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PRAGUE2022
20-23 SEPTEMBER

Design for design

How to work with editors to co-design your CMS for better content design and improved user experiences

Emma Horrell, User Experience Manager, Edinburgh University

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Talk outline

Introduction

- About me, where I work and what I do

A CMS supporting UX and content design

- Reimagining the CMS

Co-designing with editors

- How to learn what editors really want
- How to prioritise features to satisfy varying needs

Tips and reflections

- Aligning design and development in Agile

Resource list

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About me, where I work and what I do

User Experience Manager

Previously a Content Designer
Service Design student
Systems thinking enthusiast
Central Information Services

The University of Edinburgh

Founded in 1583
45,000 students
15,000 staff
21 Schools, 3 Colleges

Our Drupal CMS

Upgrade from Drupal version 7
Engage editors
Support devolved editors
Evolve editor experience

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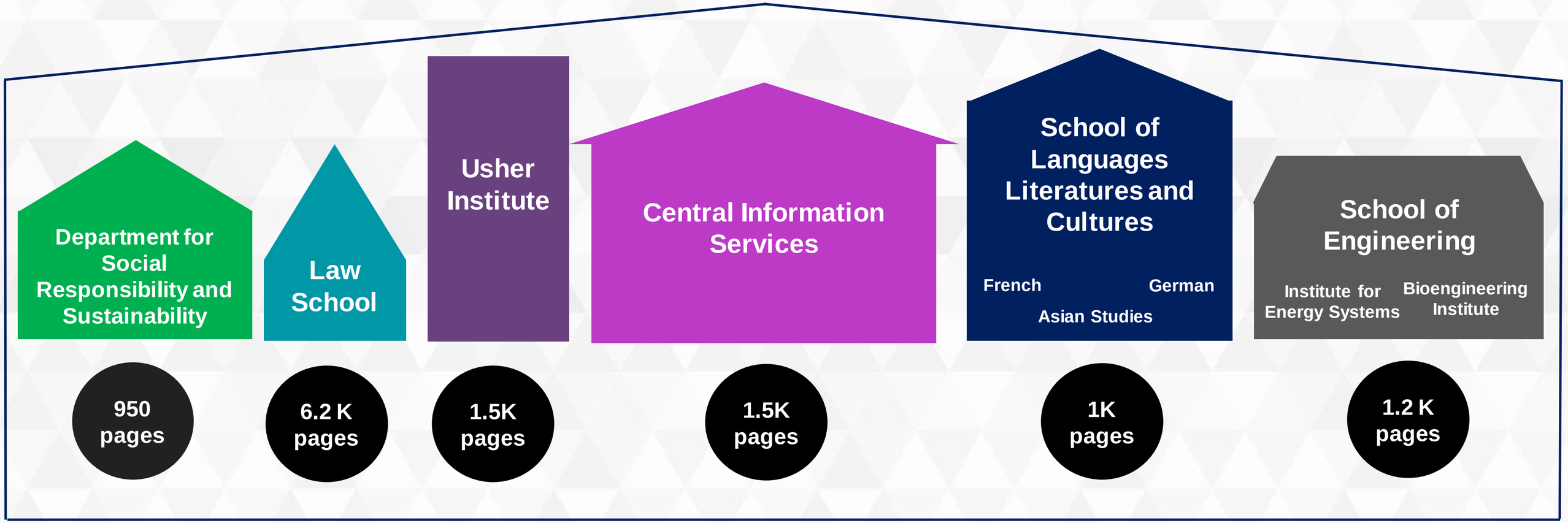
University of Edinburgh web estate

