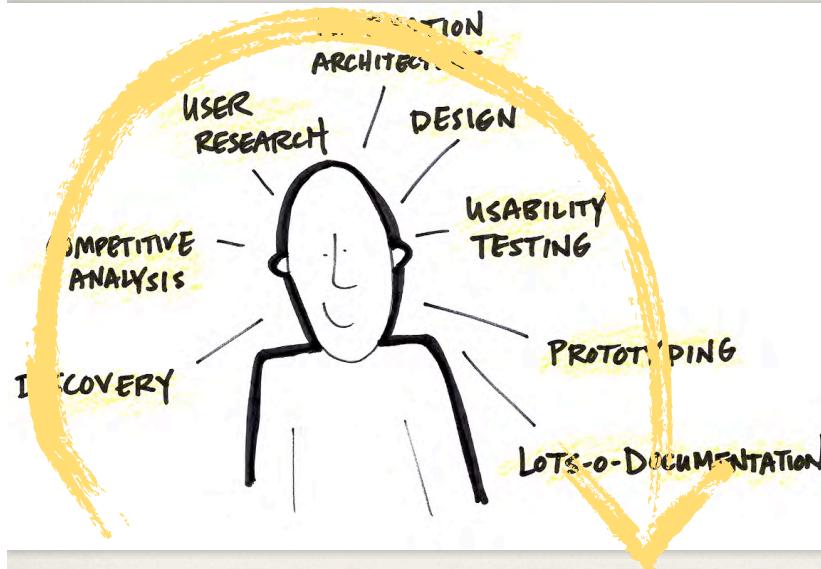
People try to get me to run tests that are loaded with an agenda.

I am the only voice of UX in my company.

Plans constantly change. I design stuff, and then it doesn't go into the planned release.

My challenge is trying to get others to understand that making something pretty is not my job.

The UX Team of One



these areas need some love too

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The UX Team of One

* working on this now *



BOOK IN PROGRESS

- Should be published in 2012
- Looks at the whole team of one situation
- Covers common situations, appropriate methods, soft skills, and growth paths
- More info at v.gd/uxteamofone

Leah Buley | adaptive path

Agenda for Today

1. Challenges for UX Teams of One · 10 MINUTES
 2. The Role of Methods and Documents · 10 MINUTES
 3. The Lean Methods · 25 MINUTES
 4. A Lean Toolkit · 5 MINUTES
-

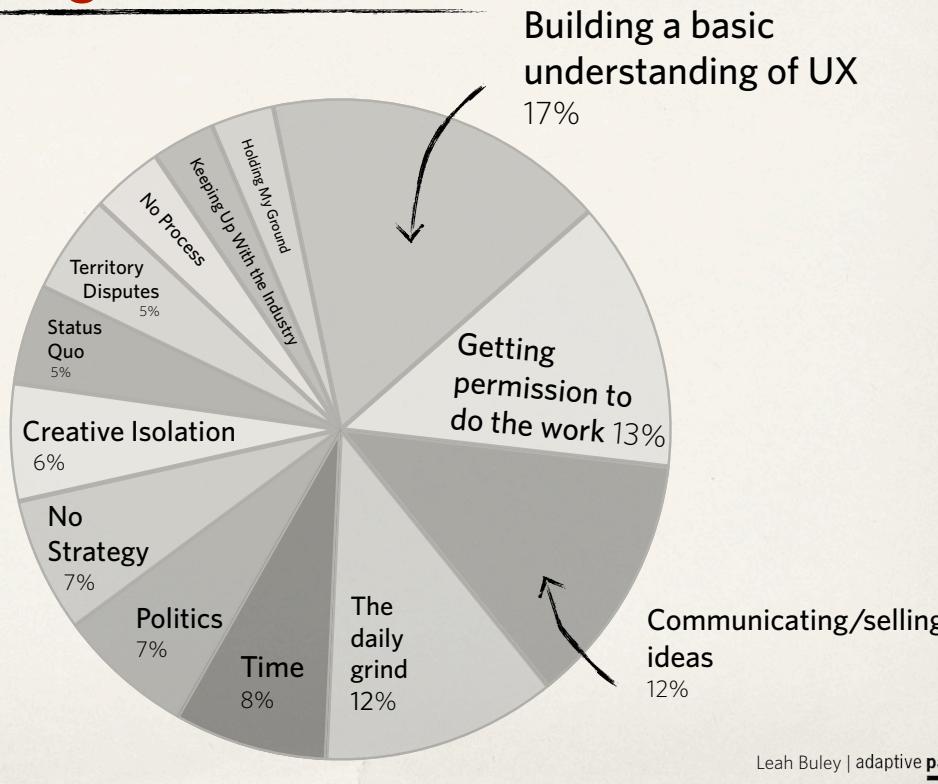
Leah Buley | adaptive path

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Challenges We Face

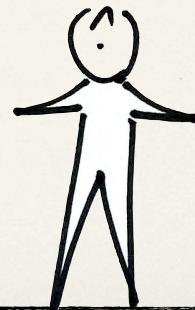


Building a Basic Understanding of UX

- Confusion about UX vs. marketing or visual design
- Weak commitment to the findings of UX (especially if VIPs don't agree)
- Uncertainty about where UX should fit it into pre-existing processes
- No trust that UX will have meaningful improvements on the outcome
- Misbelief that we know/are our users

Getting Permission to Do the Work

"Right now I know our interface is clunky but I have to wait until a sufficient number of users experience difficulty to change it."



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Getting Permission to Do the Work

"I've been working on earning the confidence of others to trust my judgement and apply my design / 'suggestions'. Prior to myself, the company had a UX team of zero. The confidence was gained over time as my input continually improved product development. It is/was a difficult path that has proved to be rewarding."



