



# **Institutionalizing User Experience: A Consulting Challenge**

First-hand accounts of how widely differing companies collaborate to “build usability into” the design and development process.

## **Presenters:**

- **Jennifer Lee Carlson, Tec-Ed**
- **Glenn Cochran, VMware**
- **Dave Linabury, Campbell-Ewald**
- **Barbra Wells, Tec-Ed**

# Introductions



- **Jennifer Lee Carlson**, Senior User Experience Consultant at Tec-Ed



- **Glenn Cochran**, Manager of User Experience Engineering at VMware



- **Dave Linabury**, SVP Social Media Experience Manager at Campbell-Ewald



- **Barbra Wells**, VP of Market Development at Tec-Ed

# Phases of Institutionalizing User Experience

- Phase 1: Finding and Developing Champions
- Phase 2: Internal Selling
- Phase 3: Building the Team
- Phase 4: Integrating User Experience into the Design and Development Process

# Phase 1: Finding and Developing Champions

- Common titles:
  - Marketing Director
  - Quality Control Officer
  - Account/Product Manager
  - VP of Design
  - President/Owner
- Could be someone from a help desk
- Could be an admin person
- Could already exist, and not be known in neighboring departments

# Biggest Challenges in Phase 1

- For the Consultant: Finding and developing usability champions is usually unbillable; it's an investment of time and resources.
- Agency Challenges: Most agencies don't recognize the benefits and can't see how it fits in their process.
- Developer Challenges: Usability champions likely are hidden within the company. No easy way to discover their existence (if at all). Developing usability champions requires lots of work, time, and potentially some budget.

# Phase 2: Internal Selling

- “Lunch and Learn” sessions
- Formal presentations of user research findings
- White papers and sales sheets

# Biggest Challenges in Phase 2

- Consultant Challenges: Development of a shared usability vocabulary and educating diverse audiences on the value of user-centered design and user research.
- Agency Challenges: Getting the right people to attend.
- Developer Challenges: Selling internally requires an audience. Many departments simply don't understand the need for user-centered design making selling even harder. You have to educate, educate, educate! This is not about ROI but rather justifying why users are important.

# Phase 3: Building the Team

- Collaborate on a proposal
- Provide menu of choices
- Integrate methodologies



# Biggest Challenges in Phase 3

- Consultant Challenges: Numerous proposal revisions, may be some sticker shock while defining and carrying out successful projects.
- Agency Challenges: Getting Creative to “check their egos at the door” when their designs are being tested.
- Developer Challenges: Building a team requires a laser focused effort on recruiting and the interview process. Finding good candidates is tricky. In addition, ramping up requires a significant investment and commitment to funding the team long term.

## Phase 4: Integrating User Experience into the Design and Development Process

- Show ROI
- Demonstrate advantages of early research and UCD practices
- Communicate the success story to other groups within the company

# Phase 4: Integrating User Experience into the Design and Development Process

- Consultant Challenges: Replicating usability successes in other departments of the client companies without repeating phases 1 through 3.
- Agency Challenges: Adapting to yet one more step in an already tight deadline.
- Developer Challenges: Requires buy-in from many key stakeholders to be 100% effective. Coordinating and collaborating with Engineering, Quality Assurance, Documentation, and Product Management is time consuming but absolutely crucial. Process change is often slow. Take baby steps.

# Case Study

## Alltel Home Page Redesign

# Case Study: Alltel Home Page Redesign

- Alltel loves usability testing
- Wanted a more modern homepage design
- Leapfrog competition, but not hurt what's already working
- Issues:
  - eCommerce site
  - Members login
  - Audience not tech-savvy

# Designer Went All Out

- Simplified “sheet-style” navigation
- Bolder colors
- Larger font
- Larger images
- He used the F-Word

