



EMPATHY IN THE ENTERPRISE:

*understanding the role humans and
technology play in big website problems*

Dani Nordin, Director of Digital UX

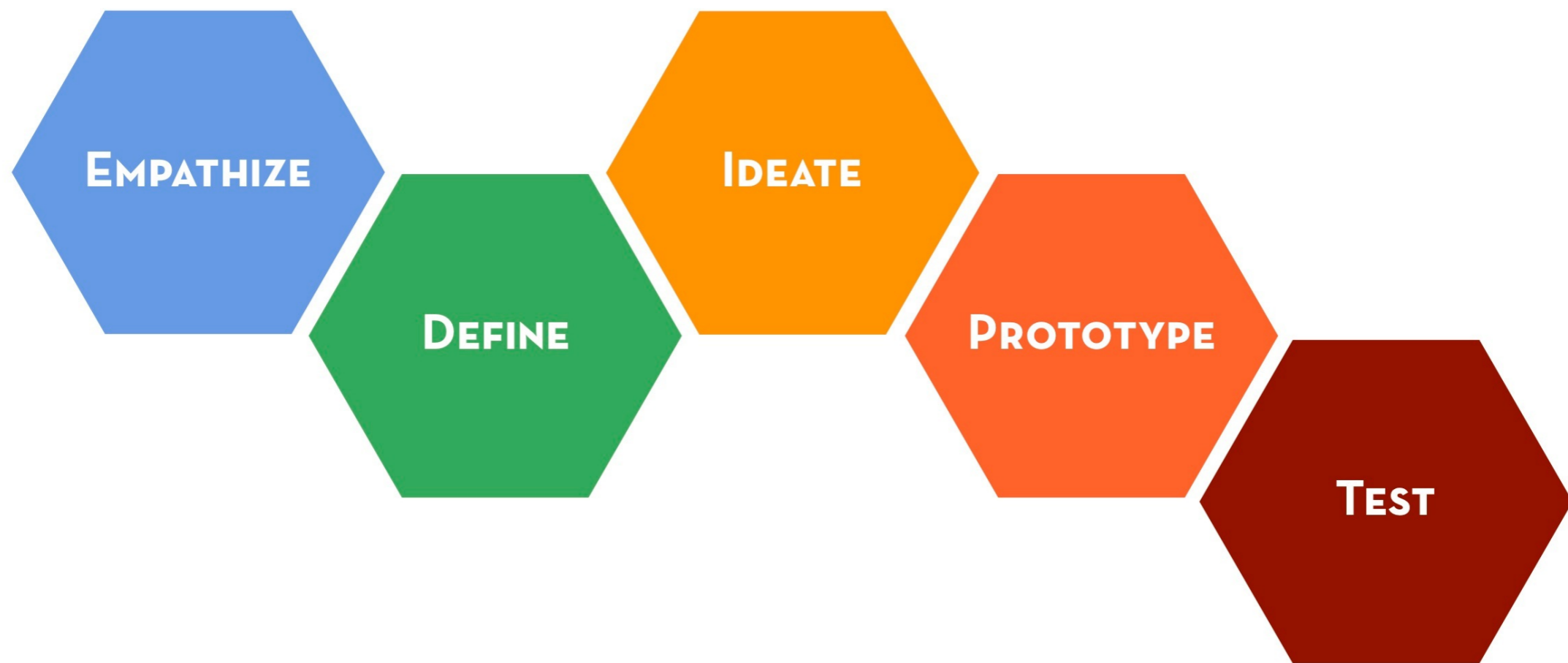
Drupalcon New Orleans, May 2016

Hi there!

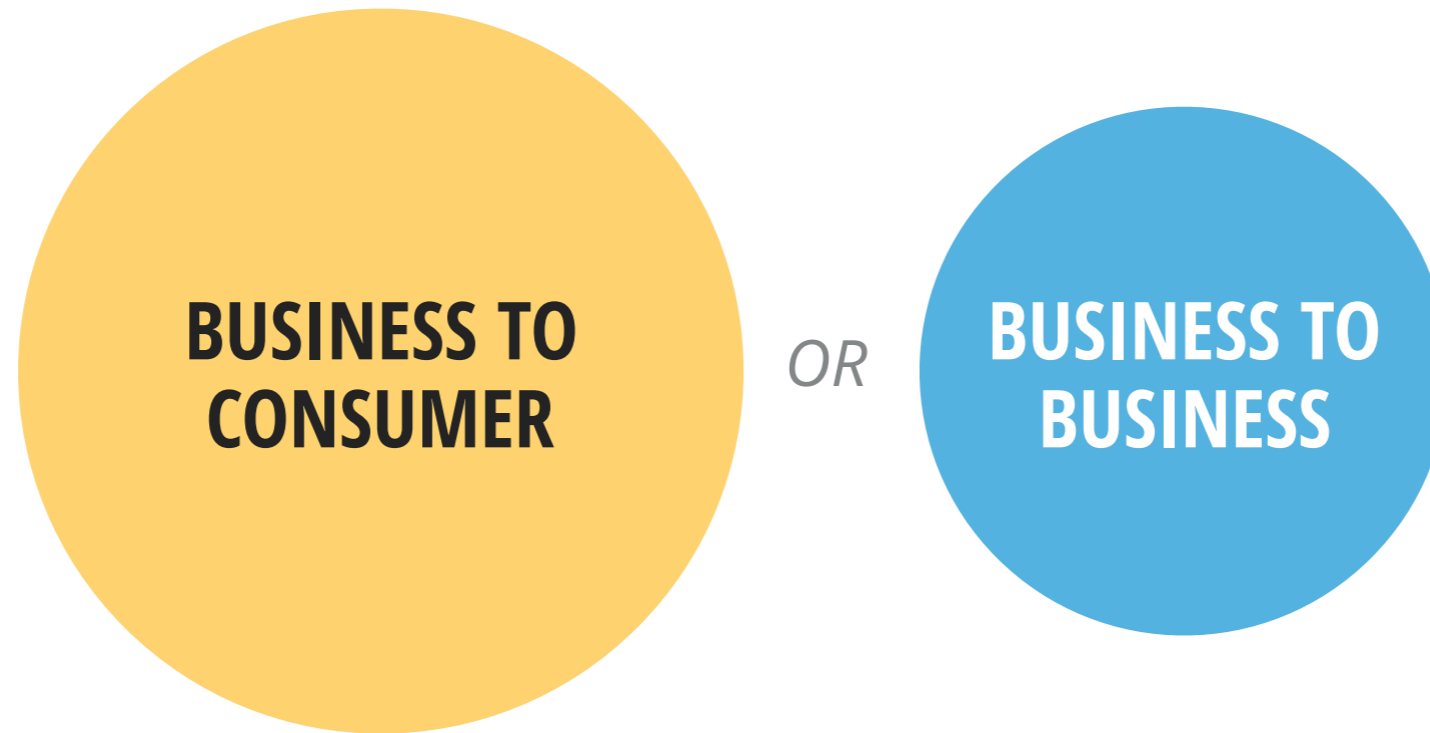
- ▶ Dani Nordin (@danigrri) is the Director of Digital UX at Pegasystems, overseeing the user experience of the company's global web properties. She regularly writes and speaks on design, UX and Drupal. You can usually find her drinking coffee, making things with yarn, and hanging with the world's most adorable 3-year-old.
- ▶ drupal.org/u/danigrri
- ▶ twitter.com/danigrri



