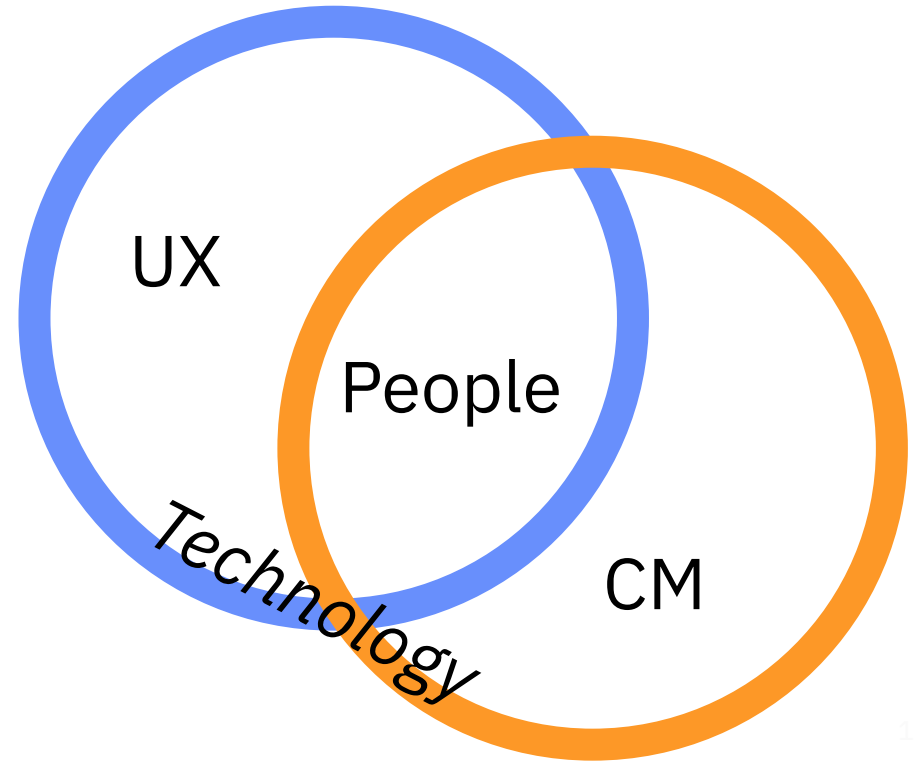# User Experience for Change Managers

# Keith Instone

> ACMP Philadelphia
> November 11, 2021

> dexterityux.com (download slides with links)

UX

People

Technology

CM

# WTF UX?

Your change management projects have always been about people, but as you facilitate more and more **digital transformation**, it may seem like technology is all that matters. To counter that, your colleagues are talking about **"user experience"**, UI/UX, usability, and design thinking, new and interesting concepts to you.

Some things you are hearing just seem like new names for familiar change management terms, tools, and approaches. At an organizational level, you already engage stakeholders and develop a shared vision. At an individual level, you already take into account human biases, motivations, and behaviors.

**What is new and different about this thing called "User Experience"?**

# All Member Connect    ⚙Settings

**March 29, 2021**

## Is User Experience (UX) a new "change management" (CM) practice?

I have been in internal company meetings and people are talking about UX and using all the familiar change management terminologies, tools and approaches.

Is CM morphing into UX ... or is UX a subset of CM?

Wei teck

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# Table of Contents

We will talk about user experience from 4 different perspectives and how change management relates to each.

> **Impressions** people get when interacting with technology
> **Activities** we do to define, design, and deliver good experiences
> **Management** of customer and employee experiences
> **Disciplines** and fields of study that make up the "UX profession"

We hope that this introduction to User Experience will help you evolve your practices in a world where digital experiences are driving change.

## PART 2: SHOP TALK! An open forum for Q&A

**Date:** Tuesday, November 16

**Time**: Noon - 1 PM, ET

Come share share your UX Design Best Practices at Shop Talk! - hosted by Jade Parkinson. Or come and ask lots of questions to learn from your fellow ACMP Philly members. Part 1 is not a pre-requisite for this Shop Talk! session.

- **Join on November 16th** via Zoom or **Dial In**: +1 646 558 8656

### Jade Parkinson · 2nd

Change & Performance Enablement Lead at Wawa, Inc.

