



THE USER EXPERIENCE TEAM OF ONE

A Research and Design Survival Guide

by **Leah Buley** Foreword by Stephen Anderson

 Rosenfeld

THE USER EXPERIENCE TEAM OF ONE

A RESEARCH AND DESIGN SURVIVAL GUIDE

Leah Buley



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The User Experience Team of One

A Research and Design Survival Guide

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For Theo and Chris, my boy and my man.

HOW TO USE THIS BOOK

Who Should Read This Book?

While many people are attracted to the field of user experience because they want to be champions for users, simply loving users doesn't guarantee that you'll be a successful user experience team of one. UX teams of one are people who love users and also make sure that designs get tested, business people's questions are answered, design problems receive an appropriate amount of creative exploration, UX specifications are implemented according to plan, the product is continually monitored and improved upon, and support for UX is ever growing. And they do it all without a roadmap or a blueprint, with the help of people who may or may not be active supporters of UX themselves.

This book is for anyone who is interested in taking on the challenging and rewarding work of spreading a user-centered mindset to new places where it's never been before. While this book is intended to be approachable for anyone who picks it up, it was written with two particular audiences in mind.

- One core audience for this book is people who are already working on product teams in another role but are interested in transitioning into the field of UX. If that sounds like you, that may mean that you've never thought of yourself as a UX professional before, and you're interested in crossing over into the field, either as a main role or part of an adjacent role. For this type of reader, [Chapters 1](#) and [2](#) are a must.
- Another core audience for this book is more experienced practitioners who are seeking ways to work more effectively within a cross-functional team. For this type of reader, [Chapters 3](#) and [4](#) are highly recommended.

What's in This Book?

The user experience team of one ethos is equal parts philosophy and practice (see [Figure 0.1](#)). It focuses on having the right attitude, seeking out opportunities, being patient and inclusive, and doing the best work you can. Between philosophy and practice, I'll cover not just guiding principles, but also the nuts and bolts of how to successfully run a UX project as a team of one.

Accordingly, this book is organized in two parts: [Part I](#) is philosophy, and [Part II](#) is practice.

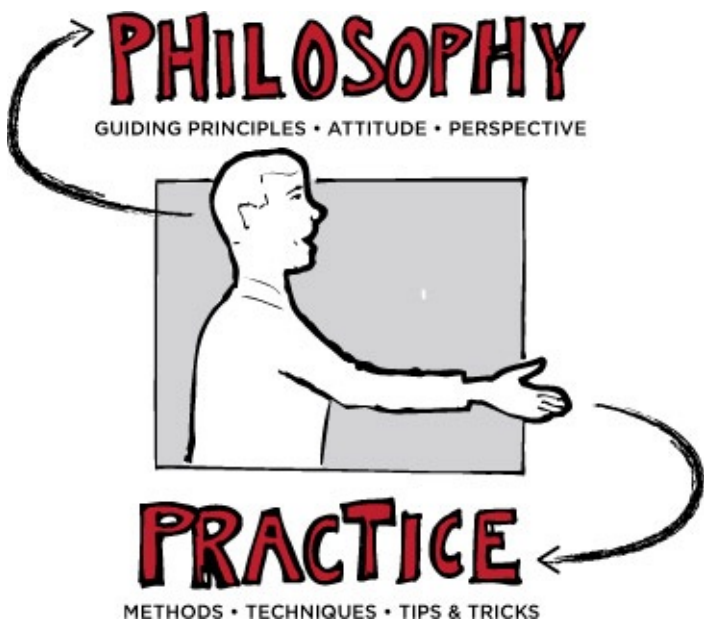


FIGURE 0.1

Being a successful UX team of one is equal parts thought and action, head and hand, philosophy and practice.

Part I, “Philosophy,” is a frank walk-through of the UX team of one’s concerns, from start to finish. In this section, I’ll explain what it means to be a UX team of one, how to establish a successful foundation, how to grow yourself and your career, and how to involve others and build support for UX along the way.

