BPTrends COLUMN

Translating the User Experience

In the spring of 2018 Jim Hackett arrived at Ford Motor Company as the new CEO with a long and successful history in office furniture manufacturing and absolutely no experience in the automotive industry. While technology is, well, driving automotive development, Ford saw the need for a different approach to car design and looked outside its own industry for help. Mr. Hackett brought from Steelcase the practice of design thinking, which focuses on how the user experiences a product and develops it from that perspective.

Such thinking has given rise to "…a new class of professional: the **user experience**, or **UX**, designer whose job is to see a product…from the viewpoint of the user alone," (Useem, p. 19). The UX professional is dedicated to holding the user central to product development so that the user's needs propel the process. A Ford posting for a User Experience Design Lead tells candidates: "You will relentlessly advocate a human centric perspective throughout all stages of the design process." (User Experience Design Lead at Ford Motor Company)

Understanding UX

A search for the definition of UX yields a wide array of explanations. Most are related to applications and websites. However, UX principles can be applied to the design of any product, service, or process. "User experience (UX) focuses on having a deep understanding of users, what they need, what they value, their abilities, and also their limitations." (User Experience Basics)

Shared Approaches

Performance Architects share a number of approaches and tools with UX designers, particularly in the analysis and design stages of a project. We have a long history of involving our ultimate customers in our project work and checking in with them frequently to verify that we have accurately captured their needs. We particularly like the User Experience Honeycomb model (Morville) below because it calls out critical components of UX that provide value to the user:

User Experience Honeycomb

- **Useful** content is original and meets a need
- **Usable** sites are easy to navigate
- **Desirable** design elements such as image, identity, and brand are appreciated and engage the emotions
- **Findable** content is easy to search
- **Accessible** content can be used by people with disabilities
- **Credible** content lets users believe and trust what it tells them

UX Process

We see a commonality among User Experience, Performance Architecture, and Business Process, particularly in how analysis/research is conducted, and product, service, or process design is accomplished. UX research and UX design use some familiar tools that performance and process practitioners can leverage to improve their project results. Let's take a closer look.

How to do UX Research

User Experience research "…is the process of understanding user behaviors, needs and attitudes using different observation and feedback collection methods. So the true value of UX research is that it's based on unbiased user feedback." (Ghazaryan)

In our exploration of how UX research is done, we found many suggestions for this phase of UX. Of these, we identified several techniques that performance architects also use. While we are not typically developing a particular product or service, we are often supporting a sales or marketing client in determining why a product is not selling well or performing as it should. Here are just four UX research methods that are also staples in performance architecture research and analysis and fit well with business process development.

User Observation is critical for a complete understanding of how a product/service/process is used in context. It is not enough to ask how a person uses a product or service or follows a process because what they say and what they actually do is often different. Watching the user provides the most accurate information. (Addison, Haig, Kearny, p. 17)

One-on-One Interviews are planned, in-depth conversations that explore, with an individual user, what her experience is with your product, service, or process. It is helpful to conduct such interviews after observing a number of users so that you have a base from which to expand your understanding of the user perspective.

Focus Groups are popular in sales and marketing customer research and they work equally well for gathering user views and suggestions for improvement. They are typically composed of eight to ten users and are designed to explore fewer topics than the one-on-one interview. The format encourages participants to share their experiences and often generates insights that individuals did not have before meeting in a group.

User Personas are fictional compilations of one or more ideal users. “They focus on the goals of the user, the characteristics that they have and the attitudes that they display.” (Franco) Each persona has a name and a personal history.

Personas are used to create reliable and realistic representations of key users for reference and study. “These representations should be based on qualitative and some quantitative user research and web analytics.” (Personas)
Effective personas:

- Represent a major group of users of the product, service, or process
- Describe the backgrounds, goals, and values of real people
- Express the key needs and expectations of the user group(s)
- Clearly describe how users are likely to use a product/service/process
- Help uncover common features and functionality of the product, service, or process

Well-constructed personas become part of a project and make it easy for team members to describe user behaviors and share project insights.

Persona Components

The use of personas provides an expanded dimension to research. If creating and using personas is a new experience, begin by pulling together information you

already have about your users, making assumptions carefully. Divide your users into defined groups. Then develop the components usually included in a UX persona (McCay):

- **Demographics** such as name, age, city and country, profession, income level, marital status
- **Background** such as work or home environment, lifestyle, preferences
- **Goals** for professional life, personal life
- **Motivations** for professional life, personal life
- **Frustrations** in professional life, personal life
- **Quote** that summarizes who this persona is in his own words
- **Other elements** such as past life or work experiences that stand out or particular skills that are germane to your product, service, or process

To see a wide range of personas from many different disciplines, search online for *persona examples.*

The Design Phase

Let's assume you've conducted your research and have significant insights into the people who use your product, service, or process. You are now ready to use the information you've collected to improve or refine an existing product, service, or process or begin the creation of a new one. Remember, "Good UX design creates a positive experience for your user by anticipating—and fulfilling—their needs." (Tran)

There are dozens of lists of UX techniques for the design of apps and websites. Likewise, there are many design techniques for performance architecture and process development projects. Design is accomplished in a series of steps whether you are creating a UX website, a bicycle, or a process for sorting mail. Rather than highlighting an approach that may not fit with your work, let's look at three vital components common to all design:

- Specifications
- Visuals
- Prototypes or iterations

Specifications describe the size, scope, and details of a product, service, or process whether it is newly designed or being updated.