Middletown, Delaware, United States · Contact info

255 connections

Wawa, Inc.

Immaculata University

1 mutual connection: Nicole Bothwell

# First: Happy World Usability Day!

Every second Thursday in November, since 2005, events occur around the world that bring together different communities to celebrate how we can make our world easy for all.

Our goal is to raise standards so that technology works to harness human potential.

Think "Earth Day" but about "Usable Tech for Good". Sign the petition.



World Usability Day
Making life easy!

My virtual schedule (at least)
Nov 10 6pm ET: Michigan
Nov 11 Noon ET: Philadelphia
Nov 11 5:30pm: Cincinnati

World Usability Day
Design of our Online World:
Trust, Ethics and Integrity.

Wednesday, 11/10/2021
6:30 PM - 8:00 PM

Online event
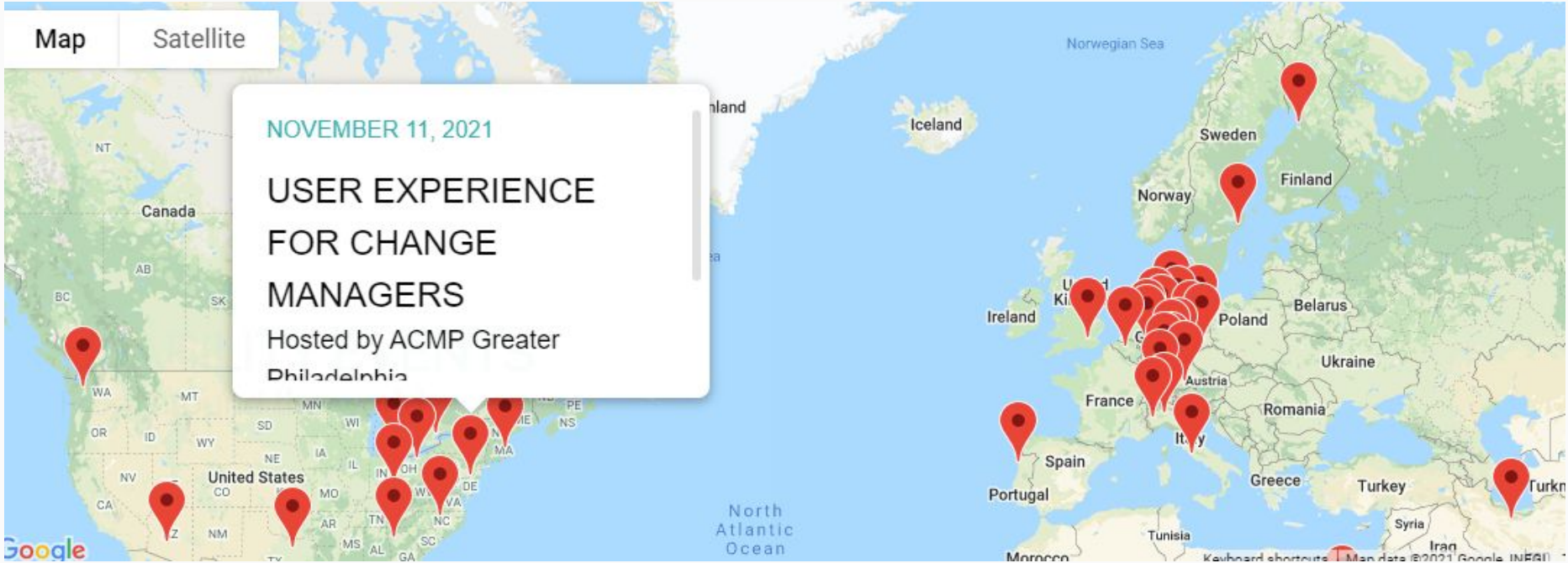Link visible for attendees

SPONSORED BY: BRESSLERGROUP + DELVE

PhillyCHI

https://www.phillychi.acm.org/events/world-usability-day-2021

PhillyCHI's event was last night

World Usability Day events around the globe

# My journey as an "agent of change"

> **2000: Survival**. Ad hoc change or fail!