- **Chapter 1, “UX 101,”** gives an overview of what UX is, how it came to be, and what it takes to be a UX practitioner.
- **Chapter 2, “Getting Started,”** focuses on how to begin, including the fundamentals of user research and design for the new and aspiring UX team of one.
- **Chapter 3, “Building Support for Your Work,”** addresses some of the most challenging parts of life as a team of one: how to build support and do great work in spite of real-world organizational and interpersonal constraints.
- **Chapter 4, “Growing Yourself and Your Career,”** is a blueprint for thriving and flourishing as you grow yourself and your career in user experience.

In **Part II, “Practice,”** I’ll focus on the nuts and bolts of user experience work. This half of the book is intended to function as a ready reference, full of practical methods that have been selected and, in some cases, adapted to fit the realities of a UX team-of-one’s situation. What is this reality? Most importantly, teams of one must rely heavily on their non-UX colleagues to help them get work done. That means there is a preference here for methods that can be done in a quick-and-dirty fashion, and an even greater bias toward methods that invite collaboration and cross-functional participation. In some cases, these methods may already be familiar to you, but the approach and tips are adapted for the work of a team of one.

- **Chapter 5, “Planning and Discovery Methods,”** helps you set up a UX project for success. It includes planning and discovery of the team’s requirements and expectations. It also covers techniques for establishing a shared UX strategy with the team.

- **Chapter 6, “Research Methods,”** is all about research. This includes research with users, the centerpiece of a UX practice, as well as research into competitors and best practices.
- **Chapter 7, “Design Methods,”** covers methods and techniques for inclusive and participatory user experience design.
- **Chapter 8, “Testing and Validation Methods,”** provides methods for validating that your strategy, research, and design work has led you in the right direction.
- **Chapter 9, “Evangelism Methods,”** brings our discussion of philosophy and practice full circle, and finishes up with approaches for building support and awareness of UX throughout your organization.
- **Chapter 10, “What’s Next,”** closes with a personal challenge for you to think critically about where you’re taking your work in UX and how it aligns with the growth of the field overall.

Parts I and II are heavily cross-referenced, so methods that are described in detail in [Part II](#) are explained in context in [Part I](#) and vice versa.

The book is designed so that you can dip in and out as needed when you face a specific challenge or are working at a particular point in a project. That said, reading [Part I](#) from start to finish will give you a sense of the common growth path for a UX team of one. And reading [Part II](#) sequentially will give you a complete plan for how to run a UX project.

What Comes with This Book?

This book’s companion website (www.rosenfeldmedia.com/books/ux-team-of-one/) contains some templates, discussion, and additional content. The book’s diagrams and other illustrations are available under a Creative Commons license (when possible) for you to download and include in your own presentations. You can find these on Flickr at www.flickr.com/photos/rosenfeldmedia/sets/.

FREQUENTLY ASKED QUESTIONS

What is a user experience team of one?

A UX team of one is someone who works in a situation where they are the key person driving a user-centered design philosophy. Certainly, if you are the only person in your company practicing (or aspiring to practice) user-centered design, you are a user experience team of one. However, even in organizations with multiple UX professionals, if you regularly work on a team where you are the *only* UX person, you are a UX team of one. [Chapter 3](#) explains the kinds of challenges that UX teams of one commonly face, and explains what to do about them.

I'm a freelancer. Is this book for me?

The User Experience Team of One focuses primarily on people working in or with organizations. It is not explicitly geared toward freelancers, consultants, or contractors. Still, much of this book may be relevant for independents, insofar as they, too, must often work with the cross-functional teams of their clients. And for readers who are considering going out on their own, be sure to check out the section “[Considering Going Independent?](#)” in [Chapter 4](#).

What's different about life as a UX team of one?

If you are a UX team of one, you have these unique challenges:

- **You feel like a jack of all trades, master of none.** You do a variety of work: probably some design, some research, some writing, some testing, and some evangelism. You care about your work, and you want to do it well. But being a generalist, you may feel as if you are spread a bit thin. You may also wonder at times if you're “doing it right.” Would a specialist's level of knowledge make a tough design problem or difficult conversation easier to get through?
- **You need to evangelize.** You probably work with or for an organization that doesn't yet “get it.” That is, they haven't fully bought into the value and purpose of UX. Or, even if they do value user experience, they may not be in a position to fully fund and build a robust UX practice. Either way that means that you're constantly seeking to educate and influence.
- **You're learning on the job.** You need to figure out how to do your work on your own. You may have discussion lists and professional communities that you can turn to for peer-to-peer advice, but in your day-to-day work, you often have to make an educated guess and then trust and defend your hunches as to the best next steps.
- **You're working with constrained resources.** The biggest challenge for teams of one is time. There's only one of you, and there's a lot of work to be done.
- **You're charting your own course.** No one in your organization has done this before. You're figuring out your own career path, without a guide or a manual to follow.