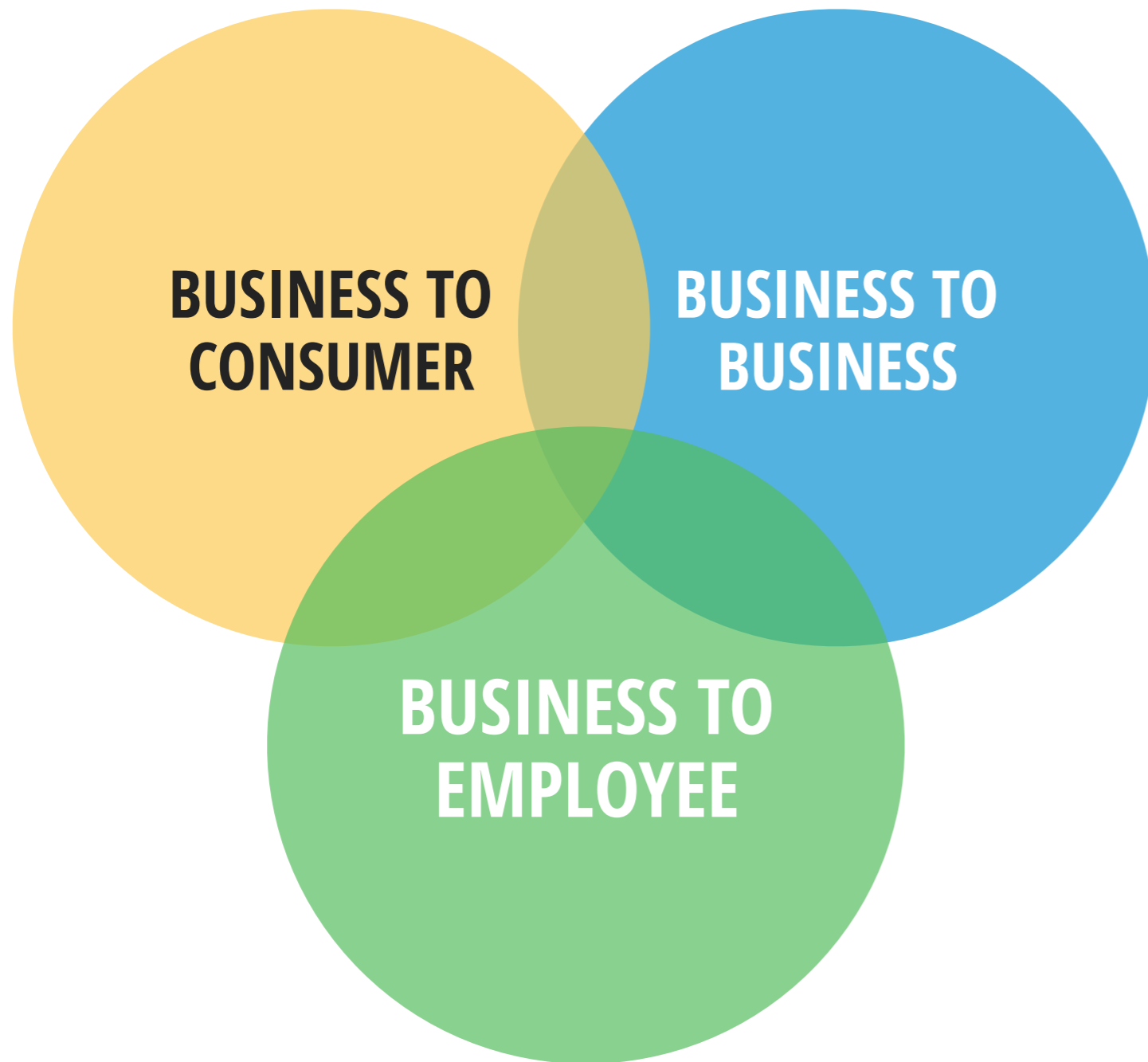
Let's talk about design thinking



When we talk about design thinking, we mean...



