

Unlocking the Power of User Research

Establishing a user-centric culture in B2B environments

Arun Jolly Joseph



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- I am from **New Delhi**, India
- Drinking beer in Germany since 6 years, currently in **Hamburg**
- **Bachelor in Computer Applications**
- **M.Sc. Human-Computer Interaction** (Psychology and Organisational Design)
- Working as a **UX Designer** at Kühne + Nagel for ~ 2 years
- Previously - Deutsche Post DHL
- Frustrating myself playing Apex Legends and following Arsenal



400,000

customers trust us to manage their logistics.



Over 130

years of corporate history



109

countries, connected by our network.



2030

is the year by which we aim to make **all shipments CO2 neutral.**



Over 80,000

logistics and supply chain professionals who give their best everyday.



5

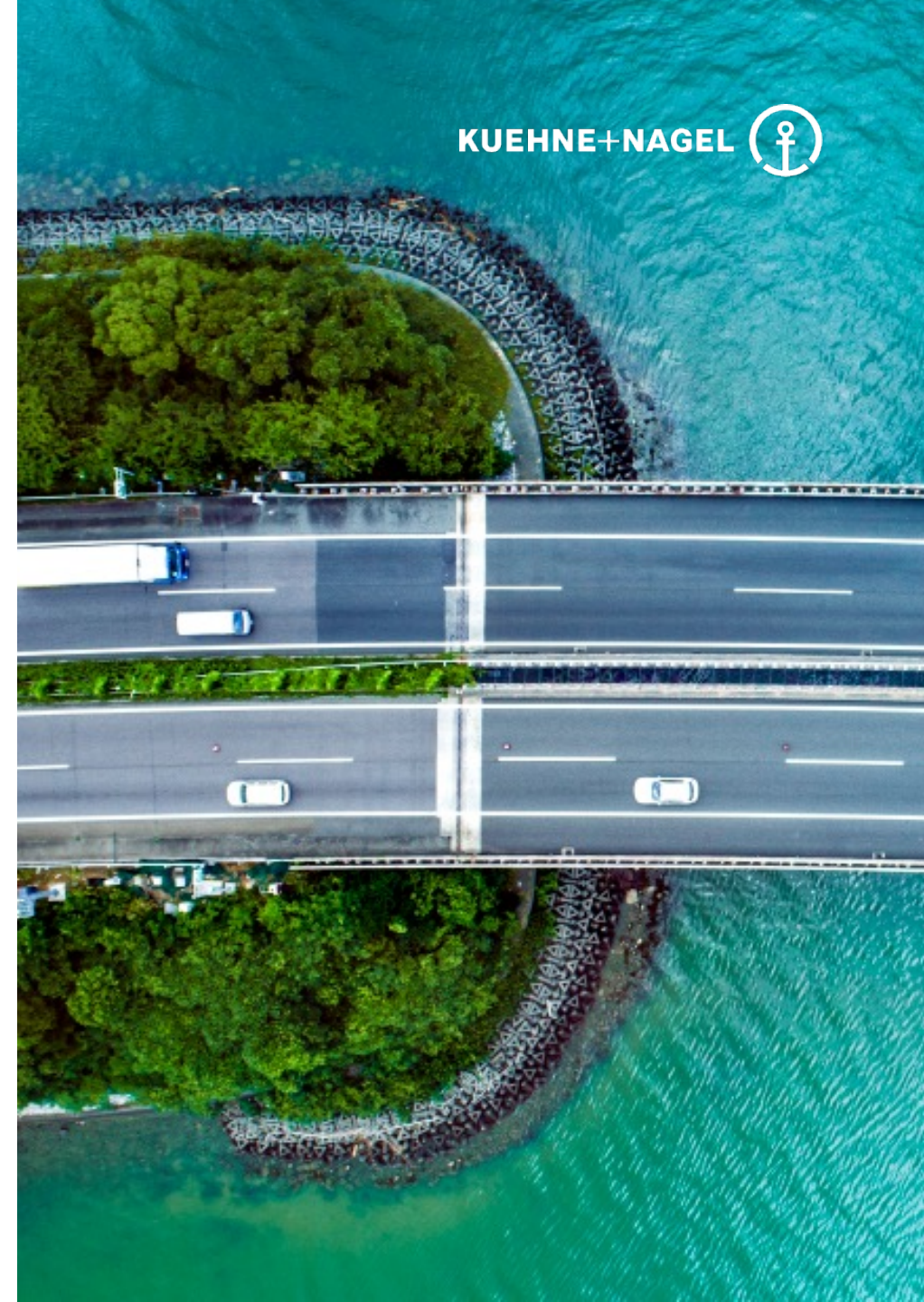
regions across the world

Sustainability – aiming for CO2 neutrality in 2030

- Transport and logistics are responsible for 7% of global emissions. **We take responsibility** to counteract climate change.
- Kuehne+Nagel's **Net Zero Carbon** programme:
 - **2020 achievement:** CO2 neutral for all direct, own emissions (Scope 1 and 2 GHG protocol)
 - **2030 target:** additionally CO2 neutral for all transport by suppliers (Scope 3 GHG protocol).
- Active participant in various **sustainability initiatives:**