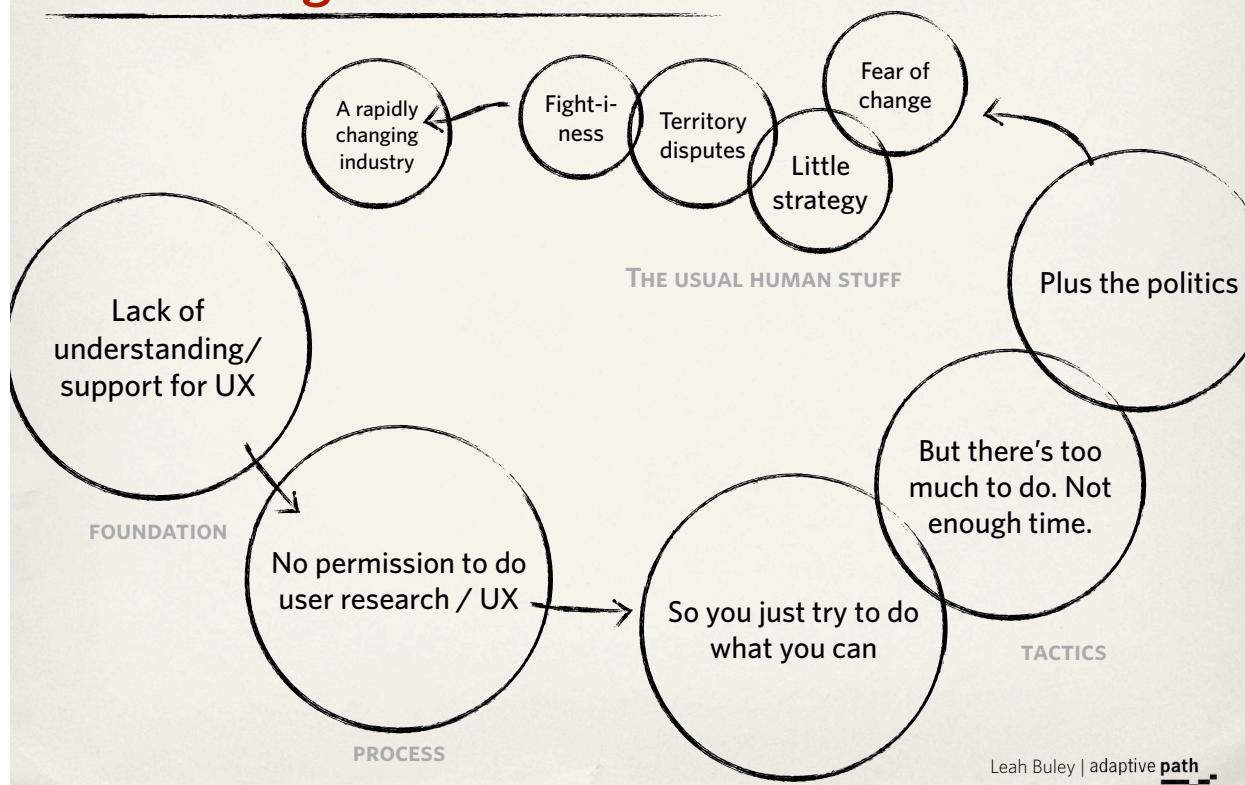
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Communicating/Selling Ideas

- Getting opinions across with assertiveness
- Rationalizing decisions to others
- Conveying UX findings into understandable steps

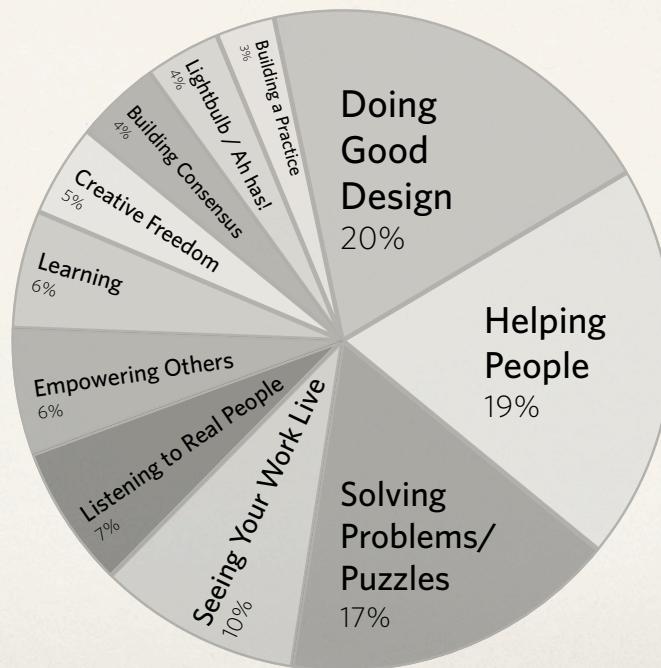
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Challenges We Face



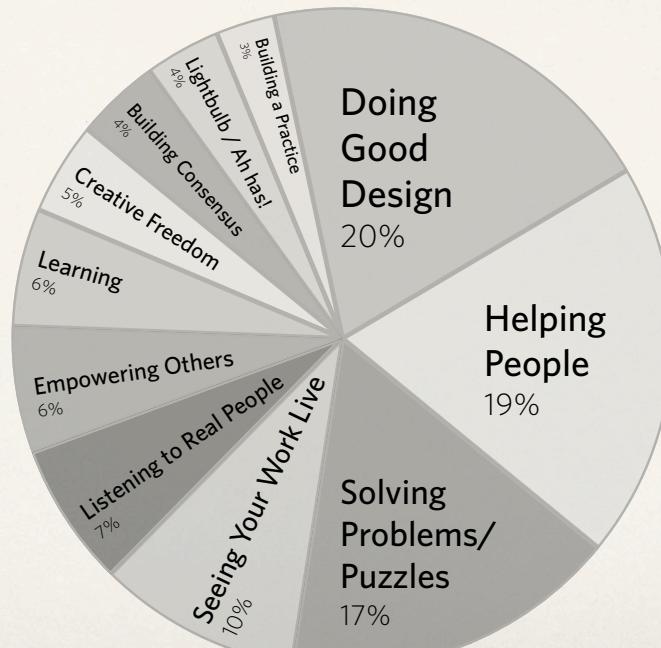
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Things We Love



Leah Buley | adaptive path

Things We Love

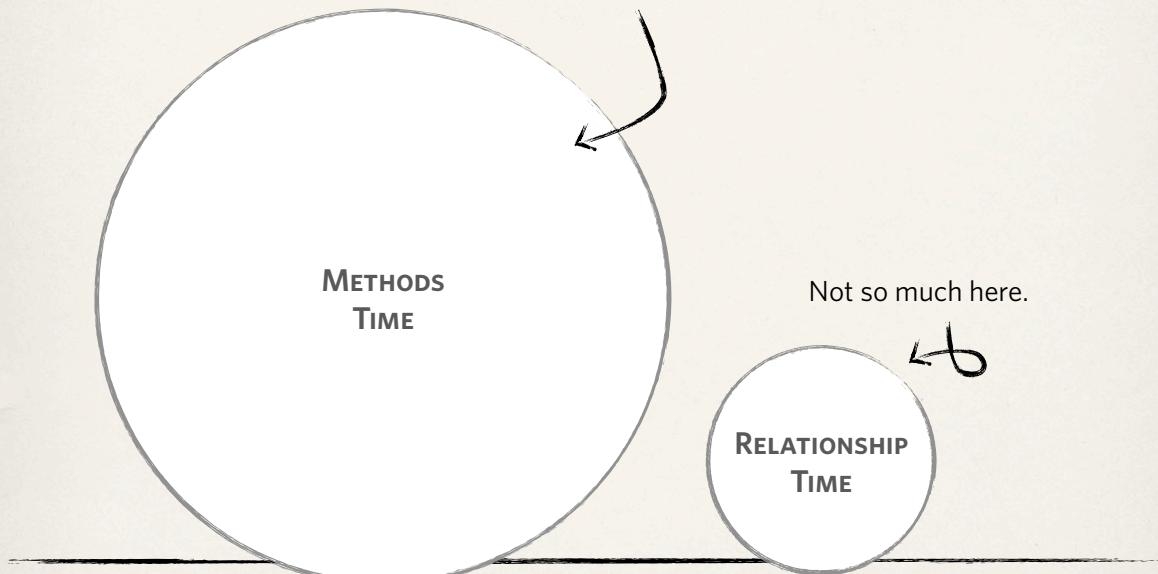


Aw. You
guys have
the right
attitude.

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The Result

We spend a lot of time here.



