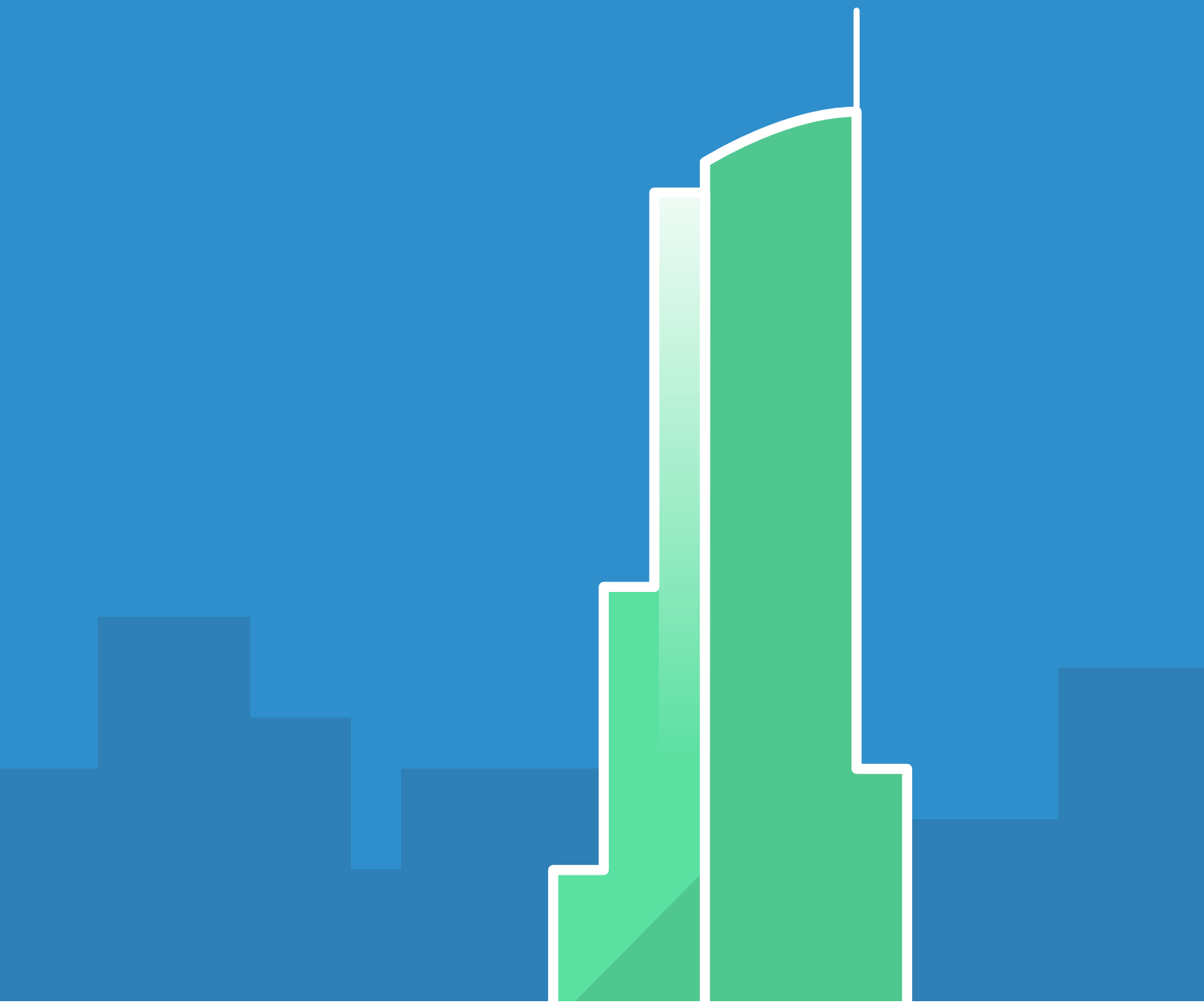
UXPin

Design Collaboration in the Enterprise:

Building the Foundation of Brilliance



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Index

Introduction

A quick note from the authors

In modern product design, collaboration can sound like a four-letter word.

Does it mean more time required for meetings, and less for the actual design? Or does it require that less qualified people are given disproportionate influence over design decisions?

Design collaboration is actually much more than asking more people for their opinions. Collaboration in the enterprise requires effort – designers must get over their own egos, objections from stakeholders, and the organizational rigidity common to most larger companies.

Design is not just a highly specialized field within product development, but a way of thinking. In its simplest form, design is about solving problems. How can we improve something to better serve our users? While non-designers may lack the visual skills or user-centered approaches, they all possess their own problem-solving mindsets that prove extremely useful when guided properly.

The key to collaboration is understanding that the design process can be as open as possible, but the output must be tightly controlled. That way, you reap the benefits of collective brainstorming and expert judgment.

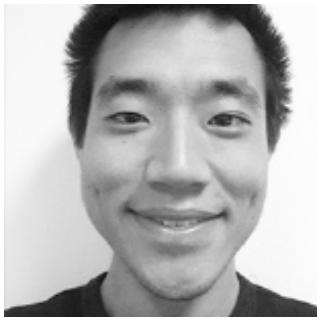
In this book, we'll examine how to foster a collaborative culture, plan your product design more collaboratively, and how to treat design kickoffs as more than just a formality. We've included best practices from **Venmo**, **Vice**, **Amazon**, **Hubspot** and our own experiences from having worked at large companies prior to UXPin.

Our hope with this book is to show that you can practice collaboration from the very beginning of the design process – not just when you're looking for feedback on the second iteration of a wireframe or prototype. As you'll see, collaboration doesn't need to be formal, nor painful. It just needs to work.

If you find this book helpful, feel free to share with anyone who might enjoy it. The world can always use more people who understand how designers think.

Jerry Cao

co-written by Kamil Zieba, Krzystof Stryjewski, and Matt Ellis



Jerry Cao is a content strategist at UXPin where he gets to put his overly active imagination to paper every day. In a past life, he developed content strategies for clients at Brafton and worked in traditional advertising at DDB San Francisco. In his spare time he enjoys playing electric guitar, watching foreign horror films, and expanding his knowledge of random facts.
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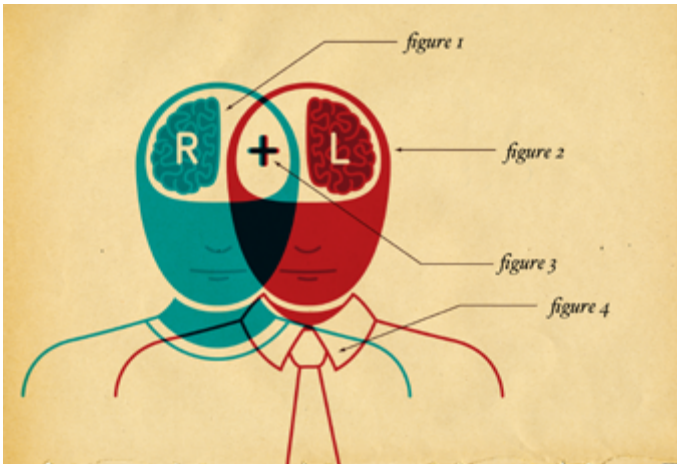
With a passion for writing and an interest in everything anything related to design or technology, Matt Ellis found freelance writing best suited his skills and allowed him to be paid for his curiosity. Having worked with various design and tech companies in the past, he feels quite at home at UXPin as the go-to writer, researcher, and editor. When he's not writing, Matt loves to travel, another byproduct of curiosity.

Building the Foundation for Collaborative UX Design

The beginnings of a collaborative design culture

Collaboration is about enhancing each other's work and creating a harmony. It's following a smart plan to avoid confusion and waste. Collaboration is creating something greater as a group than would be possible as individuals.

Design collaboration in large companies can be difficult with the forcing rigid protocols into the creative design process (which is naturally free-flowing). After all, everyone's a design critic, but not everyone can be a designer.



Source: "Is the traditional business world at war with creativity?" Opensource.com. Creative Commons 2.0.

This book is obviously written linearly, but feel free to apply the processes in whatever order makes the most sense. In some cases, you'll likely apply them multiple times – for example, collaborating on user research before a project kickoff, and periodically as you iterate the product design.