- Listed into various **sustainability stock indexes:**













KN-ESP

Focus on the top 100 customers of KN

Design based on operational efficiency and collaboration

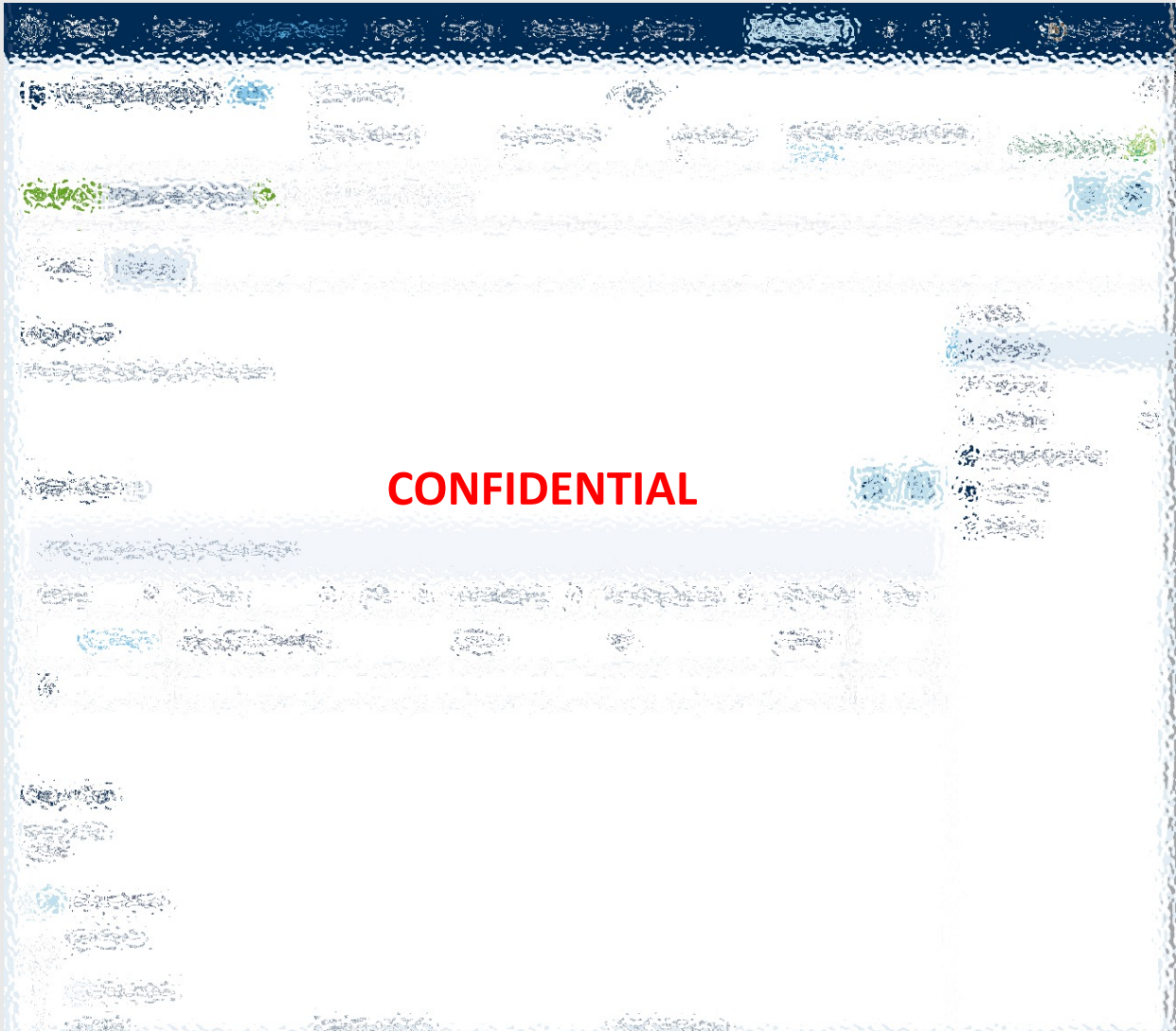
Biggest software project in KN – over 300 people

myKN

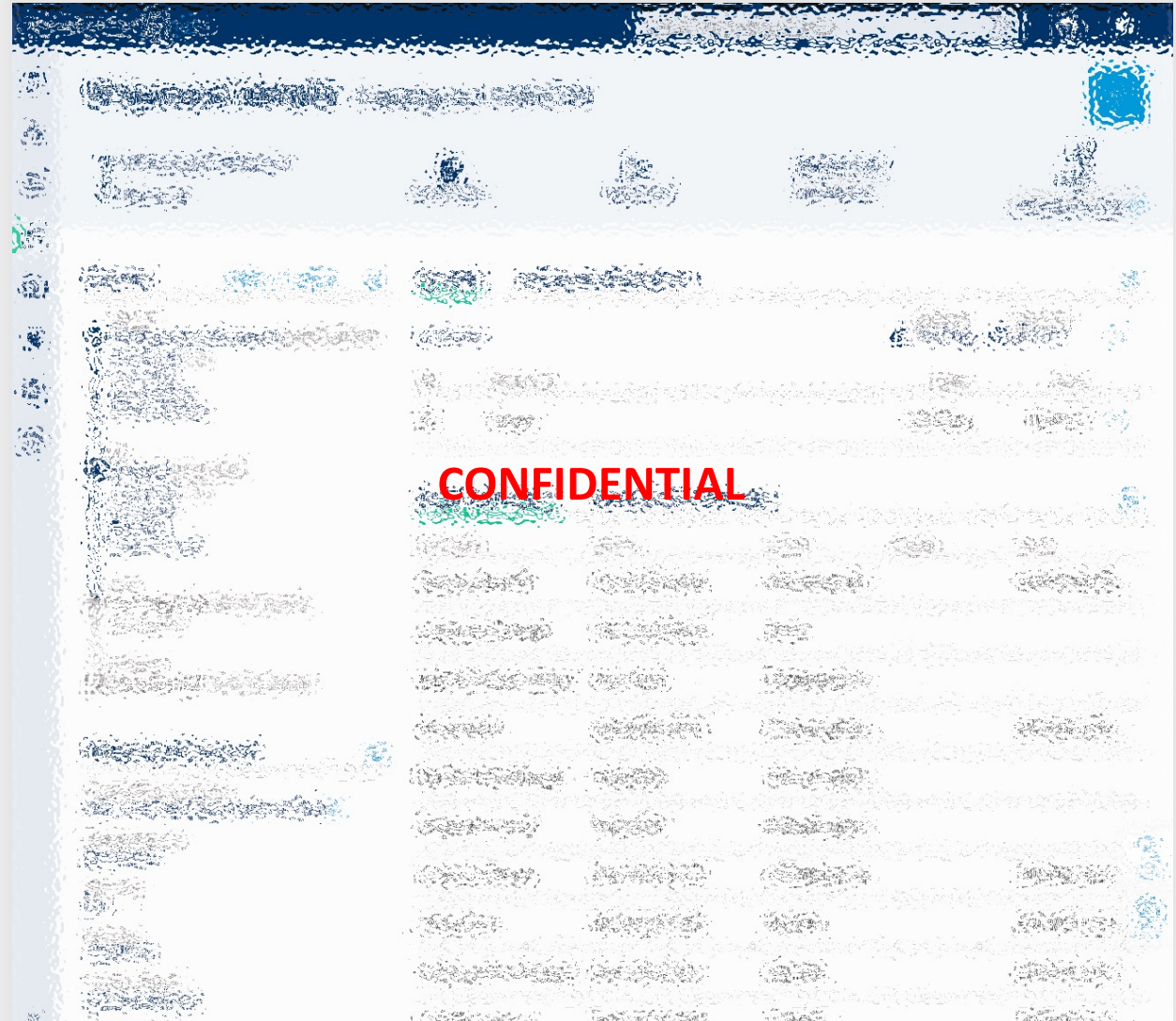
Focus on Small and Medium Enterprises (SMEs)