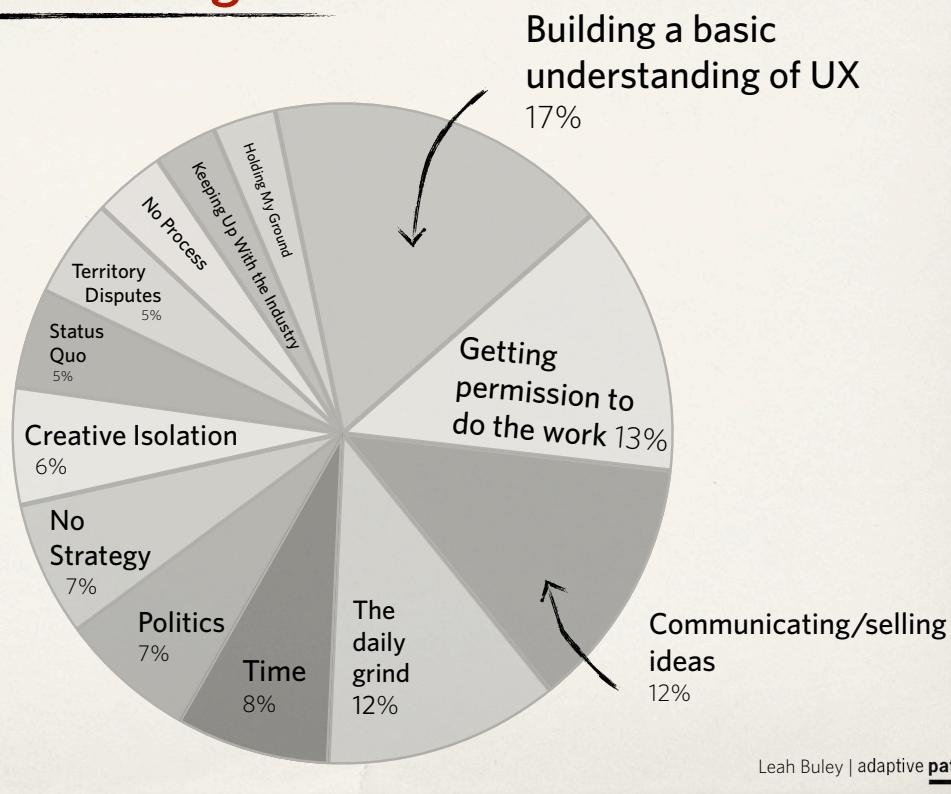
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Why?



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The Challenges



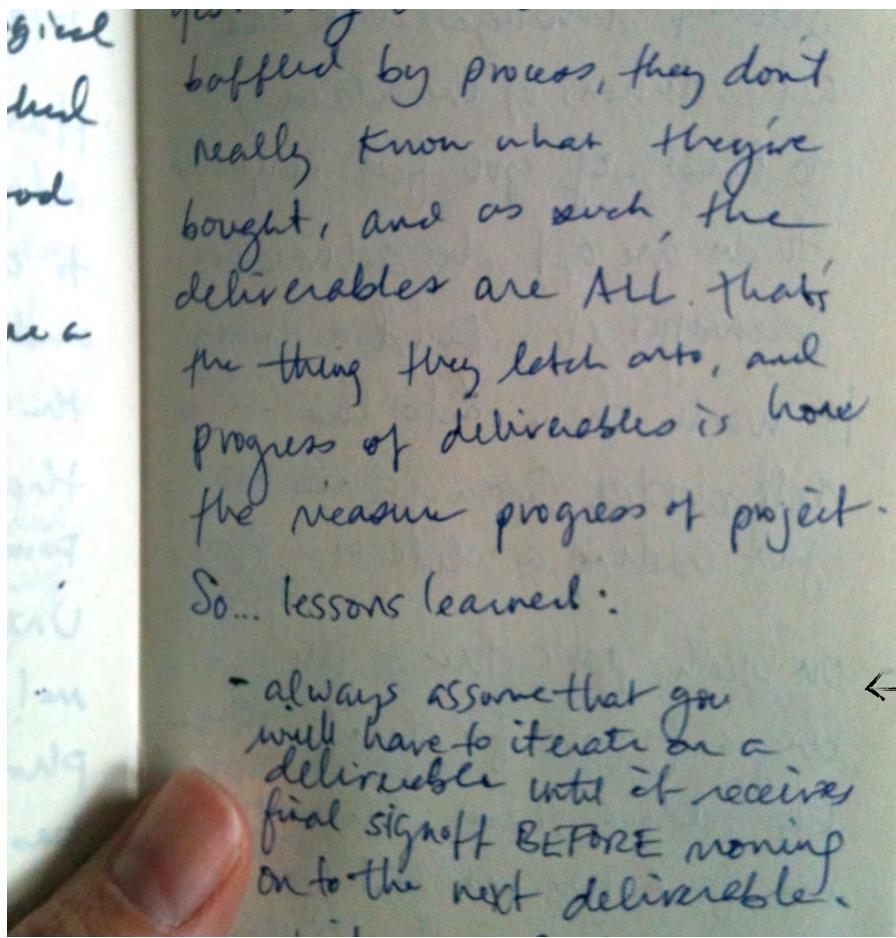
A Different Approach

Less time making things. More time for people.

Agenda for Today

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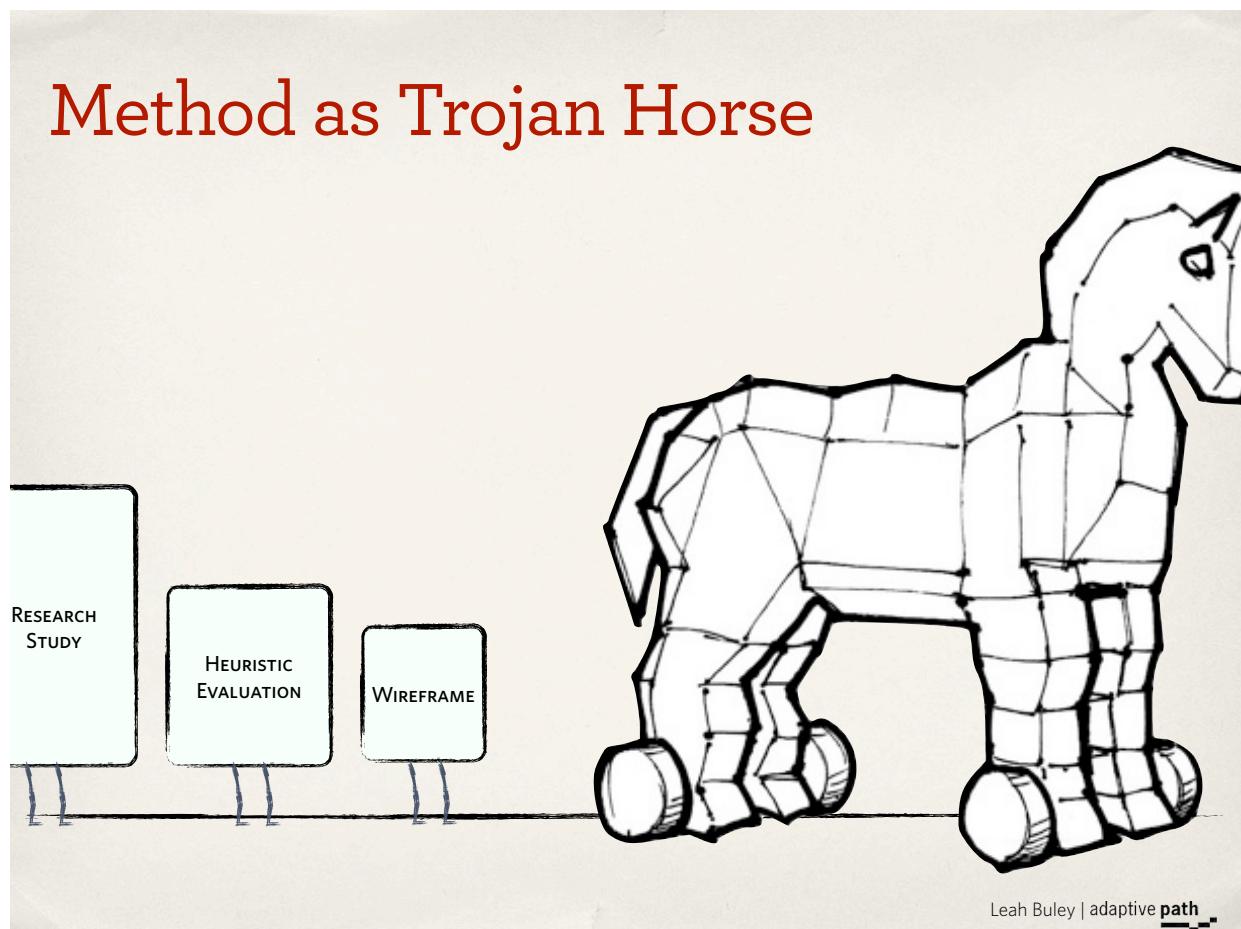
Leah Buley | adaptive path