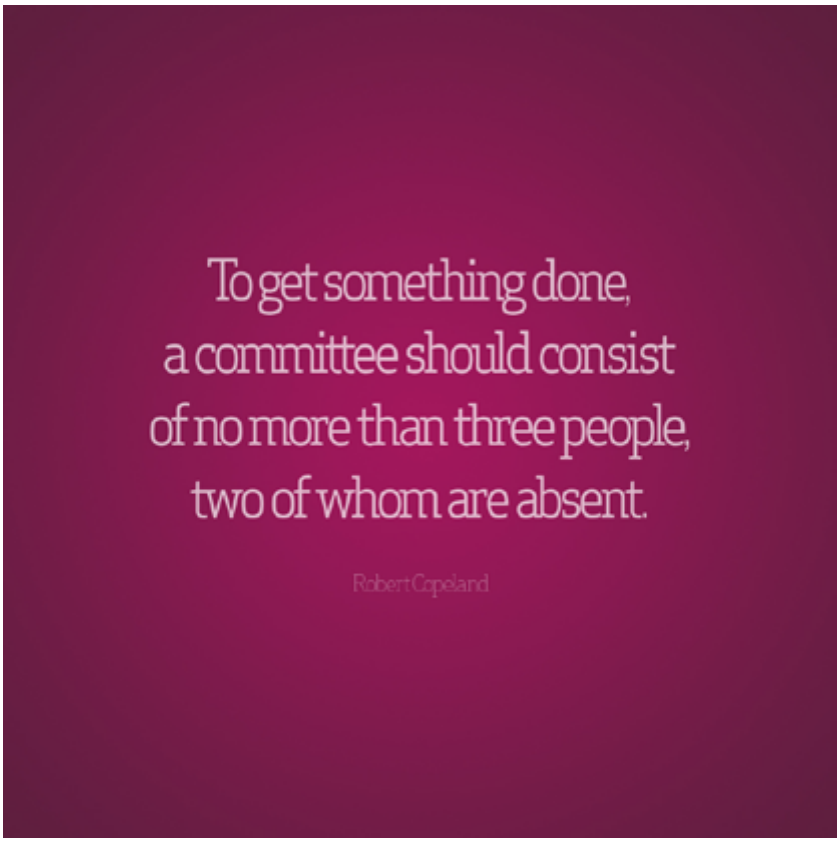
To get started, let's discuss a few tips for building a more collaborative culture in large organizations. In this chapter we'll discuss the importance of inclusion, how to keep the designer ego in check, how to give and receive feedback, and how collaboration nourishes design thinking.

> Everyone's a design critic. But not everyone can be a designer.
>
> tweet this

Welcome everyone to the design process

One reason concepts like "collaboration" or "teamwork" get a bad reputation is because we've all experienced dead weight or nightmare egos. But does that mean mean certain people should be excluded from teams? If so, then who is excluded, and on what criteria?

When we talk about inclusion and allowing everyone to participate, we draw a line in the sand which makes a world of difference: we make no promise to incorporate everyone's idea. We avoid design by committee at all costs because, well, it just doesn't work.



Source: "Bored Room." Brett Jordan via Compfight. Creative Commons 2.0.

While anyone may contribute or make a suggestion, the product design lead must have the final say. Committees do not equal design collaboration. Committees give everyone equal status and responsibility, which destroys accountability. Collaboration – as we see it – has a centralized leader. We encourage giving everyone a voice, but not bending to everyone's will.

> Committees do not equal collaboration.

With this in mind, why not include everyone? Why not give everyone the chance to speak up and share their thoughts, as long as clear expectations are set? If someone has a bad idea, listen respectfully,

then clearly defend your standpoint with reason and logic. Maybe at the next meeting they'll have the best idea anyone's heard yet.

Regarding our all inclusive meetings, we have a couple ground rules:

- **Don't take hostages** – No one is required to participate, we simply give them the chance to if they'd like. The more you convince people their opinion is valued, they less they feel like a hostage to the process. You'll likely hear their opinion at some point, so it's better to get surprises up-front rather than three iterations deep in prototyping.

- **Don't leave anyone behind** – When we say include *everyone*, we mean everyone. It doesn't matter how insignificant their role or how new they are, the best ideas can come from the unlikeliest of places. And remember, there's no risk, so why not increase your chances of getting a good idea by increasing brainpower?

For example, at UXPin, we involve everyone in the company in new feature kickoffs.

Once a quarter, we conduct a two-hour company-wide strategy meeting in which employees – *all* of them – are invited to discuss product design ideas. The sketches and tasks are recorded in **Asana** and visited weekly by our entire product design team to prioritize the best ideas (as well as add new ones of their own). Everyone

knows, however, that while they are a contributor, they are not always the decisionmaker.

> For effective design collaboration, give everyone a voice but don't bend to everyone's will.
>
> tweet this

Sometimes it's best to hear opinions from those who aren't as familiar with the process.

Fresh eyes might have a specialized or new insight that experienced minds might overlook. Developers can add a whole new level to cognitive walkthroughs, but only if they're invited. If you're conducting a benchmark study, why not have testers and visual designers do it together? And during paper prototyping sessions, invite marketers so that everyone can understand the design from the perspective of market viability.

Source: "IMG_8298." jeanbaptisteparis. Creative Commons 2.0.

All-inclusive collaboration is by no means just our idea. Companies older and bigger than ours have been doing it since before we started.

One of the most famous is **Vice**, who discussed their process in a post for Fast Co. Create's blog. Every week Vice holds a production meeting in which the members of the company's different channels – music, food, etc. – get together to discuss ways to work together. Whether at this weekly meetings or casually in the office hallways, employees are allowed time for projects that interest them, even if that's not what they were hired to do.

For a company valued at $2.5 billion (2014), this can't be a practice that's all that bad.

Build Empathy, Not Ego

Design, which lies at the crossroads of art and science, is an extremely powerful ego booster.

When we design, we feel clever and creative at the same time. We build, we create, we play god. And we usually feel great responsibility for the final product. Because a product and its design are inseparable, we feel almost a sense of parental responsibility.

This intense bond, however, also creates a dangerous trap.

Ego prevents you from creating a great product, because it will emotionally isolate you from the team. The stronger your personal connection to the product ("this is mine"), the weaker your connection to the team ("this is ours").

Photo Credit: "Pride". Ivan. Creative Commons 2.0.

That's not to say don't be passionate about your work. By all means, expend as much creative energy as you can in making the best product possible and defending the right decisions.

The difference between passionate work and ego-driven work is how much the end product reflects on your self-worth. Not only will controlling ego make you more relaxed about your work, it will also make you a better designer.

This is easier said than done, especially for such an ego-driven species as humans. Below we've listed a few pointers for keeping that voice in your head only in your head.

1. **Accept that design serves business needs**

   Art serves the individual, whereas design serves any number of external goals, from selling cloud CRM solutions to promoting a city council candidate – *not* the whimsy of the creator, in other words.

Photo Credit: "Building an open source business". OpenSource.com. Creative Commons 2.0.

The ideals of the designer – personal styles and personal opinions on aesthetics – are secondary to the business needs of the product. Because wants and needs are two separate realms, it's common to question decisions from other team members (especially non-designers). But it always helps to start by first questioning your own assumptions.

Good design doesn't call attention to itself, it simply presents choices to the user in a way that helps them best accomplish their goals. Great UX designers understand that it's not about the best idea, but about the *right* idea.

2. Rely on user data for a clearer truth

Business goals determine the destination. User requirements steers the ship.

User research and testing is so powerful because it counteracts opinion with science. Of course, there is still some subjectivity in the interpretation of the results, but at least the raw data will help everyone arrive at a more objective truth.

