

Case A

Participant: Designer 1 (P)

Facilitator: Xiao Zhang (R)

Date: 20120108

R: #00:00:36-1# In this study, I try to explore the role of designers' personal life experience in their design practice. And designers' personal life experience refers to what happened in their past life, their experience with designed products no matter digital or not, or their interaction with other people and surroundings. And experiences include like your traveling in a foreign country or your experience of using iPhone. And this experience may influence your design work.

P: #00:01:53-0# ok.

R: #00:01:53-2# Can you first briefly introduce [the name of the company]?

P: #00:02:00-7# So [the name of the company] is an enterprise software company that they do large business to business installations, and have technologies to support any kind of business in all aspects and facets of a business, so that includes HR reporting, procurement, and any kind of business, they have software that supports that, and if they don't have, they build and customize it. So [the name of the company] has hundreds of customers and they have been in business for about 40 years.

R: #00:02:51-9# what's your job position? What's the title of your job?

P: #00:02:54-9# Currently, right now, I am the design lead for the team.

R: #00:03:01-2# So what's the name of the team

P: #00:03:04-4# It's the user experience team responsible for [the name of the company] [the name of the product].

R: #00:03:10-1# So what's the routine of your job?

P: #00:03:14-2# The routine of my job. So it's obviously multifaceted, so many, many aspects to my job, I spent a lot time working with my team of designers on individual design problems, so I have a team about 6, sometimes 7 UI developers and designers, like 2 UI developers and I have between 4 and 5 designers, one of those designers is a visual designer, and then the rest are interaction designers. So each one of those designers is responsible for a certain aspect of the user experience.

R: #00:04:01-1# Yes.

P: #00:04:02-5# The UI developers for instance, are responsible for building the user interface of the software in conjunction with the engineers, and so the engineers typically like to work on and focus on large complex problems that happen on the backend of the software. We call the UI developers UI developers because they are responsible for coding the user interface which is specialize skill set and has different sort of approach

to problem solving and doing the work. They are much more focused on quality, aesthetics, performance on the front end, and just generate the user experience as suppose to the engineers who are responsible for coding, you know performance in scalability and robust in security and these backend technology, so those UI developers do that. Visual designers on my team are responsible for the form of the product, what it looks like, color palette, grid and spacing, font choices, graphic visual design elements, iconography, brand, brand management around the software, making sure the software follows the standard brand guideline that come from [the name of the company] global. And then the interaction designers are responsible for workflows and actual affordances in functionality, the user experience of using certain workflows and affordances and functionality within the product. I also do a little bit of visual design. So anyways, those 3 aspects of user experience have to be hold together into one kind of holistic user experience, right? So that's kind of the lens I look through and I 'm responsible for looking at where problems are within the existing product and making enhancements and improvements to fix those problems, but also implementing and integrating new features into the product. And so the new features come from product owners, so there is a team of product owners who responsible for managing the business side of and product decision side of putting the product out of the door, and they decide what features go in the product, when those features go in the product, and how we get to, you know, certain releases, we have releases that come out every 3 months, and so for each release cycle, the product owners decide which features we are gonna build and put into the praetor what changes or improvements we are gonna make to the product, and then I work with those product owners and support for decision making around that, but also help them with the design of the form and behavior of those features, so that's product owners. And I also work with engineers, and we work together to, once we have decided what we gonna build, we work together to first of all decide if it's possible to build what we want to build in the time that we have. And secondly, how best to build it, so we put together designs and we hand off those designs as specifications which are then given to the engineers, and the engineers go and build it, so there is that aspect to my job as well. I also responsible for doing evaluation of the product, so usability testing. So I work with a usability professional and we plan and execute on studies and testing of the product to get a sense of where problems are for the user. And then we deliver those tests to typically 10-12 users for study, and then we organize and formulate a final report about the findings from the testing, sometimes, we do that in a more formal way, other times it is very casual and very quick, because we want to do moving so fast, so that's the valuation work I do. And the other thing I do is we hast and use design research, we sit down and we conducting interviews with users and customers.

R: #00:08:48-8# ok.