But enterprise designers have to live **HERE**:



USABILITY TESTING

PROTOTYPING & DESIGN SPECIFICATIONS

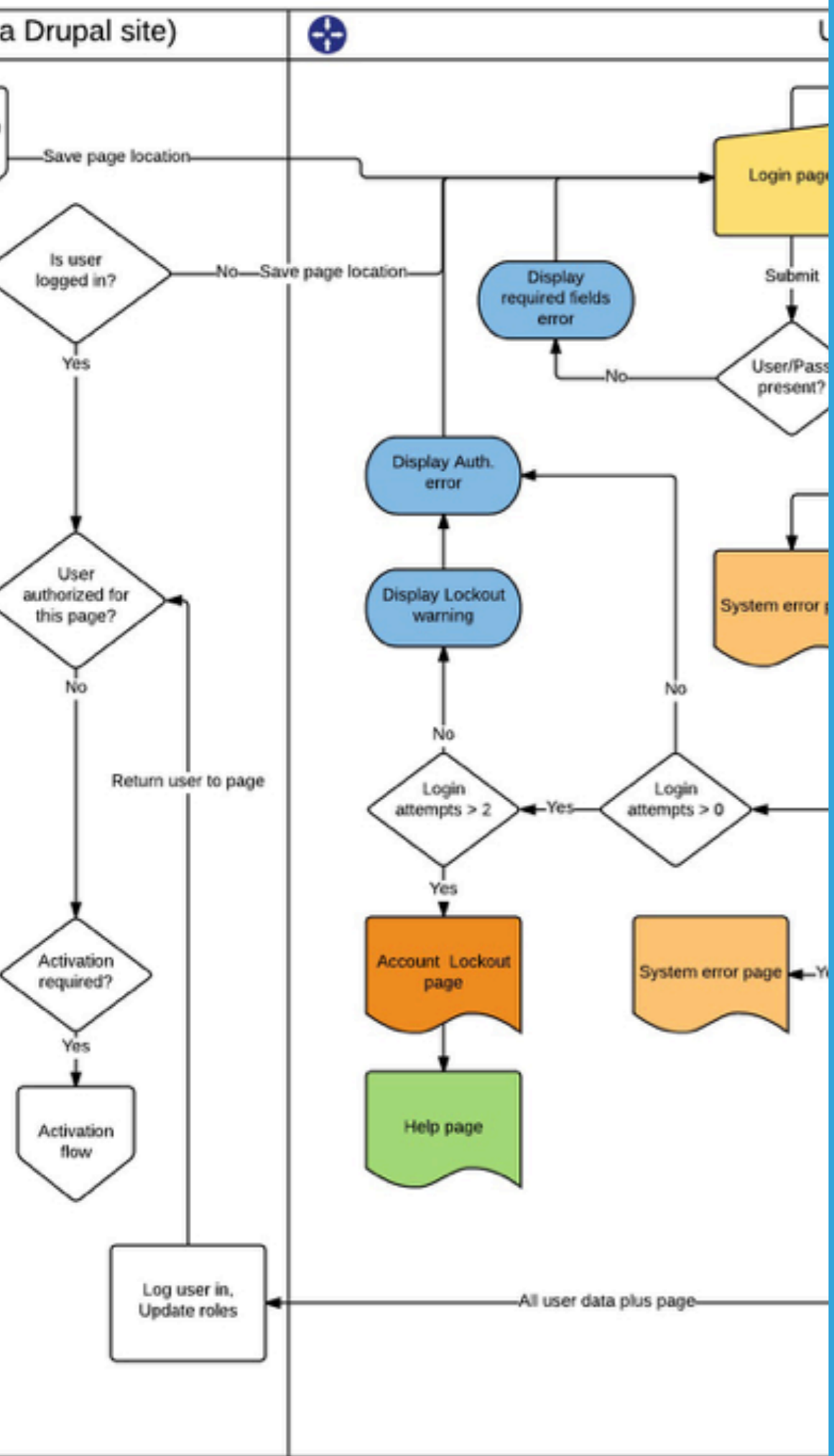
CONTEXTUAL INQUIRY & INTERVIEWS

OPTIMIZING EXISTING FUNCTIONALITY

ADDING NEW FEATURES TO EXISTING TECHNOLOGY STACKS

REDESIGNING/MIGRATING TO NEW PLATFORMS

