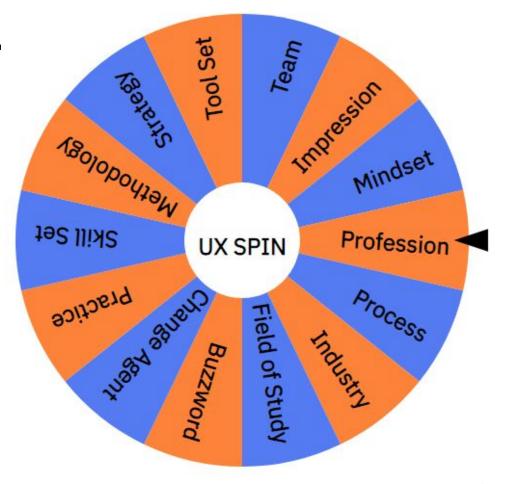
Spins on User Experience

Keith Instone

spin.dexterityux.com

TorCHI, July 20, 2020

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Session Details



What is "user experience," really?

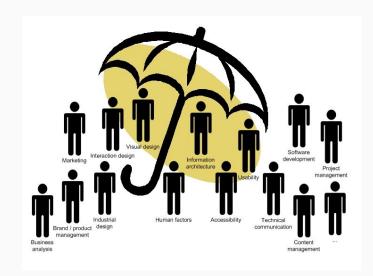
Across industry and within organizations, there are many "spins" on what "UX" represents including a mindset, methodology, tool, strategy, community of practice, or field of study.

Using an innovative and engaging format*, this talk will introduce you to these Spins on User Experience so you can consider which are useful to advance UX in your organization.

A Little About Me



- User experience consultant based in Ohio, USA
 - Helps organizations mature their user experience practice through apprenticeship, coaching, and mentoring
- Active in the user experience community since the 1990s, through efforts like World Usability Day, UXnet, and 24 Hours of UX
- Career spanning roughly equal time in academia (HCI research), industry (IBM), and consulting
- Remember the presentation at TorCHI in 2008 about the information architecture of ibm.com?





Ready to begin? Fill out the Zoom Poll (pick one)

- Yes, excited!
- Whatever
- No, my cat is bothering me
- \$*%&#!!! I hate filling out polls during a talk







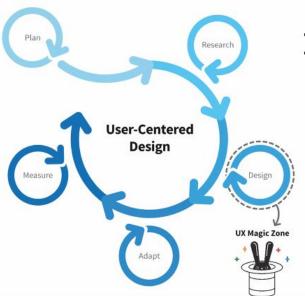








Focus - Only Interaction Design step (not full UCD life cycle)



- Other phases are important too
- Necessary but not sufficient

UCD as a PROCESS

Semantic Interaction Design as a proven METHOD

"Dan's title 'UX Magic' is...an inside joke. The whole point of the book is that the 'magic' of UX Design is in fact not magic at all."

What do we mean by "User Experience"?

- 1. Impression
- 2. Mindset
- 3. Process
- 4. Methodology
- 5. Field of Study
- Practice
- 7. Tools
- 8. Profession
- 9. Team
- **10.** Strategy
- 11. Buzzword
- 12. Skill Set
- 13. Change
- **14.** Industry







BUZZWORD



TEAM



>.<

MINDSET



METHODOLOGY

How to land a career in UX design with zero qualifications

















- Some good advice for people interested in UX as a career
 - You will need to learn key **skills**, follow a design **process**, work in **teams**
 - Go to a meetup, connect with like-minded individuals (**community of practice**)
 - Experiment with tools
- But (comment): "The title of your article is misleading, click-baity, and does a disservice to professional designers..."
- Does not understand multi-disciplinary nature: "UX design was not a thing when I was at university, so don't bet that it's here to stay" (**field of study**)
- Comment: "UX Design has been a thing for centuries!... Improving the User experience of a space, weapon, item or process has been going on for as long as there have been humans." (impression)