Over 8 million webpages

Devolved publishing community of 300+ editors



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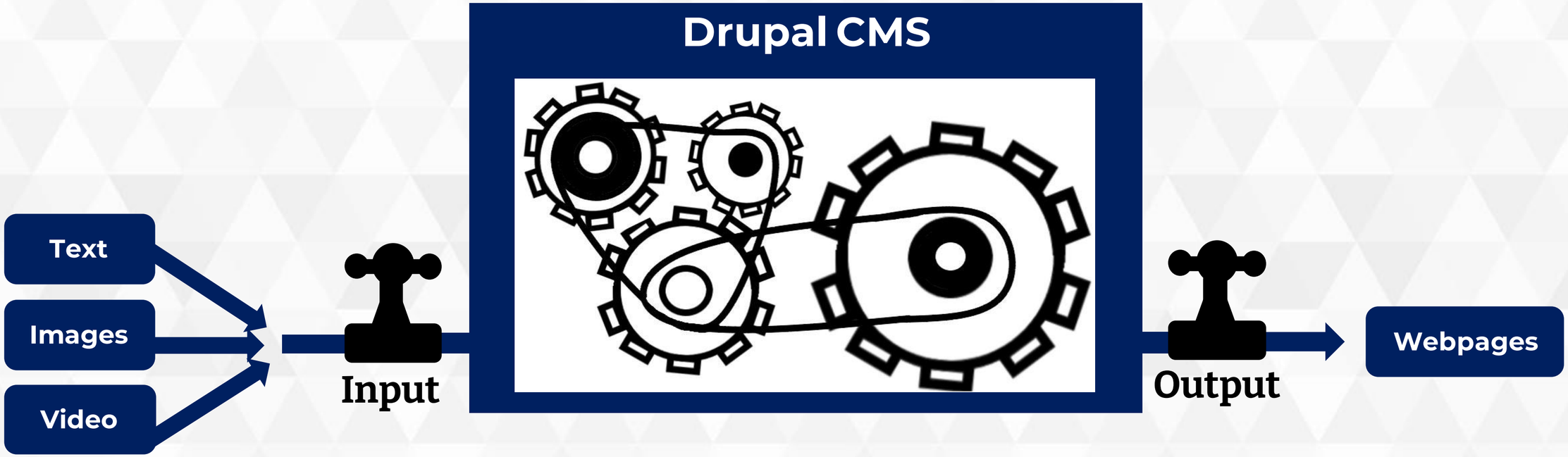
Editors and the CMS

Typical publishing process



Adapted from Donella Meadows 'Thinking in Systems'

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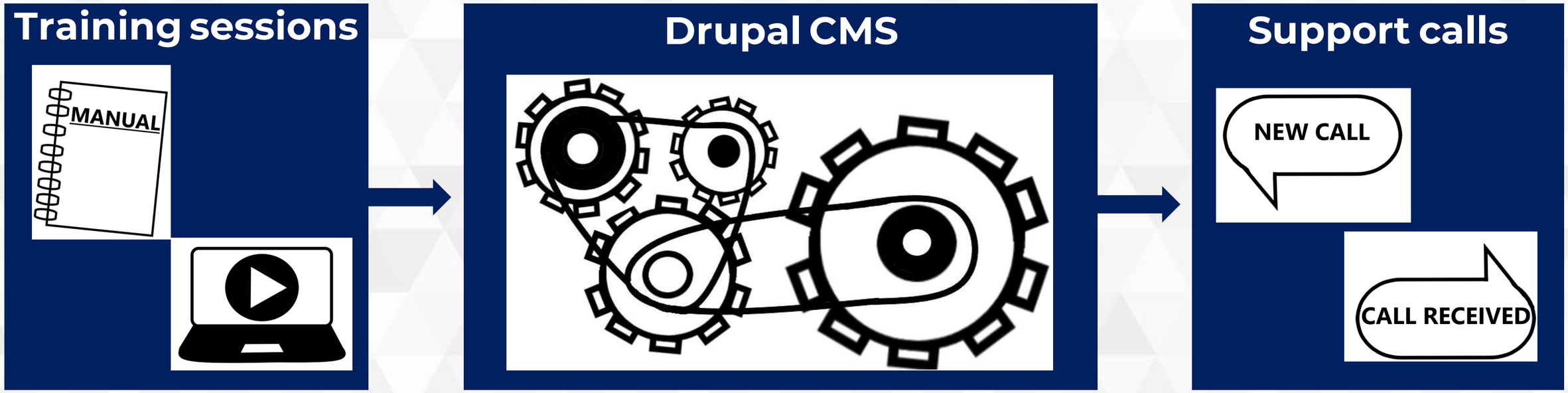
Editors and the CMS