What makes this role interesting is the dramatic tension between needing to inspire through expertise and trying to build your own expertise at the same time. This leads to a unique set of challenges that go well beyond simply trying to do good design. It makes skills like facilitation, flexibility, assertiveness, and persuasiveness central to the team of one's toolkit. This interesting tension has practical considerations, as well as philosophical ones—and that simple fact is the inspiration for this book.

Chapters 2 and 3 explain the working conditions that a team of one often experiences, while **Chapters 5 through 9** provide specific methods that are optimized for those working conditions.

Is this just an intro to a UX book?

Yes and no. This book is intended to be accessible to people who are just starting out in user experience, as well as seasoned practitioners. **Chapter 1** provides an overview of user experience and can serve as a basic introduction to the field. However, the methods in **Chapters 5 through 9** aren't just typical UX methods. They have been chosen because they educate and involve others who may not be familiar with or supportive of user-centered design, while requiring less time and fewer resources.

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FOREWORD

There are some things you should never do at the same time: Move. Have a baby. Adopt a puppy. Change jobs. Leah did all of this while also writing this book.

And while anyone who knows Leah shouldn't be surprised by her ability to pull all of this off, this speaks to a tenacity shared by those who find themselves in a "UX Team of One." There's a certain amount of grit, or perhaps it's foolhardiness, that allows us to plunge into the unknown, the untried, the undiscovered.

My own entry into the user experience world was a solitary one: dot-com boom. Lone visual designer. Surrounded by a team of engineers. Like many others, I had to look around and figure out *on my own* how to do things. Fifteen years later, I'm delighted to report that's still the case. Even as a consultant hired for my expertise, I'm still learning and making stuff up as I go along. We all are! What's more, this learning is not all solitary—we have the shared experiences of a maturing community to draw upon. What Leah has shared in this book will no doubt add new tips and processes to your own bank of knowledge, as it has mine.

But, beneath all the artifacts and processes, there's something more that keeps us going, something timeless, something fundamental: *grit and curiosity*. These traits are what keep us in the game. I suspect most of us aren't happy to leave well enough alone. And it is this dissatisfaction, this searching for something better, combined with a deep empathy, which defines the UX community. Everything else flows from this core.

I was fortunate to see Leah debut her "UX Team of One" talk at the 2008 Information Architecture Summit. (I still have my button!) Aside from a stellar presentation to a standing-room-only crowd, I recall Leah's *no-nonsense* approach to design. From the hand-drawn slides to the quick exploration of different ways to refresh an aging online service, it all just made sense. Cut the crap, do what needs to be done. No more, no less. Her presentation was at once obvious and inspiring. That was one of the few slide decks I looked for after the conference.

Which is why I was thrilled to find out later that Leah would be sharing these ideas in a book. We need to exchange rigid processes for more flexible ways of responding. Yes, there's merit to a hardened, repeatable process, or having a team of specialists to work with, but working alone means jumping in there and getting things done, whatever it takes! No nonsense. No formal process. This is better than defined roles and responsibilities. Working alone brings with it a certain amount of freedom and autonomy. We can shape the path before us. For this reason, working alone is something to savor, rather than endure.

Certainly, individuals need a team to pull off great things. But I've found that nearly every successful product story can be traced back to one or more devoted mavericks, individuals who pushed forward against all odds.

And here's the bigger truth: Whether you find yourself all alone or in a team of like-minded folks, we are all individuals with a unique voice, opinions, and diverse experiences that define us. We are all a UX Team of One. My challenge to you: Draw upon this diversity—magical things happen at the intersection of seemingly unrelated ideas. Don't let a job title define you. Do what makes sense, not

what process dictates. And most of all, never stop playing and learning. If we can all hang on for the ride, there is no limit to the places we'll go!

