

SELLING

USABILITY

USER EXPERIENCE

INFILTRATION TACTICS



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WebWord.com

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Chapter 1

Who, Why, Wha?

Read, every day, something no one else is reading. Think, every day, something no one else is thinking. Do, every day, something no one else would be silly enough to do. It is bad for the mind to be always part of unanimity.

~ Christopher Morley

I always read the last page of a book first so that if I die before I finish I'll know how it turned out.

~ Nora Ephron

End Here

Let's start with a definition. User experience (UX) is the overall experience and satisfaction a person has when using something. The product, service or system in question should allow the person to meet their goals while satisfying business and functional requirements. Good UX is a good thing, bad UX is a bad thing.

This book will tell you exactly how to get UX into an organization. I wouldn't be writing this book if it were easy to get this done. It's a difficult, uphill battle.

User experience professionals face three challenges:

- 99% of the people in an organization are not thinking about UX and the other 1% are thinking about women, fire and dangerous things
- Most managers understand UX about as well as they understand the average airspeed velocity of an unladen swallow
- Being involved in UX is an open invitation to getting beaten about the head and neck by grandmothers, hamsters, celery, and co-workers

If you are a user experience professional the problem isn't that you lack skills, rather it is that you can't get others to understand the value of what you do. I'm not going to help you sell UX and I'm not going to help you justify it to others. Instead, I'm going to help you sneak it into an organization. We're going to be working on the sly.

You're a smart puppy but you probably don't have a portfolio of methods to slip UX into a company. This book is full of stealth. We've got guerilla attacks, end runs, and cloaking devices. These tactics are not conventional.

I'm asking you to reject the frontal assault. We'll be successful under the radar. By the way, I'm not suggesting anything unethical or devious. We'll be a bit Machiavellian but we won't do anything that will make you feel greasy and queasy. We're looking for victory behind the scenes not the dead weight of guilt.

To sum it up, we're going to focus on what the business cares about: business. This is the UX MBA. Rather than focusing on UX, which you already know, I'm going to drag you into the business world. I'll help you understand "their" language and their rules. I'll help you focus on business and profits first, then UX. Everyone is going to benefit.

Why Are You Reading This?

I'm assuming that you truly enjoy UX. You believe user experience design is the right way to get things done. You can easily talk about usability, information architecture, human computer interaction, human factors, interaction design, ergonomics, and user centered design. You know that these things have roots in psychology, philosophy, anthropology, and sociology. Focus on people first, right?

It is possible you are just starting your career in UX. It is also possible that you are a UX veteran or a manager of UX professionals. Perhaps you are a consultant looking for ways to improve your business. No matter your role in the UX world, you are going to better understand the relationship of user experience to business and vice versa.

I do think that the world has changed for the better regarding UX. There are many strong organizations and groups ready to support you (e.g., HFES, CHI-Web, SIGIA-L, AIGA, UPA). There are many more jobs in the UX now. I see "usability" in job postings, advertisements, and product descriptions. UX has also made a splash in a few large companies such as Microsoft and IBM.

Despite these gains, UX is still hardly known or understood by most people. It is under funded. It is improperly labeled as quality control, design, and marketing research. How many times have you heard that a usability test is really just a marketing test? The horror never ends. That's why you're reading this book.

I'm going to make your life easier. You'll be able to better position UX in your organization and increase your job security. I'm going to make you feel more comfortable with business topics. We'll integrate UX with profits but most folks won't even know it. You'll benefit from this. You'll be recognized, just as you deserve. Of course, everyone is going to benefit because we know that UX is good stuff. It is hardly a punishment or problem for organizations.

Why Do I Think I've Got the Answers?

I'll start by saying that I'm the guy behind WebWord.com, which is one of the oldest blogs on usability and user experience. I've been feeding people with UX information for over 10 years.

I've also done UX with, and for, several organizations including IBM, Lockheed Martin, Women.com, Cabelas, US WEST, Binghamton University, Universal Instruments and Lockheed Martin. If it matters to you, I also have a B.S. in Management Science, an M.A. in Philosophy, and an M.A. in Experimental and Cognitive Psychology.

The summary is that I've been around UX for a while. I've been reading and writing about it for longer than most folks. I've written hundreds of articles and I've conducted many interviews with UX experts.