> **2007+: Informal learning.** Nexus 4 Change conference by BGSU MOD's Steve Cady

> **2008+: Common realization**. Theme at many UX conferences

> **2012+ UX consulting advantage**. Without marketing it as such

> **2019**: **Re-committed as "ally"**. Re-joined when ACMP Ohio visited Toledo

> **2021: Contribute to CM practice?** Today?
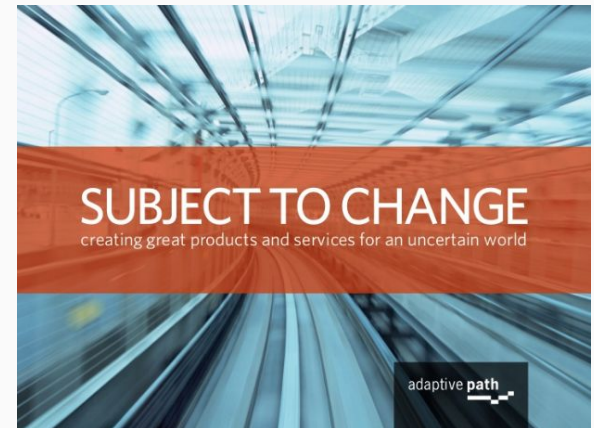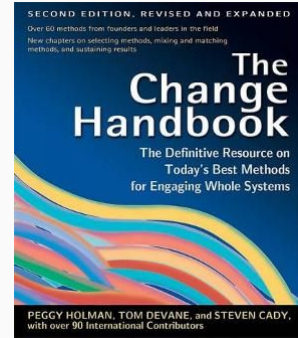
# What do user experience and change management have in common? PEOPLE

To make *technology* that improves the **human** condition, I need changes in the <u>organizations</u> I am working for (as an employee) and with (as a consultant).

- "Engineering culture": **people** adapting to *technology*
- "Profit-driven culture": make money, often by creating *technology*, regardless of impact on **people**

With the rise of **Digital Transformation**, *technology* is playing a larger role as you "apply a structured approach to <u>transition an organization</u> from a current state to a future state to achieve expected benefits."

- Current state + *Technology* + **People** = Future state

# Digital Transformation? So what?

*Adoption* of **digital technology** to **transform services or businesses**, through replacing non-digital or manual processes with digital processes or replacing older digital technology with newer digital technology (Wikipedia)

*Radical rethinking* of how an organization uses **technology, people and processes** to fundamentally change business performance ([Westerman, MIT](#))

*But it is not new!* New business demands + Updated technology systems + Talent + Culture change = **Business process transformation** ([Forbes](#))

An article we all probably agree with: *[Digital Transformation Is Not About Technology](#)* *(HBR, 2019)*

Everybody eats. People have eating experiences.

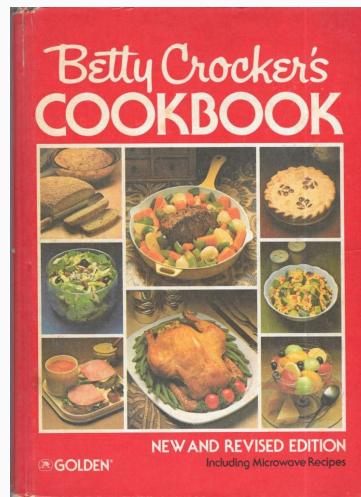Cooking skills can be learned. Cooking is part art and part science.

Managing food industry organizations is big business. It depends on business models, culture, and more.

There are many paths to being a culinary professional. You can learn on the job, study on your own, or get a degree.

# Everybody eats.
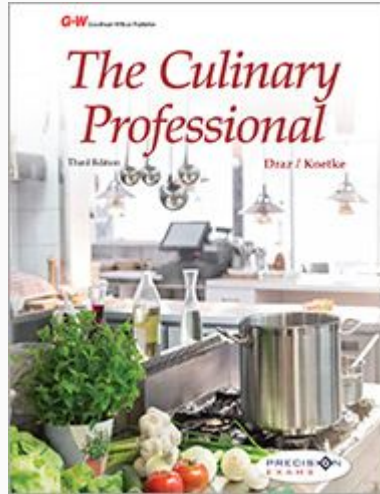# People have eating experiences.

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Everybody uses technology. People have user experiences.