P: #00:08:49-0# So there is an important difference between users and customers. Customers are typically responsible for purchasing software, users are responsible for using software or the use in their day to day work. And so that's different when you are dealing with business.

P: #00:09:05-0# Do you have a question?

R: #00:09:07-0# Yes I have a question, what's the difference between users and customers?

P: #00:09:22-5# What's the difference between users and customers? Ok, sometimes, I

talk about them as users VS. choosers. There is a difference between users and choosers, so [the name of the company] build software that really, really big companies use. Like for instance, Boeing, they built airplanes, and they use [the name of the company] software, right? So the person who's responsible for buying software for Boeing, right, is not the same person who uses this software, right? So just like your parents will buy you school supplies, they don't use school supplies, you use them, right? So your parents don't really, totally, always know exactly what you need unless you tell them, but that doesn't always happen, right? so same thing happens in big business, where the choosers will look through a certain lens when they comes to purchasing software, and they have certain things that they are interested in, is it cost-effective? Does it work with our existing software, right? Things like that. And users are more interested in can I use this in a very simple and easy way? Is it intuitive? Can I get my work done? Does it require me to learn a whole bunch of new stuff, right? And that's important to understand the difference.

R: #00:10:41-5# ok, my second question is why the new features of the product came from product owners?

P: #00:10:50-2# Well, the product owners are responsible for the business case behind making product decisions, right? So for instance, let's use a different example, let's use cars, let's say I am a product owner for Toyota, and 15 years ago, I realized fuel-cost and oil is just start to really go up, so I think it will be good if we built an electric car, so here is why we should build that electric car, here is the market requirements and the market need, we done a bunch of research to show that oil-cost are gonna go up significantly, and no one else is building electric cars right now, we think if we get an early start on this, we will be a market leader and people will like Toyota more, and wanna buy more Toyota products cause they are being innovated, right? so then once that decision is made, then you go to the designers and say, right, how do we build an electric car? right? So the same person doesn't do that work because this is different expertise, right? So this product owner has probably looks more through business lenses, what are the margins? How much money can we make if we have all these parts be pulled together, can we sell it at a price point that people wanna buy? And designers are more interested in things like materials and is it intuitive and easy to use, do users understand that if they push the button to start the car and not turn the key, and you are completely different skill sets, completely different responsibilities and basically comes down to the division of labor, and so yeah.

R: #00:12:44-8# I think you said you also do the user testing, so if the findings from the user testing, you also can figure out the new features you need to add to the product.

P: #00:12:58-0# So, the product owners rely on a close relationship to myself and my team because, you know, we inform them and say, Well, you know, it's probably a good idea to still have a key for the car, right? Because it's a model that users are used to, right? So just have a button is a bad idea, so then they decide, Ok, well, then that's something we need to design, we need to design, this is something that's part of the product offering, it comes with a key, right? And that's something that comes out of user testing or user experience, we work together on that, and a product owner who may not be thinking about that kind of stuff, wouldn't think that we need to design and build the key, they just want the button, right? So we worked together and there is always overlap.

P: #00:13:52-0# Does that make sense?

R: #00:13:52-1# Yeah, so what do you think about interaction design practice?

P: #00:14:04-3# What do I think about it? That's pretty broad question, I think you need to narrow it down. I mean I can say, oh I like it, or I can say, you know, this is what I do everyday.

R: #00:14:51-2# So what are the differences between your practice and what you have learnt from school?

P: #00:14:59-2# Oh, ok, I think I understand now. Well, they are significantly different, you know, when I studied interaction design, it was extremely theoretical, I was fortunate enough to work on a lot of projects that were very broad in scope, and weren't require to think about the business case, and weren't require to think about constraints such as time and money, and there is more just about being creative. It's fine to be creative, but really, creativity only goes so far in the real world, and this is the difference between creativity and innovation, is that you could be creative and built something that's really cool and different, but nobody will buy it, right? It is just different for the sake of being different and oh, isn't that creative? Isn't that clever? But no one buys it, right? And the difference between that and innovation is you built something that is creative and clever and everyone wants it, right? So, I think in the real world, innovation is far more important and it is a fundamental difference between school and my daily professional practice, is that the innovation imperative is much more pronounced. You have to build something that people will pay for it, and that really is what comes down to and something that's really hard for designers when they come out of school, is if they spent their whole academic career just being creative, that's a real difficult transition, because business and money runs the world, unless you are working for a nonprofit or you know, you want to take your design practice in a very particular kind of direction, you ended up having to very seriously think about how you make some money off for this. And so, when it comes down to that, it takes a while to get used to that lens and to get good at that lens, alright? And so, I think that's the biggest difference.