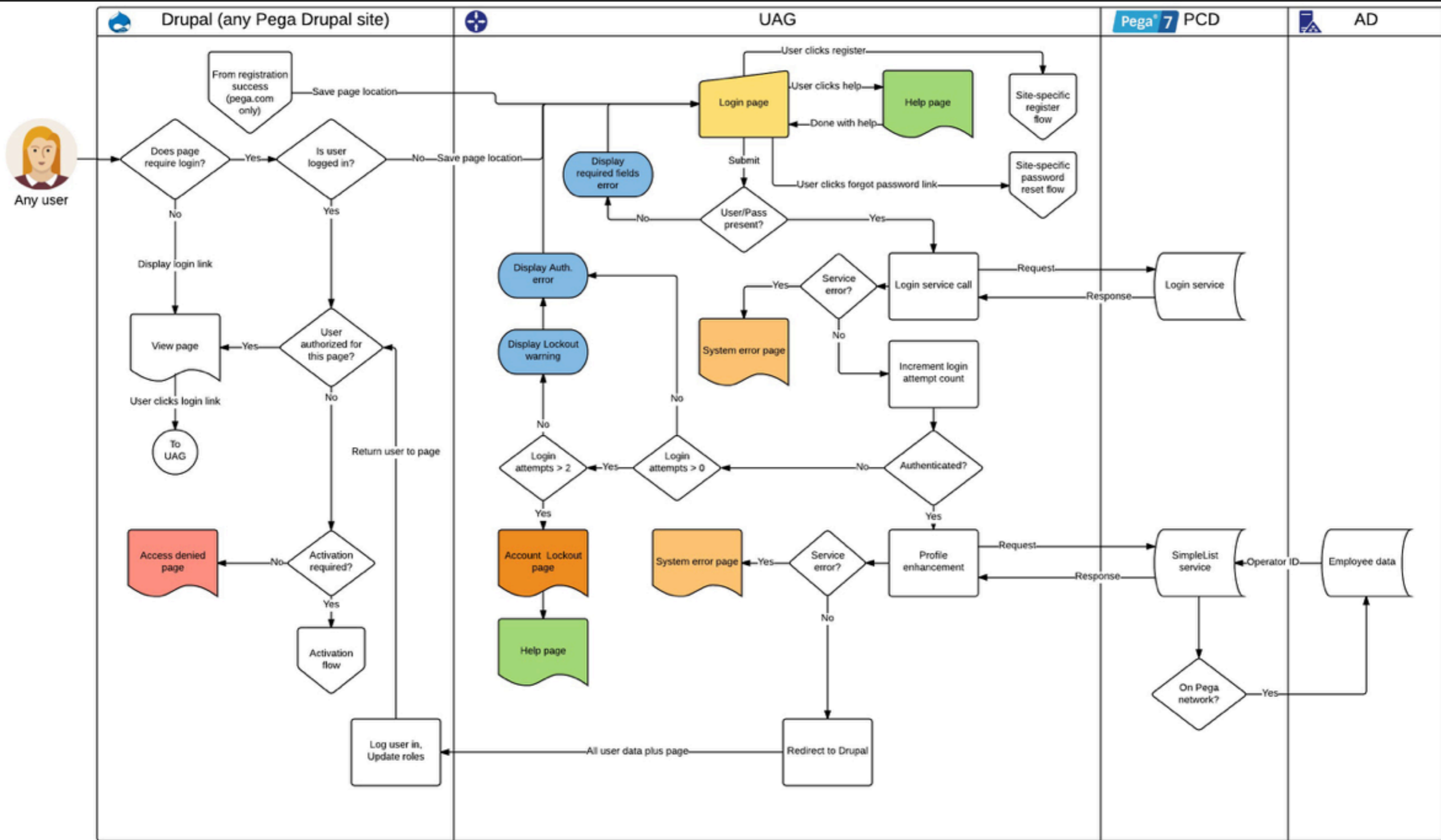
WHAT DO WE MEAN BY EMPATHY?

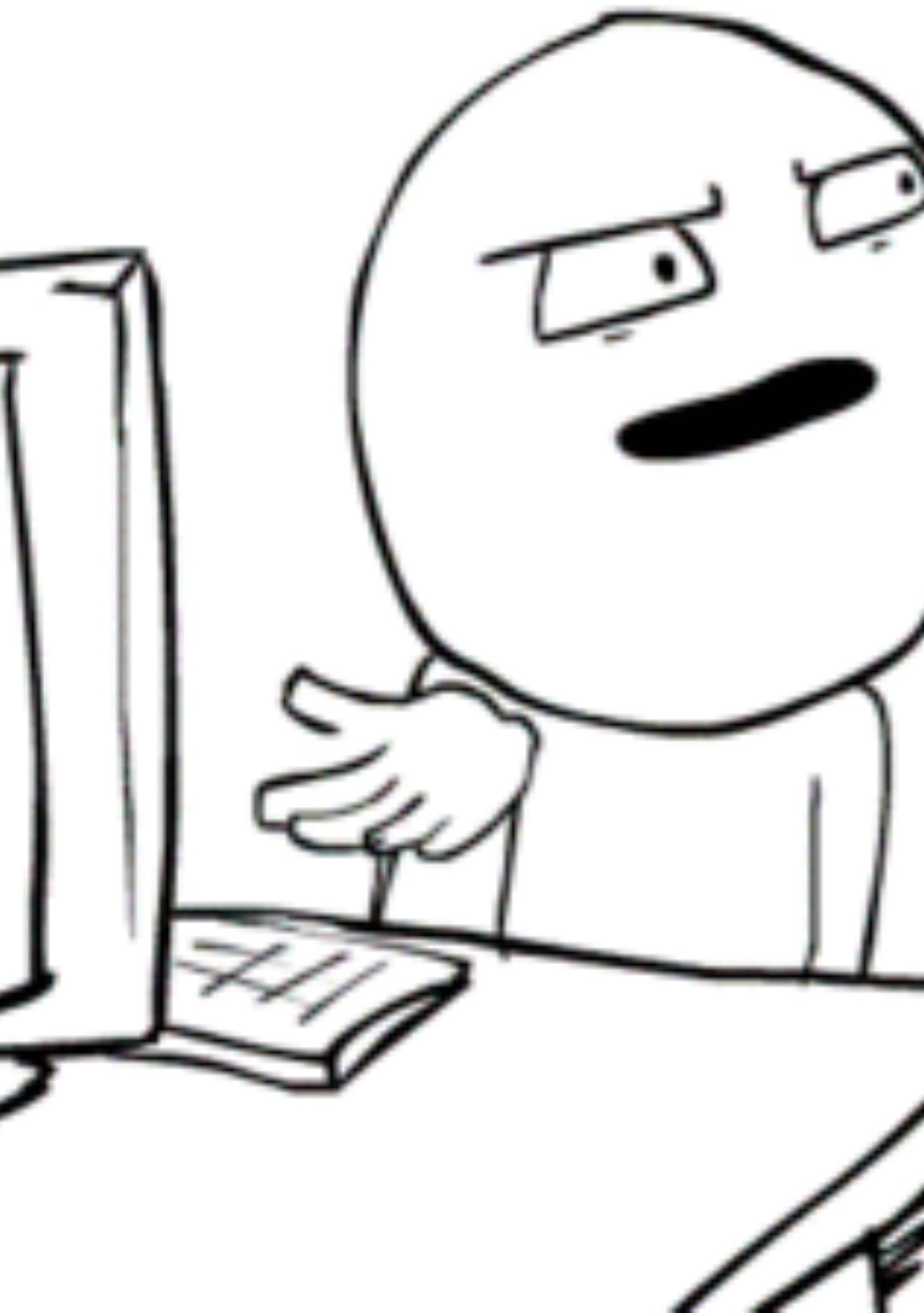


EMPATHY FOR TECHNOLOGY

THOSE TAXONOMY TERMS CAN'T BE CHANGED; THEY'RE FROM [OUR LEGACY SYSTEM THAT'S BUILT IN OUR PROPRIETARY TECHNOLOGY]. IF YOU UPDATE OR ADD INFO, THEY'LL GET OVERWRITTEN IN THE NEXT SYNC.