Training and support process



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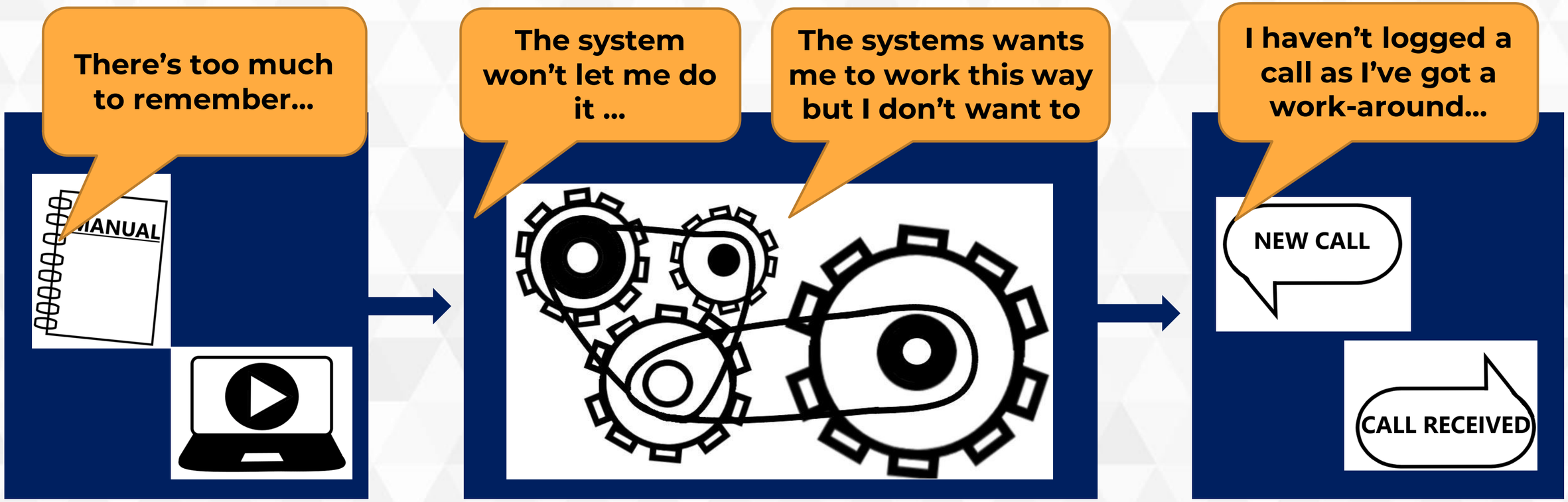
Editors' relationship with the CMS



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Reimagining the CMS
What if it was shaped by editors?

From: Building for:

- Something that gets my pages published
- Something shaped by IT specialists
- Something I keep forgetting how to use

- **Something that restricts how I work**

To: Building with:

- Something that builds content I'm proud of
- Something that fits my thinking and processes
- Something I know because I helped shape it