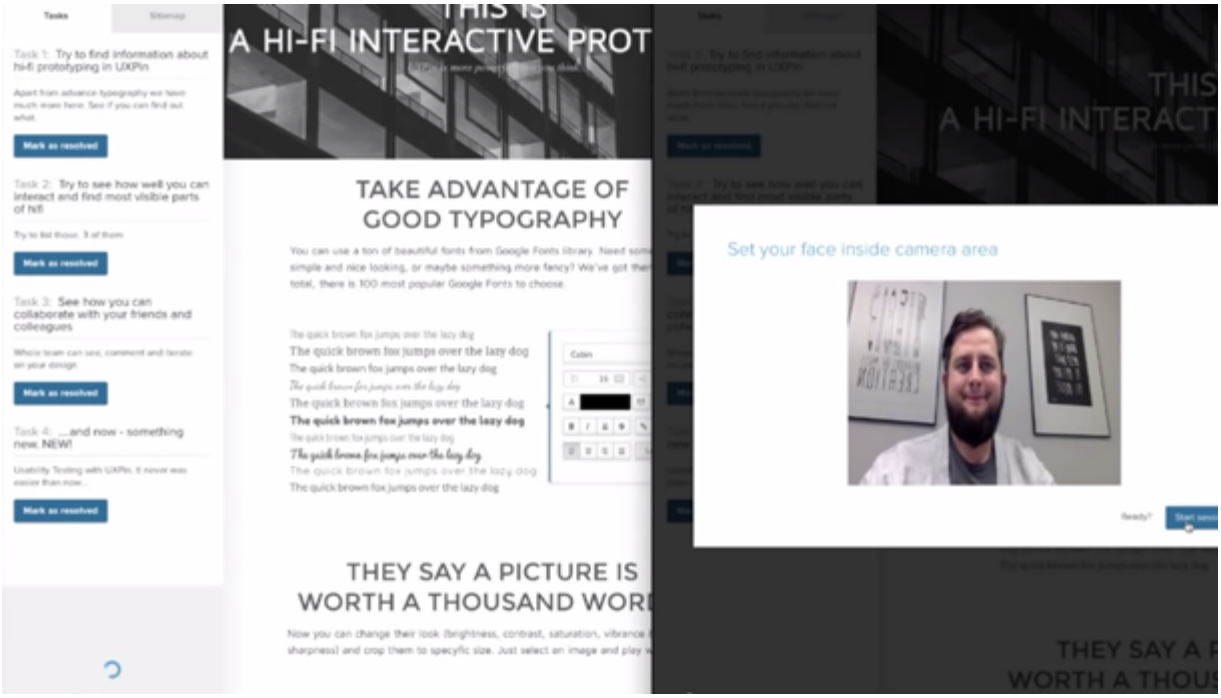


Photo Credit: uxpin.com

As we discussed in *The Guide to Usability Testing*, let the user stand in between your ego and the stakeholders. In fact, we built usability testing directly into UXPin to encourage designers to constantly evaluate their work from a task completion point of view.

> Business goals determine the destination. User requirements steers the ship.

You may think an infinite scroll is best for increasing time on site, but the usability testing might show users bouncing after a minute or two. A good design, then, could still be the designer's second choice. But what makes it a good design isn't just what the creator thinks of it, but also what the user thinks.

3. Focus on empathetic design

Egotistical design satisfies yourself. Empathetic design satisfies the users.

Empathetic design balances user needs with stakeholder needs. The end users – best represented through realistic personas – should be the primary concern: their opinion certainly tips the scale. But empathetic design is also acknowledging that you're part of a team, it's not just your name going on the final product, so others also have the right to contribute.

Let's assume that you have the most expertise of your team – that alone is not enough. You also need to be a facilitator and an advocate. An "expert opinion" will not get you as far as knowing your users, and facilitating a better understanding of them with stakeholders. This works in the designer's favor, because you can share common ground with others by focusing on users together.

Egotistical design satisfies yourself. Empathetic design satisfies the users.

Go out and conduct interviews in the user's natural environment. Watch how users solve problems, and if they create any workarounds. Create empathy maps. To really put yourself in the minds of users, you can even try designing in the environment which users will interact most with your product.

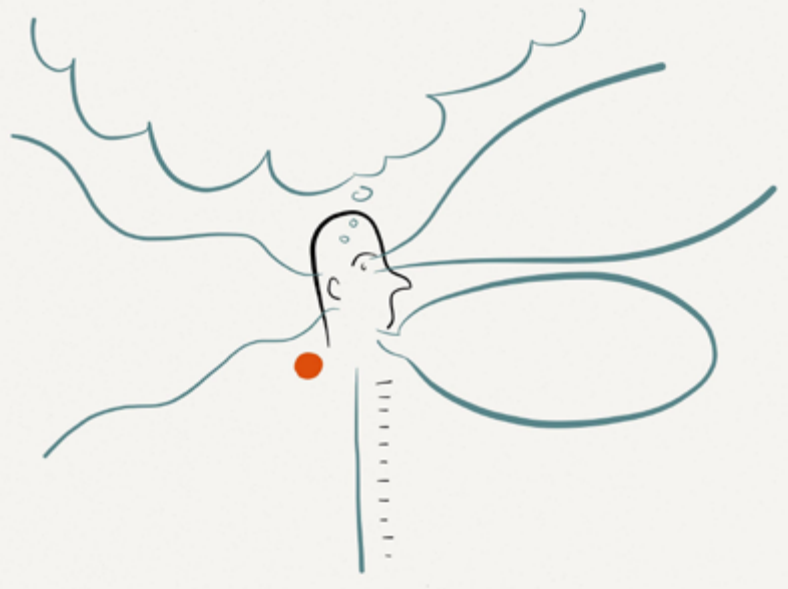


Photo Credit: "Sketchy Empathy Map Template". Zak Greant. Creative Commons 2.0.

Treat empathy like a skill, then practice and develop it. The more empathetic you are, the better of a UX designer you will be.

To learn more about immersive empathetic design, check out this great piece on **Smashing Magazine** in which designer Pete Smart tried to solve 50 design problems in 50 days.

Master The Art of Critique

How well can you take criticism? How tactfully can you give it?

There's no doubt that critique and feedback is vital to improving any design, no matter how personal it may feel at times. The art of critique is a two-way street and, harping on our points from the last section, the only way to navigate it is through empathy and understanding.

Photo credit: "Have an opinion. Elaborate." *See-ming Lee. Creative Commons 2.0.*

We all know that what people say and what they actually mean can be completely different. More difficult, perhaps, is then translating that feedback into something that makes sense on screen. So how can you better decode the subjectivity?

1. Treat Feedback as Dialogue

When you're on the receiving end of feedback, it can feel like a one-way ordeal. The other person tells you their thoughts, you digest it, then make the changes you feel necessary.

Instead, treat the person's feedback as only the starting point of the discussion. Regardless of how prescriptive their feedback, remember that it is still just an opinion. Feedback sessions should always be two-way, and you should feel equally empowered to critique their feedback.

Source: "Negotiation Cartoons: Positions Vs. Interests" Johnny Goldstein. Creative Commons 2.0.

Once you present the design, make sure the first question you ask isn't too open-ended. For example, when we tag people in our design comments in UXPin, we avoid questions like "What do you think?" Those questions open you up to all sorts of dreaded responses like "I don't like it," or perhaps worse: deceptive acceptances like "Sure, looks ok."

For the most productive negotiation, explain the context of the design, then ask questions that focus on the objective, for example, "Do you feel the vibrant use of color is engaging for our older audience?"

To learn more about responding logically to emotional feedback, check out Andrew Follett's advice on Smashing Magazine.

2. Phrasing and Framing

How feedback is expressed separates constructive criticism from personal insult.

The best feedback clarifies the problem instead of prescribing solutions. Before the feedback session, state this point to help keep personal opinions on a leash and yield more practical results.

For example, an appropriate piece of criticism would be, "It's not clear where I should go to generate a quote" whereas a comment like "How about a larger call-to-action?" is certainly well-intentioned, but far too tactical when the discussion should be strategic.

If someone provides you feedback that's focused on the solution, ask follow-up questions until you dig into the real problem. In the above scenario, you could ask the critic "What would the larger CTA solve? Why does that matter to our users, and what goal does that accomplish?"

The best feedback clarifies the problem instead of prescribing solutions.

On a related note, you can also challenge feedback with three questions to make the person elaborate, as first suggested by

Dustin Curtis. If their feedback really was unwarranted, they will falter when answering. If it was valid, their answers will point you further towards the right solution.

3. **Respect Facts**

   Opinions can be argued and disputed all night, but facts cannot. Whenever possible, refer back to facts, whether usability research, user data, or design principles. As we've previously established, never forget that design is much more than art.

   The line between art and science is easily blurred since design requires creativity and interpretation.