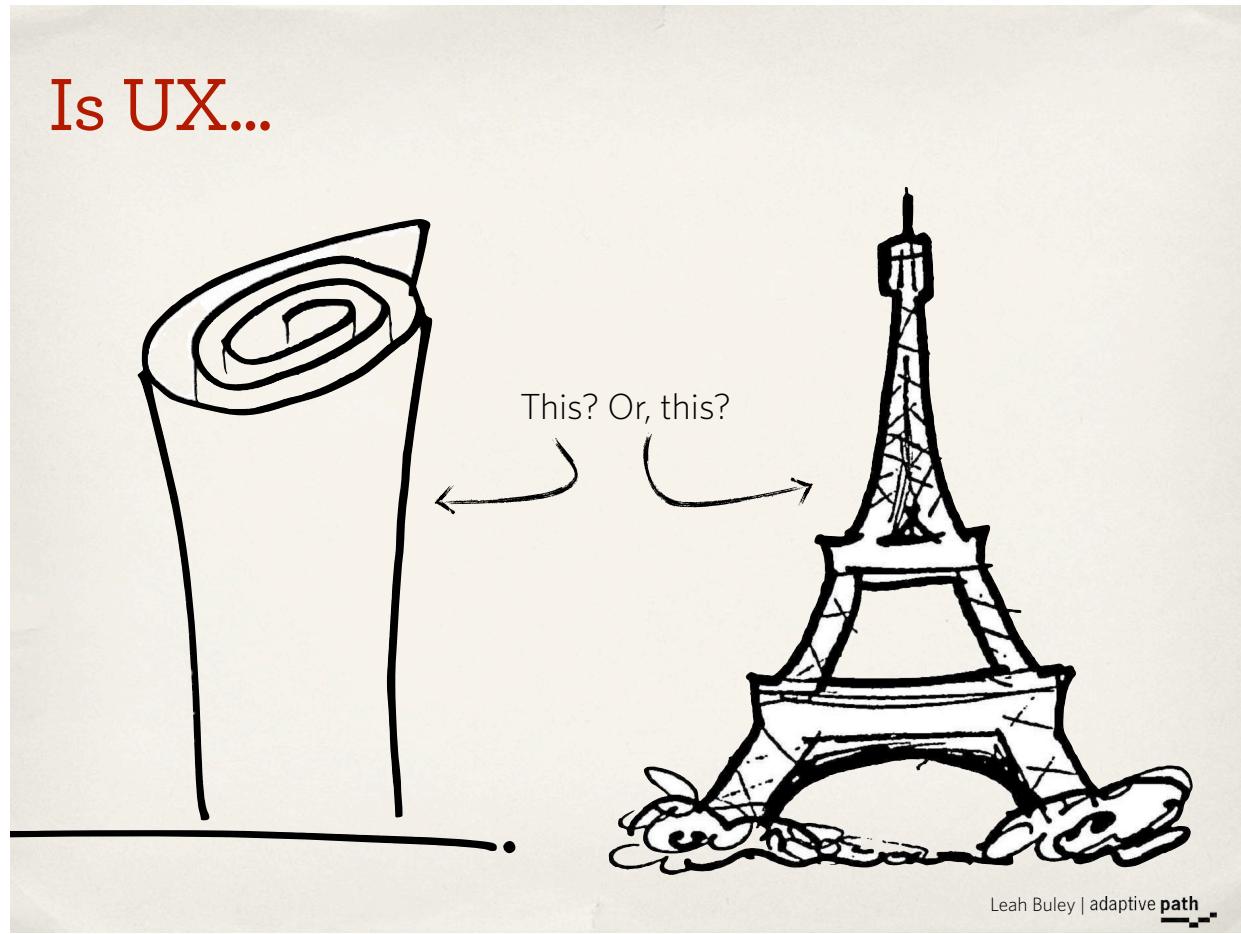
A picture from
my "learning
from work"
notebook.

Leah Buley | adaptive path

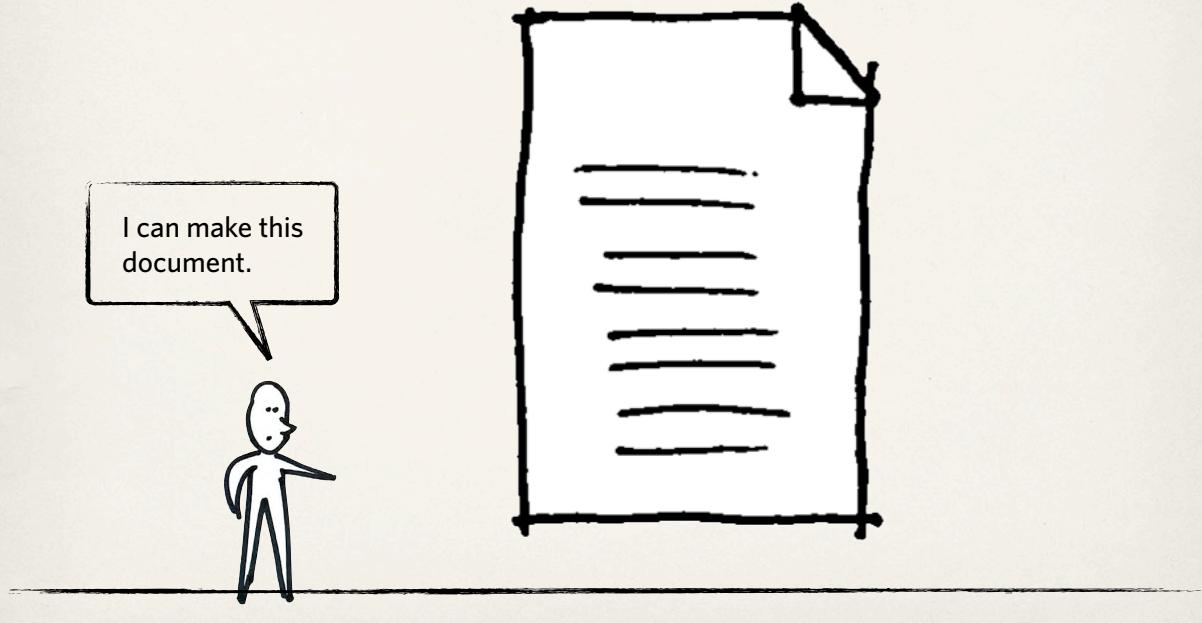
Method as Trojan Horse



Is UX...