- **Something that empowers me**

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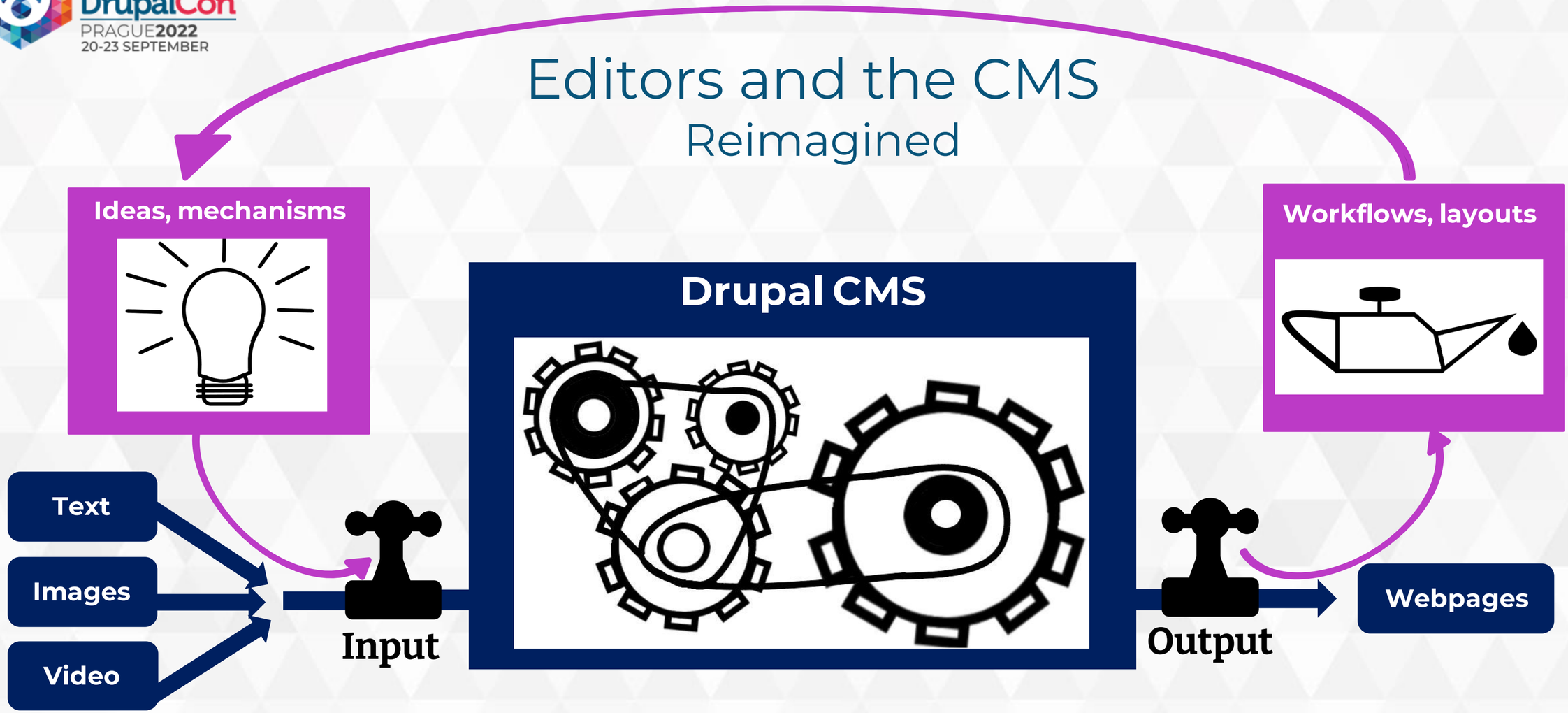
Editors and the CMS
Reimagined