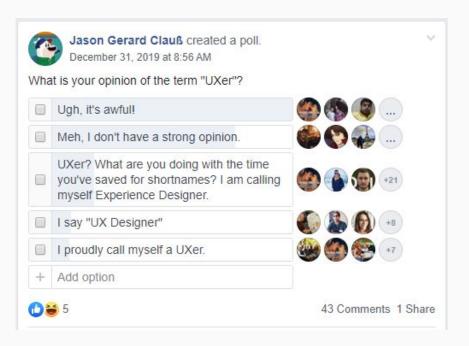


What is your opinion of the term "UXer"? (pick one)

- I proudly call myself a UXer
- OK for bootcamp grad, but not very professional
- Better than "UX/UI"
- Terrible, it cheapens what we do
- Confused, designER or researchER?
- Nonsense, "UX" is not a person
- A waste of time to talk about it

UXPA Facebook group post, 12/31/2019



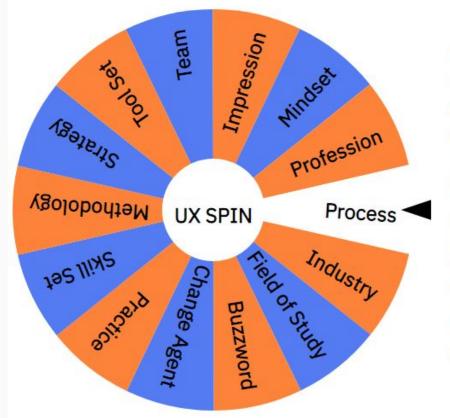


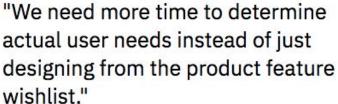
Different interpretations of the term "UX"

- Doesn't make much sense as "User ExperiencER" (because UX is the user's impression).
- A way to cover many roles on a **team** with a single term.
- A general term for anyone who works in the field (a **practitioner**).
- Inclusive of all the different UX professions.
- UX seems to be a set of skills taught at a 4 week course.

Triggering bigger issues and challenges

- OK as shortcut for **UX Designer**. *Reply*: That ignores all of the **UX Researchers**, and others. It is short for UX practitioner.
- Makes sense because UX Designers are becoming mindless pixel movers.
- It is better than UX/UI, which is a sign that recruiters have no clue.
- UXer **cheapens the profession**. *Alternate*: It cheapens the craft.
- A UXer has some skills, but an Experience Designer understands the theory.
- UXer is someone on our broad UX team. Reply: Why not call it the design team? Reply: Because we are not all designers.
- Does the field (profession) require more regulation?
- Why are we arguing about a term? Just do quality work!





User Experience is a humancentered process (with steps like discovery, analysis, conceptual design, and evaluation) used for business and social impact



spin.dexterityux.com

DISCLAIMER



- > I do not agree that all "spins" are equally valid or useful, or all of my example quotes are "the truth"
- I am documenting what I am hearing and reading
- We are here to discuss
- Make up your own mind about what "spins" on UX are useful to you and your organization



COVID-19 has triggered a "digital transformation" initiative at your organization.

You are part of the leadership team which is creating a plan to make the initiative successful.

Your focus is on "user experience" plans & resources.

Which spin do you plan for?

Spin the wheel to determine your fate

What do we mean by "User Experience"?



CORE (noun): Impression

MICRO (verb): Process, Methodology, Tool Set, Skill Set

MACRO (adjective): Team, Strategy, Change, Mindset

META: Practice, Field of Study, Profession, Industry

NOTHING: Buzzword

UX as Buzzword

"Sprinkle some UX magic on our app before we launch."

A buzzword misunderstood in business

Common example: UX/UI

- > "I don't know what either phrase really means. Someone else told me to slap them together."
- > "The job only involves cranking out visual designs, but it sounds more important if I add UX to it."
- The slash stands for PLUS and it means it is a T-shaped role, deep on user interface design but also doing some user research, information architecture, strategy, and more. It is the new label for a digital design generalist."