—Stephen P. Anderson
author of *Seductive Interaction Design*

INTRODUCTION

In June 2011, this message appeared on the Interaction Designers Association (IXDA) discussion list:

I am at a point in my life where I know I want to do UX design after doing Web design for so long and then reading about usability testing, etc., 6 years ago. But my issue is I'm tired of working for orgs who say they care about their customer but don't do testing to even know what their customers want from them... I'm kind of fed up with working for people who don't get it.

This frustrated plea perfectly sums up the challenge that many passionate user experience professionals face. Many organizations have only a modest understanding of user experience. Some have none at all. In such an environment, if you are the key person driving for a more user-centered way of working, you *are* a user experience team of one. (And that's true whether it's your official job title or not.)

But this is about more than just professional frustration.

While this book is intended to be a practical resource for people who do user experience design without the support of a large UX team, I'll tip my hand right here at the beginning and confess that I believe that being a UX team of one is much more than just a job. It's also an important avenue for doing good in the world. The UX team of one is as much a professional circumstance as a constructive philosophy. And here are its founding principles:

- **UX is a force for good.** In an increasingly technological world, designing products with real people in mind helps us make sure that technology integrates in our lives in a human way. It's a voice of reason, arguing that products and technology can support and even enrich our fundamental humanity.
- **The world needs more of it.** As the boundaries continue to blur between the technological world and the analog world, everything that we buy, use, and do will need this user-centered perspective. Companies that never thought of themselves as being in the user experience business before will realize that they are now. We all are. This field can only grow.
- **You can make that happen.** Yes, you. The person reading this book right now, whatever your job title, whatever your career aspirations, you have it in your power to spark an awareness of the "user's perspective" in the work that you do and with the people that you work with.

This book can help you spread the growth of a new and exciting field, one person, team, and company at a time.



Philosophy

What makes a team of one special is that you find yourself in situations where you not only see an opportunity for a more user-centered approach, but you also need to lead the charge, bringing others along with you. A team of one challenges the mighty forces of the status quo, inertia, and other people's way of doing things. That's brave and ambitious work, and it requires not only technical know-how but also vision, conviction, and a soft touch. This part of the book will arm you with all of the above. The approach outlined here can help you spread the growth of a new and exciting field, one person at a time.



PHOTO BY ANGELO AMBOLDI (FLICKR)

CHAPTER 1



UX 101

Defining User Experience

An Example

Where UX Comes From

Where UX Professionals Come From

If You Only Do One Thing...

Talking about user experience (UX) can be a bit like looking at an inkblot test: whatever matters the most to you ends up being what you see. People find their way to the field of user experience through a variety of pathways, and they naturally apply their own lenses in how they think about and describe the work of UX. This chapter will attempt to balance out the picture by giving you a simple definition of user experience to work with, a little more information about where it comes from, and an understanding of how it's different from other fields.

Defining User Experience

User experience is a famously messy thing to describe. Many people have offered their own definition, and yet no single one has prevailed as the clear favorite. UX, it turns out, is a controversial concept. This is probably because “user experience” is a general term that describes not only a professional practice, but also a resulting outcome. To be a user experience designer means to practice a set of methods and techniques for researching what users want and need, and to design products and services for them. Through good UX, you are trying to reduce the friction between the task someone wants to accomplish and the tool that they are using to complete that task. The resulting user experience that someone has is determined by a multitude of factors so vast that no one person, team, or even technology can claim to be responsible for it (see [Figure 1.1](#)).



FIGURE 1.1

Often, the term *user experience* refers to the encounters that people have with digital products like software or a Web app.

In a simple working definition, you might say that a user experience is the overall effect created by the interactions and perceptions that someone has when using a product or service (see [Figure 1.2](#)). *User experience* is a fancy term for what people often describe with words like “love” or “hate”; or phrases such as, it’s “easy to use,” or “a pain in the butt.” You may recognize *user friendly* as a term that has worked its way into popular usage. For example, when someone says a product is user friendly, he is basically referring to the user experience. Given that we transact so much of our lives through technology, how easy or difficult it is to use is what really matters. And that’s what user experience is all about.