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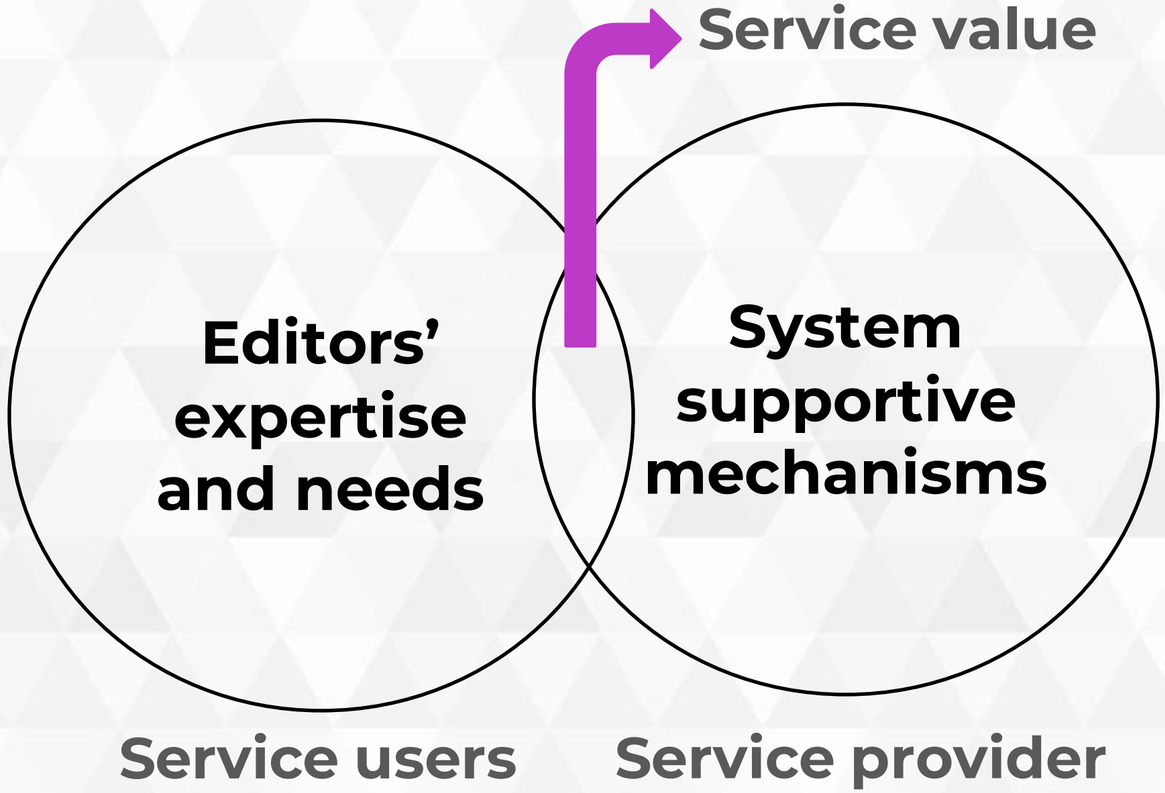
Co-design thinking
Ways to enable designing together

6 co-design mindsets

1. Elevating lived experience
2. Being in the grey
3. Valuing many perspectives
4. Curiosity
5. Hospitality
6. Learning through doing



KA McKercher 'Beyond Sticky Notes'

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Ways to learn what editors really want

Build relationships not lists of requirements

Reach out

- Top tasks survey (Gerry McGovern)
- “From a list of all possible tasks, pick 5 most important to you”

Active listening

- See their natural workflows
- Learn their hacks (and the reasons behind them)

Open channels for feedback

- Share prototypes
- Encourage sense-making
- Release test environments

Indi Young ‘Practical empathy’

Resist the urge to define features
(even if editors are asking for them)

Could we paste images in as well as text? ...

Carousels would be great ...

Different button styles to make things stand out ...

Can we have custom components for our site?...

Accordions to fit more content in....

A body text editor which you can paste components in to ...