   To help non-designers understand the validity of your arguments, try to explain the science behind the design. For example, as we described in *Web UI Design for the Human Eye*, Gestalt principles provide well-documented arguments on how people naturally interpret design patterns.

Foster Collaboration Through Design Thinking

Design thinking is an ideology regarding product development that centers around people and their needs, as opposed to just the current business climate. The process begins with finding a need in the customer, instead of following a single innovator's vision.

Source: "Every Design Challenge". Jo Quinlan. Creative Commons 2.0.

As Silicon Valley veteran Steve Blank explains on his blog, design thinking is even more suitable in larger companies who have greater resources for user research. Because design thinking is people-centric, it also helps to involve different departments for a diversity of interpretation and ideas.

This can be done any number of ways, such as sketching sessions, workshops, and design tools accessible to multiple teams. We've already mentioned the all-inclusive periodic ideation sessions prac-

ticed by Vice (and ourselves). This doesn't necessarily have to be artistic, the idea is that a visual medium can accomplish some feats that verbalizing cannot:

- **Documentation** – Ideas become physical and documented. In a creative dry spell, you can simply go through the backlog of ideas to see if the problem hadn't already been examined (maybe even solved) months earlier.

- **Clarity** – It can be nerve-wracking sharing your idea to higher--ups, and sometimes employees can't articulate exactly what they mean. Having a separate medium in which they can take their time to flesh out their ideas may help them express themselves.

In fact, we encourage everyone at UXPin (not just designers) to contribute to this visual inventory of ideas. We create a project named the "Design Bin," and anyone with access can upload a sketch, draw a quick wireframe, or create a prototype. For organization, we follow a strict naming convention so that the product team knows if ideas are for our app or website. At any point, other employees can sift through the material and maybe find the right inspiration.

Takeaway

Especially for large companies, collaboration can be an advantage over your competition – but only if its used properly. We'll spare you the sappy quotes about teamwork and get right to the heart of the matter: collaboration is good for business. A team working together accomplishes more than a team following one person's orders.

That is the very purpose of design collaboration: it's not about man-power, it's about the diversity of strengths and ideas.

Collaborating on Product Design Planning

Advice for Collaboration Before Kicking Off Your Design

The waterfall model of design may have worked during the birth of the digital era, but our industry has certainly outgrown the linear product development process.

Today, more and more companies are abandoning the obsolete waterfall model in favor of Lean and Agile UX methodologies. These more modern approaches value and incorporate collaboration: the first time the developer sets eyes on the project shouldn't be when they begin coding; the copywriter shouldn't add text only after the layout design is finalized, etc.

Source: Creative Commons. Creative Commons 2.0.

In this chapter we'll discuss how to implement collaboration in the earliest planning stages of the design process. We'll provide advice on conducting user interviews, stakeholder interviews, analyzing data, and then mention how the affinity diagrams (the KJ technique) can tie it all together.

Collaboration Through User Interviews

User interviews can go in countless directions depending on the setup (group or individual), location (on-site or contextual), and strategy (the types of questions you ask). While the more technical options will be determined based on your specific needs, it's the strategy – the methods for the actual interview – that are enhanced by collaboration.

1. **Collaborating with users with contextual interviews**

   As we described in *The Guide to Usability Testing*, we always recommend collaborating with users for research. For starters, user interviews can produce more honest and unguarded feedback since there can be too many social-psychological factors at play in focus groups that add bias and skew the responses.

   Going a step further, contextual interviews – interviews that occur in your user's natural settings, such as their home or office – are even more fruitful because you're able to see and discuss how the user engages with their surroundings to accomplish tasks. Bring-

ing users to an external environment (even a conference room) can introduce variables that, however slight, may affect their thoughts and feelings, which of course affects their responses.

In addition to the user being more relaxed and confident, contextual interviews provide information about your user that otherwise goes unnoticed. Playing a bit of detective while you're in your users' home or office helps reveal:

- **Technological preferences** – Mac or PC? iOS or Android? Feel free to ask them why they prefer one over the other.

- **Technological proficiency** – Seeing them actually interact with technology goes a lot further than merely asking them about it. People tend to be inaccurate when asked about this – whether from pride, humility, or just unawareness – but seeing it firsthand will give you a solid answer.

- **Personal quirks** – How a person decorates their environments says a lot about them. Pay attention to what they keep nearby (whiteboard or sketchpad, for example) and clues to their personal interests (for persona creation).

- **Organization** – The general state of cleanliness will tell you the user's organizational skills and preferences. This will go a long way in designing your ideal interface and user organizational menus.

- **Unmet Needs** – Does your user have any "quick reference" bits of paper or links lying around? Maybe makeshift reminders because whatever's in the existing system isn't enough? These are gold for a designer in inspiring new features and sometimes even new products.

- **Daily Life** – What external circumstances interfere with your user's daily life, and how frequently? Knowing that your product must contend for your user's attention with meetings, social media, outdoor noises, etc., you can sometimes design ways to minimize or avoid such distractions.

When you go on-site, follow the Master-Apprentice Model. Pretend that you are the apprentice who is consulting with the master to learn their mentality, methods, and secrets. Remember that you're there to watch and listen, not to dictate better ways of doing work.

Source: "Expert Interview – Ruth Benny." Nicholas Wang. Creative Commons 2.0.

Now that we've examined how you can take advantage of user environments for collaborative research, let's examine how you can involve the rest of your team.

2. Collaborating with your team on user interviews

In an ideal world, you'd be able to bring the entire team onsite to observe (and even participate) in contextual interviews. But that's quite rare in today's world of distributed teams and creeping deadlines.

Luckily, you can still set yourself up for better interviews by planning with your team beforehand. For instance, you'll certainly want to decide the strategy of the interview, specifically the questions being asked.

Before beginning user interviews, try holding a team meeting with every relevant member. **Ask them what they'd like to know about the target user**. Identify the glaring knowledge gaps, then start creating a rough draft of interview questions.

As we mentioned in the last chapter, not every suggestion will be usable, but you will certainly gain new insights and perspectives. New questions can lead to more thorough data, and the varied perspectives of product managers, developers, and marketers unearth questions you may not have thought of alone.

When UXPin first moved to the United States around 2012 to build our web app, we conducted over 50 user interviews. We talked to everyone ranging from designer friends to well-known experts like Brandon Schauer of **Adaptive Path**. We met at their offices, at coffee shops, in their own apartments – anywhere that put us closer to the user.

Source: "2014-04-30 17.09.22." Nicholas Wang. Creative Commons.

Considering that interviews made up most of our customer development process, we had to ask the right questions. We sat down with the marketing and development leads, then spent almost an entire day discussing knowledge gaps. When the first session was finished, the design team reconvened to draft a list of roughly 20 questions. Once the list was done, we spent another 2-3 hours with everyone polishing the questions before we were ready.

During the interviews, we always brought along at least one marketer or developer. We also brought existing sketches and doc-

umentation so that users could react to something, making the session more collaborative.

Photo credits: "App sketching". Johan Larsson. Creative Commons.

As we just described, always try to invite other team members. For example, another designer or researcher can help take notes while you focus on follow-up questions. In the best case scenario, you'll also be accompanied by team members from other departments – we highly recommend sparing some time for developers to observe the interview.

If you choose to have more than one representative at the meeting, you must follow one essential rule: **one person should take charge**. This means doing most of the talking and interviewing, but that's not to say the observers must sit in silence. They can certainly chime in, but the interview lead should have the authority to steer the conversation should follow-up questions go off-track.

3. User Interview Best Practices

Once you have the parameters set, it's time to focus on the actual interview itself. All the preparation aside, it's how your team presents itself in the interview that determines the data quality. Below are some guidelines that we tell our own teams to make the most out of of the interviews.

- **Memorize the questions beforehand** – Constantly checking the list of questions will slow the momentum of the interview, and distract you from observing some key environmental clues. Memorizing the questions beforehand gives you one less thing to worry about, and makes the dialogue more conversational.

- **Use open-ended questions** – In other words, avoid yes-or-no questions. Open-ended questions urges your interviewees to think critically about their answers and give more insight than confirming or rejecting your initial biases.