Design based for visibility purposes

KN-ESP



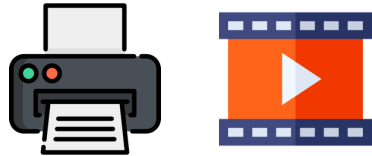
myKN



PROJECT MISSION:

**Integration of two systems:
KN-ESP with myKN**

KN System Trainings (example)



Creation of more training material



How would the integrated product look like?



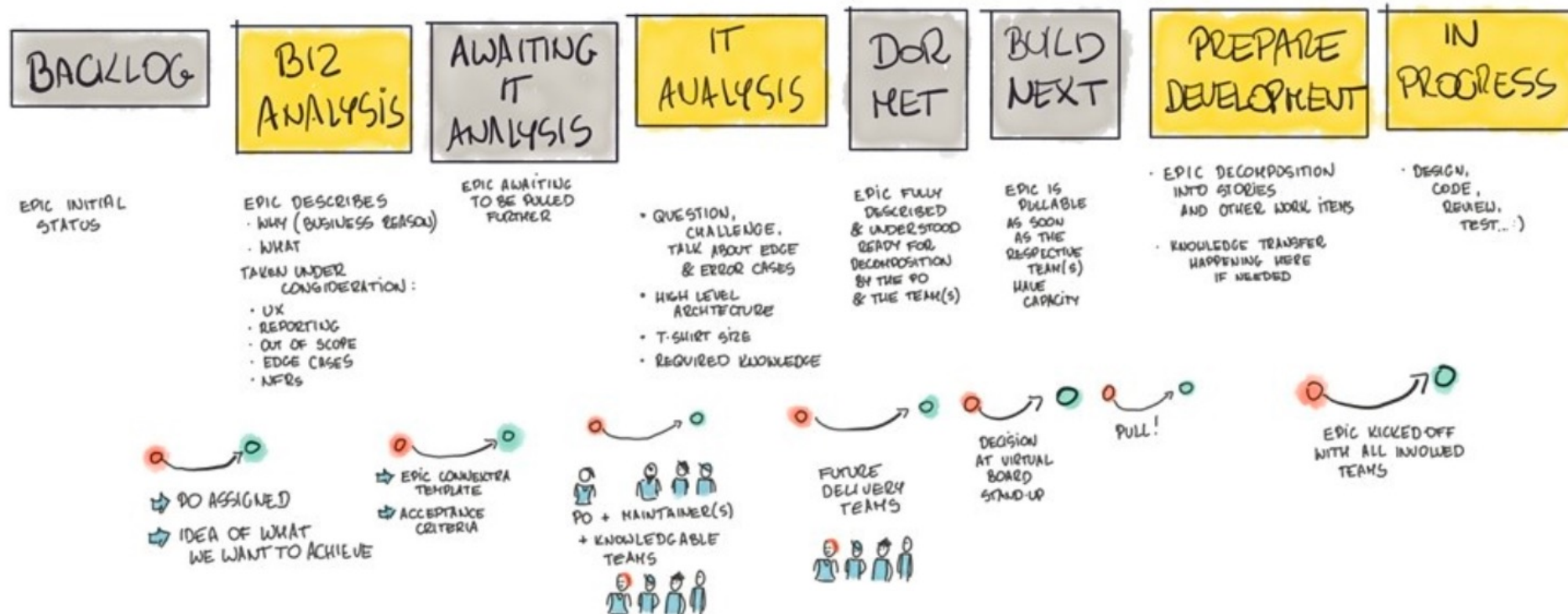
Attended Onboarding sessions with Regional Manager and Implementation Managers

“A user interface is like a joke. If you have to explain it, it’s not that good”. — Martin Leblanc

How did the Upstreaming process look like?

ESP EPIC/IMPROVEMENT WORKFLOW (LEVEL 2)

COMMITMENT POINT
↓



How did the Upstreaming process look like?

ESP EPIC/IMPROVEMENT WORKFLOW (LEVEL 2)

COMMITMENT POINT
↓



EPIC DESCRIPTION
WHY (BUSINESS VALUE)
WHAT
TAKEN UP
COMMITMENT

- UX
- REPORTING
- OUT OF SCOPE
- EDGE CASES
- NFRs

QUESTION, CHALLENGE, TALK ABOUT EDGE & ERROR CASES

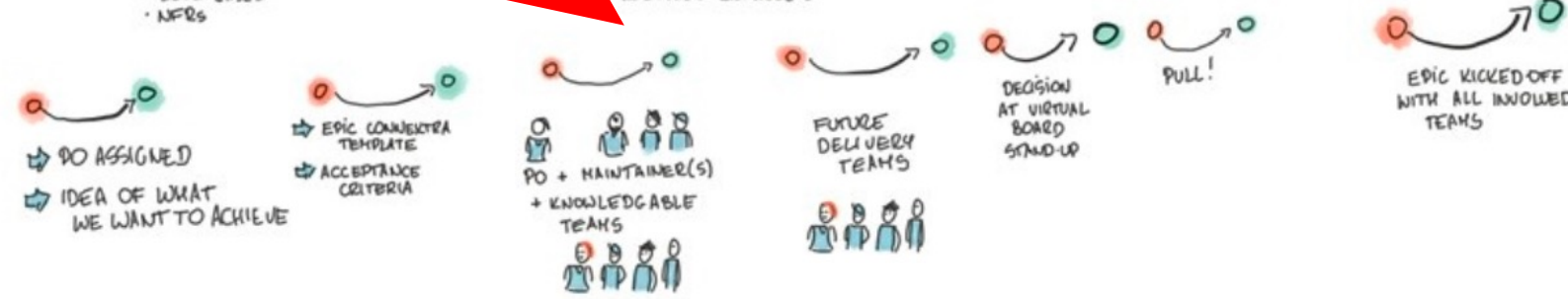
- HIGH LEVEL ARCHITECTURE
- T-SHIRT SIZE
- REQUIRED KNOWLEDGE

EPIC FULLY DESCRIBED & UNDERSTOOD READY FOR DECOMPOSITION BY THE PO & THE TEAM(S)