Harried developer





EMPATHY FOR CONTENT CREATORS

Content creators for Pega websites

TECHNICAL WRITERS

Writes on pace with engineering

Has to time publishing with product releases

Has to turn chunks of content on or off depending on what gets released in this version

Authors in a specialized tech docs tool (Madcap Flare)

How do I get the content I write in Flare into Drupal without losing formatting or duplicating work?

E-LEARNING SPECIALISTS

Creates tutorials, video lessons and walkthroughs

Lessons on one site may include a video combined with articles from another site followed by a quiz

Also authors content in Flare

How do I create a learning experience that crosses two platforms, but feels seamless?

DIGITAL MARKETERS

Creates marketing campaigns, landing pages, blog posts and other site content

Designs often need lots of customized content formatting

Key aspects of the site are beholden to hard-to-change legacy systems

So much content, so little time!

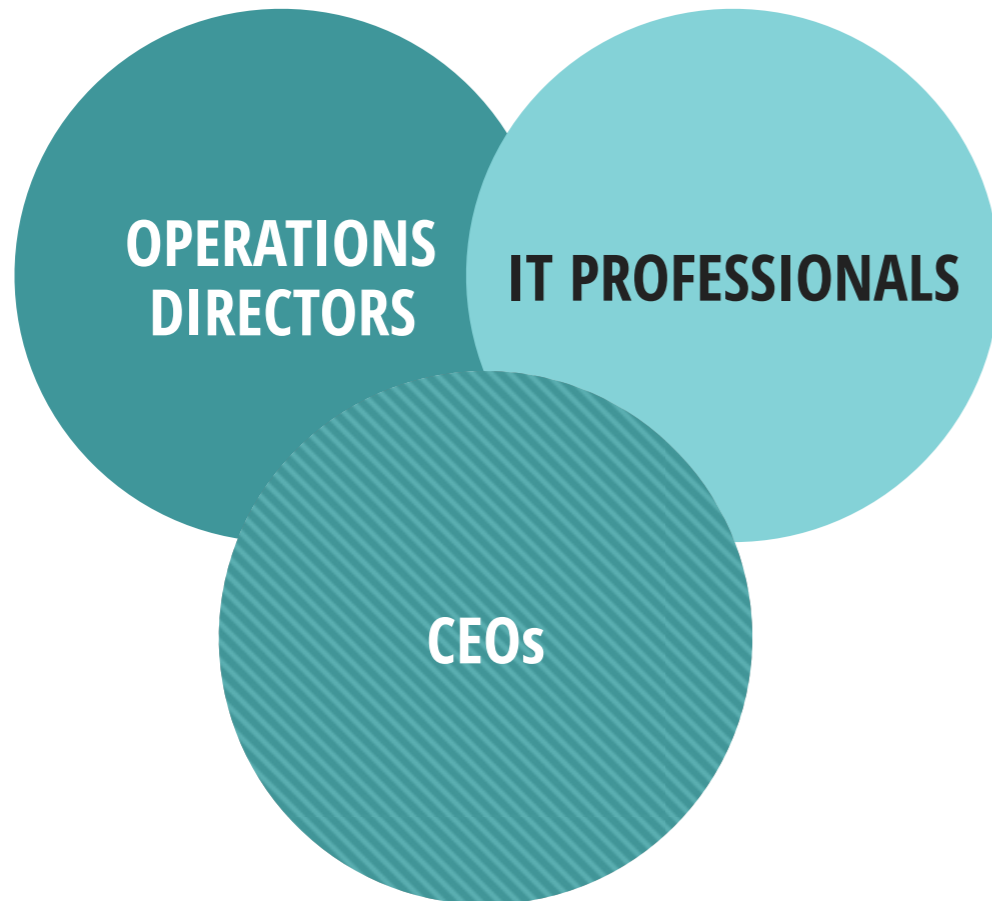
Why do we need two weeks of development time to create a set of landing pages?



EMPATHY FOR CONTENT CONSUMERS

EMPATHY FOR CONTENT CONSUMERS

PEOPLE WHO BUY OUR PRODUCTS



PEOPLE WHO SELL OUR PRODUCTS



PEOPLE WHO BUILD WITH OUR PRODUCTS

PRACTICE LEAD

**PRE-SALES
ENGINEERS**

**PEGA-EMPLOYED
CONSULTANTS**

**DEVELOPERS
EMPLOYED BY
PEGA CUSTOMERS**

**SALES/
IMPLEMENTATION
PARTNERS**

AND THEN THERE'S...

