



USER

EXPERIENCE REVOLUTION

by Paul Boag

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About The Author

Paul Boag is a leader in digital strategy and user experience design. He has been working with organisations such as The European Commission, Oxford University and Doctors Without Borders for over 20 years.



Through consultancy and training he helps organisations make better use of digital technologies. He helps them meet the needs of today's connected consumers.

Paul is also a well respected figure in the digital sector. Author of five books including Digital Adaptation and Client Centric Web Design. He also writes for industry publications including Smashing Magazine, Sitepoint and Net Magazine.

Finally, Paul speaks around the world on user experience design and digital transformation. Alongside speaking he also hosts the award winning user experience podcast over at boagworld.com.

Get Managerial Support

Andrew was one of the nicest people I've ever had the privilege of working with. He had been working as a full-stack web developer within an internal digital team of a charity for the last eleven years. Before that he had been a Church of England minister. He still had that soft-spoken demeanour one expects from an English vicar.

A caring and gentle person, you never heard him say a harsh word about his colleagues. Most of the time he was positive; and yet right now his round face was screwed up in a look of resignation.

“You are right. We need to start with user needs,” he began. “But getting the executive to think like that just isn't going to happen.”

It turns out Andrew had tried many times to get management to think about user experience without success. He had concluded it just wasn't going to be possible and to be honest I didn't blame him. As I listened to Andrew talk about his attempts, Jared Spool's article flitted through my mind – the one about not being able to convince the executive of anything.

But things were different this time. We had been working hard to raise the profile of user experience among colleagues. Our newsletter and blog posts had attracted a lot of interest and there was a general buzz around the idea of customer experience.

There was more that we wanted to do. But we knew that to do those things we needed management's support. The time will come when you will have done all you can behind the scenes. You will need permission to take the next big step.

Where that line is and what that next big step will be will vary from company to company. It might be to run an internal conference. Or it could be to carry out a pilot project (something we will get to in the next chapter).

What I would say is do as much as you can before going to management. The longer you leave it, the more momentum will be behind your cause and the more compelling your case will be. You will have more support, more statistics, more stories. In short, you will be better prepared. That will be important if you want management to take you seriously.

Get The Attention Of Management

Whether the executive of a large multinational, or your line manager, getting their attention can be tough. It is going to take patience and perseverance.

You will find yourself going through the same process with each layer of management in what can feel like an endless cycle. But remember, your job is as much an educator as an implementer. Nobody said building a user experience culture was going to be easy.

It would be tempting to go to management asking permission for whatever it is you want to do next. For example, you might want to run a big splash event. But that is not going to get their attention. At least, not in a positive way.

Management get requests like this all the time, from people who want permission, time and funding for some project or initiative. They spend their lives knocking back half-baked ideas and rejecting good ideas they don't have the budget for.

If we want to get their attention, we need to be different. That is why we are going to start by going to them with nothing but good news. After all, that almost never happens! A member of staff, proactively going out of their way to make a positive difference to the business. Who has ever heard of that?

But before we can do that, we need to find out what they care about.

APPLY UX DESIGN PRINCIPLES TO MANAGEMENT NEEDS

If you want to get management's attention you need to know what they care about. This will allow you to frame your pitch around that interest. As Jared Spool said in his post.



You can find out what your executives are already convinced of. If they are any good at what they do, they likely have something they want to improve. It's likely to be related to improving revenues, reducing costs, increasing the number of new customers, increasing the sales from existing customers, or increasing shareholder value.

Good UX can help with each of those things.

Take a moment to think about your immediate line manager. What does that person care about? Maybe it's meeting an annual target. Maybe it's achieving the budgetary cuts imposed on them. If you want to be cynical, maybe it's getting their annual bonus.

Once you know that, you can frame the work you have been doing with user experience within that context. It may take a little imagination, but it is possible.