- **Pause after asking** – Silence after your question will signal to your interviewee that you're expecting their answer, and will avoid accidentally influencing them with suggestive follow-ups. It's human nature to avoid silence by talking more, but fight that instinct or risk "leading" your users' responses.

- **Don't just ask about emotions** – Your data on motivations will be more accurate if you analyze user behaviors instead of feelings. Your interviewees are likely strangers, so they won't be

> completely honest about their emotions. Stay on specifics, what they did or will do, rather than only how it makes them feel.

> For further user interview best practices, Erika Hall gives her advice in this article for A List Apart, including general guidelines and sample questions.

(For examples on how to conduct user interviews and more sample questions, download our free ebook *The Guide to Usability Testing*.)

Team Collaboration Through Stakeholder Interviews

Just like user interviews help you understand the target audience, stakeholder interviews help you understand the business requirements. The idea and motivations behind both kinds of interviews are the same – but the application is different.

Some people prefer to hold their stakeholder interviews after the kickoff meeting, but we advise against this. In our experience, revealing all of your stakeholders' goals and expectations early on will prevent last-minute surprises, ensuring you start and end the project on the right path.

While user interviews are best conducted one-on-one, for stakeholder interviews it's quite common to have multiple team members present. You don't want to overwhelm the stakeholders by inviting

every member of your team, but you can include all the department heads, plus a few lower-level extras who need a lot of answers.

It's not as important that everyone is present at the meeting, so much as everyone is **represented**. As with user interviews, hold an internal meeting beforehand and ask your team what they'd like to know from the stakeholders. Gather questions, concerns, and ideas from all the team members, and relay the most useful ones during the meeting. This is the best way to ensure nothing slips through the cracks.

Source: "Kristovskis Meeting." Baltic Development Forum. Creative Commons.

As far as how to conduct the meeting, remember that, just like user interviews, it needs to feel like a conversation – not an interrogation.

Here's a few tips:

- **One team member should lead the discussion at a time** – It also helps to select one person as the official scribe, although you should certainly encourage everyone to take their own notes. As the topics change, it also makes sense to shift the interviewer accordingly. For example, if you're talking about technical constraints, it makes more sense to hand the reins over to the lead developer.

- **Focus more on problems, not solutions** – Set aside around 45-60 minutes per stakeholder, then make sure you keep an ear out any time someone starts rattling off a long list of "must-haves" or "nice-to-haves." Hear them out, but then ask follow up questions to dig up the root problem.

- **Get inside their heads** – Ask directly what the stakeholders want the product to accomplish, and what their criteria for success is – their answer will have a direct impact on the subsequent kick-off meeting discussions. While these aren't the only questions to bring up, these are a good start towards questions focused on goals and objectives instead of solutions.

Just as important, ask stakeholders what risks might cause the project to fail.

In all likelihood, this question has been on the stakeholder's mind, but not on their tongue. Get them to admit their fears – as early as

possible – so you and your team can be on the look out and prevent them from derailing the entire project. If they're apprehensive about answering (for obvious reasons), assure them that the conversation is "off the record." That security will yield honest answers, and you'll at least be aware of the threats even if you can't disclose the source. Obviously, you'll need to alter your strategy to the type of stakeholder. In her book *Designing for the Digital* Age, Kim Goodwin outlines the different types of stakeholders and how to approach them. The below guidelines are tremendously helpful for each department:

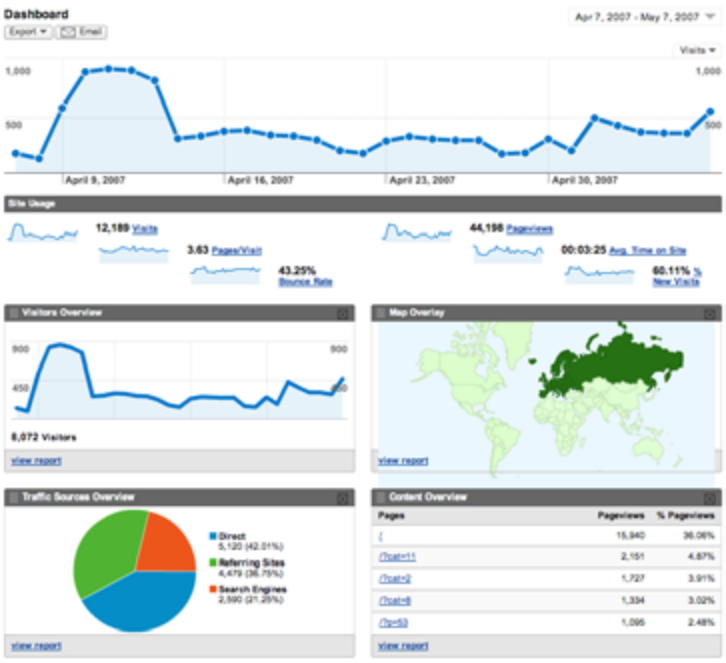
- **Marketing Stakeholder**
- **Engineering Stakeholder**
- **Sales Stakeholder**
- **Executives and SMEs**

Goodwin compiles all the need-to-know information in this quick--reference checklist – be sure to look it over before your next stakeholder meeting.

Analyze Different Sources of Data Together

In the vein of collaboration among team members, your data will greatly benefit if it's drawn from multiple *types* of sources. So far, we've discussed methods for collecting qualitative data, such as user interviews. But quantitative data – such as click tests, analytics, and A/B tests – is just as important.

Since this is a guidebook on collaboration in design, we won't go into the details of how to do conduct quantitative tests; but if you're interested in learning more, download our free *Guide to Usability Testing*.



Source: "Google Analytics 2.0." Panayotis Vryonis. Creative Commons.

Combined with proper team communication, quantitative research and data can save a failing project or fix a critical mistake. This is exactly what happened to Venmo, a money-exchanging app with a

curious problem. While they used data to fix a critical design error, their collaborative approach certainly applies to the pre-kickoff phase.

Monitoring the customer service feed (research data in itself), the support team noticed an increase in users accidentally paying when they wanted to charge. They immediately notified the product team, who then collaborated with the data team to interpret the metrics.

By diving into business analytics in Looker, the teams pinpointed the start of the trouble to a recent interface update. Within a month, the product team released a revamped interface (v. 6.2), and the data team then confirmed that error reports sharply declined.

The moral of the story is that, by treating data as a collaborative tool rather than an elixir, product teams can iterate more quickly and more accurately – regardless of whether they're planning features or fixing them.

Like Venmo demonstrated, **share the results with the entire team**. Don't keep the insights to yourself. Everyone on the team benefits from the fruits of your research, whether you think it's in their department or not.

Here at UXPin, whenever we're doing our quarterly collaborative "planning sessions," we're preparing data (raw and interpreted decks) to help the whole team understand the full context of new feature ideas. That's an essential step in the design process. The team

is composed of individuals each making critical decisions within their fields, and each choice should be as well-informed as possible.

We also draw our data from different sources. We look at Kissmetrics (user behaviour), our own database (financials and business data), Desk.com (customer service data) and qualitative data (customer interviews). We've found this triangulation of the data types gives us a wide blanket of understanding, with the fewest blind spots.

Affinity Diagrams: The KJ Technique

User interviews and stakeholder interviews provide enough feedback to get started. An analytics review and data analysis helps to validate these initial findings.

After qualitative and quantitative analysis, you probably have a rough idea of what features to build and design. But how can you prioritize them efficiently?

In the 60s, Japanese ethnogeography professor Jiro Kawakita created the Affinity Diagram, also known as the KJ Method or KJ Technique, in order to organize and analyze large groups of data. As a team activity, creating an affinity diagram ensures everyone understands the correct feature prioritization.

Source: "Affinity Diagramming 2." d_jan. Creative Commons.

While companies commonly personalize the technique with their own modifications, we've found Jared Spool's version to be the most efficient (we now use it as much as possible for clarifying priorities).

Here's a quick summary:

- **Focus the activity around a singular goal or question** – Basically, you must first agree on what issue you'd like the affinity diagram to help with. In the context of pre-design planning, this could be what elements you'd like the product to have.

- **Write ideas on sticky notes** – Write down each idea on a sticky note or index card. These should remain simple and not go into too much detail. Continuing the example of product elements, these ideas could be features you'd like to implement, stylistic

choices, or issues from user research that need to be addressed. Afterwards, place the cards on a wall.