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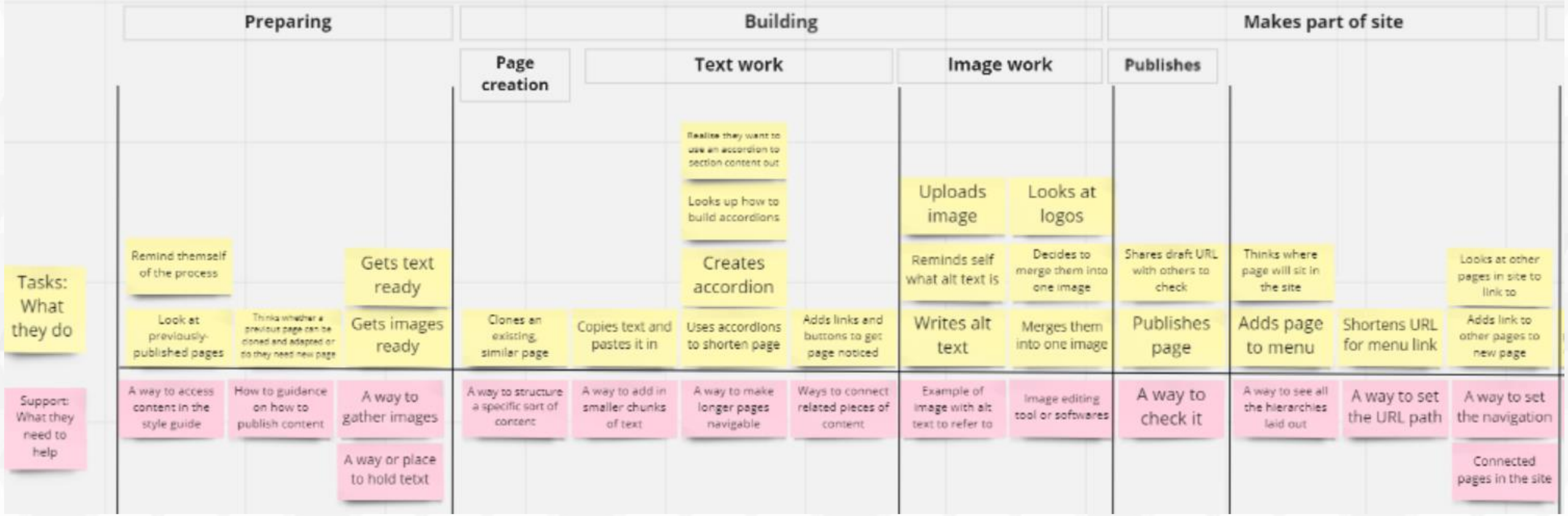
Fully understand the space they work in

Mental model maps - for their workflows

Creating a page about a course



Indi Young ‘Mental Models’

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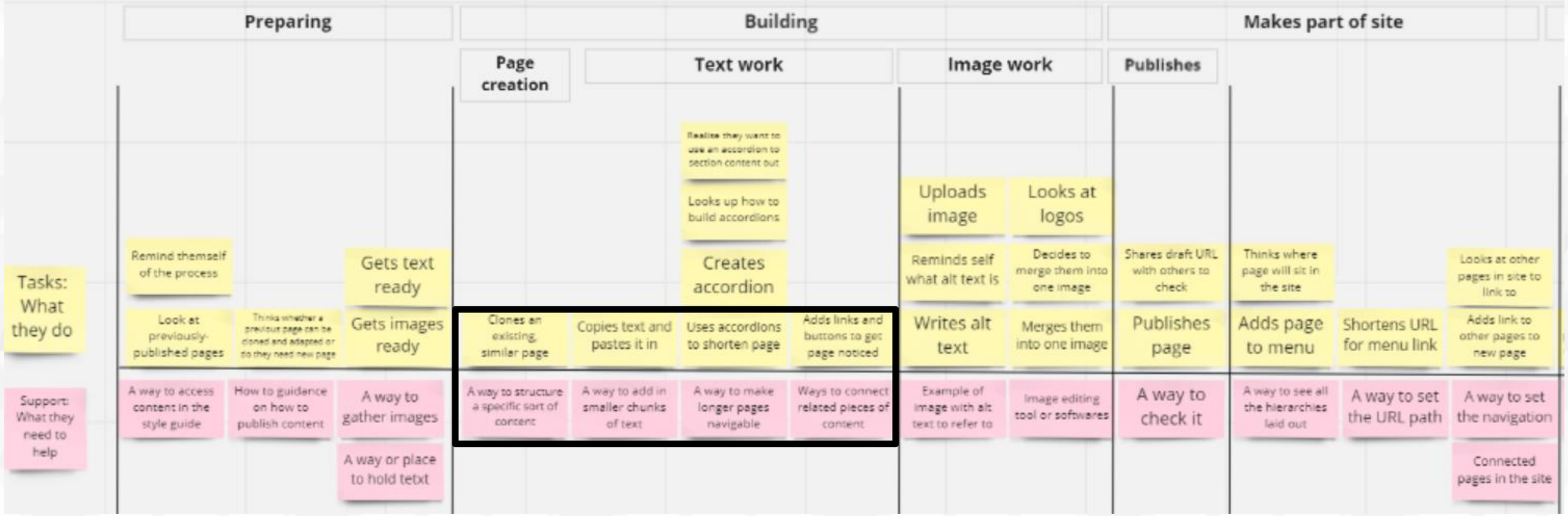