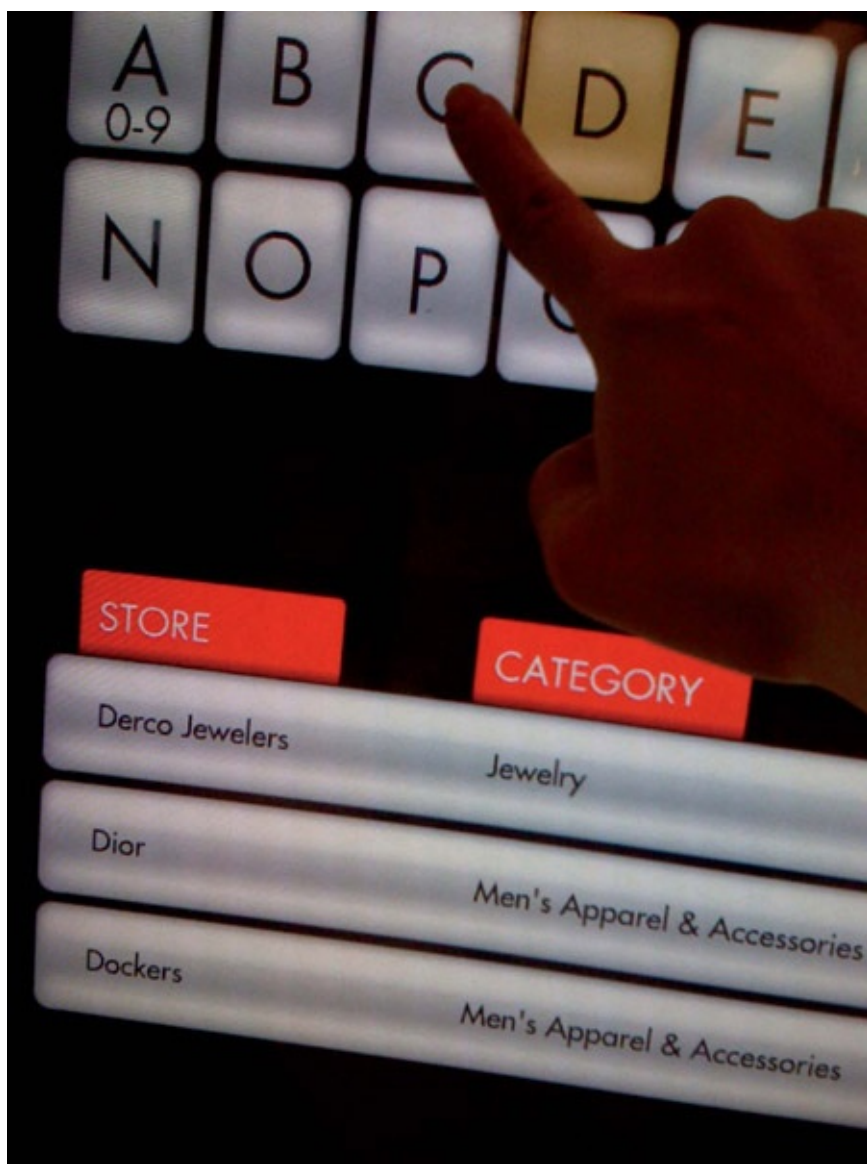


FIGURE 1.2

User experience is not just restricted to what you do on your phone or your laptop. This shopping mall directory has an interactive user experience, which impacts how easily shoppers can find what they are looking for in their physical environment.

As a field of professional practice, user experience encompasses several disciplines. The main contributors are user research and user experience design. User research is about understanding users and their needs, and user experience design is about designing a user's interactions with a product from moment to moment. Lots of user experience professionals have one of those titles, but it's also common to see people mixing and matching these terms into inventive but nonstandard titles like "user experience architect" or "user interaction designer."

What's in a Name?

An alphabet soup of acronyms has been adopted as shorthand for user experience. Which one you use depends largely on what term your organization or professional community has adopted to talk about user experience. Although they vary quite a bit,

all terms tend to be variations on the theme of “experience.” Among them, you’ll find UX (user experience), XD (experience design), and UE (user experience, again). Although the acronyms differ, they pretty much mean the same thing.