EPIC IS PULLABLE AS SOON AS THE RESPECTIVE TEAM(S) HAVE CAPACITY

- EPIC DECOMPOSITION INTO STORIES AND OTHER WORK ITEMS
- KNOWLEDGE TRANSFER HAPPENING HERE IF NEEDED

- DESIGN, CODE, REVIEW, TEST...!



State of User Research then?



User Interviews done with two Customers (Pre-coronavirus)

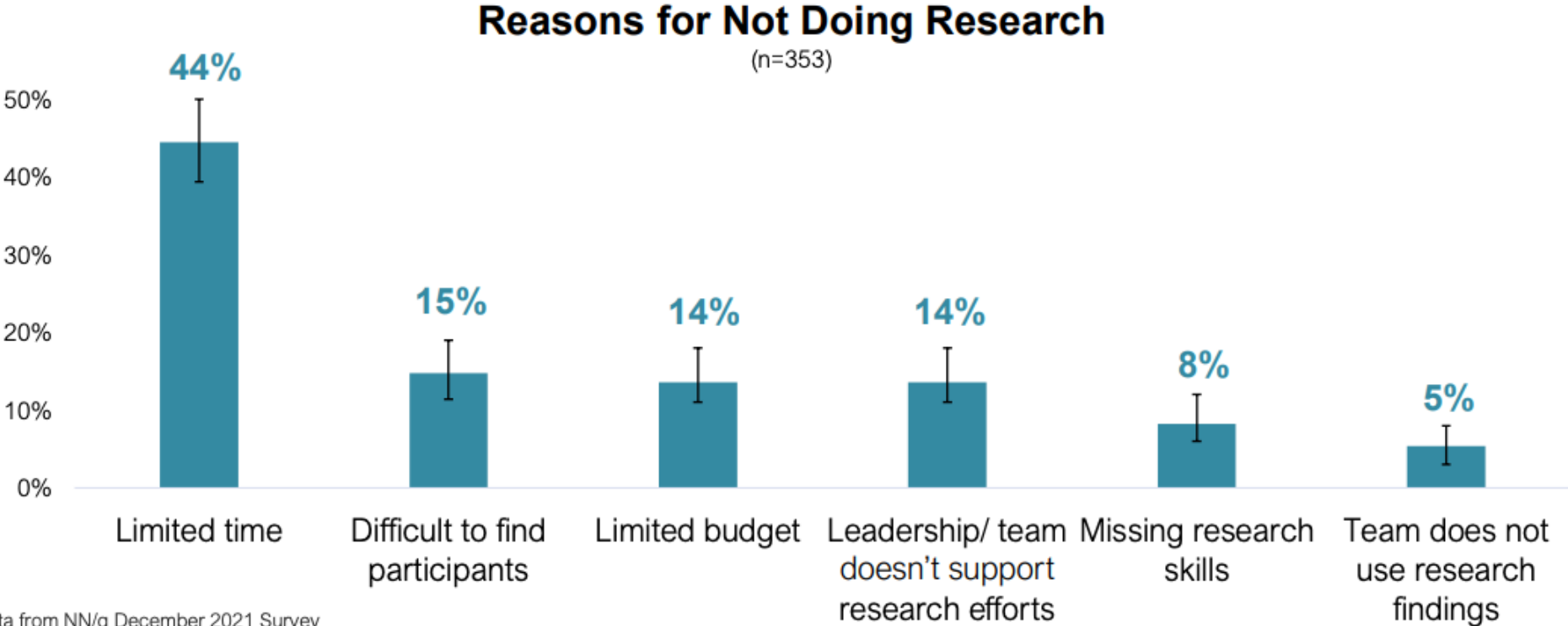


Survey sent out once a year

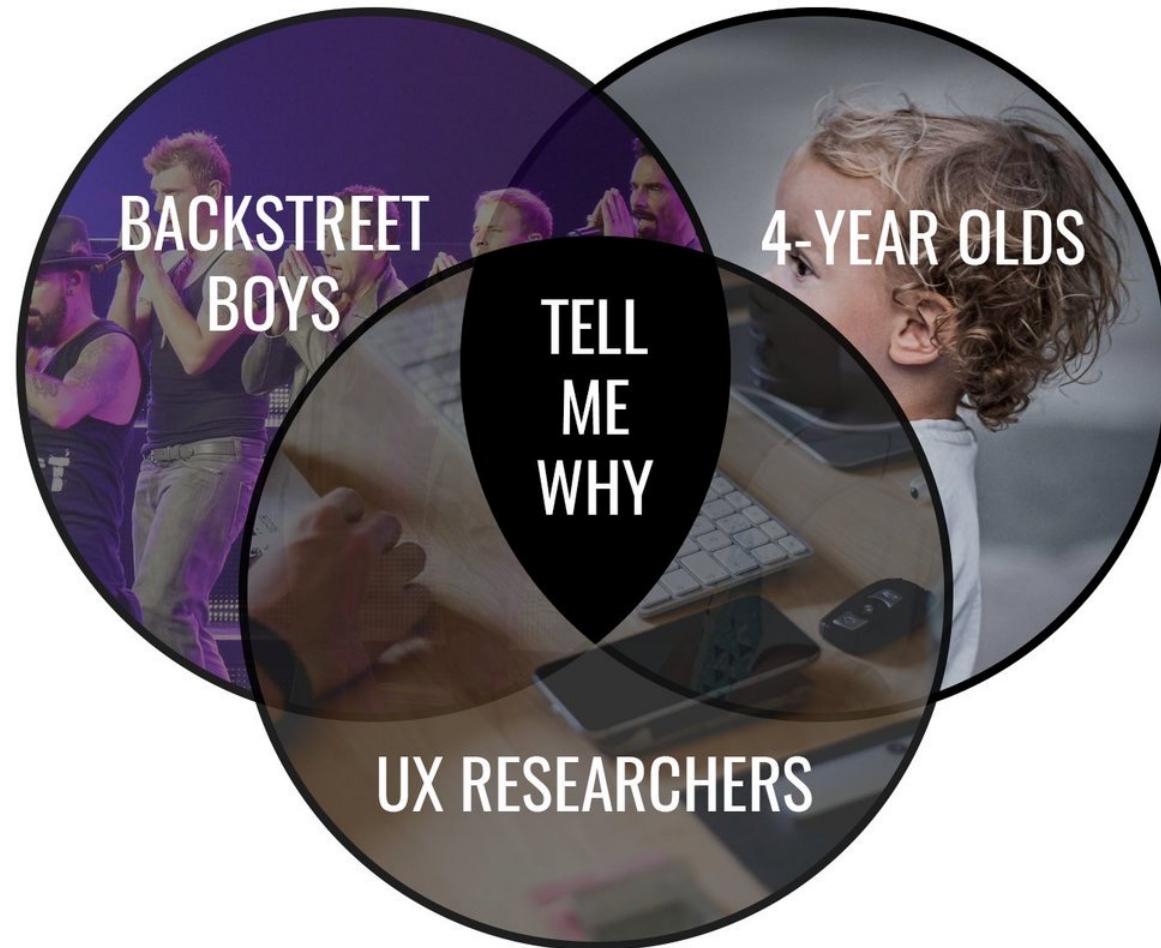


Piano Analytics implemented but analysed rarely

Barriers to Doing Good Research



Data from NN/g December 2021 Survey
353 respondents, people doing UX in a variety of industries



WHY #1:

No established UxR process

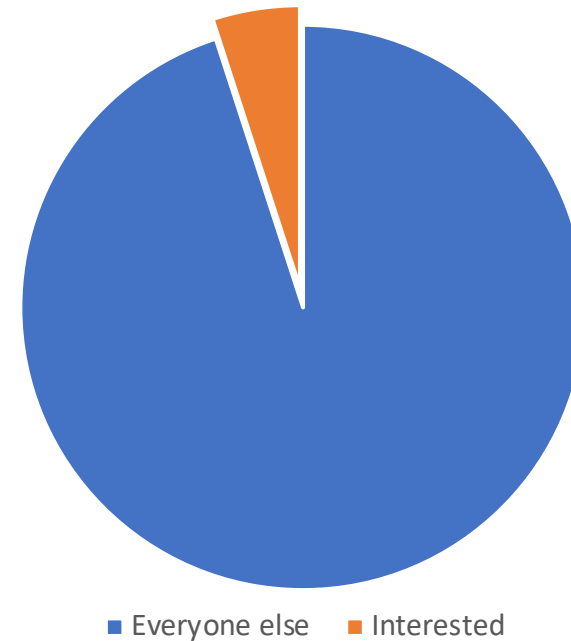
Why #1: No established UxR process

Identify your Allies

“To find ideas, find problems. To find problems, talk to people”

– Julie Zhou

Colleagues interested vs. willing to contribute in UxR



Why #1: No established UxR process

Concepts – Action Plan

This is an action plan for **New Concepts**

Action Plan Stage	Product Readings Analysis (PO)	Connect with SMEs	Identify Research objective	Create User Scenarios and Tasks	Create/Update Concepts	Create Prototypes	Finding required participants for interview	Contacting potential participants	Preparing Artifacts for User Interviews	Dry Runs (Internal)	Conducting Interviews	Preparation of Analysis	Analysis (Dovetail / Lookback)	Creating the "Report"	Presentation of Results	Divide results into tickets	Followup with users (optional)	Post-Interview compliance requirements
Goal & Outcome	Identified potential topics for user interviews	Identify the relevant PO/Business Area Experts (to support us during the whole process and after)	Defined Research Objectives	Detailed User Scenarios and tasks that the user would need to engage in	Designing the concepts in our design tool (currently Sketch)	Create prototypes based on User Scenarios and Tasks	Participants list + contact details Strategy creation on how to involve participants during this time period	Reaching out to participants for sessions within a time frame	Compilation of all artifacts	Identify employees for dry runs Schedule dry runs before the time frame for actual "real users"	Interview artifacts (3- 7 participants)	All artifacts modified and collected needs to be stored and documented in a proper manner for further steps	Artifacts are analysed and 'Implications for Design' are created	Document the analysis and list recommendations	Presenting results to show how User Interviews gives access to insights	PO/DLs are included in creation of tickets (Design and Development)	To evaluate if the implementation has met expectations	Would have to be double checked with a legal team