Do We Need A Better Term For

UXP With the lack of consistency and simplicity in how we define UX, we've stripped it of it's meaning and, more importantly, reduced the job to a mere buzzword.





A "user experience" is an impression someone gets when interacting with... (pick one)

- Web sites
- Technology
- A company
- Products & services
- A system
- People

UX as Phenomenon: Impression



"I had a really bad experience trying to buy something from that web site."

An impression someone gets when interacting with products, services, spaces, brands, systems, and organizations

The official ISO 9241-210 definition

> User Experience is a person's perceptions and responses resulting from the use and/or anticipated use of a product, system or service.

Someone	Impression	Interacting	Products, services, spaces, brands, systems, and organizations	Instone (as trigger for discussion)
Person	Perceptions and responses	Use and/or anticipated use	Product, system or service	ISO 9241-210
Person	Emotions and attitudes	Using	Product, system or service	Wikipedia (June 2020)
User	Perception		System	<u>Lean UX (SAFe)</u>
User	Feel	Interaction	System	Preece, etal (2002)
End-user	All aspects	Interaction	The company, its services, and its products	NN/g
Someone	Nearly everything	Interaction	Product	Kuniavsky, Observing the UX
User	The result	Interacting	Object	Araz, UX Collective (Medium)
Individual	Totality	Interaction, Response	Business, product or service	Dave Rogers (2005)
Person	Sum total		Product, service, organization	Merholz (2005)

Comparing definitions of the core meaning, the phenomenon

User Experience Questionnaire

A fast and reliable questionnaire to measure the User Experience of interactive products. Available in more than 20 languages. Easy to use due to rich supplementary material.

What does it measure?

The scales of the questionnaire cover a comprehensive impression of user experience. Both classical usability aspects (efficiency, perspicuity, dependability) and user experience aspects (originality, stimulation) are measured.



Attractiveness

Overall impression of the product, Do users like or dislike it:



Dependability

Does the user feel in control of the interaction? Is it secure and predictable?



Is it easy to get familiar with the product and to learn how to use it?



Stimulation

Is it exciting and motivating to use the product? Is it fun to use?

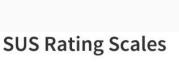


Can users solve their tasks without unnecessary effort? Does it react fast?

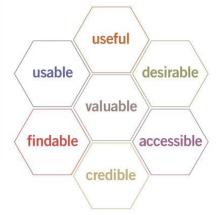


Novelty

Is the design of the product creative? Does it catch the interest of users?



- I think that I would like to use this system frequently.
- I found the system unnecessarily complex.
- I thought the system was easy to use.
- I think that I would need the support of a technical person to be able to use this system.
- I found the various functions in this system were well integrated.









Spend more time discussing UX as a NOUN ("our users' experiences") in your organization

The Impression spin is getting lost in the buzzwords & noise from the other spins



"Our *users*' experiences" Replace "users" with specific phrases for your situation (more later)

- Customers, Potential customers, Current customers
- Employees, New hires, Invoice approvers
- Patients, Family members, Doctors
- Residents, Citizens
- Faculty, Students → Teachers, Learners
- Humans, dogs, <u>chickens</u>?



Why do you do usability testing? (pick several)

- Iteratively improve a design
- Get insights into user needs & requirements
- Confirm launch readiness
- Benchmark against competitors
- Wake up leadership
- I don't do usability testing

UX as activities, "what we do":