Let's imagine your manager is the head of marketing. She has had her budget cut for the third year in a row

and she's looking for cost savings. Going to her and asking her to spend money on a big pilot project is a waste of time. Instead, you need to start by helping with her immediate problem.

Make some small incremental improvements to the website, changes that encourage more social shares and maybe boost your Net Promoter Score. Talk to some users and get testimonial saying they were more likely to recommend the brand because of the good experience.

Once you have made some positive changes, now is the time to go to your manager. Don't go to her with problems and requests. Go to her with positive feedback. Tell her about the tweaks you have made. Tell her about the fact users seem more willing to promote the brand after improvements to user experience. Say that if you can continue to make these kinds of improvements it might increase word-of-mouth recommendation. This should, in time, decrease expenditure on advertising.

This is the kind of conversation that makes management's day. You have shown an understanding of the problems the department faces and taken steps to address it. If you can go back to her with good news like that two or three times you will find her much more receptive when you ask her for something.

FRAME YOUR REQUEST AROUND MANAGEMENT'S AGENDA

After you have established some credibility with your manager it is much easier to go to her with requests. But even so, it is still important you frame those requests in the right way. You still have to prove that the request is going to benefit your manager or at least the department.

If you want to run a big splash event your manager will want to know what benefits it will provide. Not benefits to the user and, to be honest, not even benefits to the company as a whole: she will want to know the benefits to her and her department. In other words, you are applying user-centric thinking to your own management. You are identifying their needs and addressing them.

Talk about how an event like that would raise the profile of the marketing function, or that if we could get cross-departmental support it might help raise funding for a user experience project – a project that would increase brand perception.

Whatever it is you're asking for, frame it in the context of management's agenda. Maybe your manager wants to increase revenue. Make sure you can show your request will help address that; if you cannot, you might have to change your request.

Most of all you will have to put the work in to prove that your idea is worth spending time on. That means spending as much time as possible up front working out how best to present it.

Show, Don't Tell

How would you convince the executive team of Disney to invest \$1 billion to renovate their entire Disneyland resorts to improve the user experience? That was the challenge facing one small team within Disney who had an idea.

They wanted staff to greet visitors to the Disneyland park by name. They wanted Mickey and the other Disney characters to be able to seek out and wish children a happy birthday. They wanted adults to never have to worry about paying for things or losing their hotel keys. In short they wanted to make the Disney experience even more magical.

They aimed to achieve this by giving every visitor a wristband with an RFID chip in it. This would identify them and their location in the park. This simple band would offer up a wealth of possibilities.



The Disney MagicBand involved a significant investment for the Disney executive team.

By associating their credit card details with a band, people could pay for anything in the park. The greeters at restaurants could see people approaching and greet them by name.

There would be administrative benefits too. Disney could see where people were in the park and so could control the flow of visitors and staffing.

There was so much potential. But tapping into this potential was a huge investment in renovations. Something as simple as allowing the band to open a hotel door would mean replacing every lock.

The team could have chosen to go to the executive with a business plan. But that wouldn't have done the idea justice. This is an important lesson to learn. To understand an experience, people need to experience it. A document is not going to get the job done for two reasons.

First, a document will not sell the experience. User experience is hard to quantify. To get buy in from the executive they needed to experience it. They needed to see and feel what the user would see and feel. Second, a document has limited capability to create a shared understanding. Different people will interpret what that experience will be like in different ways. The nuances of the experience get lost, and when it comes to creating a great experience the devil is in the detail.

So how did the team at Disney convince their management to invest \$1 billion? They showed them what the experience would be like, rather than telling them.

They took an unused warehouse on a backlot of Disney and built a prototype.¹ Using nothing more than some plywood and cardboard, they built a low fidelity mock-up of key locations in the park.