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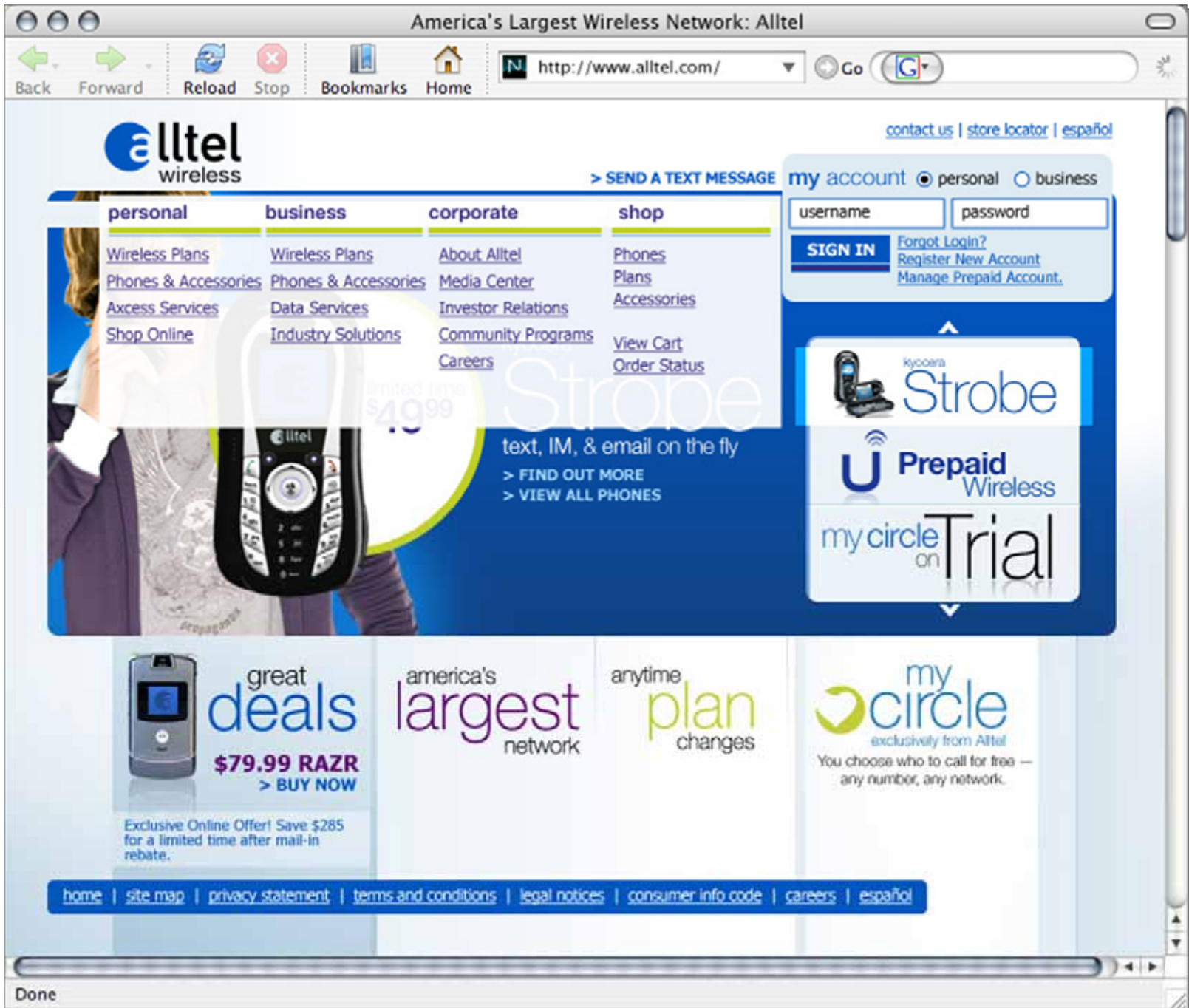
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“No, you tell the art director the design sucks.”

- Bad news is easier to take from a stranger
- Cooperation between agency and consulting usability firm comes into play
- Reduced internal friction among agency employees later on
- Solid relationship between agency champion and consultant is critical

# “Will you also tell the client that the design sucks?”

- How best to break the news to the client that the comp they liked most... failed
- And not look like we're idiots
- Rely on the consultant to safely bridge the relationship between client and agency
- Consultant becomes a “safe haven” for the client; someone looking out for their best interests

# Case Study

VMware, Inc.

# Case Study: VMware, Inc.

- At six years old starts in-house usability “team”
- Hires Ken Guzik as “Usability Architect”
- Partners closely with Tec-Ed for research
- Uses external vendors for visual design and Section 508 compliance testing
- Challenges:
  - No data on users; new customer base
  - No formal design process or standards in place
  - Operating budget constraints
  - Brand new, highly specialized, IT-focused product

# First Vendor Engagement

- 8 months after first enterprise product launch...
- Usability Architect needs data on users (early adopters)
- Much discussion around current company size and small budget for research
- Partners with Tec-Ed
- Decides on Contextual Inquiry
- Tec-Ed conducted research and presented findings internally at VMware

# First Usability Study

- One year and two point releases later...
- Powerful features being added to product
- Need more data on users and designs validated
- PowerPoint prototype (medium fidelity)
- Remote testing via WebEx
- Use of instant messenger technology to communicate with researcher
- Formal presentation of findings at VMware

# Success Breeds Funding

- VMware hires two additional UA team members
- Begins to broaden focuses to include desktop products
- Hires external visual design firm and purchases re-usable icon library
- Centralizes team in specific division within engineering
- Partners with Tec-Ed to conduct additional research



# The Next Big Thing...

- At eight years old UA team is 5 going on 6 strong
- VP requires formal design managements role
- VMware hires UX Manager, Glenn R. Cochran
- Begins hiring of summer interns
- Starts formalizing processes and standards
- Budget constraints lifted
- Team renamed “User Experience Engineering”
- Goal: Support every product team with design, research, and visual design. “If it has users, we need to work on it!”

# Visibility is Key: UE Everywhere!

- Formalized relationship with Campus Recruiting
- Volunteered to help IT staff and biz-dev teams
- Presented existing research to other teams
- Held World Usability Day 2007 event internally
- Aligned closely with documentation on standards
- Reached out to technical support
- Partnered with training to develop CBT
- Began attending CHI, UPA, and BayCHI
- Focused on hiring quality people

# User-Centered Design is Prolific

- At 10 years old UX team is 22 strong
- Has interaction design, visual design, and user research components
- Still partners closely with Tec-Ed for additional research
- Still partners for Section 508 compliance testing
- New department focused entirely on customer experience (non-products focus)
- Internal IT team hiring designers
- Building on-site usability labs

# Hands-On Activities

- Role Play Exercise: How to find potential usability champions
- Team Exercise: Scenarios for developing partnerships

# References

Many practitioners have developed processes for institutionalizing usability; some of which are described in the following references. The references are not central to the specific challenges of consulting firms helping to build such processes using partnering relationships.

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