R: #00:17:29-2# Yes, that's a clever point. So what the role of interaction designer in [the name of the company]?

P: #00:17:52-8# Ok, so what's the role of interaction designers in [the name of the company]?

P: #00:17:59-9# Well, they are positioned within the user experience group. First of all, they are responsible for designing the behavior of features in our software, sometimes they are also responsible for designing the form, but less so at [the name of the company], because the form is already established and determined by the global group, so basically the interaction designers, most of the interaction designers in [the name of the company], get a handful crayons that are allowed to use, right? because and what those crayons look like and how they are is defined by the global group, so they have to use those crayons to build all the feature. So if you use Microsoft products, they all look and feel the same. So, it's not different every time. So you have to follow what is basically a standardize collection of patterns and user Interface, widgets to build out a feature. And the product that I'm working on, because it's coming from the labs, and [the name of the company] is more focused on innovation, so we haven't followed any strict standards yet, but that's happening and coming soon. Within the next year, we will start

to take, because the product is been starting to be successful in the market, then we have to bring it in line with standard way that [the name of the company] product look and feel. So, anyways, that's what interaction designers do and they work with product owners and they define the behavior of features that are going into new products, they also responsible for evaluating the user experience of existing features in our products and trying to improve them through enhancements.

R: #00:19:51-6# So what was the common design process your design team explored in design the software, so do you have a common design process or you don't have design process?

P: #00:20:06-0# We do have a design process. But again it depends on how you want me to answer that question, right? We have phases that we go through, and I can talk about that. Or I can talk about how an interaction designer sits down and works on a problem. How would you like me to answer?

R: #00:20:26-7# I think I prefer to know how the group does it.

P: #00:20:32-8# So basically, we built the products in sprints. We call it sprints, because we use an agile process. So we have 4-weeks sprints, and we have 3 sprint releases, so every 3 months, we release a new version of the product. For each sprint, we sit down and we talk to the product owners and engineers and we say what we wanna do in this sprint. And we say well, we wanna use a different analogy, we wanna make, say, we are making food instead of software, right? Well, we would say we are gonna make lasagna, and a salad, and some salad dressing, right? And so, somebody agrees, ok and then the engineers would say, what kind of lasagna? Because we only have these ingredients, we don't have any meat. All we have is vegetable. Ok, so we are making vegetable lasagna. Ok, everybody agree on that? Yes. Ok, what kinda salad? Well, let's use caesar salad. Ok, well then, that tells what kinda salad dressing we need. We need caesar salad dressing. So everybody agrees. And that period where you just kinda talking about what you wanna build that sprint. That's called the inception. And so basically then what we do is the designers, they take that and they go away, and they start to draw sketches, and they come back to the product owners, and they say, is this what you had in mind when you through about the caesar salad? And the product owner says, yeah, but I don't like the croutons of purple. Can you just get regular color for croutons? Yes, no problem, so we will go away and then come back and say, is this what you think? And they say yes. Ok, good. So then we sign off on that. And then we take that to the engineers, and the next phase is called elaboration. And we say, right, this is what it needs to look like. It needs to have green lettuce and amazon cheese and these are the croutons that are ground. And it needs to have this amount of salad dressing on it, and not too much and not too little, right? And the engineers go, Ok, what about this and what about that? Can the salad dressing be purple? No! has to be white, right? Ok, ok, what we can do what. Well, can we do base? Well, yeah, sort of. Ok, what do you mean sort of? Well, it's kind of beige blue. Ok, well, that's not gonna work. Ok, then we can't do that. Ok, then what kinda salad is it? Well it's not really a caesar salad, it's got a blue dressing on it. So then what is it? Well, it's kinda parch. Can you just do the salad without the dressing this time? So we can do the white dressing? Yes, we can! Ok, so let's do that. And then just understand that, we are gonna have to tell the people who are coming over for dinner, or who are gonna buy your software. That it's a salad without any dressing on it. Well they are not gonna like that. Well yeah, I know, but that's all we can do. Ok, so when can we have the salad with the dressing on it? Well, we can