Things get a little trickier when you start talking about the subdisciplines that make up UX. Being a somewhat new field, the user experience community hasn’t done a great job of standardizing its job titles yet. A quick scan of user experience job postings will unearth a grab bag of titles: UX designer, UI designer, user researcher, customer experience researcher, interaction designer, information architect, user experience architect, usability engineer, graphic designer, visual designer, Web designer, copywriter, tech writer, content strategist, design strategist—and infinite permutations on all of the above. Ultimately, these roles fall into one of just a few categories:

- **Interaction Design or Information Architecture.** Someone who designs the structure and detailed interactions of an application or product, similar to an architect. This person decides which rooms need to be in a building, how people go from room to room, and where the windows and doors are placed. Note that some people see the two roles as distinct. You could argue that interaction designers focus on screens, detailed interactions, and workflows, whereas information architects focus on information structures, controlled and uncontrolled metadata, and ultimately, findability. However, both roles share a fundamental goal: designing how a user moves through a complex information system from moment to moment. So, for simplicity’s sake, I have placed them here together.
- **Visual Design.** Someone who focuses on the visual layer of an application or product (color palette, typography, hierarchy of information, and visual elements). Although layout of screens and pages is typically considered to be the interaction designer’s job, a good visual designer will also have a point of view on layout. If the interaction designer is like the architect, the visual designer is like the interior designer.
- **User Research.** Someone who conducts research into user needs and behavior. This could be qualitative (for example, one-on-one interviews with a handful of people to gain a rich understanding of their motivations and experiences). This could also be quantitative (for example, sampling large pools of people to uncover broad trends in attitudes, behaviors, pain points, and the like). The research usually spans up-front discovery of user needs all the way through to product validation and usability testing. If the interaction designer is like the architect and the visual designer is like the interior designer, the researcher is like the demographer that uncovers who really lives in this place and what important factors characterize them.

- **Content Strategy or Copywriting.** Someone who thinks strategically about the role of content across the entire product. This person considers what messages are being delivered to users, how the language should be framed, what the voice and tone of the product is, and how and when the content will be created (and by whom). This person makes sure that all in-product content is consistent, on-brand, and contributes to a unified experience. Basically, the content strategist sets the tone for the tenor of conversations that take place here. What topics do people talk about? What's the local dialect? What stories get told? How do the people who live here ultimately communicate with each other?

Most UX teams of one act as generalists, blending some or all of the above roles together. If you see the title *user experience designer*, it's usually one of those catchall roles.

But there are other disciplines that certainly contribute to the resulting experience that a user has with a product, even if they may not fit as snugly into the job description of a user experience designer. These disciplines include visual design, content strategy, copywriting, business analysis, product management, project management, analytics, search engine marketing and optimization, brand marketing, and even engineering. In this field, there are lots of heated discussions about who gets to claim ownership of the user experience. Without fueling the flames, let's just say that for the purposes of this book, if you do *any* of these things, you're contributing to the user experience of your product, and this book is for you.

An Example

Personally, I think it's easier to understand UX when you think about what it's like to actually use a product. For example, right now I'm sitting in front of my computer, hopping around within the operating system and keying from my word processing program to my email program to my music program. My perception of each of those programs is impacted by how it looks, how it functions, and how well it serves its purpose in the personal need that it satisfies. (Helping me write a book; managing my personal and professional communications; and listening to some tunes that keep me tapping my feet as I work, respectively). In any of these programs, a thousand little decisions were made by someone—or more probably, many “someones”—to create what I experience as the flowing, seamless experience of working (see [Figure 1.3](#)).

And that's just the software. My user experience is also impacted by the physical hardware of my computer: How big and bright the screen is, and whether it feels like “enough” to help me effectively use the hodgepodge of programs for which this laptop is intended. The tactile feel of the touchpad as I scroll down long Web pages. The satisfying clickety-clack of fingers tapping their way across the keys. These are all user experiences, too.

And what about the products and services that are connected to my laptop? Recently, I set up an in-home music system that integrates wirelessly with software that I run on my computer and my mobile

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