Deliverables	<ul style="list-style-type: none"> List of planned topics to conduct interviews on Lynn team members are available during this time period 	<ul style="list-style-type: none"> 1 PO identified for this topic based on BA/ topic description (optional) a SME is available for consultation on the topic 	<p>2) Filtered research canvas</p> <p>https://www.researchcanvas.com/2019/06/27/show-the-research-canvas-to-the-right-people-at-least-defined-answers-to-the-following-questions/</p> <p>2) Creating and documenting above information on conference</p> <p>https://www.ericacofoloway.com/2016/03/04/ux-research/</p>	<ul style="list-style-type: none"> Relevant User Scenarios from the business perspective is identified Simplified User Scenarios for the end-users (also to keep in mind during iterative processes) are created Documentation (in Word) Ticket for Lynn team to create the concept screens 	All designed screens in Sketch/Pligma	Prototypes based on the number of categories of User Scenarios	<ul style="list-style-type: none"> The participants are recognised (external or internal) Time period to consider when these participants are going to be involved Creating documents to support sending the invites 	Sending calendar invites to participants	<ul style="list-style-type: none"> Screens / Prototypes Collection of all deliverables from previous process steps Setting up an environment only for participants with test data 	<ul style="list-style-type: none"> We need to have a dry run with 1 or 2 colleagues Validate scenarios, tasks, prototypes and the overall setup 	<ul style="list-style-type: none"> Conducting User Interviews Documenting feedback of all 	Artifacts documented in Dovetail	<ul style="list-style-type: none"> Qualitative Analysis done Snippets related to various themes are tagged together Implications for Design are created 	Report is created where the context, problems, Participant's idea of a solution and UX team ideas are documented	<ul style="list-style-type: none"> Presentation created with process of User Interviews + results Showcasing the report at multiple occasions 	<ul style="list-style-type: none"> PO/DLs create tickets for design/development teams Relevant results from User Interview is mentioned in tickets, so that the overall picture is clear 	<ul style="list-style-type: none"> Follow-up meetings are scheduled to verify solutions/concepts Previously documented problems are referred to check if the solutions work 	TBD