- **Sort the cards into groups** – Look for similarities in the cards and sort them into groups. The most important part of this step is that no one talks during it. The silence while sorting will ensure that the cards are organized into groups organically, and that no one person dominates the process.

- **Name each group** – Give each group a title to properly categorize them. Now you know which department each idea falls under.

- **Vote on the most important elements in the groups** – Optionally, you may want to start prioritizing ideas while you have everyone together. Within each category, democratically decide the priority list for each element. If you're conducting a large affinity diagram, feel free to toss out the least important categories. If you've decided that "Improving Collaboration" is an important group, then now is when you'd decide if "Make comments editable" or "Auto-email daily project summaries" is more important.

The affinity diagram is a tried-and-true method of organization for helping you and your team make sense of the wealth of data available to you. In a way, it is one of the greatest gestures of collaboration, as everyone comes together to suggest the project's priorities.

Of course, this exercise is meant to help capture as many insights as possible, not to command the product direction. In order to avoid product design by committee, we still advise letting the product team to make the final call. The KJ method simply ensures they leverage other teams' expertise for better informed decisions.

To learn more about running a KJ workshop for UX purposes, we highly recommend Jared Spool's insightful piece based on his experience.

Takeaway

Collaboration begins well before the design process.

Incorporating teamwork right from the start will build team unity throughout the entire process – and you'll be glad its there when you come to the trouble points along the process. Get your team's input before user interviews, and stakeholder meetings, and share your findings with everyone what the data is analyzed. Involving everyone in a prioritization activity like creating affinity diagrams also gives everyone a voice for better informed products.

Collaborative Design Kickoffs

Clear the Air Without Stating the Obvious

Kickoff meetings set the precedent for the entire project. Kickoffs aren't just about generating ideas – they're also about setting expectations and minimizing surprises later on.

But without the right collaboration, time fillers for people to feel like everything is safe. Aside from introducing new people to one another, this is where you determine how you and your teammates will interact throughout the project, and they provide the opportunity to size up each other's strengths and weaknesses.

Source: "Meeting pictures." Achim Hepp. Creative Commons.

In this piece, we discuss the details of what makes a successful kick-off meeting. We'll explain the philosophy behind them, explain how to conduct helpful design studios to get your creative juices flowing, and discuss kickoff activities and templates to get you started.

> Without the right collaboration, kickoff meetings are just expensive people discussing obvious things.

Practical Philosophy for Kickoff Meetings

The kickoff meeting is more than just a business meeting for solidifying goals. Don't forget about the relationship-building. This is an opportunity for the different members to get to know each other, to interact, to mingle – sometimes for the first time. Fortifying these bonds early on will make collaboration easier throughout the rest of the process.

All the key players gather in the same room (sometimes via teleconference) and unite under the same goal. Treat the kickoff as a special meeting where everyone feels energized as the team sets the initial course for the best possible product.

At least, that's how it's supposed to work. In reality, kickoff meetings can feel like a drag as certain people try to talk over each other or push their own agendas.

Source: "Kickoff." Bart Everson. Creative Commons.

Successful kickoff meetings don't just happen, they require effort. The moderator must work to contain the bigger personalities from dominating and draw out the shyer personalities who would otherwise remain silent. There is a balance that must be struck between a casual, open environment, and a focused and productive one. The meeting can't just be reading through documentation, although that is a necessary part of it as well.

Treat documentation as tools that create context for the kickoff activities. Review the documentation to get people in the right direction, then dive into the activities and let the ideas flow. This is exactly what Amazon does, since they actually make their product manager write a mock product press release for discussion during the kickoff and beyond.

As discussed in the *Web UI Best Practices*, more traditional documents include early drafts of data analysis, personas, product requirement documents (PRD), functional spec documents (FSD), Lean/Business canvases, and notes from your interviews. You may also want to include any sources of inspiration, such as rough sketches or mood boards.

Because it's important to keep the documentation and design together, we actually provide free templates (like business canvases) in UXPin for quick access.

The VIP Guest List

As for who to invite, the size and range depends on what the key decision-makers are comfortable with. For the following list of essential attendees, use your best judgment in determining the level of seniority for each:

- **Product lead** – usually the product manager. This person may also dictate the requirements based on feedback from the rest of the team.

- **Designers** – UX, UI, interaction and visual designers.

- **Developers** – technology experts (someone who can interpret and provide feedback on technical requirements).

- **Data analyst** – someone who knows product metrics and can ground the discussion in quantitative evidence.

- **User researcher** – whomever is in charge of customer development and persona analysis (usually a usability analyst or UX researcher, but could also just be the designer).

While these are the essential members, we advise that you **invite as many relevant people as possible**. This means copywriters and even marketing operations, not just the higher-ups. Remember that you always want to address concerns as early as possible, and you never know who might uncover the fatal flaw.

Source: "CEO Tiare – Board Meeting." tiarescott. Creative Commons.

From our time working at larger companies before UXPin, we recommend doing the kickoff in person. It's easier to pick up on body language, and visual communication is much easier. But that's not always an option, so if you must kick off the project remotely, you may need to make some allowances.

For more information on how to prepare for remote kickoffs, read the article Designing with Remote Teams, written by Agile product designer and expert Jeff Gothelf.

Kickoff Meeting Process

The length of the meeting depends on the amount of talking points and activities you have planned, but you **should aim at around 2-3 hours**, give or take. This provides ample time to flesh out ideas, without testing people's patience and concentration.

Because this is a business meeting with a lot riding on it, "winging it" is not really a viable option. We recommend creating a solid agenda beforehand, one that covers all the key points that should be covered. This will keep the meeting focused and productive, and you can always make changes in the moment if the situation calls for it.

In general, your meetings should follow this structure:

1. **Review initial project roadmap** – Like we touched on in the beginning, a good ice-breaker is to review all the previously distributed documentation and discuss what works and what doesn't. This will also plant the seeds for defining a more concrete project

roadmap later in collaborative tools like Asana, Trello, Confluence or Aha!.

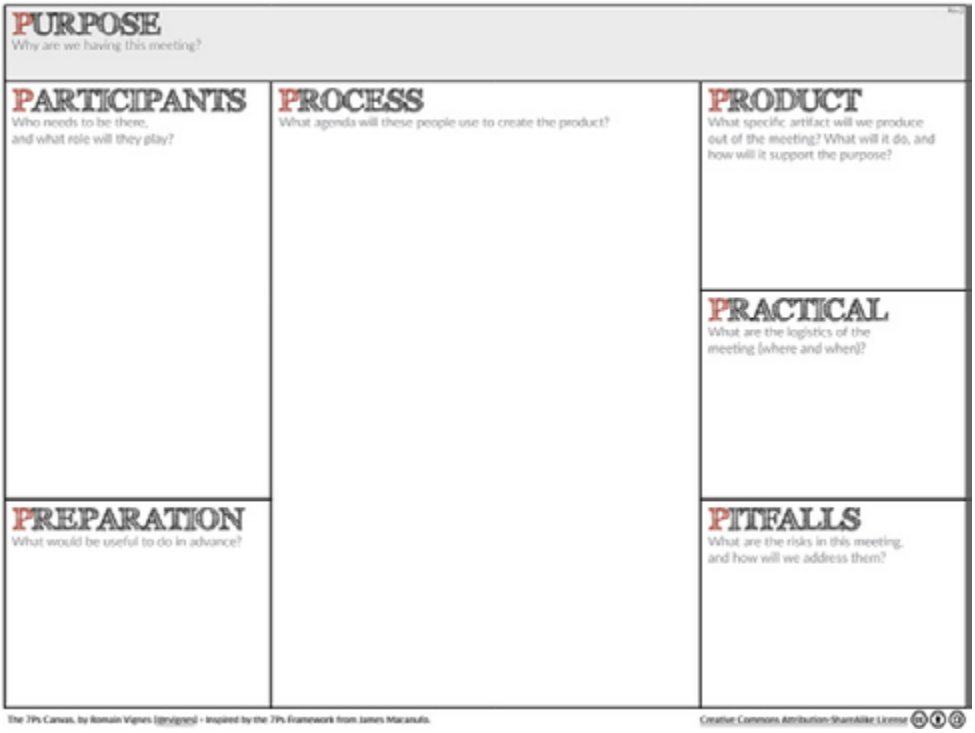
2. **Discussion** – Having a list of discussion questions ready beforehand will ensure you don't accidentally forget a topic, but you should always open it up to the floor for new insights. To set a tone of honesty, we suggest opening with a tough question about the product's purpose. (We list some more topics below.)