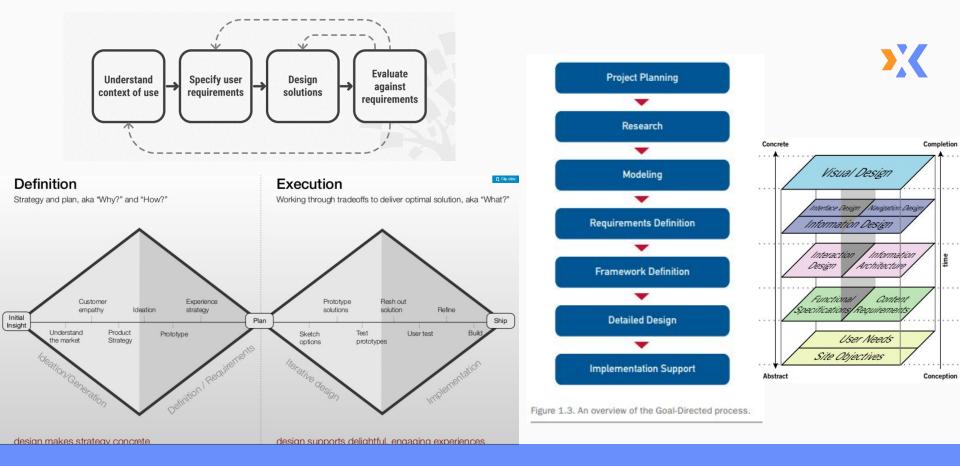
Process, Methodology, Tool Set, Skill Set

Human-centered **process** (with steps like discovery, analysis, conceptual design, and evaluation) used for business and social impact

Methodology, a body of techniques and rules about how to use them that govern our specialty

Set of tools, ranging from sticky notes & sketchbooks, to spreadsheets & drawing applications, to remote testing & prototyping platforms

Skill set, a collection of abilities, such as empathy, divergent thinking, and sketching, which can be applied to any professional or creative endeavor



Process: some form of user-centered design, usually





Interviews / Surveys
Usability Audit

Gap Assessment

Usability Goals

Requirements Gathering

DEFINE

Brainstorming

User Profiling Storyboarding

Creative Direction

Requirements Definition

User Experience Definition

DESIGN

Wireframing

Prototyping

Functional Design

Design Concepts

Visual Design



DEVELOP

UI Application Coding Style guides

UI Specifications

DEPLOY

UI Assessment

Standards

Compliance Check

Accessibility Testing

User Training

Expert Evaluation

DRIVE

Usability Check

Maintain & Support

New Needs

Mapping steps in a process to specific activities: methods, work products & deliverables

A LANDSCAPE OF USER RESEARCH METHODS







Current topics

- · Affinity Diagramming
- · Claims Analysis
- Competitor Analysis
- Future Workshop
- Persona
- · Quality Function Deployment (QFD)
- Stakeholder Interview
- Scenario of Use
- Use Case
- · Usability Benchmark

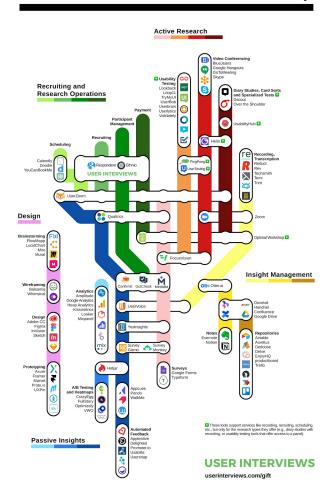
How does heuristic evaluation compare to usability testing?

Heuristic evaluation was codified around 1990, at a time when it was expensive to get access to users. It was common for people to have to be trained to use the technology being evaluated before they could sit down in a usability lab to perform some tasks. The whole concept of even having an interface for end-users was pretty new. Conventions were just settling into place.

Usability testing has been around since at least the 1980s, but began to be widely practiced about the same time Nielsen and Molich published their heuristic evaluation method. While usability testing probably needs some updating as a method, the basic process still works well. It is pretty

Methodology: knowing when (& when not) to apply a specific method for a specific project based on goals, budget, time, ...