NEW HIRES

POTENTIAL PARTNERS

PEOPLE WHO NEED TECHNICAL SUPPORT

COMMUNITY MODERATORS

INDUSTRY ANALYSTS

EVENT ATTENDEES



EMPATHY FOR THE ORGANIZATION



Backlog

Configure

QUICK FILTERS: Product Recently updated Only my issues Server UI

VERSIONS

EPICS

All issues

SeeSpaceEZ Plus

Large Team Support

Space Travel Partners

Summer Saturn Sale

Afterburner Plus

Local Mars Office

Hyper-speed shuttles

New launch platforms

Delicious Space Nutrition

Spacetainment

> **Sprint 1** 14 issues

▼ **Sprint 2** 6 issues

Start: 10 Aug 2015 — Release: 9 Oct 2015

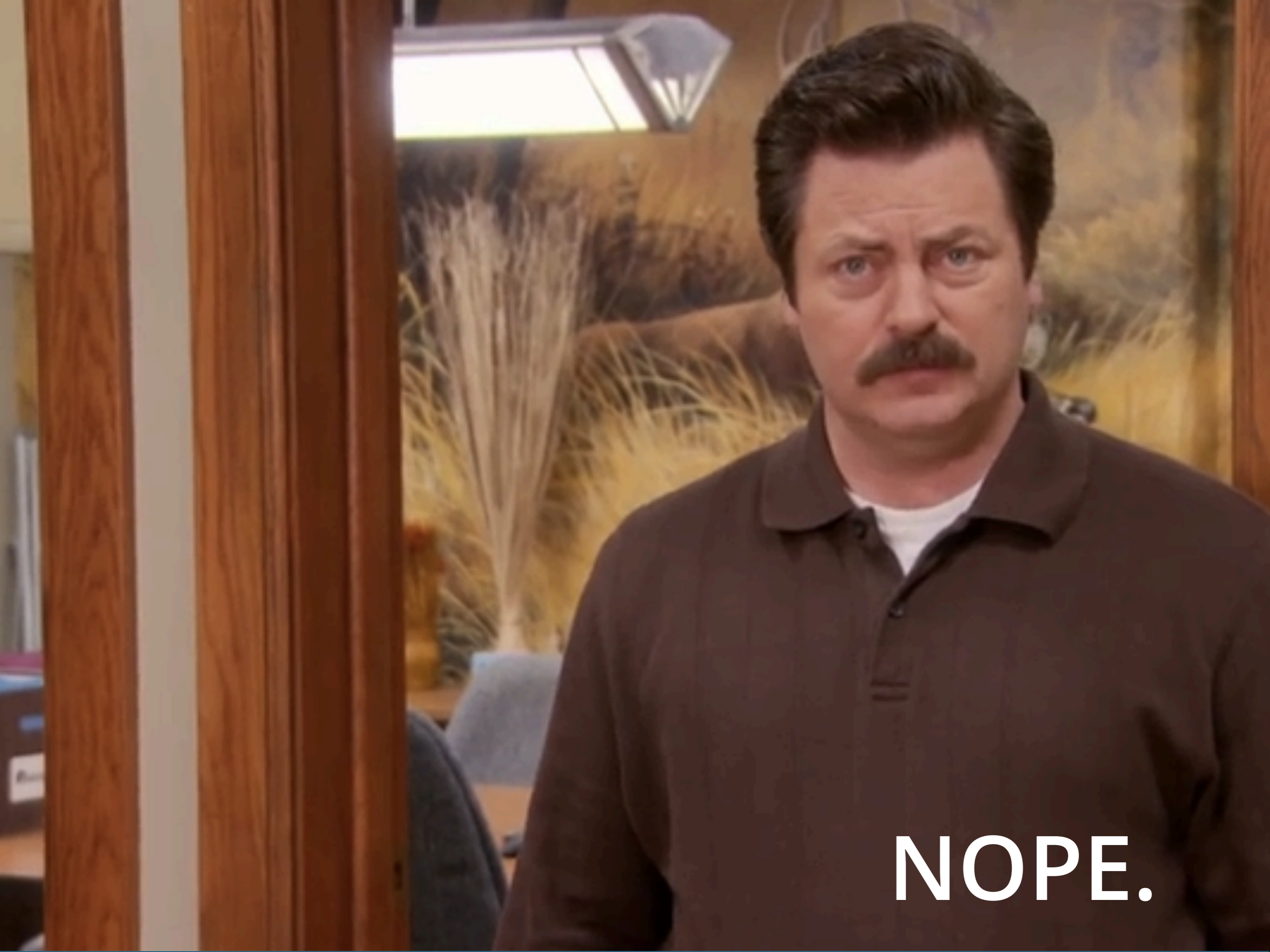


- TIS-25** Engage Jupiter Express for outer solar system travel SeeSpaceEZ Plus
- TIS-37** When requesting user details the service should return prior trip info Large Team Support
- TIS-9** After 100,000 requests the SeeSpaceEZ server dies Local Mars Office
- TIS-7** 500 Error when requesting a reservation Large Team Support
- TIS-10** Bad JSON data coming back from hotel API Space Travel Partners
- TIS-18** Enable Speedy SpaceCraft as the preferred individual transit provider Large Team Support

▼ **Backlog** 49 issues

- TIS-25** Engage Jupiter Express for outer solar system travel Local Mars Office
- TIS-37** When requesting user details the service should return prior trip info Space Travel Partners
- TIS-9** After 100,000 requests the SeeSpaceEZ server dies Space Travel Partners
- TIS-7** 500 Error when requesting a reservation Local Mars Office





NOPE.

WHERE DO WE
START?

PRINCIPLE

**START WITH A SMALL
GROUP AND WORK
YOUR WAY OUTWARD**



@danigr1 | #EnterpriseEmpathy





How to get started

- ▶ Have a broad research toolkit
 - ▶ Interviews and contextual inquiry
 - ▶ Usability tests
 - ▶ Surveys
 - ▶ Analytics
- ▶ Find opportunities to do research
 - ▶ Kicking off new design projects
 - ▶ Evaluating designs in process
 - ▶ Research at user-group conferences and meetups