1 <http://smashed.by/ux45>

When the team finished, they invited the executives to come and view it. Each executive got a dummy wristband and were guided around the warehouse. They were asked to touch the wristband to the hotel door and somebody behind the scenes would ‘beep’ and open the door. They were greeted by name as they walked up to the mock-up’s restaurant. And so it went on. Each stage of the experience was made real to help the executive feel what it would be like for users.

This principle of show, don’t tell is the cornerstone of selling user experience. If you want management to invest, you need to give them a taste of what they will be getting. If you want to throw a big splash event, hold a smaller event first and get at least one of them along. If you want to run a pilot project, produce a basic mock-up first, something to give them a sense of what they will get.

This approach will get them excited about the direction you want to go. It will help them feel the experience. But by itself this won’t be enough. You will need to validate your approach too.

Validate Your Arguments

You are not going to convince a finance director to spend money based on school room art projects. Far more executives make decisions based on gut instinct than would care to admit. But appealing to them on that basis alone will not be enough. We need something more tangible.

There are four approaches available to us to add credibility to our case for investment. These are:

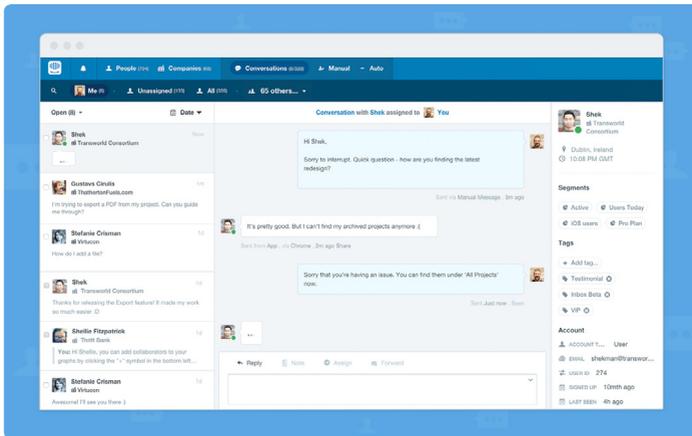
- Data validation.
- User validation.
- External expert validation.
- Comparable case studies.

The most compelling of these is data.

COLLECT DATA

If you can associate specific figures with your request, you will find management much more likely to accept it.

Let's imagine you want to introduce live chat to your website, so users can get support as they navigate. You would start by establishing how many simultaneous chat conversations an operator can handle. Next, take the number of calls you receive and the cost per call. You can then calculate the cost savings live chat would provide.



Live chat systems like Intercom are much more cost-effective than call centres. This makes showing the return on an investment in user experience easy.

Another example could be improvements to a checkout. If you want to improve a checkout, it is straightforward to make predictions about the increase in revenue.

But not all improvements to the user experience are so easy to quantify. Then there are managers who have already decided they don't want to invest in your idea – data will not convince them. All this means you cannot rely on data alone. Which brings us on to user feedback.

GATHER USER FEEDBACK

User feedback is a way for management to see the reality of the user experience. People in management often have little contact with users, finding themselves detached from the experience. You need to bridge that gap. As I said earlier, you need to humanise the user.

We have already discussed ways of doing this with your colleagues. The same principles apply with management. Showing videos of users struggling with the existing experience is particularly powerful. Even better is getting management to sit in on a usability test session.

The great thing about exposing management to users is that they can draw their own conclusions. They don't have to rely on your interpretation. The sad truth is that they don't respect your opinion as much as they should. That is why an external perspective can also be helpful.

GET AN EXTERNAL PERSPECTIVE

I want to let you in on a secret. One of the first things I do when I am asked to consult for a company is sit down with the internal team and ask them what needs to be done. Almost without fail they know what needs to happen. Here is the embarrassing bit: much of the time I just repeat that to management. Why doesn't management just listen to its own staff, rather than hiring me? There are two reasons.

First, internal teams often lack the communication skills to convince management. A big part of my job is to sell management on ideas. Presentation is everything, as I am sure you have gathered by this point in the book.