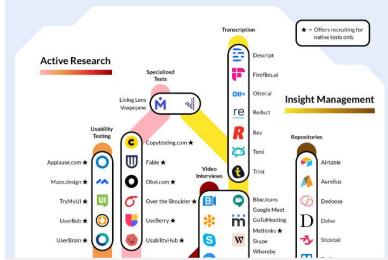
The 2019 UX Research Tools Map



The 2020 UX Research Tools Map

USER INTERVIEWS





De	sign Prototy	ping Handoff	Design Systems	Versioning	Monitoring	
	Name V Name of app	Usage A Based on the 2018 Design Tools Survey	Platform Which platforms can upload designs?	Free Can be used for free without trial?	Cost V Estimated cost per year?	Programs Compatible design programs
۱	Zeplin		. □	•	\$180	→ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □
in	InVision		•		\$180	~
•	Figma		444	•	\$144	₽
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-1	Sketch Measure	_	<u> </u>	0		•

uh	2019 Design Tools Survey Results					
	Not sure which tools to use? 3,000 designers come together to share their toolkits in this annual survey.					
۵.	Design Tools					
Ķ	Prototyping Tools					
	Handoff Tools					
ů	Design System Tools					
p	Versioning Tools					
ŝ	Monitoring Tools					





UX as a VERB - "how we do UX" - is very important (still, always), but don't get in a rut

Process & Methodology: explore & innovate Tool set: try not to obsess too much Skill set: democratize?



Who does your UX team focus on? (pick several)

- Potential customers
- Current customers
- Employees
- Business partners
- Citizens
- Learners
- Someone else

UX as "organizational capability": Team, Strategy, Change, Mindset



A **team** (made up of various roles) that defines, designs, and delivers solutions for customers, employees, business partners, citizens, and other groups of people

A **strategy**, a vision and plan, on par with organizational strategies for business, marketing, branding, technology, and products

An element of digital transformation and **change**, key for organizations to survive in the future

A **mindset** of caring about your users' needs and doing your best to serve them

UX as Team



"Is UX done yet? We need to start coding!"

A team (made up of various roles) that defines, designs, and delivers solutions for customers, employees, business partners, citizens, and other groups of people

Common roles on a UX team

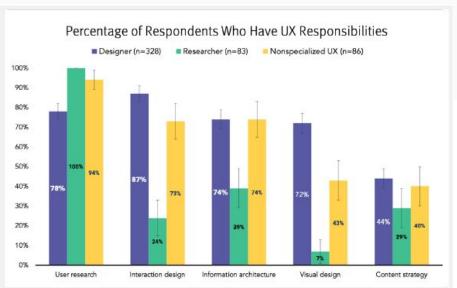
- Visual designer
- User interface designer
- Interaction designer
- Product designer
- Experience designer
- > Information architect
- Content strategist
- User researcher
- > Experience architect
- Prototype developer
- Usability specialist
- Accessibility specialist
- Design system manager
- Project manager
- Manager

Other team names

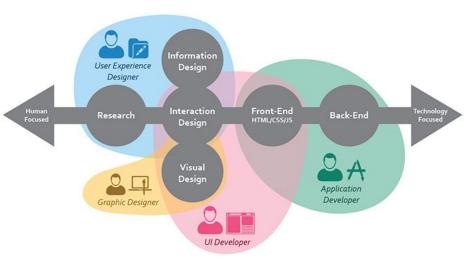
- Design
- > Product design
- Service design
- Digital design
- > Experience design
- Customer experience
- > Employee experience
- > Experience strategy
- <Business unit> design (if distributed)
- Usability
- DesignOps
- ResearchOps

Common "owners of UX" & "homes for UX teams"

- > CEO, CTO, CIO, CMO, CDO, CXO
- > Vice President, Director, Manager
- > Engineering
- > Product
- > IT
- Marketing
- > HR
- > Innovation
- Customer service
- Communications
- > <Business unit>







How does your organization think about their ability to do UX activities? (pick several)

- We don't: other things dominate
- Easy: just be nice to users
- Mechanical: use the most powerful tools
- Repeatable: follow the process
- Manageable: tell people to do it right
- Strategic: our leaders drive it from the top down
- Scientific: study it objectively
- Professional: leave it to the experts

UX as Mindset

> <

"UX is easy, just follow the Golden Rule."