User-centered design skills can be learned. Defining, designing and delivering good experiences is part art and part science.
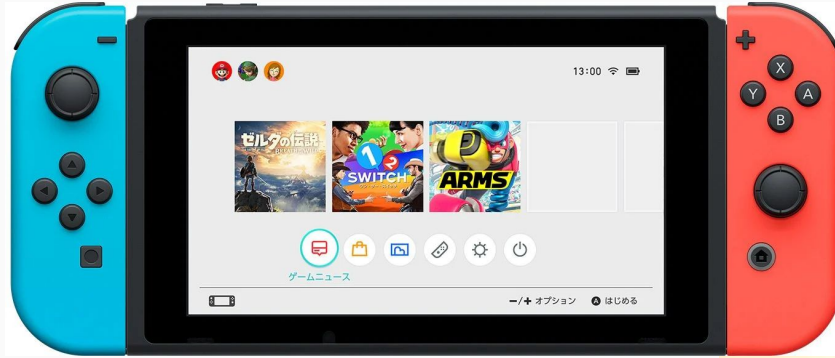
Managing customer and employee experiences is big business. It depends on business models, culture, and more.

There are many paths to being a UX professional. You can learn on the job, study on your own, or get a degree.

# Everybody uses technology.
# People have user experiences.

User interface: the buttons, controls & links you interact with directly

User experience: the context, content, expectations, etc. that determine how you FEEL

**New Study Ranks Animal Crossing: New Horizons As Most Relaxing Game, Surprising No One**

Here are the top ten

# "THE UX" → "Our users' experiences" (it depends...)

Replace "users" with specific phrases for different situations

- <u>Customers</u>, Potential customers, Current customers
- Employees, New hires, Invoice approvers
- Patients, Family members, Doctors
- Residents, Citizens
- Faculty, Students (roles) → Teachers, Learners (goals)
- Non-humans? <u>Dogs</u>, <u>chickens</u>