UxR Process for new concepts (first draft)

Analysis (Dovetail / Lookback)	Creating the "Report"	Presentation of Results	Divide results into tickets
<p>Artifacts are analysed and 'Implications for Design' are created</p> <ul style="list-style-type: none"> Qualitative Analysis done Snippets related to various themes are tagged together Implications for Design are created 	<p>Document the analysis and list recommendations</p> <p>Report is created where the context, problems, Participant's idea of a solution and UX team ideas are documented</p>	<p>Presenting results to show how User Interviews gives access to insights</p> <ul style="list-style-type: none"> Presentation created with process of User Interviews + results Showcasing the report at multiple occasions 	<p>PO/DLs are included in creation of tickets (Design and Development)</p> <ul style="list-style-type: none"> PO/DLs create tickets for design/development teams Relevant results from User Interview is mentioned in tickets, so that the overall picture is clear

WHY #2:

Whom shall we contact?

Why #2: Whom shall we contact?

Contacting Users (then)

To reach out to a potential user the following people needed to be contacted in order:

- Product Owner
- Global Implementation team
- KN Implementation Manager
- Customer's Implementation Manger
- Customer User (or the best Customer's Representative)



Why #2: Whom shall we contact?



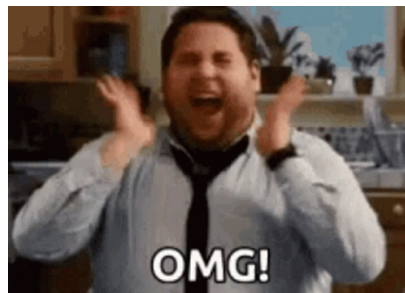
Implementation Manager (UK)
requested for "Usability Sessions"



We got in touch with actual users
working daily with the system



Success story shared with the
project team



Why #2: Whom shall we contact?

Creation of a Contact Book

Best way to solve the issue of finding participants is the creation and maintenance of a contact book.

It helps in:

- Effective Communication
- Networking Opportunities
- Recurring Research Projects
- Expertise and Knowledge Sharing
- Organizational Memory

Kindly contact with approval
This list contains contacts of Customers, Suppliers and Operators, and related personnel. **These contacts should only be reached out to with a strong business purpose.**

KN Facilitators
List of internal contacts who can help find and get us in touch with the user groups we are looking for.

Name	Email	Role	Additional Information	Company / Project	Location	Language	Last contacted by?	Can help find
[Redacted]	[Redacted]	Systems and Process Manager Portugal	trains operators how to use all sea freight software	KN ESP	Porto, Portugal	English / Portuguese	-	Operators
[Redacted]	[Redacted]	Global Operational Key Account Manager	from Poland, but located in Hong Kong	KN ESP	Hong Kong	English / Polish	[Redacted]	Suppliers
[Redacted]	[Redacted]	IT Product Lead	Matomo	myKN	Hamburg	English	[Redacted]	-
[Redacted]	[Redacted]	Implementation Project Manager	touchpoint for [Redacted]	KN ESP	United Kingdom	English	[Redacted]	Customer
[Redacted]	[Redacted]	ISC Advanced Digital Solutions Manager	touchpoint for [Redacted]	KN ESP	London, United Kingdom	English	[Redacted]	Customer
[Redacted]	[Redacted]	Regional Customer Solutions Manager	CoE ASP Project Manager - contact person for OEDI users	KN ESP, OEDI	Hong Kong	English	-	OEDI users (Operators?)
[Redacted]	[Redacted]	Regional Customer Solutions Expert	CoE MEA Project Manager - contact person for OEDI users	KN ESP, OEDI	Edenvale, South Africa	English	@Arun Jolly Joseph on 19 Sep 2022	OEDI users (Operators?)
[Redacted]	[Redacted]	Regional Customer Solutions Expert	CoE AMER Project Manager - contact person for OEDI users	KN ESP, OEDI	New York, USA	English	@Arun Jolly Joseph on 19 Sep 2022	OEDI users (Operators?)
[Redacted]	[Redacted]	Regional Sea Logistics Requirement	Operations in EU	KN ESP	Hamburg, Germany	German, English	[Redacted]	operations in EU (as opposed to US or Asia)

WHY #3:

“Let Product Owners do the research”

Why #3: Let Product Owners do the Research



POs were subject matter experts of a niche field. Hence, confirmation bias could be a risk.



User Researchers are keeping a neutral stand point to research and can have a hollistic user understanding.



Agreed on working mutually together.

Why #3: Let Product Owners do the Research

Creation of Jira checklists

Once agreed with all parties, checklist templates could be created to ensure a new demand does not skip the User Research process.

Insert a Template...