3. **Assess risks** – With the more meatier topics already out of the way, it's time to move on to the project's threats and how to minimize them. If anyone at the table has any fears or concerns, they should mention them for creative problem-solving. This is a perfect example of why collaboration is important – diverse mindsets and expertise direct attention to problems that may surface in more dangerous times later.

4. **Conduct ideation exercises** – These can range from ways to help people concentrate to artistic tasks to explore concepts. Some companies stray away from these types of activities because they prefer to stick to more formal practices, but we recommend them as a means to generate ideas. We'll discuss these in detail in the remainder of the chapter.

5. **Create a basic timeline** – Remember to thoroughly investigate logistics, and consider any potential limitations inherent in the tools or processes. Just remember the plan should be rough, as

it will likely change as you test your designs and course-correct for the market.



Source: "The 7Ps Canvas." Romain Vignes. Creative Commons.

One of the most important phases here is step 3, the discussion phase. This is where all the important stakeholders weigh in with their expertise (and of course, opinions). As such an important phase, we've listed some common discussion points here, to help inspire you to think of your own:

- **End** Goals (KPIs) – the project's objectives
- **Priorities** – agree on a prioritized list of the end goals
- **Review Target Users** – explain the results of your research so far, including typical behaviors, workflows, pain points, and frustrations

- **Information Architecture** – for digital products, this refers to how the product will be organized (e.g., navigation)

- **Content** – a basic approach to content, including layout, themes, and tones

- **Aesthetics** – general creative approach, including atmosphere and any inspiration (refer back to any sketches or mood boards)

Feel free to amend or add activities or talking points to suit your needs. This is just one agenda that's proven useful, but it's by no means the only way to conduct a kickoff meeting.

Design Studios

Like we discussed before, the real magic of kickoff meetings lies in the collaborative design activities. Once you've finished discussing the details, you can dive into the design studio.

The design studio is a workshop in which team members generate as many ideas as possible through sketching. The goal is to channel and drum up everyone's latent creativity, while at the same time bringing the team closer together.

The activity itself also provides additional benefits of strengthening the bonds through mutual complimenting and criticism. It helps

dictate early on how to properly give and receive feedback from each other for the rest of the project.

Source: "A List Apart big meeting, 30 January 2015." Jeffrey Zeldman. Creative Commons.

These are the team-building advantages, but perhaps one of the greatest strengths of a design studio is the practical approach to problem solving.

The differences between divergent and convergent thinking are well-documented, but in case you're unfamiliar, we'll briefly explain.

- **Divergent** thinking – In group dynamics, divergent thinking is everyone thinking individually. This is what happens when you pose a question to the group and everyone tries to think of solutions on their own. Divergent thinking works well for idea generation and new approaches to problems.

- **Convergent** thinking – The opposite of divergent thinking, this happens when people improve upon existing ideas, or combine different aspects of their own ideas. Convergent thinking works well for taking the ideas created in divergent thinking, and making them better until they become workable.

Source: "Divergent Thinking vs Convergent Thinking." visualpun.ch. Creative Commons.

The perfect meeting involves a good mix of divergent and convergent thinking, as both as necessary. But that's not always how it works out.

One of the greatest threats to kickoff meeting discussion is confirmation bias. Because solutions are not easy to come by, group mentality leads people to latch on the first reasonable solution they develop. In discussing this singular solution more and more, their attachment to it grows and they become less likely to either address its flaws or invent an even better solution. The balance is thrown off in favor of convergent thinking too early, and often the best possible choices remain forever undeveloped.

But design studios counter this confirmation bias by propelling divergent thinking. Everyone is tasked with coming up with ideas in a way that ensures no one idea is chosen prematurely. Due to the nature of group mentality, divergent thinking is naturally slighted – a design studio simply evens the scales a little bit.

Design studios are not exclusive to kickoff meetings, and in fact can be conducted at any time during the design process when the team finds itself stuck. The activity was actually popular among industrial design and architecture, but has since been modified to suit digital design.

The mechanics of design studios vary, and really the term "design studio" represents a *type* of activity, rather than a specific set of directions. In general, though, they tend to follow similar paths. We'll explain a basic design studio process, and give some examples variants:

1. **Distribute art supplies** – Of course, everyone needs sketching materials before you start. If you're opting for everyone presenting more than one idea, take this time to divide your paper into segments, for example, six equal boxes for six screenshot proposals. You can also print out this helpful template.

2. **Pose a specific task** – While this can be broad, a specific and detailed task will yield specific and detailed solutions. Consider the different outcomes if you tell your team, "design a homepage," or,

"design a home page navigation menu that promotes the product page, and include a separate login/signup link."

3. **Set a time limit and required number of concepts** – This encourages a quantity of ideas and prevents people from obsessing over artistic finesse. Try 1-2 minutes per concept to start out, with at least 3 concepts per person.

4. **Present and give feedback** – This is where different companies tend to vary. One popular option is to pair people up so they can give feedback on each other. Another is to present all ideas to the entire group. Again, set a time limit to keep the meeting from dragging on.

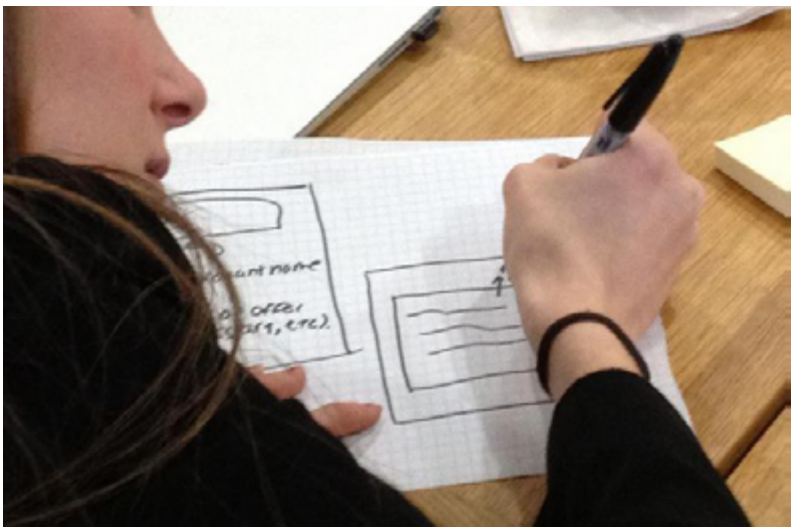
5. **Repeat the process again** – Depending on which variation you are going with, you'll repeat the process again under a certain stipulation. Some methods will have people now working together in pairs. Others involve people working individually, but on the condition that they incorporate someone else's idea.

6. **Repeat the process yet again** – If you're going with the group variation suggested by Kevin Hoffman, you will repeat the entire process again and again, combining groups instead of individuals. Pairs become groups of four, then groups of eight. If you're sticking with individuals, repeat the process one more time, but with only a single concept and a longer time limit. At this phase, after hearing and incorporating everyone else's ideas, you should

focus on quality over quantity.

7. **Present to everyone** – At this point, the sketches should increase in fidelity, and the ideas more focused. Critique as an entire group and go from there.