# User-centered design skills can be learned.
Defining, designing and delivering good experiences is part art and part science.
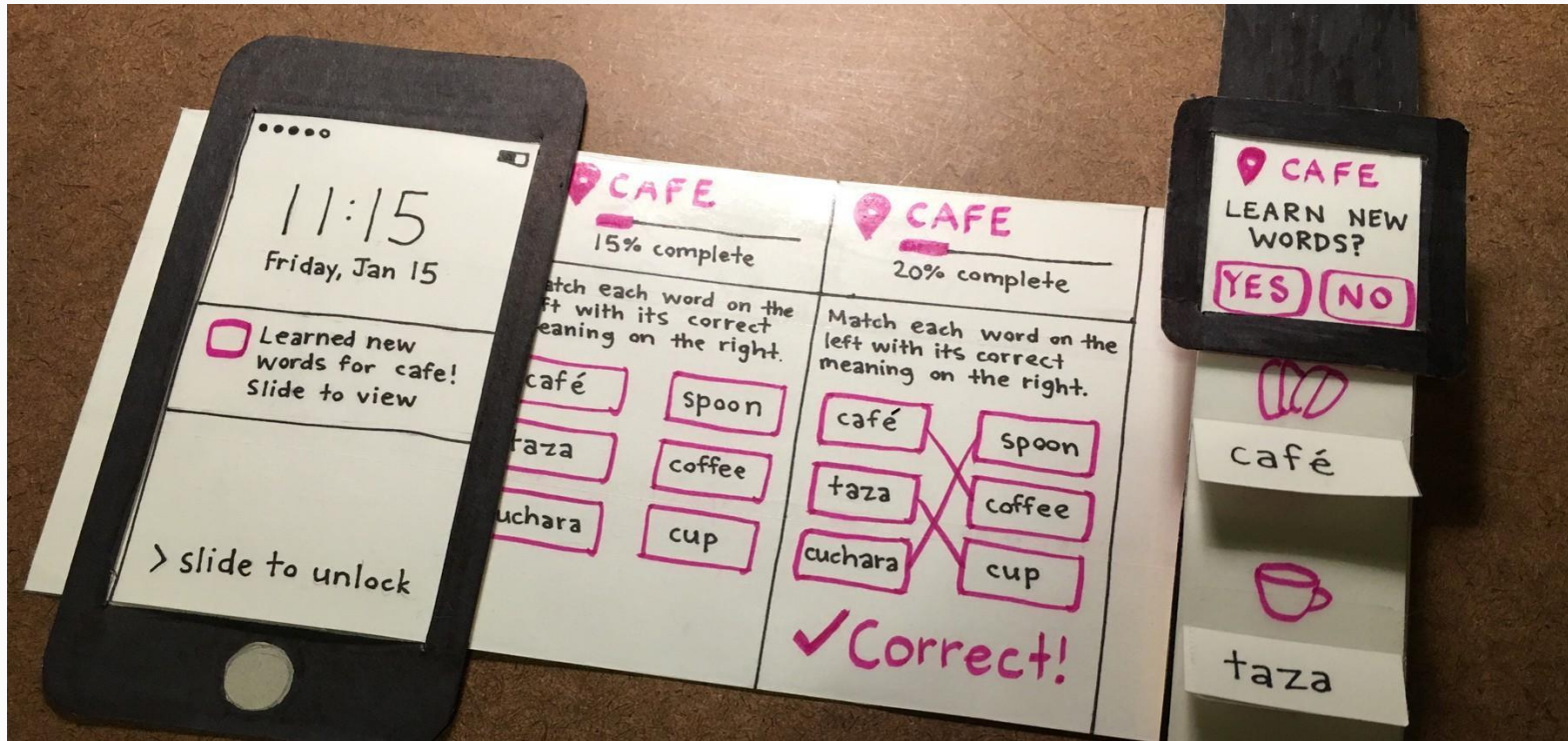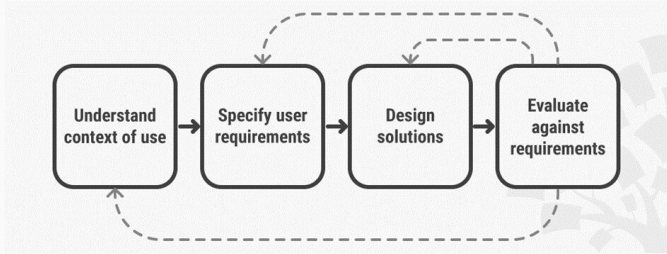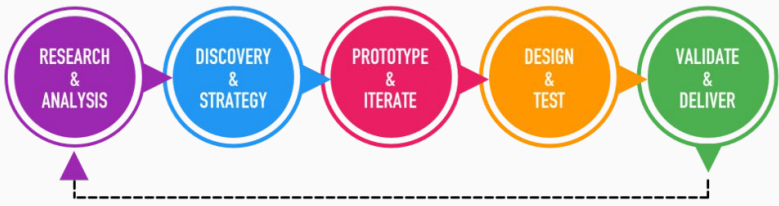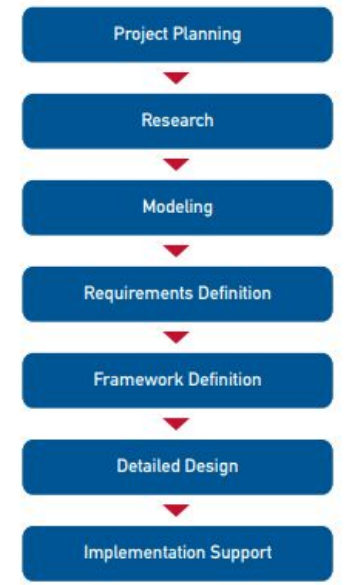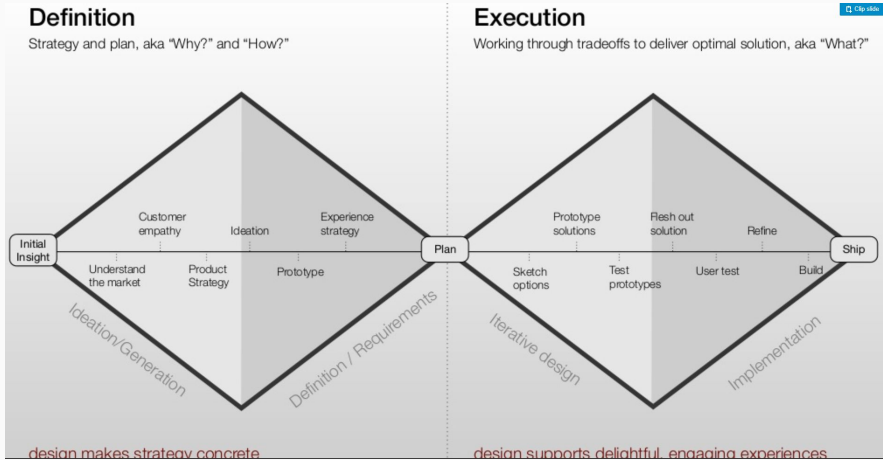
UCD: iterative, understanding users at every step