On the flip side of the UX story, I also understand business and technology. For example, I've been a business analyst and webmaster. I supported sales, service and marketing organizations for years and years. I've been a software engineering manager in charge of nearly 20 direct reports and multi-million dollar budgets.

The short story is that I suffer from the *Better World Syndrome*. That is, I want to make the world a better place. UX can make the world a better place. To me, usability is not a joke. It can save lives, ease pain, enable the disabled, and more. I believe in it. So, by helping you I am helping the UX cause. This stuff matters to me.

How Does the Book Play Out?

It is pretty straightforward, really. I believe in short, easy to read chapters. I'll give you a summary of the chapter and then supporting material. Each chapter will have examples or little cases studies. Despite the fact that I'm going to give you tons of help and advice, you should be able to read this book in just a few hours. You can chow it down on a plane ride from New York City to Los Angeles.

I'll end this introduction by saying that I'm really excited about this material. I drink the user experience Kool Aid and I love it. You can rest assured that I will help you as much as I possibly can through this book. If you've been beaten down, don't worry. We're going to make some magic happen.

Chapter 40

Them! Cult(ure) Change Redux

Support bacteria - they're the only culture some people have.

~ Steven Wright

Per aspera ad astra.

~ Latin Proverb

Summary

You must know your company as well as you know yourself. This is your key to success. You must also understand the typical work patterns in your organization. These culture patterns will signal how much your organization will accept usability and user experience. To know the strength of the patterns you must measure and monitor. Don't shy away. Lastly, you must be strong. You must be confident. Selling usability and using these infiltration tactics requires a strong backbone and real confidence, even in the face of rejection. But, you can do it!

Know Thy Company

If you want to have an impact on the culture of your company then you must understand that culture. If you can influence leaders in your organization to make changes in favor of UX, then you must answer some of the questions below. These are based on ideas originally put forth by my colleague Paul Sherman; I can't claim ownership.

First, should UX be set up as its own department? If yes, where do these UX'ers report ultimately? They must report up through some part of the management chain and this will have an impact on your ability to inject changes. Keep in mind that some divisions and business units have more money and power (e.g., sales), whereas others might have more reach and direct influence over employees (e.g., human resources). Where UX'ers call "home" absolutely has an impact.

Second, should UX be folded under product management, quality, or engineering? That is, is it best to get UX deeply rooted in one business unit or another? What makes more sense for you from an infiltration perspective?

This question becomes more important as your reputation grows and your results speak for you.

Third, are you liberated or constrained by senior management. For example, do executives maintain strict control over all design decisions? How many layers of approval are required before a particular UX is blessed by the executives? If your culture is more of a dictatorship than a democracy you might have to change your operations to enable culture change.

Fourth, what type of design and development does your organization follow? Do you adhere to more of a traditional waterfall software development lifecycle (SDLC)? Or, are you more nimble, following agile or extreme programming methods? If your organization is more traditional, for example, then generating change must be more calculated and clever since you'll have to work through more red tape. There's more scrutiny about process change and personalities generally are a bit more rigid.

Fifth, what is usually the most important project driver in your organization? That is, does your company typically put more weight on cost, schedule, or quality? If it's cost, then watching the budget and demonstrating ROI is key. If it's schedule, however, you might need to worry about speed to market or rapid design cycles. And if it's quality, you might need to work closely with the process engineers to reduce cycle time. These are all just examples, but the point is that knowing the weighting of the factors will help you position UX for greatest impact.

Sixth, is UX bottoms-up or top-down in your organization? In large part, this knowledge tells you who requires the most attention. If you're looking to really sneak UX into an organization but you're top-down, you might actually work closer with hands on coworkers and maybe first line managers. Again, just knowing how you're company positions UX is a key to effectively infiltrating.

Finally, is your company engineering-centric, marketing-centric, or design centric? If you're driven by engineering then you might not even really have UX in the company. The company has grown organically due to pure technical innovation and products are given attention simply because they are interesting, not because they offer an outstanding UX. Other companies are design-centric, and they focus on products that designers love. An outpouring of creativity generates products. And lastly, sales and marketing-centric organizations are pushed by a powerful sales force that claims to have perfect knowledge of customers. Although they pull in money, they are often blind to the upside potential of UX.