have that in 2 months. Ok, so let's hold on and serving the salad for 2 months then. Ok, that's called elaboration. And so, there is inception, which is like everybody just agrees, then we get into the details and look at constraint, right? And that's that whole thing and then get real or scope of what we can or can't do. And sometimes, we have to push out certain features because we can't do them in the time we have. So then once everybody agrees, then they go off, and the interaction designers work on that first piece which is building the salad, and what that's gonna look like. And they hand that picture to the engineers, and the engineers build it, and then the engineers come back and say, ok, here is what I built, and then product owners and designers on my team will sit down and look at them and go, well, it kinda doesn't really totally look at what we had hoped it is gonna look like. That picture we drew for you, this doesn't look like that. And then the engineers go, well, I don't have enough time to make it look like that. And they say, ok, well, how close can you get it? So then they tweak it a little bit, and that's called construction where they are actually building it, right? And then we have a final phase which is called stabilization, so that's point that it's actually built and delivered, and so they come, the engineers come to give us the salad, give the product owners salad, the engineers, the designers design the salad and we eat the salad, and we say, this's pretty good or it needs a little bit more of this, so a little bit more of that, and that's called stabilization and QA, or a quality assurance, right? So the engineers stabilize and we do quality assurance, and then we make a little tiny changes, and then we release.

R: #00:25:28-2# So because every three months, you launch a new version. So is there a big difference between the 2 versions?

P: #00:25:41-9# Sometimes, it's a really big difference, but sometimes it's smaller. It depends how complicated the feature is we are trying to do right, like last year, we created an entirely new landing page for the product, which was more like Google+, right, then just a list of work spaces, and so it had a feed, and it had, you know, people you should follow, and all these social computing affordances were built into the product in the last year, so this is a significant difference until what it was, and so at some point, you have to release those and so you make big change, and follow that with a sprint, which is about cleaning that big changing, making small changes and stuff like that. So we probably get 2 big changes and 2 small releases.

R: #00:26:37-3# Ok. So this project is always going on?

P: #00:26:39-2# Constantly.

R: #00:26:48-2# So based on your design practice, do you think your personal life experiences are one kind of potential factors that can help or influence you in design practice?

P: #00:26:56-6# Yes.

R: #00:26:57-1# Can you give an example?

P: #00:27:07-4# So first of all, I will say this that.....

R: #00:27:13-5# You can first talk about what your project is or what are the features of the software, and you can talk about what the experience is. So what experience influence your design of the features?