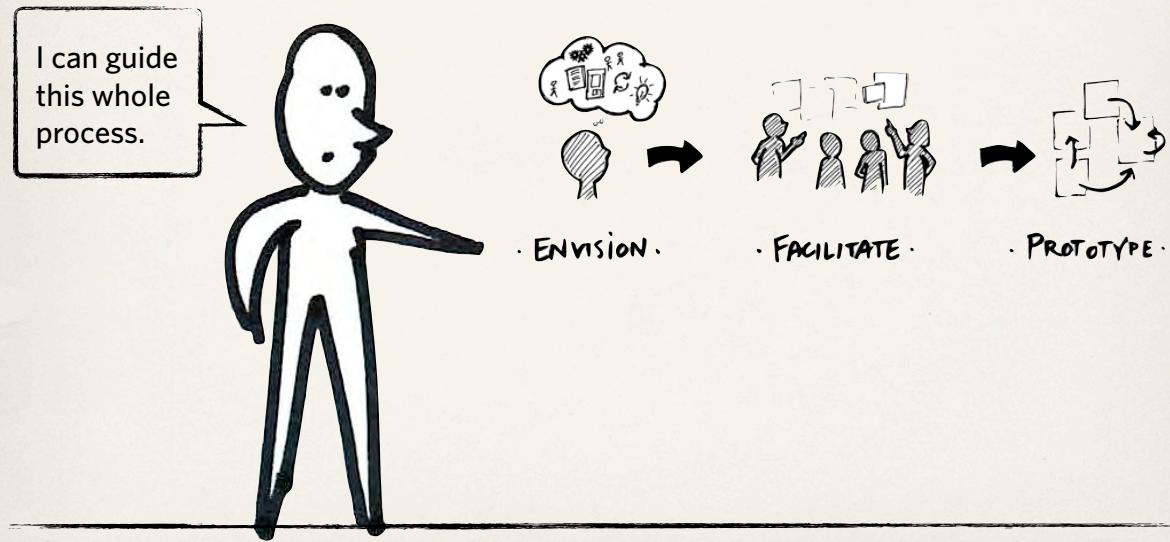


The Value of a UX Team of One



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The Value of a UX Team of One



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What Our Methods Need to Accomplish

CHALLENGES

1. Build a basic understanding of UX
2. Get permission to do the work
3. Communicate ideas
4. Save time
5. Deal with politics
6. Set a strategy

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What Our Methods Need to Accomplish

CHALLENGES

CONVEY

- | | | |
|--------------------------------------|---|-------------------------------|
| 1. Build a basic understanding of UX | → | 1. Goals and process |
| 2. Get permission to do the work | → | 2. Summaries & rationale |
| 3. Communicate ideas | → | 3. Bite-sized purpose |
| 4. Save time | → | 4. A self-documenting process |
| 5. Deal with politics | → | 5. Open questions |
| 6. Set a strategy | → | 6. Priorities |

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Agenda for Today

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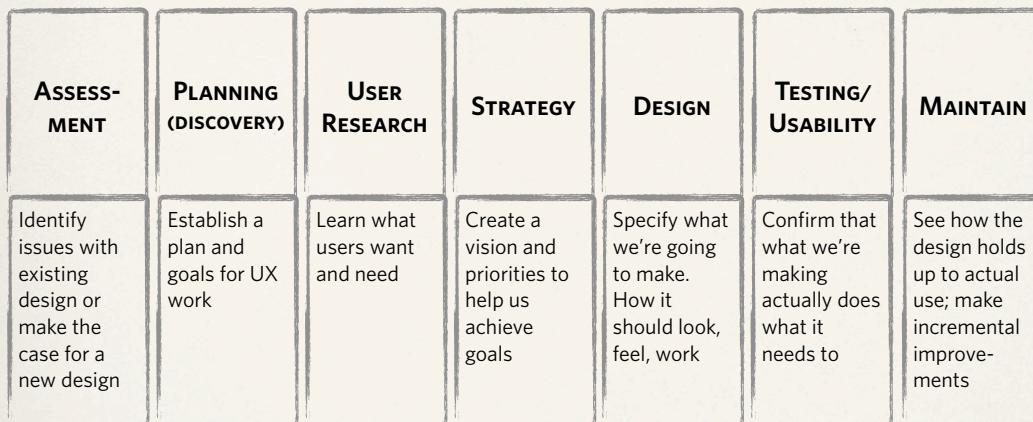
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Core Concepts

1. Eliminate waste.
2. Understand what parts provide value.
3. Less time making things. More time for people.

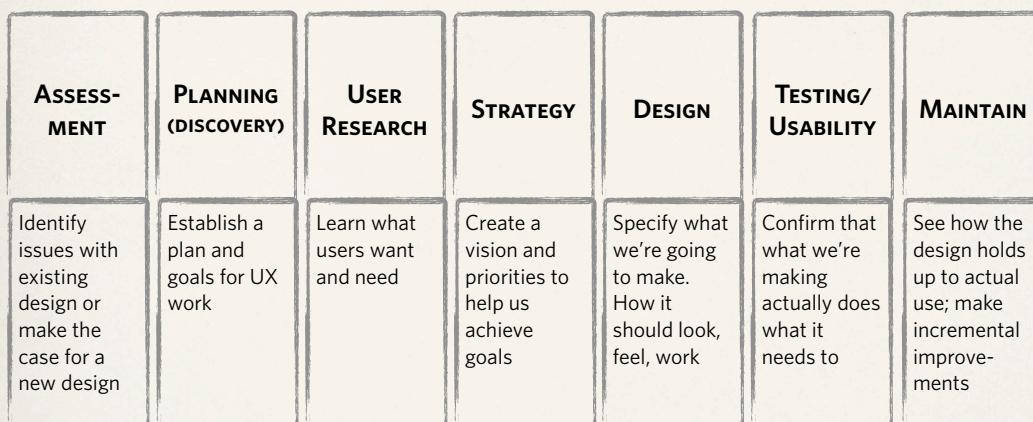
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Value Mapping + UX



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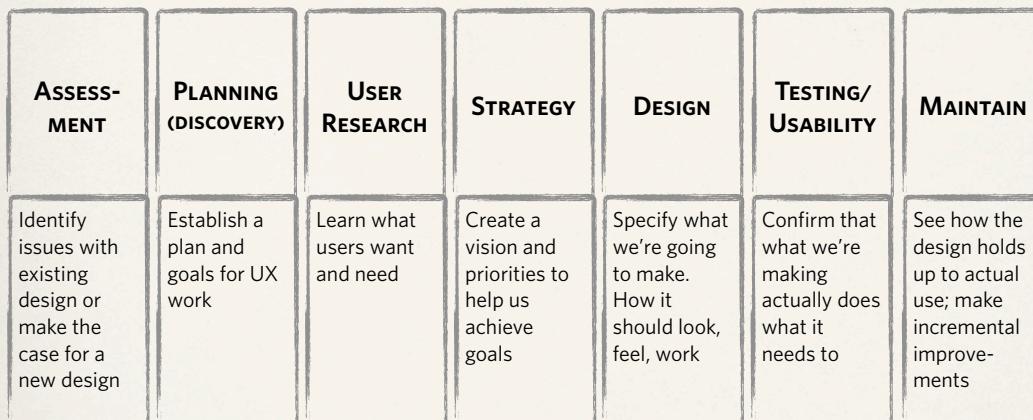
Value Mapping + UX



weeks weeks weeks weeks months weeks years = ??