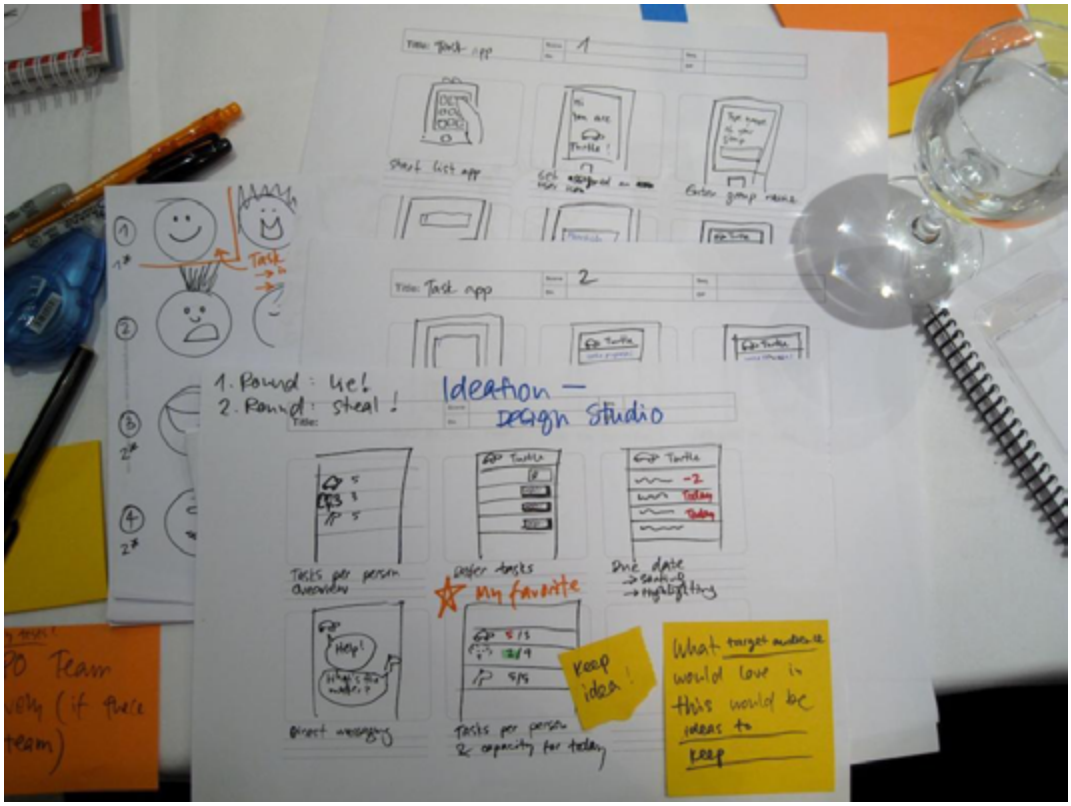
Remember that this process isn't necessarily about finding a solution. It's more about generating ideas, inspiring creativity, and team-building. If an idea or sketch actually grows into a real solution during the session, all the better.



Source: "Design Studio." LindsayT.... Creative Commons.

To capture all the possibilities, make sure you photograph the sketches and upload them to a shared folder. For example, in UXPin, you can upload the sketches into your project (along with any other documents like personas and requirements docs) to serve as references for your team when wireframing and prototyping.

One setback you should be aware of before you start: you'll probably encounter some resistance. Firstly, someone is bound to complain about having to sketch. "I'm not a designer," "No one will understand my ideas," etc. You can try to ease these fears as best you can by reminding them that it's not about the visual, it's about the idea. The sketches are supposed to be rough (even ugly) because they're timed.



Source: "Ideation sketching." visualpun.ch. Creative Commons.

Another obstacle is disrespectful feedback, which is why it's also important to emphasize maintaining a respectful environment. It might be worthwhile to discuss with the group some of the criticism principles we explained in the first chapter. Make sure the people involved respond to the idea and not the execution.

To see how **Hubspot** adapted the design studio technique described by Google Ventures, check out this post from former Hubspot UX Director Joshua Porter.

For more kickoff activities and advice, we highly recommend checking out designer Kevin Hoffman's site Good Kickoff Meetings. Concise and practical, the site is one of the best resources we've found. To name a few, the priority card sort, feasibility plot, and 20-second gut test are all worth exploring.

Kickoff Meeting Templates

Starting a kickoff meeting from scratch can be a difficult responsibility, especially if it's your first time. Below are a few resources to help get you started.

- **Six Revisions Web Development Worksheet** – This 7-page packet allows you to fill in the relevant sections for web design, from technical requirements, to member responsibilities, to stylistic decisions.

- **Pivotal Labs Product Definition Exercise** – This short and simple card poses 6 questions to help you further define the parameters of your product.

- **Questions to Ask at a Kickoff Meeting** – This downloadable Word document from Usability.gov provides several pages of questions to pose to the group, organized by category.

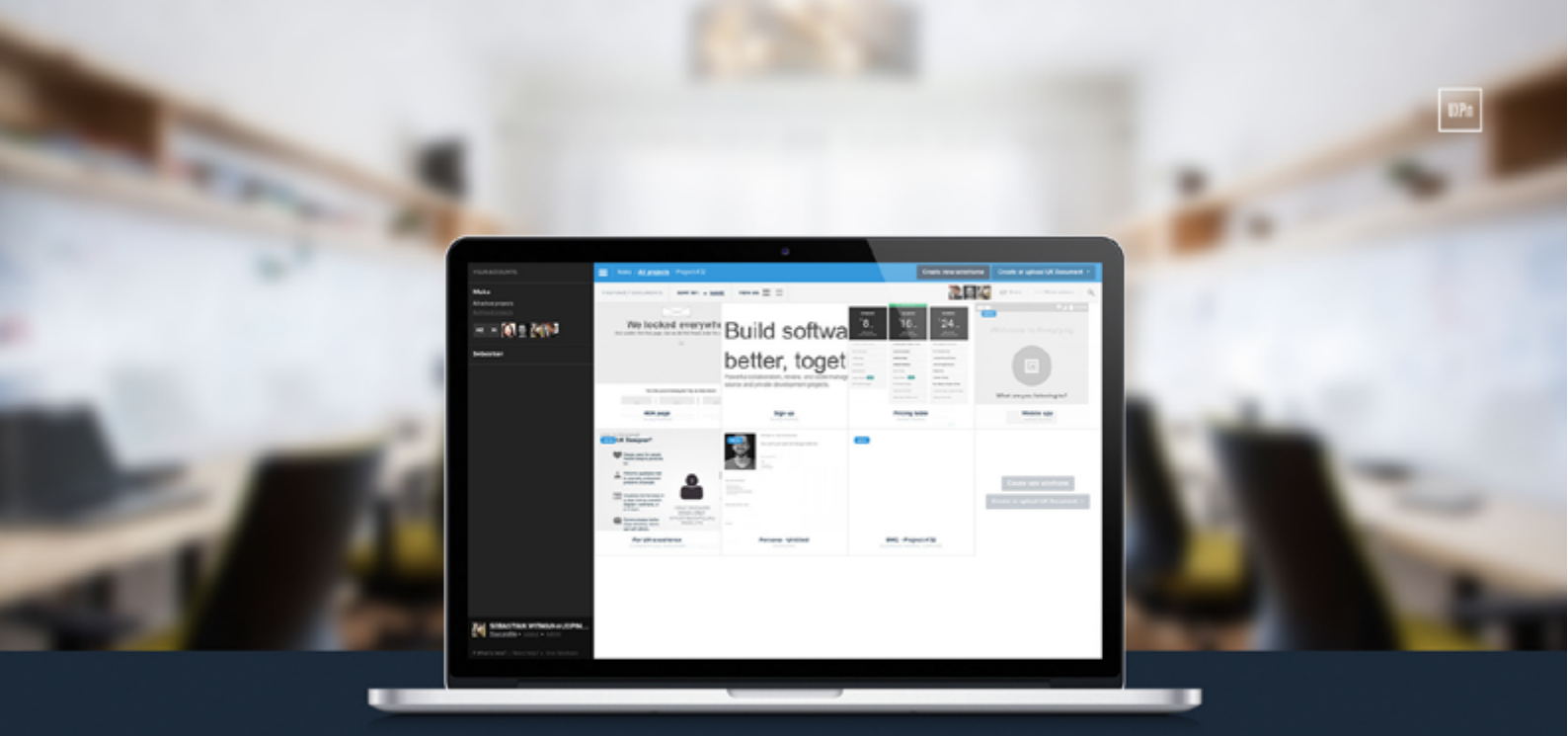
These templates are just to help you along – try fleshing them out with your own ideas and adapt as needed for your company.

Takeaway

It's always hard to get VIPs in the same place at the same time, so make the most out of this opportunity by coming in prepared. Know beforehand what you want to get out of the meeting, and invite everyone whose presence you think would benefit the project. Follow the agenda based on your needs, and we recommend using the design studio to further your goals.

Like first impressions, you only get one chance to have a good kick-off meeting.

Make it count.



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