P: #00:27:29-5# Sure, ok, one of the things we built in the [the name of the product] is a place where people could go in and collaborate around doing work with other people. It's a collaborative work tool. And so you may have a business situation that becomes up, and you and me and Leah need to get together to work on that business situation. So we create this work container, and all of our documents go in, and that is where you go in and you do your work, right? So that's what we are asking our users to do with this tool. So my day to day experience working at [the name of the company], I spend most of my time communicating in doing work in two ways: the question is how do I currently do this kind of work, right? Is a really important lens for me, right? So I did it in two ways: I sit in meetings, right? And sometimes I have those meetings face-to-face or over the phone or I use email, right? So that's how I currently do my job, right? When I have to collaborate with other people. So we've built this tool that we are asking people to go in and do their work in this new tool, right? The [the name of the product]. So we built [the name of the product], and we want people to go use that to do collaborative work. Right? Well, the problem is that I am already doing my work in a certain kind of way, and most people are, most people do their work with emails and meetings. So when we think about how [the name of the product] should be designed, well it's really important that it works really easily with Email, right? Because that's where all this work is happening for me right now, and I am just not gonna stop doing email, right? So, I need, if you are gonna ask me to use the new tool, it better work really well with the tools I already use, right? And so this is something I am very aware as the design lead for product, right? And so I am constantly advocating and in discussions with the product owners about meeting to make [the name of the product] work better with email, right? Because my personal experience is that, and I 'm also the advocate for the user is that I am already using email, so the more it works with email, and easier it is to move back and forth, the more likely the users are gonna adopt it, right? So every day, that I am using email, and I am doing work and all my work is constantly collaborative, right? I am thinking and looking for points of friction between email and [the name of the product]. Right? So I would say that 95% of my take on, what should and should not go in to [the name of the product] is driven by my personal experience of using it. My personal life experience drives about 95% of my current awareness of what [the name of the product] needs to do and how I need to behave, because the product needs to get to a certain point where it's just easy to use, and then once we do that, we can customize it so that it can fit into all these unique situations, but there is features that what I will call hygiene features. And a hygiene feature is this. The reason is called hygiene, is because if somebody has good hygiene, right? Do you know what hygiene is? Hygiene is, like for instance, you and myself and Leah, we have a shower every day, we brush our teeth, right? We use soap, we wear clean clothes, we wash our hair, right? and so we have good hygiene, we keep ourselves clean, we don't stink, we don't bad breath, right? and we are not dirty, right? But we all met people who don't have good hygiene, right? They don't brush their teeth, hairs are greasy, and their clothes are dirty, right? They might smell...right? So they had bad hygiene. If someone has good hygiene, it's just expected, right? In society, it's expected that you will shower on a regular basis and you will show up to meetings and not stink, right? And so if you have good hygiene, we don't go around and say, oh, congratulations, Xiao, you are clean, right? Because it's just expected, right? Where becomes problem is when it's not there. So when somebody stinks or smells, then everyone is aware of that, but if they don't stink or smell, no one is aware of it, because it's just expected. So that's called the hygiene factor. And you can look through that lens for software, so search is sometimes considered the hygiene feature, is that when it's there, it's like, ok, yeah, I would expect it to be there, right? But if it's not there, it's a

problem, right? So right now we are at the stage with [the name of the product] where there are a lot of hygiene features, that aren't in it yet. And so I don't need to go to do user research to understand those features needed in the product. I can just from my own personal experience to understand that those features need to be in the product. So I can just pay attention to how I do things and how I would use certain tools and represent the user through my own personal experience. So yeah, I would say that at this stage, the product hasn't mature enough that we have covered all the hygiene features and so I would say 90% of my design thinking happens as a result of my personal experience and my teams' personal experience.

R: #00:33:58-4# How does [the name of the product] support sitting in a meeting?

P: #00:34:20-1# There is a bunch of different ways that we looked at. First of all, if you're in a meeting with people, and they are not co-located with you, they are not in the same room with you, they can, one is in Japan, and one is in Vancouver, you need to be able to see the same thing and talk on the phone, right? So we'd like, we are currently looking at how could we make it easy to do that with [the name of the product] so that you can both log into the [the name of the product] the same time, and you can do your work when you are not together in the same room, but you are collaborating remotely.

R: #00:35:00-6# So they can also use [the name of the product] and talk with each other, and they can, on the same page of the screen.

P: #00:35:10-1# So you are here in Japan. And I am in Vancouver. We will meet in an activity in [the name of the product], right? And we'll talk about what we wanna do and take notes, and you can see those notes, and so can I, just like being in a meeting.

R: #00:35:23-4# So this is like Google Docs.

P: #00:35:27-7# Similar to Google Docs. That's just one feature, right? I can't talk about other features because we are still building it, right? But there is a lot of work that we are doing to try to make [the name of the product] work well with meetings.

R: #00:35:43-6# Ok, but this is a great example. Because your example is [the name of the product], so the rest of the questions are about [the name of the product].

P: #00:36:12-6# I should probably say this that when you write your thesis, you cannot be able to mention [the name of the company] or [the name of the product]. You need to say this software product, you can talk about it being a collaboration tool, you can talk about [the name of the company] being a larger enterprise software company. We need to move that stuff.