Include Globals Templates



1. UX checklist - Upstream

1. UX -related activities checklist for ESP Epics to be done before it's pulled into development (Upstream)

Hide Preview

Select

- UX Research: stakeholders' input
- UX Research: users' input
- UX Analysis: user flows
- Prototype
- Prototype: usability testing
- Prototype: concept validation (PO+Dev+UX)
- UI Design



2. UX checklist - Before the Launch

2. UX-related activities to be done before the Epic launch

Preview

Select



3. UX Checklist - After the Launch

The activities related to the UX of the Epic to be done after the launch

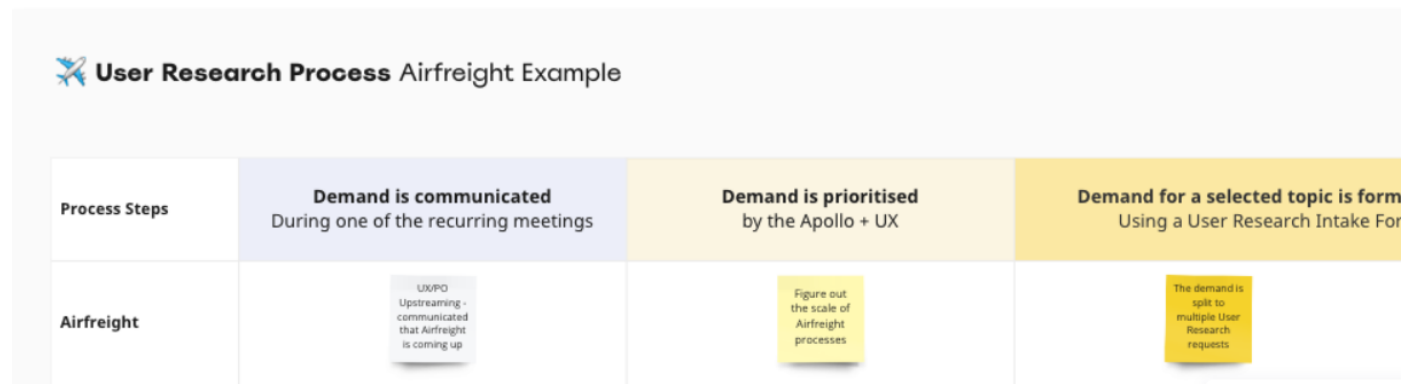
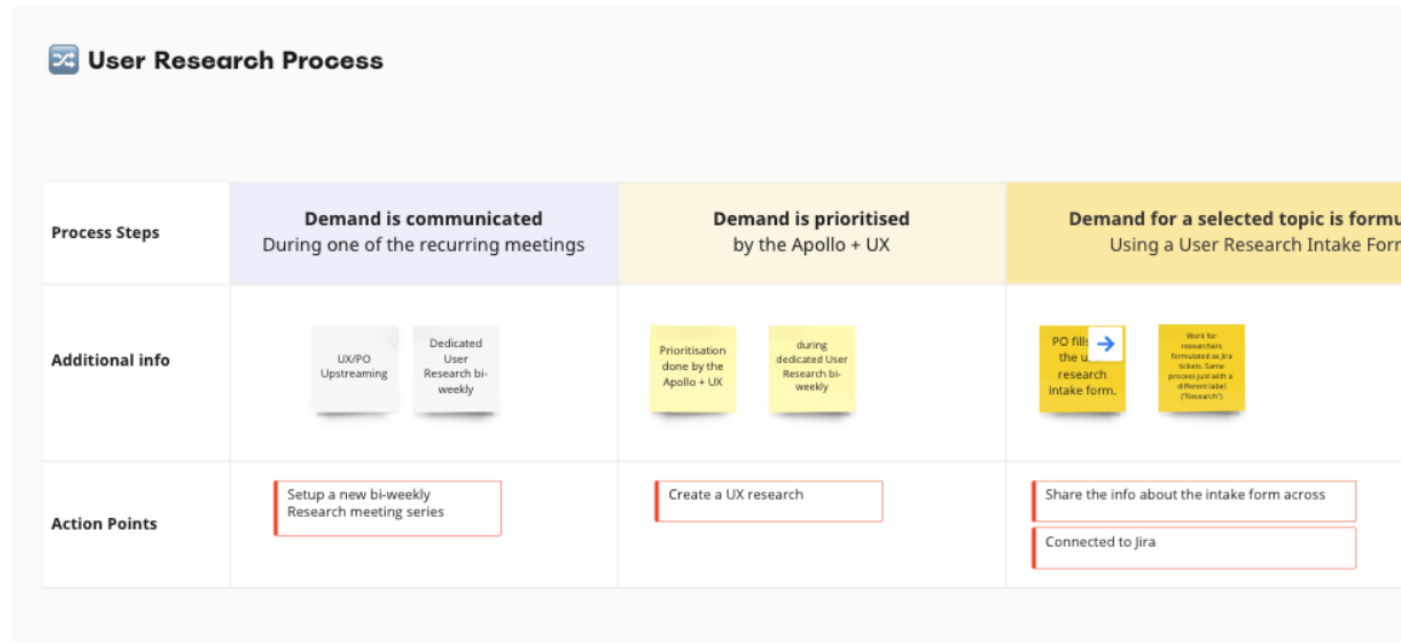
Preview

Select

Why #3: Let Product Owners do the Research

Formulate the Upstreaming Process

Plan a clear plan of action so that all parties involved know what to do and when to do it, and what they can expect.