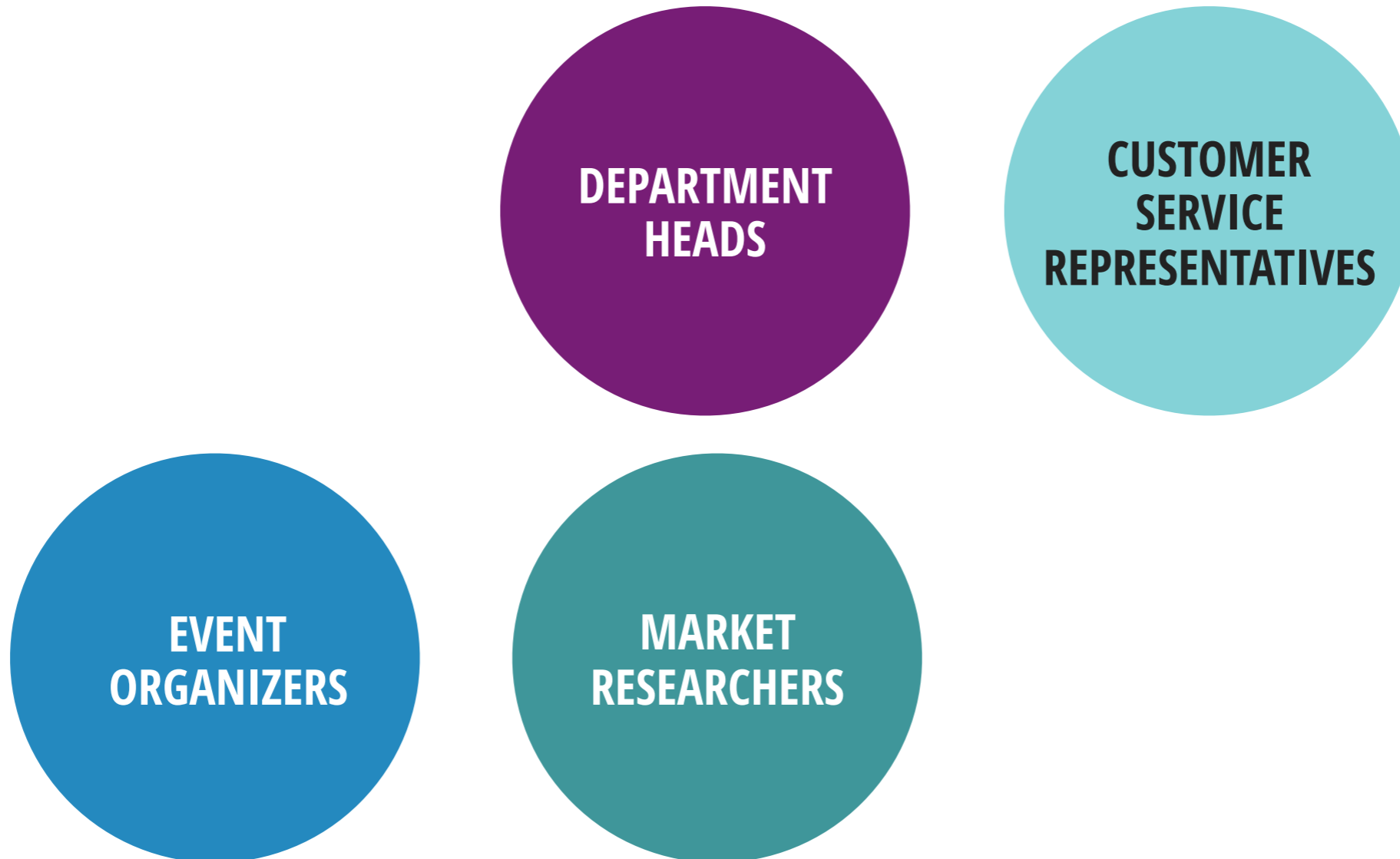
PRINCIPLE

**FIND AND BEFRIEND
THE GATEKEEPERS
TO YOUR USER BASE**



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Who are the gatekeepers?



How to involve them

- ▶ Work with event coordinators to organize research at company/user group conferences and meet ups
- ▶ Sit with customer service reps to understand the types of questions they get most frequently
- ▶ Work with department heads to better understand their employees' needs, and introduce you to potential research participants
- ▶ Ask department heads and event coordinators to forward recruitment emails and surveys
- ▶ Talk to market researchers to understand how the company segments its customers

PRINCIPLE

**FOCUS ON BEHAVIORAL
SEGMENTS, NOT
MARKETING SEGMENTS
OR JOB ROLES**



Marketing segments

- ▶ Tells you what people are likely to need/buy and why
- ▶ Helpful for determining what products/content to offer
- ▶ Doesn't tell you anything about how they actually interact with your site, content or product

EXAMPLES



Behavioral segments

- ▶ Tells you how people interact with your site, content or product
- ▶ Focuses on specific behaviors or philosophies
- ▶ More likely to inform new features or functionality

EXAMPLES

**HARRIED
EXECUTIVE**

**LIFE-LONG
LEARNER**

**OFFICE
THOUGHT LEADER**

**SHOW, DON'T
TELL**

“THE KEY IS TO RECOGNIZE THAT THERE ARE DIFFERENT CASTS OF CHARACTERS INVOLVED WITH THE VARIOUS SERVICES YOUR ORGANIZATION HAS TO OFFER.”

Indi Young

<http://uxmas.com/2013/squabble-over-personas>

PRINCIPLE

**FOCUS ON THE JOB(S)
TO BE DONE**



@danigr1 | #EnterpriseEmpathy

AS A USER, I WANT A SET OF QUICK LINKS TO FILES I NEED FREQUENTLY SO I CAN READILY ACCESS THEM.

Every user story ever

Job stories

- ▶ When my colleagues and I have to work through a proposal, **we need to** have all the template files in one place **so we can work** more efficiently.
- ▶ When I'm starting out on an engagement with a client, **I need to** find the resources and paperwork I need to get up and running as quickly as possible **so I can** feel confident that I'm adding value.
- ▶ **As I'm working** on a client engagement, **I need easy access to** key forms that I have to fill out to report progress on the project **so I can** spend less time doing paperwork and more time getting my work done.