A mindset of caring about your users' needs and doing your best to serve them

Organizations view the **amount of work needed and challenges** in defining, designing, and delivering good user experiences at **many different levels**.

- > Easy: Just don't treat them like "stupid users": PICNIC, PEBKAC, ID10T, Layer 8
- > Basic: Some general purpose skills will do the trick
- > Mechanical: With the right tools, anything is possible
- > Repeatable: Follow a (any) process, requires practice to get it right
- > Manageable: Administer and direct your teams to success
- > Strategic: If the people at the top know what they are doing, we'll be fine
- > Scientific: We cannot just make it up, there is knowledge to acquire and proven approaches
- > Professional: Bring in professionals who have devoted their careers to it (like brain surgery)
- > Cultural: "Culture eats strategy for breakfast"
- > Industrial: Our company cannot solve the important challenges alone



UX Maturity Models

Gena Drahun, July 2017



UX as an organizational capability depends on your level of design maturity, culture, business model, etc. (duh!)

Team, Strategy, Change, Mindset: Share a story from your context



What should you study to be good at UX? (pick one)

- Human-Computer Interaction
- Library & Information Science
- Graphic & Visual Communication Design
- Cognitive Psychology
- Business Management
- Rhetoric & Writing
- Criminal Justice

UX beyond your organization: Practice, Field of Study, Profession, Industry



A **community of practice**, a group of people who share a passion for user-centered design and learn how to do it together in social settings

A **field of study** focused on how people behave in technology-enabled contexts and how to creatively address human needs

A **profession**, with careers, occupations, and jobs such as user researcher, information architect, user interface designer, and usability engineer

An **industry**, a collection of business establishments that act as a whole, are regulated, and get analyzed for economic activity

UX as Field of Study

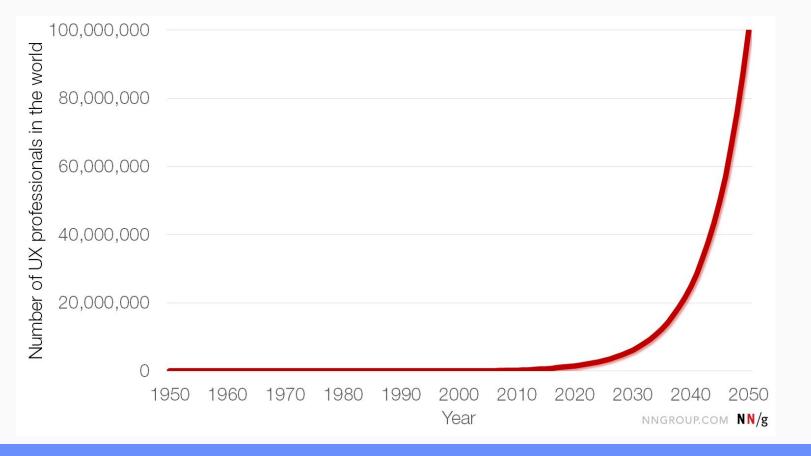


"What do I need to learn in school in order to get a UX job?"

A field of study focused on how people behave in technology-enabled contexts and how to creatively address human needs

Canada's UX-related fields of study (with some paths to courses & research areas as examples)

- > LOTS > Science > Computer Science > **Human-Computer Interaction**
 - Carleton > Computer Science/IT > HCI (master's) > Research methods in HCI
 - Waterloo > HCI+Health Lab
- > U Toronto > **Information** (master's) > User Experience Design > Information Architecture
- > Emily Carr University of **Art + Design** > Design > Interaction Design
- > OCAD > Design > **Industrial Design** > Experience/Interaction Design
- > Vancouver Film School > **Digital Design** > User Experience + UCD Innovation
- > NBCC > Graphic and Communications Design > Interaction Design
- > Concordia > Fine Arts > **Design and Computation Arts** > Interaction Design
- > UT Mississauga > **Communication**, Culture, Information and Technology > UXD and Board Games
- > Calgary > **Psychology** > Human Factors
- > UCC > IB > Design & Innovation > Design Thinking > Innovative product design
- > UT > Continuing Studies > Information, Technology, Environment, and Engineering > UX Design (certificate) > Introduction to User Experience (UX) Design
- Queen's > School of Business > Executive Education > Innovation and Design Thinking (2-day course)