Goal-directed
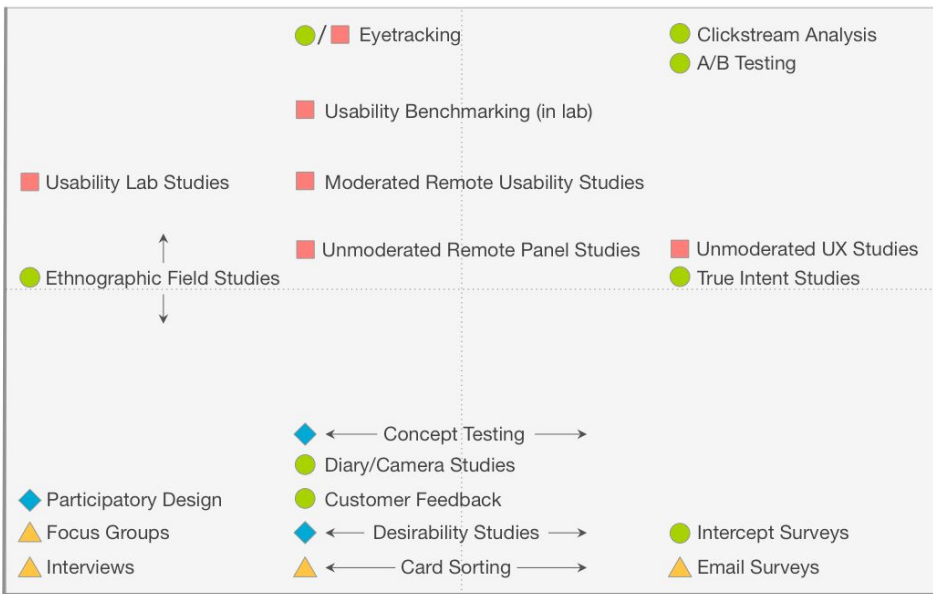


Double diamond: define & execute, diverge & converge

# Example user-centered design processes

## A LANDSCAPE OF USER RESEARCH METHODS

**BEHAVIORAL**

- ● / ■ Eyetracking
- ● Clickstream Analysis
- ● A/B Testing
- ■ Usability Benchmarking (in lab)
- ■ Usability Lab Studies
- ■ Moderated Remote Usability Studies
- ■ Unmoderated Remote Panel Studies
- ■ Unmoded UX Studies
- ● Ethnographic Field Studies
- ● True Intent Studies

- ◆ ← Concept Testing →
- ● Diary/Camera Studies
- ◆ Participatory Design
- ● Customer Feedback
- ▲ Focus Groups
- ◆ ← Desirability Studies →
- ● Intercept Surveys
- ▲ Interviews
- ▲ ← Card Sorting →
- ▲ Email Surveys

**ATTITUDINAL**

QUALITATIVE (DIRECT) — QUANTITATIVE (INDIRECT)

### KEY FOR CONTEXT OF PRODUCT USE DURING DATA COLLECTION

- ● Natural use of product
- ▲ De-contextualized / not using product
- ■ Scripted (often lab-based) use of product
- ◆ Combination / hybrid

© 2014
Christian Rohrer

## Requirements 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 technique for a specific project based on goals, budget, time, ... 22

# Personas and Journey Maps for Organizational Change
## Lanette Ferguson, Change Management Texas 2018

**Persona**
IT Supervisor

**What is Changing for Me**
My team needs to change their processes while also learning a new tool. They will likely need training and will need to participate in process reengineering meetings which impacts their productivity.