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Value Mapping + UX



weeks weeks weeks weeks months weeks years = ??

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Assessment Methods

GOAL Identify issues with existing design -or- make the case for a new design

METHODS

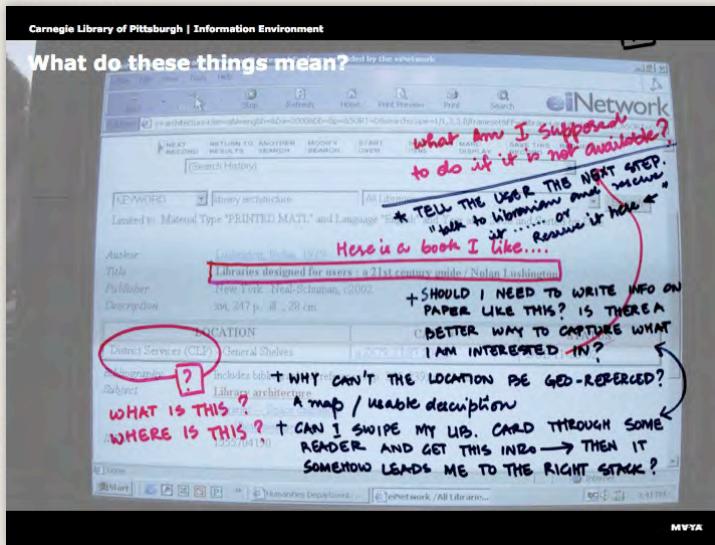
- Current State Analysis
- Heuristic Analysis
- Usability Test
- Content Audit / Content Analysis
- Analytics/Analysis
- Competitive & Comparative Analysis

PROBLEMS If you don't have clear business goals as a foundation, it's common for this case to be built upon subjective goals. For example, "our customers are complaining" or "we know it sucks."

When it comes to building a case to make improvements, if the UX person is championing this on their own it requires lots of communication after-the-fact and increases the chances that others won't see the same implications as the UX practitioner.

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Assessment | Heuristic Markup



Slide from presentation by MAYA Design
<http://www.maya.com/portfolio/carnegie-library>

HOW IT WORKS

1. Start at the beginning of the site or service
2. At each step, take screenshots or pictures
3. Write directly on the image what's confusing

HOW IT GETS OTHERS INVOLVED

Creates a very visual document that you can send around to raise awareness of design issues

WHAT QUESTIONS IT CAN ANSWER

Basic awareness questions.
What kinds of issues does UX address? What opportunities do we have for improvement?

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Assessment | Internal Survey

Web Site Survey

I am researching opportunities to improve our website. Please help by taking 5 minutes to answer the following questions. Thank you.

What do you think is the main purpose of our web site?

How would you measure if we're successful?

What parts of our site do you think are great?

What parts of our site need help?

How well do you think you understand our users, and who are they?

Submit

HOW IT WORKS

1. Send around a survey to internal stakeholders
2. Ask them about their goals for the web site, what parts need improvement, and their understanding of users

HOW IT GETS OTHERS INVOLVED

Invites others to share their expertise and vision for the site/service. Creates a starting point for further conversations (people will want to hear what you found)

WHAT QUESTIONS IT CAN ANSWER

How much support for change is there?
What business goals do people expect the site/service to serve?

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Planning Methods

GOAL Establish a plan and goals for UX work

- METHODS**
- Stakeholder Meetings
 - Use Cases
 - Task Flows
 - Agile Backlog
 - ROI Analysis
 - Product Roadmapping
 - System Modeling
 - Design Principles
 - Content Strategy

PROBLEMS It's common to jump into features enhancements without a clear articulation of the goals of the work -- the specific business and user value that the work is intended to bring.

Project plans are sometimes unaccompanied by a coherent strategy, that is, no articulation of how the user experience should feel and function holistically, and what parts need to be built first to deliver on a compelling product for users.

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Planning | Project Brief



The Sweet Potato Project Brief landing page features a large image of three sweet potatoes at the top. Below it, the title "Sweet Potato" is displayed next to a small icon of two sweet potatoes. The page is divided into several sections:

- The Elevator Pitch:** A brief paragraph describing the service as a new stand-alone service that makes decisions about food easier, combining good choices with personal tastes.
- Functional Requirements:** A list of features:
 - your food profile—a compelling interview that reveals interesting insights about how you shop, cook, and eat and the good/bad impacts
 - meal-based tracking—forget detailed shopping lists and point-counting; you tell Sweet Potato the meals you eat, or Sweet Potato guides you to tasty meals you could have
 - intelligent suggestions—Sweet Potato learns from your food profile and past meals to make informed suggestions about new ingredients, recipes, and menus that you'll probably like
 - the web app—a highly interactive application for tracking, planning, and browsing ideas
 - mobility—you don't take your laptop to the grocery store, but you do take your mobile phone; the Sweet Potato apps for the iPhone, Google Android, and BlackBerry offers the essentials of the web app and specific in-store features
- Design Principles:** Three images illustrating the principles:
 - It's visually stimulating**—like a trip to the grocery store.
 - It feels creative and experimental**—like trying a new recipe for the first time.
 - It's social and cultural**—like dinner with family and friends.

HOW IT WORKS

1. Create a one-page overview of the project
2. Include vision, functional requirements, and design principles or user goals
3. Setup a meeting to review and "redline" with others

HOW IT GETS OTHERS INVOLVED

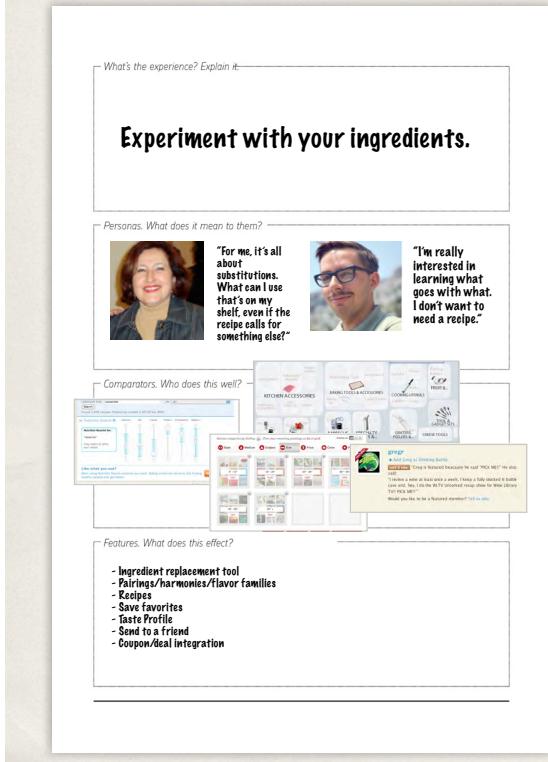
Puts the goals of a UX project in an appealing summary and invites people to think about what you're trying to accomplish

WHAT QUESTIONS IT CAN ANSWER

Do we all agree on the goals of what we're trying to accomplish?