R: #00:36:34-1# Ok, ok. And thank you for reminding me of that. So [the name of the product] is really a big project, how many people are involved in this project?

P: #00:36:50-3# I think there is about 50 people.

R: #00:37:03-2# So how much did you influence the design results of different versions of [the name of the product]?

P: #00:37:20-1# Significantly...Yeah, so significantly, I would say there has probably

been about 4 significantly different versions of [the name of the product]. So like version 1, and it had like a collection of functions, right? And version 2 had more advance functionality, and version 3. And then right now we are in about version 4. So I would say significantly I have been involved in every single one of those versions. Version 3 and version 4, I was the design lead and so I was very significantly involved in what those look like, but prior to that, version 1 and 2, I was on the team still, but I wasn't the lead.

P: #00:38:54-0# So because you are the design lead of version 3 and version 4. So in the design practice, a product owner told you what should be included in the new version, and then the visual designer and interaction design sketch the conceptual development for the new version. So is the interaction designer, they propose their ideas and then you will determine which design is the best, and you will give feedback for them?

P: #00:39:35-9# Yeah, so the product owners, we collaborate very closely. And for version 3 and version 4, they obviously made decisions about the general feature set that we should have in those versions. But I was responsible for making decisions in addition to my team. My team was responsible, myself and my team. For a significant portion of what the product look like, and how it will be felt, and how those features came together. So yeah, is that answer your question?

R: #00:40:23-9# Yes. So how do you think your personal life experiences can contribute to your creativity in your design practice?

P: #00:40:53-5# Well, I think it's important given my role that I spent as much time as possible using other tools, but also reading and researching contemporary trends in software development and understanding the opportunities. That's a really big part of my job is trying to stay up to date before it's happening in the industry. Particularly because I 'm responsible for innovations, so we have to think about what the next thing is, so we always have to be thinking ahead. So it's important that I 'm using contemporary tools all the time, so for instance, I have the latest iPad, I have the latest iPhone, but I also have access to Android and windows phone 7 mobile technologies. Mobile is a really important direction for us as a company, it's a huge massive technology paradigm shift, so I need to be using mobile tools all the times so that I'm familiar with what are the opportunities and also the issues, and barriers. And so through that usage, I understand through my personal experience, how we can apply certain ideas to our own products, and it's something that designers are always doing, and in that way, I am always working, always, always working, I am always paying attention to everything and all the technologies I am using, I'm reading blogs and making sure I got the latest version of this or that software, and it is just a part of the job, is you have to keep your thumb on the pulse of technology, so and without that, you end up becoming, you know, out of the loop if you will a little bit your skill set becomes antiqued, because if you wanna work in technology, you have to be careful that new technology doesn't deskill you, right? so a perfect example is Flash, Flash is something that's no longer relevant, it's completely in the last year two years falling off and html5 is the new standard, right? so I need to be understanding html5, working with it, I have to be nearly a doctor so that I can get my job done.

R: #00:43:34-8# Do you have other examples that you incorporated your experiences of iPhone or iPad into your own design?

P: #00:43:51-9# That's a difficult question to answer. Mostly because there is all kinds of

patterns issues that come, like if I was to say in sale, oh I use this app, and then it inform this feature in our app. That could get me in legal trouble. So, I can't really talk about that. I can't give you explicit examples. It's just... I can tell you this, right? like for instance, Facebook, right? everyone uses Facebook, right? and I occasionally use it as well, because I need to understand what the experience of using and reading a news feed is like, right? where you have constant events coming in, right? and updates, and that approach to consuming information is become a pattern in our world, and I need to understand what is like to consume all that information, right? it's overwhelming, right? And so it's a kind of fire holes. and one of the big challenges from a user experience perspective around that kind of experience is giving users that handles to filter the information, so that they can just focus on the thing that they are interested in, right? So I am constantly using different examples of feeds, where it called news feed, right? as well as observing different approaches to filtering feeds, to try to come up with the strategy for our own product that uses feeds. How about that, is that a good example?

R: #00:45:38-6# Yeah, it's really good. Ok, I think we are done.