Second, management often feels the need for an external, unbiased perspective. They have employees coming to them all the time with an agenda. An external consultant doesn't carry that kind of baggage. So there are times when getting an outside perspective might help to sell an idea.

But that doesn't always have to involve hiring a consultant like me. Quoting books like this one or referring management to online posts and reports can sometimes be enough. A similar option is to refer to what other companies have been doing.

FIND COMPARABLE CASE STUDIES

Most management teams are risk-averse. This means we need to reduce the size of the risk in their minds. One way to do this is to refer to others who have taken a similar approach.

The more similarities, the more compelling the case. Ideally, you want a direct competitor who has done exactly the same thing and made it work. I say ideally. In fact, it's not an ideal circumstance at all, because it means your

company is playing catch-up. But an example like that will motivate management.

Failing that, look for examples of big names. If IBM or General Electric does something then most management teams will consider it a good idea. In truth, it might not be, but that is how management tends to think in my experience.



When a big name like IBM invests in user experience, others are likely to follow suit.

What you will find is that if you can combine some real-life examples with your data and a working prototype, management will listen. Now we need to get their approval.

Get Management's Approval

I sat back feeling rather smug. That was one hell of a presentation, even if I did say so myself. I had just finished presenting to a charity's management team. I had shown how they should invest in user experience, rather than pouring money into advertising as they had done in the past. I had proved this would significantly improve donations.

The presentation had everything: some mock-ups to help them understand what the improvements would look like; data on how those improvements would translate into donations; videos of users interacting with the old and new versions. The whole thing was watertight.

I laid out their next steps. They needed to put on hold their advertising campaign for the next year and redesign their website from the ground up. It was a big job, but my presentation won them over. There were details to work out, but I secured their agreement.

I went away confident that I would get the approval the internal team needed to move forward. Yet a month later, nothing had happened. What had gone wrong?

I agonised over this question for years. As I got more experienced with other companies I eventually realised my mistake. I had overwhelmed them. The size of the challenge

had frightened them and they reacted by burying their head in the sand. It happens a lot and can destroy momentum for change.

Since then, I have got better in these situations. When I present to management today it consists of three steps:

- Scare them.
- Inspire them.
- Start small.

SCARE YOUR MANAGEMENT

Right back in chapter 1, I talked about the need to scare management into action. Nothing motivates people like the threat of something taken away. If you can prove that the status quo is under threat they will react.

The problem with scaring people is you can overwhelm them. You have to offer a solution. You cannot just present them with the threat. If you do, they will feel overwhelmed and try to ignore it. You have to offer them some form of salvation.

INSPIRE MANAGEMENT

Once you have established the danger, you must provide a solution. But you cannot stop there. You must also excite them about the future. That is what the Disney MagicBand

demonstration did – it inspired management about what was possible.

For you it might be a small prototype before a bigger pilot project. It might be a series of small workshops before a big splash event. The point is to give management a glimpse of the future, at what could be.

But even that can overwhelm them.

GIVE MANAGEMENT A SIMPLE NEXT STEP

If you imagined standing on the top of Mount Everest seeing the world stretching out below you, chances are you would feel inspired. But if you are anything like me, the journey to get there is insurmountable. No pun intended.



The view from a mountaintop is inspiring. But the journey to get there can be daunting.

The harder the journey, the more resistance you will meet from management. Ask them to approve a project that is going to cost a lot of money or take a lot of time and you will struggle. Ask them to take a small step towards that bigger project and they are much more likely to say yes.

This is not just because you remove the sense of being overwhelmed. It is also because you are reducing the perceived risk. Their decision isn't going to cost a lot of money if it goes wrong. It is only going to cost the next step.

A great example of this is the pilot project. A pilot project is a small step that allows management to validate an idea. It doesn't feel like a big request and so is more likely to get approved, especially when it addresses an area of concern to management. It is this idea of a pilot that we are going to address in the next chapter.