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Planning | Experience Poster



HOW IT WORKS

1. Create a poster-sized view of the core experience you're designing
2. Include the "mantra," how it relates to personas, inspiration, and core features
3. Hang it up somewhere people can see it.
4. It's like an experience mood board.

HOW IT GETS OTHERS INVOLVED

Large format invites others to walk by and engage with it. Hang it in the team workspace for a constant reminder of the experience you're creating.

WHAT QUESTIONS IT CAN ANSWER

What's the design vision? What's the coherent vision?

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User Research Methods

GOAL Learn what users want and need

METHODS

- Automated Site/Product Survey
- Manual Intercept Surveys
- Contextual Inquiry
- Bespoke Research Study
- Secondary Research
- Mental Model Diagrams

PROBLEMS This phase often lacks clear goals. Anything that could help establish go-no-go decisions. Heavily reliant on interpretation of researcher. Without trust and support, the findings may be put in question, making it a throwaway activity

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User Research | Proto-Personas

Seamus
71 years old
San Francisco

Seamus's state of mind
I want to trust my doctors and Western medicine.

Seamus's motivation

- + Trying to get into liver transplant program in order to get on donor list
- + Kaiser referral
- + Motivated by proximity
- + Skeptical of Western medicine but finds himself in a dire situation

Seamus's environment

- + Kaiser patient
- + Tried homeopathic remedies
- + Uses computer at library
- + Alone, no family

Needs from the web site for Seamus

How can I get a liver?
How do I get in to see an expert? How do they choose who gets one and why? How long will it take?

How will the transplant affect my life? Do I have to stop drinking after the transplant?

What are other treatment options if I don't get a liver? Are there complementary therapies? How do they work?

How long will I be in the hospital? What's the recovery process?

From the web site:
Set Up Consultation With a Doctor
General Information Location
Procedure Descriptions
Hospital Locations
Patient Follow Up Programs

Transplant Services
Patient Profiles

Treatments for Conditions
Alternative Medicine Services
[Specific language to address pioneering live donor treatment]

Preparing for Surgery / Procedures
Recovering From Procedures

HOW IT WORKS

1. Schedule a meeting
2. Divide people into groups and give each group a user type
3. Ask them to envision their user's state of mind, motivations, environment, and key needs
4. Let them pick out a picture to match

HOW IT GETS OTHERS INVOLVED

Invite the whole team to envision users' state of mind

WHAT QUESTIONS IT CAN ANSWER

How much do we think we know about our users. What questions do we have? What do we need to confirm?

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User Research | Surrogate Test



HOW IT WORKS

1. If you can't meet with users, find someone who knows about the users
2. Meet with them
3. Look at the site or service with them
4. Ask them to explain where it breaks down for the user

HOW IT GETS OTHERS INVOLVED

Invites surrogates into the process and makes them allies

WHAT QUESTIONS IT CAN ANSWER

Where users are probably having issues; where to dig further

TO LEARN MORE

<http://www.slideshare.net/RuthEllison/guerrilla-user-design-research-final>

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Design Methods

GOAL	Specify what we're going to make. How it should look, feel, work
METHODS	<ul style="list-style-type: none">- Wireframes- Sitemaps- Visual Design Comps- Task Flows- Storyboards- Concepting/Visioning- Content Strategy- Sketchboards- Styleguides- Content Inventories- Story Cards- Functional Specifications- Prototyping
PROBLEMS	How do you know it's good? If VIPs/stakeholders don't like the resulting design, it can derail these methods

Leah Buley | adaptive path

Design | Story Cards

PLAN DINNER.

As a tired person at the end
of a long day

I want to figure out what I can
make with the food in my
kitchen

So I can eat and relax.

HOW IT WORKS

1. Pick a concrete user need, and make it granular
2. Write it on a card
3. If it helps, use "as a..." "I want..." "so I can..."
4. Start designing

HOW IT GETS OTHERS INVOLVED

Have meetings to make and review these cards. Keep passing the cards around to remind people what you're working on.

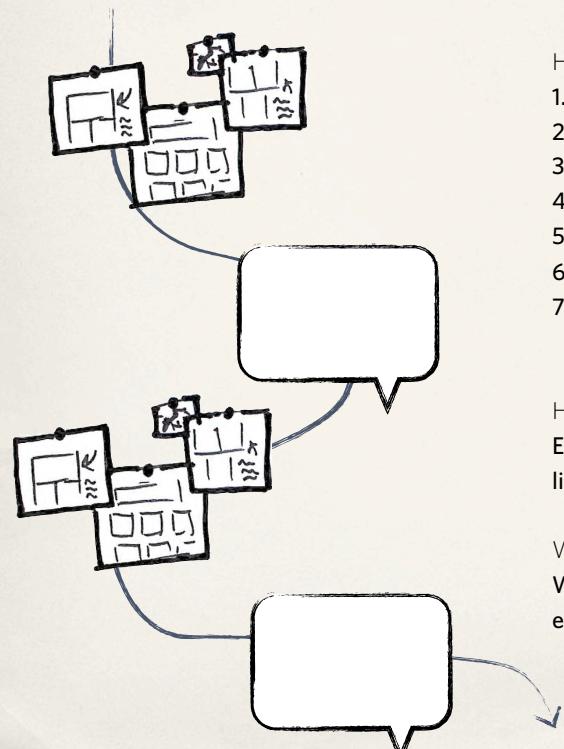
WHAT QUESTIONS IT CAN ANSWER

What are we prioritizing next?
What specific outcome are we trying to make possible?

FOR MORE INFO

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Design | Co-Design Workshop



HOW IT WORKS

1. Schedule a meeting
2. Everyone draws their vision for the design
3. Everyone talks about their design
4. Everyone throws away their drawings, and draws again
5. Everyone talks about what they drew
6. Repeat steps 4 and 5
7. Final designs should be closely aligned toward shared group goals

HOW IT GETS OTHERS INVOLVED

Everyone gets to share their vision for design, and has to listen to others

WHAT QUESTIONS IT CAN ANSWER

What are outlying ideas for the design vs. core shared expectations

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Testing/Usability Methods

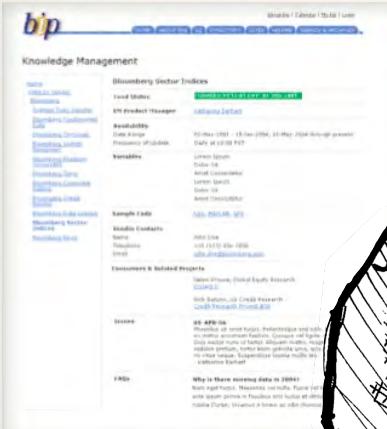
GOAL Confirm that what we're making actually does what it needs to

METHODS
- Testing with Clickable Prototype
- A/B or Multivariate Test
- Analytics Data/Dashboard

PROBLEMS Often comes too late in the process -- only a way of confirming design choices, not necessarily influencing them.