Profession: the context, challenge, opportunity

Communities



- > <u>uxWaterloo</u> is a professional **interest community** for **anyone** concerned about improving the "user experience" of products and services.
- > <u>UXPA Toronto</u> provides a platform for UX **practitioners** to share techniques and experiences.
- > <u>TorCHI</u> is a **professional association** of people in the Toronto UX community...our members include professionals, academics, and students.

UX as Profession



"I am a good interaction designer, but I want user researcher to be my next UX job."

A profession, with careers, occupations, and jobs such as user researcher, information architect, user interface designer, and usability engineer

Profession "requirements"? How do we stack up?

- Full-time occupations
- Training and certificates
- University programs: degrees, labs, research
- Body (bodies) of knowledge
- International, national, local associations
- Standards and standards bodies
- Ethics
- Licensing (by province in Canada)
- Recognition by governments to self-manage or be regulated

0 Management

- 0124 Advertising, marketing and public relations managers [e-business manager, graphic design firm manager]
- 0213 Computer and information systems managers [computer software design manager]
- 4011 University professors and lecturers [computer science professor university]
- 4021 College and other vocational instructors [graphic design instructor]

1/A Professional

- 2171 Information systems analysts and consultants [applications analyst, solutions architect IT]
- 2173 Software engineers and designers [software designer, systems architect]
- 2174 Computer programmers and interactive media developers [graphical user interface (GUI) designer]
- 2175 Web designers and developers [web designer]
- 4169 Other professional occupations in social science, n.e.c. [applied anthropologist, ethnographer]
- 5111 Librarians [cybrarian]

2/B Technical

- 2252 Industrial designers [product designer]
- 2283 Information systems testing technicians [user acceptance tester]
- <u>5241</u> Graphic designers and illustrators [user experience designer]

3/C Intermediate

1454 Survey interviewers and statistical clerks [survey interviewer]



- Type 0 (zero): management jobs, such as restaurant managers, mine managers, shore captains (fishing)
- Level 1/A: professional jobs that usually call for a degree from a university, such as doctors, dentists, architects
- Level 2/B: technical jobs and skilled trades that usually call for a college diploma or training as an apprentice, such as chefs, plumbers, electricians
- Level 3/C: intermediate jobs that usually call for high school and/or job-specific training, such as industrial butchers, long-haul truck drivers, food and beverage servers
- Level 4/D: labour jobs that usually give on-the-job training, such as fruit pickers, cleaning staff, oil field workers

Recognized by the Canadian government?
National Occupational Classification (NOC)



UX across organizations and at "multi-disciplinary scale" is hard but we have to do better, lots better

Field of Study, Practice, Profession, Industry

Your ideas??

More discussion about "User Experience" spins



CORE (noun): Impression

MICRO (verb): Process, Methodology, Tool Set, Skill Set

MACRO (adjective): Team, Strategy, Change, Mindset

META: Practice, Field of Study, Profession, Industry

NOTHING: Buzzword



	TEAM Roles	SKILL SET		
		TOOL SET	INDUSTRY Companies	
STRATEGY		METHODOLOGY		
			PRACTICE	PROFESSION
CHANGE		PROCESS	Communities	Careers
MINDSET		FIELDs OF STUDY		
	IMPRESSION			

Clexiterity Dexterity User Experience LLCTM

Keith Instone

Founder

instone@dexterityux.com 419.569.1217

dexterityux.com

UX as Skill Set



"Everyone needs to get better at UX if we want to be agile and innovative."