<https://medium.com/the-job-to-be-done/replacing-the-user-story-with-the-job-story-af7cdee10c27#.5e3loa3w>

PRINCIPLE

**SOCIALIZE WHAT YOU'VE
LEARNED. A LOT. NO
REALLY - ALL THE TIME.**





LATEST CHANGE 2 WEEKS AGO

USABILITY TESTING

16-03 Pega.com Industry Page Prototype test

Background

This study was conducted to understand the usability and visual appeal of the updated Industry pages on Pega.com and identify potential usability issues and areas for improvement prior to development.

Study logistics

- 5 participants were recruited using the TryMyUI platform, using desktop machines.
- Sessions were conducted using an Axure prototype (<http://c9isx3.axshare.com/>)
- In 2 sessions, a technical issue caused the prototype to appear in a mobile-only, incomplete "Base" view. We were still abo

Research objectives

1. What do people think they're looking at? What does the company offer?
2. Can they figure out how to find one of our offerings, and what it does?
3. Can they find a way to take the next step on starting the purchase conversation?
4. Can they find any information on how we handle regulatory compliance?
5. Can they figure out where they'd find something they could send a colleague?

Study Protocol

- Without clicking on anything, take a look over the content and layout of this page and give your impressions. What strikes you about this page? What do you think this company does? What do you think you can do from here?
- You would like to learn more about Pega's Client Lifecycle Management product. Please look on this page and navigate to the Client Lifecycle Management product.
- Take a look around this page and give your impressions. What do you think this product does?
- You would like to get in touch with someone to learn more about how you could use this product in your company. Please show how you would expect to do that.
- Please copy and paste this URL into your browser: http://c9isx3.axshare.com/public_sector_level_1.html. Without clicking on anything, take a look over the content and layout of this page and give your impressions.
- You would like to find something you can send to another member of your team to give them more information about Pega's products for this industry. Please explain how you would expect to do that.

name / email



WITH ELIZABETH MULLANE, ZOE KAZMIERSKI, AND 4 OTHERS

BACKGROUND

STUDY LOGISTICS

RESEARCH OBJECTIVES

STUDY PROTOCOL

KEY FINDINGS

POSITIVES

USABILITY ISSUES (MOST SEVER...

DETAILED OBSERVATIONS

RECOMMENDATIONS

CONSIDER DISPLAYING ALL PRO...

INCREASE THE VISUAL PROMINE...

CAREFULLY CONSIDER THE OPEN...

RECONSIDER THE COLOR OF THE...

Starting February 1st! Show Details

WELCOME TO THE PSC!

- Community Mission Statement
- Community Tips & Tricks
- Community Blogs
- Community Rules of Engagement
- Posts That Need Your Help
- Community Polls

THE PRODUCT SUPPORT COMMUNITY

Post your question

Ask it

THE EXPERT!



Ask the Expert



David Kircheis
Product Manager, Integration

Information Experience - Pega 7 Integration:

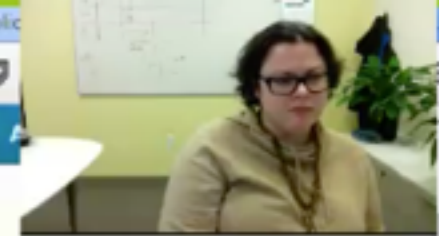
Empower your integration developers to securely link systems and build communication assets using state-of-the-art industry-standard technologies.

ANSWERED QUESTIONS

- Pega 7 import/export jar files**
2 hours ago by David Clark
- Authentication failed: User not found in directory**
2 hours ago by Oscar Negrete
- Any one getting blue screen in IE browser..**
5 hours ago by Srikanth A
- DB2i as a Package Name**
6 hours ago by Prabhakaran M.L.
- AES-access restrictions for remote nodes**
9 hours ago by Ahmad Ali

RECENT ACTIVITY

Filter



Andrey Kostikov
Joined on Jul 1, 2015

We have Andrey Kostikov as this week's Participant of the Week. Andrey has initiated some interesting discussions and has actively participated in driving them. We appreciate your contribution to the community. Keep up the good work. Congratulations!

Follow

Following: 0 Followers: 0

LATEST POLL

Previous Next More polls

What Questions Would You Like Answered?

With our first ever Pega Ask The Expert event coming to you in February, we thought we'd create a new poll asking what else you'd like to ask questions about!

So let us know! What topic would you like us to provide you with an Expert to answer your questions?

If you choose Other, please leave a comment with your topic.

- Case Management
- Mobility
- Pega Marketing
- Performance
- User Interface
- Other - Leave Topic in Comment below

Feature Priority Matrix

OPEN SALESHUB TO SALES COLLABORATORS

SOLUTIONS CONSULTING CONTENT SECTION

INTERNAL "READ THIS FIRST"

CUSTOMER-FACING "READ THIS FIRST"

Essential

PRODUCT PAGE HIGHLIGHT VIDEO

FEATURED STORY SNIPPETS

Utilitarian

ADMINISTRATION/LEGAL CONTENT

SHOW HOW SLIVERS CAN EXPAND

PRIORITIZE SALES "ENTRY POINTS"

High Polish

SPOTLIGHT CASE STUDIES

PEGA.COM VIDEO FEED

PRIVATE COLLABORATION SPACES

Nice to Have



“WHEN WE’VE TALKED TO PEOPLE THROUGHOUT THE ORGANIZATION, WHAT WE’RE HEARING IS A NEED FOR [THIS TYPE OF FEATURE].”

She says in a meeting with the CEO

<https://www.youtube.com/watch?v=wMTYs2LeyEQ>



Join us for Sprints!

Friday, May 13 at the Convention Center

First-Time Sprinter Workshop - 9am-12pm in Room 271-273

Mentored Core Sprint - 9am-6pm in Room 275-277

General Sprints - 9am-6pm in Room 278-282

Evaluate this session:

<http://bit.ly/1rNJ0z4>