- If we are updating a bicycle design, we will specify the changes and improvements we plan to make based on what we learned from customers who bought this bike previously
- For the website, our specifications will include a design theme, colors, content, number of pages, animation and music, font styles and sizes, etc.
- For our mail sorting process, we'll look at daily mail volume, both incoming and outgoing, special handling needs, how postage is calculated and applied, timeframes for delivery to recipients, and other considerations

Visuals are an integral part of design. We understand things better when we can see a drawing or a photograph. The act of drawing an object, no matter how crude the

result, tells us a lot about how it can be used, what problems it may present to the user, and how we might tweak a feature to improve the result.

- A CAD drawing of a bicycle offers multi-dimensional views and allows us to show design changes to customers in real time, making adjustments as they tell us what they want
- The website components can be shown to users with different design elements they can compare and discuss
- A flowchart is one way we and our customer can 'see' different ways the mail could be sorted and moved

Prototypes or Iterations are *drafts* of products, services, or processes. These are tested with real users to determine if we are meeting their needs and to learn what else we should do to improve them. The results incrementally improve our project and we can then construct the next round of prototypes.

- We can make a clay model of the bicycle based on our best understanding of what the customer wants and request feedback
- The website can be constructed in test mode so the design team and our users can try it out and provide suggestions for improvements
- In a small-scale, controlled environment, we can test our best understanding of what the mail sorting process should be and ask the customer to suggest further improvements

Success Stories

UX is widely used and there are many success stories across industries. Here are two examples.

Success Story #1 - The $300M Button

Buying from Amazon used to require customers to add selected items to their shopping carts and when ready to buy, click *Checkout* to pay and complete their purchases. At this point, a pop-up form asked them to either login or register before proceeding.

The result? $300M in abandoned shopping carts because customers didn't want to have to register to make a purchase. Ironically, the information required to register was the same as needed for checkout. Even some previously registered customers couldn't remember their login information, got frustrated, and left.

The solution? Replace the *Register* button with a *Continue* button and a message saying, *"You do not need to create an account to make purchases on our site.*

Simply click Continue to proceed to checkout. To make your future purchases even faster, you can create an account during checkout."

The results? A 45% increase in completed purchases and $300M in additional revenue for the first year.

The Lesson? Test everything and test often! (Spool)

Success Story #2 – AVID Hotels

The Intercontinental Hotels Group (IHG) wanted to develop a hotel brand "…that meets and exceeds the needs of short-stay travelers balancing quality and price," in the mid-scale hotel range and partnered with IDEO, a global design company for this project. (Reimagining Everyday Travel)

Research: The project launched with extensive conversations with travelers of many types to better understand their lives, needs, and goals. They included people who take short trips from time to time as well as travelers who essentially live on the road.

Prototypes: Research led to two distinct prototypes that were constructed at IHG's design center. Over several weeks, prospective guests and hotel owners explored the prototypes and gave their feedback on every aspect of the hotels from food to reservations and service.

These explorations revealed the anxieties travelers experience about mid-scale hotels: concerns about cleanliness, safety, comfortable beds, and food options. The take-away: "Guests should be able to access a simple booking process, rooms designed for sound sleep, and a quality breakfast, all at a fair price." (Reimagining Everyday Travel) And hotel owners should be able to confidently and consistently deliver this experience.

Results: The Avid Hotel brand was created. Interest in the brand and the response have been exceptionally high. There are 150 hotels in process in the U.S. with others in Mexico, Canada, and Germany.

UX Implications for Process Design and Development

User experience has always been an integral part of the performance architect's approach to projects both tangible and intangible. And as we stated in our Column,

Performance Architecture: Through the Customer's Eyes, the most effective processes "…are created in organizations that begin their thinking with the customer and make sure that the customer's wants and needs are the focus of all operations."

We assume that your organization is already using UX tools and models as part of its business process work, even if they are not identified as UX-specific.

- What tools and approaches from UX are you using?
- What results are you seeing?
- To what extent do you credit UX with process improvement in your organization?
- What else can UX offer to make your results even better?

UX offers much to help related disciplines develop and improve products, services, and processes. What UX successes has your organization had?

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Summary

The **user experience** or **UX designer** is a newer type of professional who specializes in using tools and techniques that place the user at the center of product and service design and development. Growing out of web design and application development, the UX approach is now used for a wide range of products and services and is also well suited to process development.

UX uses a range of tools and techniques shared by both Performance Architects and business process professionals. In the research phase, these include: user observations, one-on-one user interviews, focus groups, and user personas. In the design phase, key elements include specifications, visuals, and prototypes.

There are numbers of UX success stories and case studies that demonstrate the effectiveness of the UX approach. Two examples are The 300M Button and AVID Hotels.

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