Hitting the Bullseye

Daniel Szuc put together a list which represents a framework for understanding the targets within your organization. In other words, the list gives you new perspectives on your internal customers.

I'll get to the list in a moment. Before I do that, please consider the importance of knowing your customer. If you don't have a clear idea then you simply cannot sell. And, if you cannot sell, then you cannot drive culture change. Here's the list. I'll throw in comments along the way.

First, is the person you're targeting in management? More importantly, do they have power and influence? Are they leaders and can they affect change? Although you never know who will help you, leadership has the greatest ability to drive culture change in the shortest period of time.

Second, is the person an existing UX champion? In a previous chapter I indicated that it's best to target people who already know the true value of UX. But there's more here. The champion might have a high, medium or low interest. They might be tactical and focused on the current business quarter, or they might have a long term strategic vision. Further, this champion might be thinking of how UX can help them professionally, perhaps through major project success or maybe a promotion due to outstanding customer feedback. These people would be champions due to your ability to assist them with UX methods and systems.

Third, your targets might be influenced by the current morale situation. For example, maybe you're organization is facing incredible market pressure. Perhaps your company is considering layoffs and your coworkers are looking for special assistance. Remember the UX sometimes can be a silver bullet. This isn't always the case but the point is that you might find the some people become more receptive to UX when they are faced with uncertainty, pressure, or stress. UX offers a surprising amount of certainty.

Recognize that there are various reasons why your internal customers would be warm or cold to UX. If you understand the basic framework above, you can sell better. If you can sell better then you'll be able to more effectively inject UX into your organization.

User Experience Culture Patterns

I've repeatedly encouraged you to collect and analyze data. When you measure something, you can understand it better and control it.

For this reason, you should take a look at the UX culture patterns all around you. Your organization is at some level of UX maturity and there are markers that I'm going to provide below.

You know that you've hit the UX jackpot when...

First, you hear managers and executives using UX lingo. Of course, they might not say "pluralistic walkthrough" but they might be talking a lot more about customer satisfaction, smart design, easy-to-use products, and so forth. You have to pay close attention since attitude changes might be happening, even if the language isn't changing.

Second, the company has hired new UX'ers. These folks might be interns or day-to-day works like junior usability engineers, or they might have hired a Director or VP of UX. If your company has brought in these folks, you know that UX is getting in deep. The culture has changed, without a shadow of a doubt.

Third, usability testing is a "given" in the company. It's just something that is always done because the value is so high but also so obvious to everyone. You might even have a fully funded usability lab.

Finally, product managers, engineers, and marketing all claim that UX offers a strategic advantage for the company. For example, UX might always be part of strategic conversations, perhaps in reference to new products and services coming to market.

If you see these culture patterns you know that UX has become important to your organization. The need to justify UX goes down. And, your need to use some of the more sneaky UX infiltration tactics likewise decreases. You can be more open and frank about UX, although some tactics will never go out of style. For example, being generous and patient will always win you points. Further, if you can continue to improve your presentation skills, writing skills, and listen skills, you'll continue to grow as a usability professional.

Here's why you want to watch culture patterns. If someone else demonstrates a positive impact to the bottom line you will never have to sell or justify UX again. So, keep looking for those culture patterns and keep

driving change in your organization. Use the UX infiltration tactics as much as needed to get the job done.

Confidence My Friend, Have Confidence!

I'll end with this. If you haven't convinced yourself of the value of usability and user experience then you'll never have the confidence or the ability to enable culture change in your organization. You must truly believe in the work that you do. You must know that you're an emissary for UX. You'll be amazed at your ability to change the very core of your organization if you believe in yourself.

I encourage you to step away from your day job for a moment and reflect. You now have an incredible toolbox of user experience infiltration tactics. Bind UX tactics to the right attitude and you can make a difference.

If you take what I've said to heart, change will happen. You'll hardly be selling UX at all since others will sell it for you. They'll flock to you, begging for help and you'll be there for them.

Embrace the change. Become the change. It's now within your reach.

Summary of infiltration tips

- Be sure to very clearly understand your corporate culture
- Know your internal customers well before you target them
- Always be looking for UX culture patterns; use measurements
- Have confidence in your culture changing abilities; you can do it!

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