**How this Impacts Me**
Level of Impact: Medium
Training requirement: Medium
Engagement requirement: H

**Age Range:** 38-55

**Length of Service:** 5+ years

**Roles within organization:**
Supervises Network Engineering, IT Security, DevOps, Disaster Recovery and Cloud teams

| | | Identifying | Planning | Implementing |
|---|---|---|---|---|
| **Awareness Activities** | | o Begin to hear about the new ITSM initiative from leadership<br>o Begin sharing what I know with my team | o Receiving updates from management about the change<br>o Passing info along to my team<br>o Participating in requirements conversations<br>o Stakeholder analysis meetings | o Keeping my team informed<br>o Modeling new behaviors<br>o Supporting my team by giving them time to attend training, participate in UAT, as Change Champions or Super Users |
| **Thoughts** | | o What does my team need to do to implement and maintain these new processes and tool?<br>o What about the other initiatives my team is working on? | o What integration points do we need to take into consideration?<br>o My team is being asked to change everything they do which is concerning to me | o Which members of my team are on board with the change and who are not?<br>o How do I get those that are resisting on board? |
| **Emotional Experience** | o Overwhelm<br>o Fear<br>o Denial | o Concern<br>o Happiness<br>o Excitement | o Ambivalence o Curiosity<br>o Resistance o Anticipation<br>o Skepticism | o Cautious o Optimism<br>o Frustration o Relief<br>o Realization o Acceptance |

Go Live

| **Good suggestions!** | **Yes, but...** |
|---|---|
| Purpose: Personas are used to **humanize stakeholders** as well as **bringing awareness** to a particular stakeholder group's unique needs | Yes: "**Empathy**" (humanize & awareness)<br><br>But also: **Make decisions** |
| Value: Creates **deep awareness** of how each stakeholder experiences the change journey | "Deep" depends on the "**research**" behind it |
| Value: Enables **buy-in** from project and leadership team in support of recommended change activities | "**Alignment**", not just buy-in |
| Inputs for building your personas: **Stakeholder interviews** | And **other user research methods** and stakeholder engagements (workshops) |
| How to do it: 1. Envision yourself in the role 2. Empathize with the persona 3. **Get help from SMEs**... | Thinking about it is a start, often not enough Don't forget: **experts are biased** |

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# UXers have LOTS of methods for understanding human behavior, plus synthesizing, communicating & getting buy-in

- Personas & customer journeys are "popular" ones
  - Often being taught & done poorly, outdated
- Qualitative & quantitative user research
- Attitudes vs. behaviors
- Design workshops & visualizations
- Invest in design → Less need for training

# Managing customer and employee experiences is big business. It depends on business models, culture, and more.

| Interest | Physical World | Digital World | Role, Job Title |
|---|---|---|---|
| Builder | Wheelchair ramps, birdhouses | Applications, websites | Software engineer |
| Artist | Posters, paintings | Screens, animations | Visual designer |
| Tinkerer | Legos, Rube Goldberg machines | User interface design systems, front-end coding | Interaction designer & developer |
| Organizer | Sort books, re-arrange kitchen | Content management, tagging | Information architect |
| Writer | Fictional storyteller, journalist | Website editor, technical writer | UX writer |
| Listener | Therapist, "good friend" | User interviews, field studies | User researcher |
| Scientist | Biology experiments, science fairs | A/B tests, usability evaluations | Usability specialist |

# How to engage with a UX team? It depends on so many things, unfortunately

- Separate or together: Strategy, research, design, content, engineering
- User focus (customers, employees, both)
- Central service / agency vs. Distributed / embedded
- Projects (start & end) vs. Products (ongoing)
- UX maturity: Hostile, Skunkworks, Managed, Integrated

There are many paths to being a UX professional.
You can learn on the job, study on your own, or get a degree.

## MASSAGE THERAPISTS
### LICENSING REQUIREMENTS

At least **18** years old

High school **graduate or equivalent**

**Diploma** from a school with a board-approved curriculum or an active out-of-state license for the last five years

**Pass** MBLEx (Massage and Bodywork Licensing Examination)

**Complete** application and **pay** $150 fee (biennial renewal $100)

**Undergo** FBI & BCI criminal records check

No "Licensing" for UX jobs

PhillyCHI connects the local UX community by organizing monthly educational and networking events. We welcome anyone interested in UX to attend an event, share their knowledge, and engage with other professionals, students, and enthusiasts.