A skill set, a collection of abilities, such as empathy, divergent thinking, and sketching, which can be applied to any professional or creative endeavor

Listed for UXers (and other roles)

- > Empathy, team player
- Solution driven, delivery focus
- People, relationships
- Passion, energy
- Communication, listening
- Creativity
- Technology understanding

Common for UXers

- > Sketching
- Storytelling
- Critiquing
- > Presenting
- Facilitating

UX as Strategy

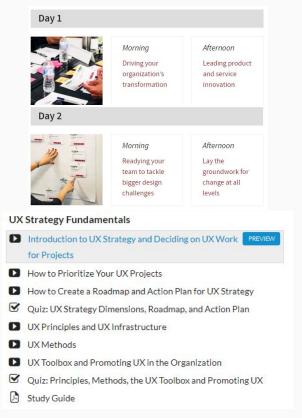


"Let's make sure users can do everything themselves online, we do not want them to call us."

A strategy, a vision and plan, on par with organizational strategies for business, marketing, branding, technology, and products

- > Goal for the impressions you want to enable
 - Strategy for what users experience, perhaps communicated as a Product or UX roadmap

- How your organization prepares to "do UX well"
 - Strategies for method selection, prototyping, staffing, training, evangelization, selecting projects, etc.



https://playbook.uie.com/

https://courses.theteamw.com/series/complete-list-of-all-courses-and-reports/ux-strategy-bundle

UX as Change Agent



"Our UX work will not succeed if we don't change the culture around here."

An element of digital transformation and change, key for organizations to survive in the future

My journey as a change agent

- > In early days, I did incremental, tactical process and operation changes focused on getting the job done.
- > Then, I started learning from professional organization developers, picking up specific change management skills (e.g., "appreciative inquiry" instead of "problem solving") and applying them (secretly).
- > I started to have clients who loosely connected them, like "Change management" and "Usability" as peer teams.
- > Things advanced more when client innovation teams became "design thinking based".
- > Now Digital Transformation has became a THING and UX is usually a key part of it...
 - Why User Experience (UX) is the centerpiece of digital transformation (Akami)
 - Why User Experience Should Be Front and Center in Digital Transformation (Cherwell)
 - "Chemical companies never imagined that they would need to provide the same 'user experience' to their customers as consumer electronics companies." (Accenture)

UX as Practice



"I really liked the case studies at that UX conference."

A community of practice, a group of people who share a passion for user-centered design and learn how to do it together in social settings

There are LOTS (too many?) communities where you can learn how to do UX, even if you are only interested in it.

International, national, local groups, with talks, articles, workshops, ...

- > ACM SIGCHI: TorCHI, Ottawa
- > IxDA, IxDA Montreal, Ottawa, Toronto, Vancouver
- > UXPA, UXPA Montreal, Toronto
- > RGD, AIGA (US)
- > Independent "communities of interest": <u>uxWaterloo</u>, Calgary UX, ...

Conference-driven communities, like CanUX

Online communities: General purpose, like Reddit & UX Mastery; Topical, like Design Systems (on Slack)

UX as Industry



"Companies need to work together to change the way we assess UX talent and make hiring decisions."

An industry, a collection of business establishments that act as a whole, are regulated, and get analyzed for economic activity

Different ways to think about UX & Industries

- > Companies that specialize in UX
 - UX Consultancies: Lextant, Blink, TecEd, Frog
 - UX training, education & content: NNG, UIE/Center Centre, Rosenfeld Media
 - UX tool providers: Adobe, InVision, UserTesting
- > Companies that do UX (and lots of other things)
 - Design agencies (like IDEO)
 - Product, app & software shops
- > "The tech industry" (Facebook, Google, IBM, ...)
- > "The design, computer systems, management & research services industry" (NAICS 5414, 5415, 5416, 5417)

But these do not capture the **cross-industry** nature: UX teams at manufacturers, financial institutions, healthcare systems, government agencies, ...