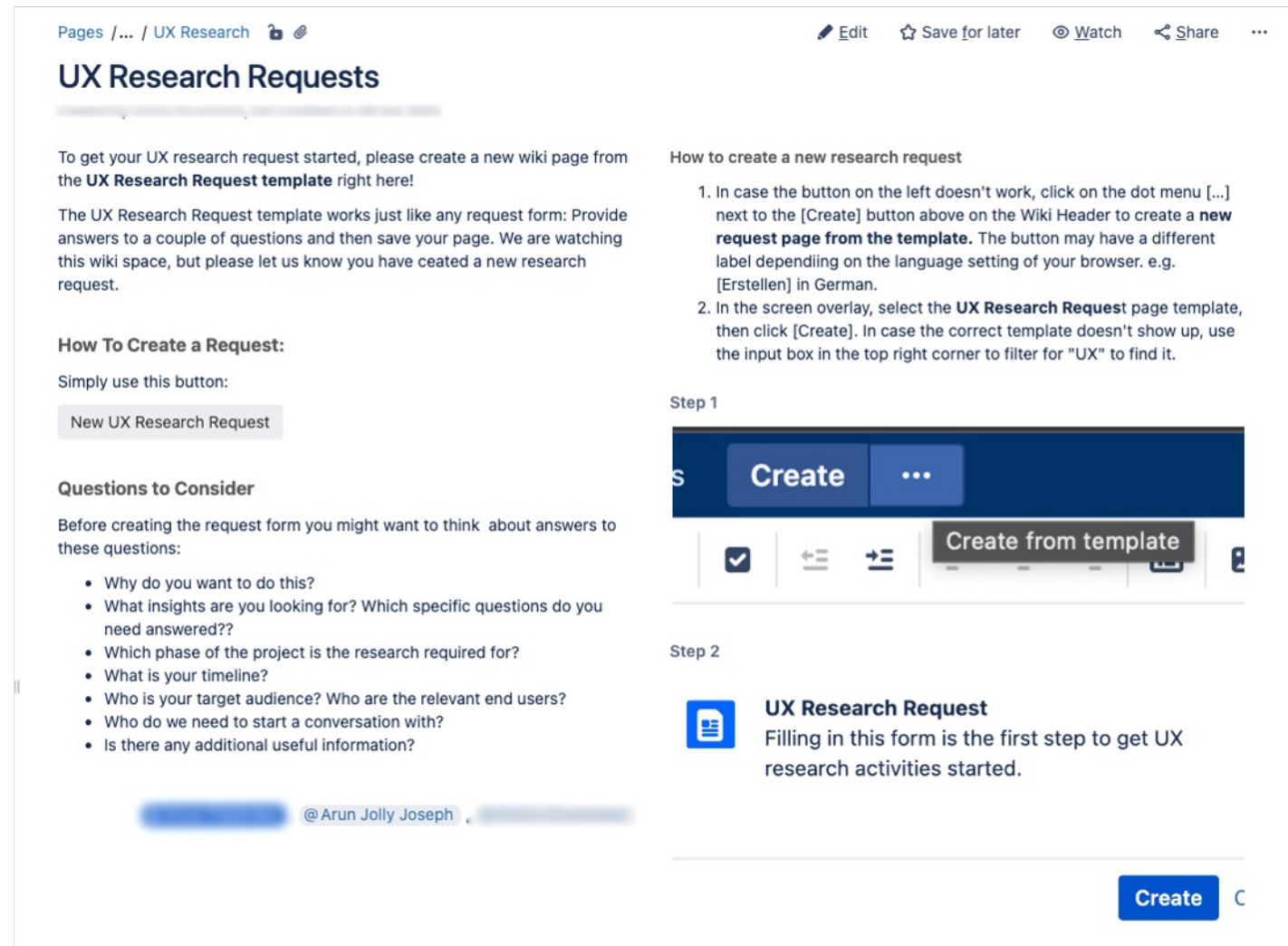
WHY #4:



Timing of the Insights

Why #4: Timing of the Insights

Research Requests

Ensure that the important people in your project, feel "ownership" for the research activities. You are responsible for the process, but involving others gives them a sense of control and shared responsibility.



Pages /... / UX Research  

UX Research Requests

To get your UX research request started, please create a new wiki page from the **UX Research Request template** right here!

The UX Research Request template works just like any request form: Provide answers to a couple of questions and then save your page. We are watching this wiki space, but please let us know you have ceated a new research request.

How To Create a Request:



Simply use this button:

[New UX Research Request](#)

Questions to Consider

Before creating the request form you might want to think about answers to these questions:

- Why do you want to do this?
- What insights are you looking for? Which specific questions do you need answered??
- Which phase of the project is the research required for?
- What is your timeline?
- Who is your target audience? Who are the relevant end users?
- Who do we need to start a conversation with?
- Is there any additional useful information?

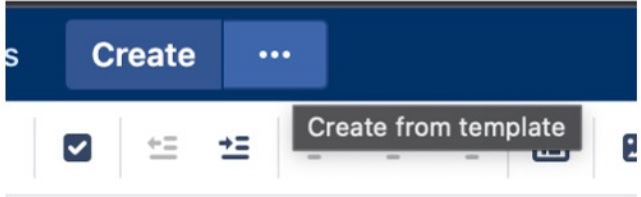
 @Arun Jolly Joseph 

[Edit](#) [Save for later](#) [Watch](#) [Share](#) ...


How to create a new research request

1. In case the button on the left doesn't work, click on the dot menu [...] next to the [Create] button above on the Wiki Header to create a **new request page from the template**. The button may have a different label depending on the language setting of your browser. e.g. [Erstellen] in German.
2. In the screen overlay, select the **UX Research Request** page template, then click [Create]. In case the correct template doesn't show up, use the input box in the top right corner to filter for "UX" to find it.

Step 1



Step 2

 **UX Research Request**
Filling in this form is the first step to get UX research activities started.

[Create](#) C

Product Roadmap 2023

Establish UX Research & Analytics Process

BA Core Flow

BA Data Integration

BA OEDI

BA Purchase Order

BA Reporting

BA eSOP & Admin

Integration of KN-ESP and myKN

OKR Q2 and Q3 - 2023

“We collected feedback and constructive criticism from our Beta-User Panel through user research and analytics”

Introducing Beta-User Panel

To collect early feedback, diversify user perspectives, real-world testing and understanding user engagement and ownership.

Working closely with the KN Global Implementation team

Integration of KN-ESP and myKN: Beta-User Panel



Additional tips to establish User Research

- **Market the topic as much as possible**
 - Influence OKRs, KPI sets for next quarters
 - Present to the team wide meetings
- **Prefer to communicate that the feedback gathered was full of positivity and constructive criticism for User Research**
 - Product/service feedback might differ
- **Share the results smartly – keep the POs in loop**
 - POs were concerned with conducting feedback – as it could be a direct reflection of their work
- **Democratize Results**
 - Make it possible to access all the results for the relevant stakeholders to make informed decisions
- **Make templates of everything**
 - Emails, calendar invites, research interview scripts, results reports and so on...

What is next for us?

Having our first dedicated “User Researcher”

Democratize Research (not only results)

Hire someone for Research Operations role

Keep it consistent and effective



“User Research is an evolution and not a revolution” – Anna Ptasinska

Inspire. Empower. Deliver.