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Testing | 5 Second Test



HOW IT WORKS

1. Show users a design for 5 seconds
2. Take it away
3. Ask them some questions about the design
4. See what they can remember

HOW IT GETS OTHERS INVOLVED

Invite team members to watch.
Invite team members to participant.
Best if you can get users involved too, of course.

WHAT QUESTIONS IT CAN ANSWER

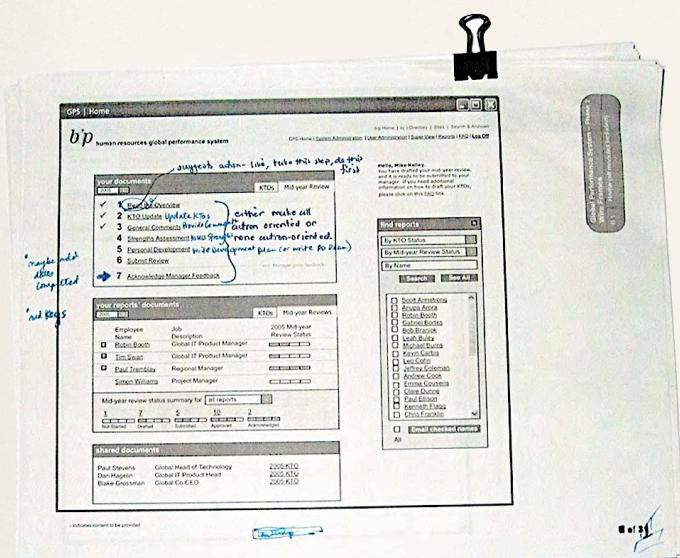
Do we all agree on the goals of what we're trying to accomplish?

WHERE TO LEARN MORE

uiexperiments.com/articles/five_second_test
fivesecondtest.com

Leah Buley | adaptive path

Testing | Paper Prototype



HOW IT WORKS

1. Print out in-progress designs
2. Find someone to test with
3. Give them a task and ask them to show they'd do it using the designs in front of them

HOW IT GETS OTHERS INVOLVED

Invite team mates to watch. Invite team mates to be test participants.
Best if you can get users involved too, of course.

WHAT QUESTIONS IT CAN ANSWER

Is the design working as expected?
Are we on the right track?

WHERE TO LEARN MORE

Paper Prototyping by Carolyn Snyder

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Maintenance Methods

GOAL See how the design holds up to actual use and make incremental improvements

- METHODS**
- Analytics
 - Search Logs
 - Customer Feedback
 - Periodic User Testing
 - Micro-Projects/Releases

PROBLEMS Spot fixes can erode design cohesion, creating frankendesigns, and also derailing focus from long term practice development

Leah Buley | adaptive path

Maintenance | UX Health Check

HOW IT WORKS

1. Schedule a recurring meeting
2. Make a spreadsheet
3. Break the site into sections (e.g., search, registration, etc.)
4. For each section, choose relevant comparators
5. For each section, grade how good it needs to be vs. its comparators
6. For each section, grade how good IT IS vs. its comparators
7. As a group, discuss the gaps

Section	Benchmarks	Target	Score	Difference
Profile	Hunch, LinkedIn	70	40	-30
Community	Facebook	70	70	0
Reports	Mint, TripIt	50	60	10

HOW IT GETS OTHERS INVOLVED

Invites others to regularly assess how the site/service is doing

WHAT QUESTIONS IT CAN ANSWER

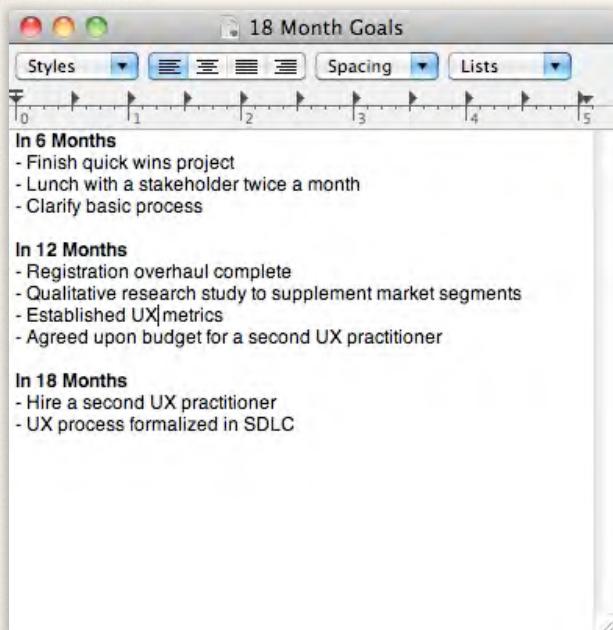
Where do we need to focus next?

FOR MORE INFORMATION

<http://www.slideshare.net/livlab/ux-health-check-phillychi>

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Maintenance | UX 18-Month Plan



HOW IT WORKS

1. Make a list of UX achievements you want to accomplish in 18 months
2. Working backwards, think about where you need to be in a year, and then in 6 months
3. Make it a part of your goals

HOW IT GETS OTHERS INVOLVED

Share your goals with managers and colleagues

WHAT QUESTIONS IT CAN ANSWER

How to grow a practice. How to break educating others into an achievable process

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Agenda for Today

1. Challenges for UX Teams of One · 10 MINUTES
2. The Role of Methods and Documents · 10 MINUTES
3. The Lean Methods · 25 MINUTES
4. A Lean Toolkit · 5 MINUTES

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Tactics

<p>Simple artifacts (posters, one sheeters)</p> 	<p>Meetings & activities (reviews & co-creation)</p> 	<p>Lo-fi (screenshots, marginalia)</p> 
<p>Gather data as you go (surveys, annotations)</p> 	<p>Don't be a purist (proxies, provisionals)</p> 	<p>Time constraints (timed tests, short surveys)</p> 

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How to Plan a Method

Wherever you can, combine steps

How to Plan a Method

Method Planning Worksheet

Goal/What to figure out:

Get some ideas for fixing user drop-offs in registration at step 2

Necessary parts:



Who should you include at each part?
How will you involve them?
Can you combine parts?

Have a brainstorming meeting.
Invite John, Kai, Lu, Mary, Chris
Do six magic hats activity

How long should each part take?

2 hours/plan + 1 hour/meeting + 2 days/email feedback

What are some reasonable objections/arguments you might hear as you work? In what ways are you prepared to compromise?

Is this an opportunity for Mary to push hard on her agenda. Maybe if it comes up, I can agree to do a quick design of her vision plus a few others that the group comes up with, and then we can guerrilla test it

Wherever you can, combine steps

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Our Mantra (just a reminder)

Less time making things. More time for people.

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Go forth and conquer.

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Resources

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UX Team of One Book | <http://www.rosenfeldmedia.com/books/ux-team-of-one/>

Lean Startup | <http://www.startuplessonslearned.com/2008/09/lean-startup.html>

Lean User Experience Residency | <http://luxr.posterous.com/>

Paper Prototyping | Paper Prototyping by Carolyn Snyder

MAYA Design Carnegie Libraries Project | <http://www.maya.com/portfolio/carnegie-library>

5-Second Test http://www.uie.com/articles/five_second_test/ + <http://www.fivesecondtest.com>

Surrogate Test | <http://www.slideshare.net/RuthEllison/guerrilla-user-design-research-final>

UX Health Check | <http://www.slideshare.net/livlab/ux-health-check-phillychi>

Other Methods | <http://creatingminds.org/index.htm>

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