Lots of communities of interest and communities of practice

DREXEL UNIVERSITY
College of
Computing & Informatics

ACADEMICS          ADMISSIONS          STUDENT EXPERIENCE          RESEARCH          PARTNERSHIPS          ABOUT

HOME > ACADEMICS > GRADUATE PROGRAMS > HUMAN-COMPUTER INTERACTION AND USER EXPERIENCE > MSI HUMAN-COMPUTER INTERACTION/UX MAJOR

# MS IN INFORMATION - HUMAN-COMPUTER INTERACTION (HCI) & USER EXPERIENCE (UX) MAJOR

# UX is multi-disciplinary
# Good: Rapid evolution, broad & deep
# Bad: Fractured
# Ugly: Getting 1st job in UX

- Core (1980s) from CS + Psychology (Human-computer interaction)
  - Information Science (1999), Graphic Design (2003)
  - Humanities, Business, Industrial design, …
- Growing pains
  - Qualifications vs. Inclusion
  - Art vs. Science
  - Business vs. Social

Everybody changes. People experience change.

Change management skills can be learned. It is part art and part science.

Managing change is big business. It depends on business models, culture, and more.

There are many paths to being a change management professional. You can learn on the job, study on your own, or get a degree.

# Common goals (I think!)

| |
|---|
| Positive technology-based experiences that encourage changes for good. |
| Sharing our most effective methods for defining, designing, and delivering good, change-enabling experiences. |
| Managing experiences, not just products, services, projects, work (or change). |
| Communities of interest, practice, and professional associations that support all of the above. |

# Thanks!

UX

People

Technology

CM
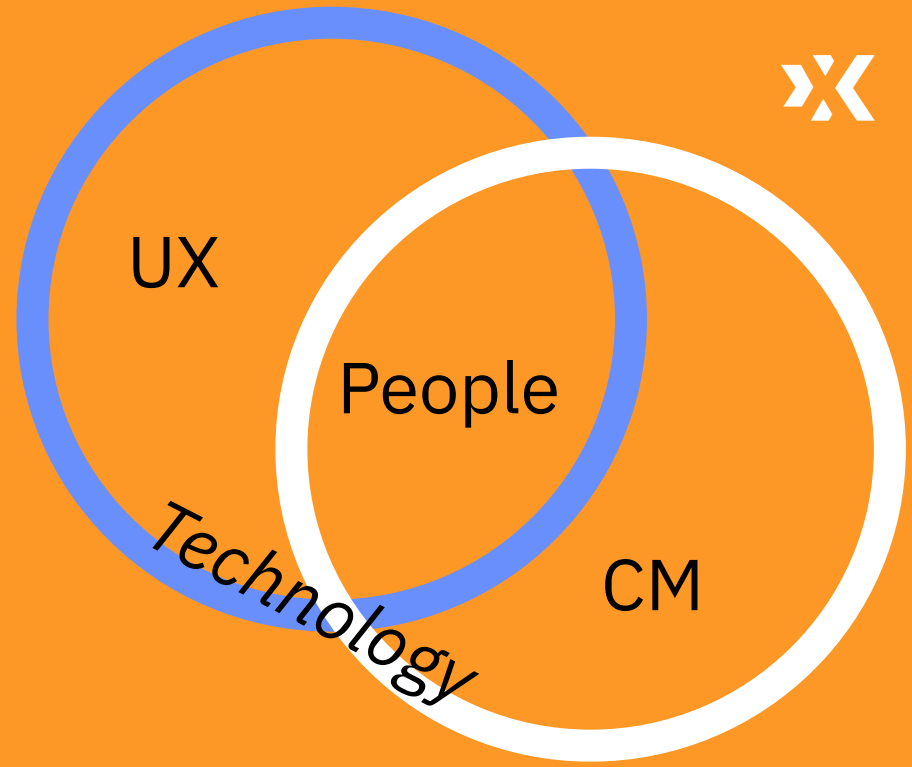
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