Indi Young ‘Mental Models’

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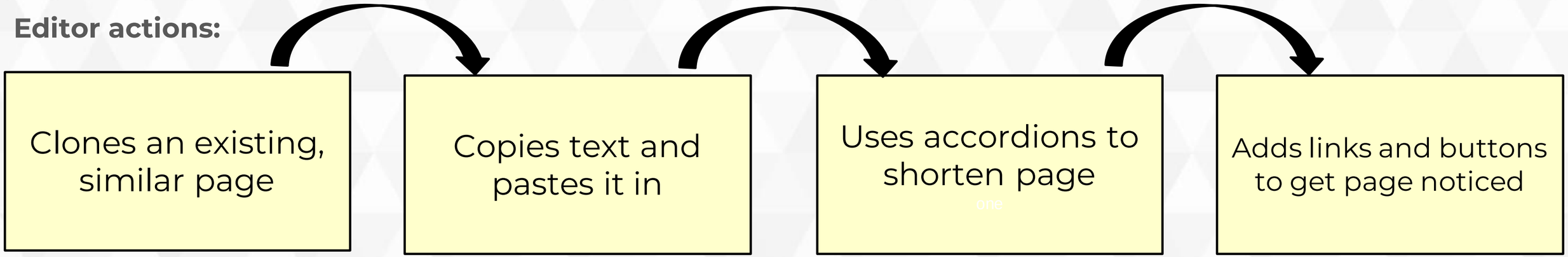
Identify opportunities for co-design in workflows

Focus on shared goal of good content

Editor actions:



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What are the underlying needs?

How can the interface support editors make better content?

Editor actions:

Clones an existing, similar page

Copies text and pastes it in

Uses accordions to shorten page

Adds links and buttons to get page noticed

CMS Supportive mechanisms:

A way to structure a specific sort of content

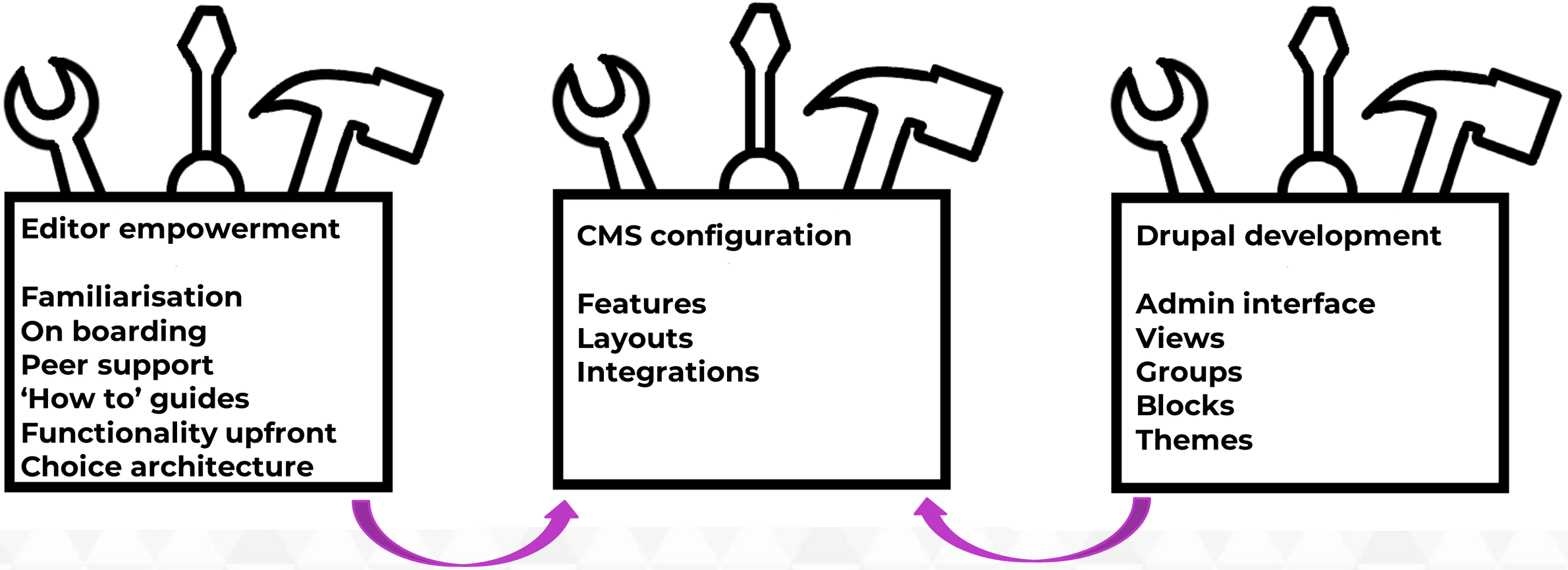
A way to prepare and finalise text

A way to make longer pages navigable

Ways to connect related pieces of content

Features are only part of the solution toolkit

Co-design embraces broad perspectives and expertise



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The success of solutions relies on editor behaviour

Use insights from behavioural theory to ensure editors are empowered

COM-B Model: A behaviour is supported by…

Capability
Familiarisation
On boarding
‘How to’ guides

Opportunity
Functionality upfront
Choice architecture

Motivation
Peer support

‘Designing for Behavioral Change’
Amy Buchan

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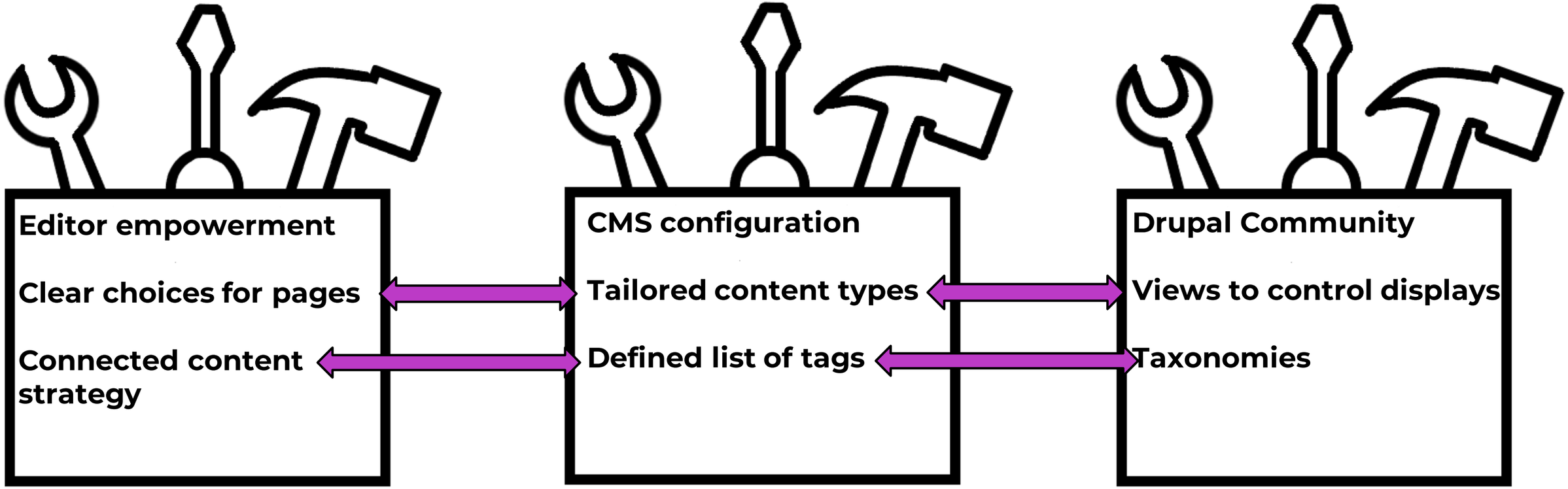
Prioritise solutions that complement each other

Creating a page about a course - example



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Editor-focused backlog and releases

Benefits of prioritising on needs

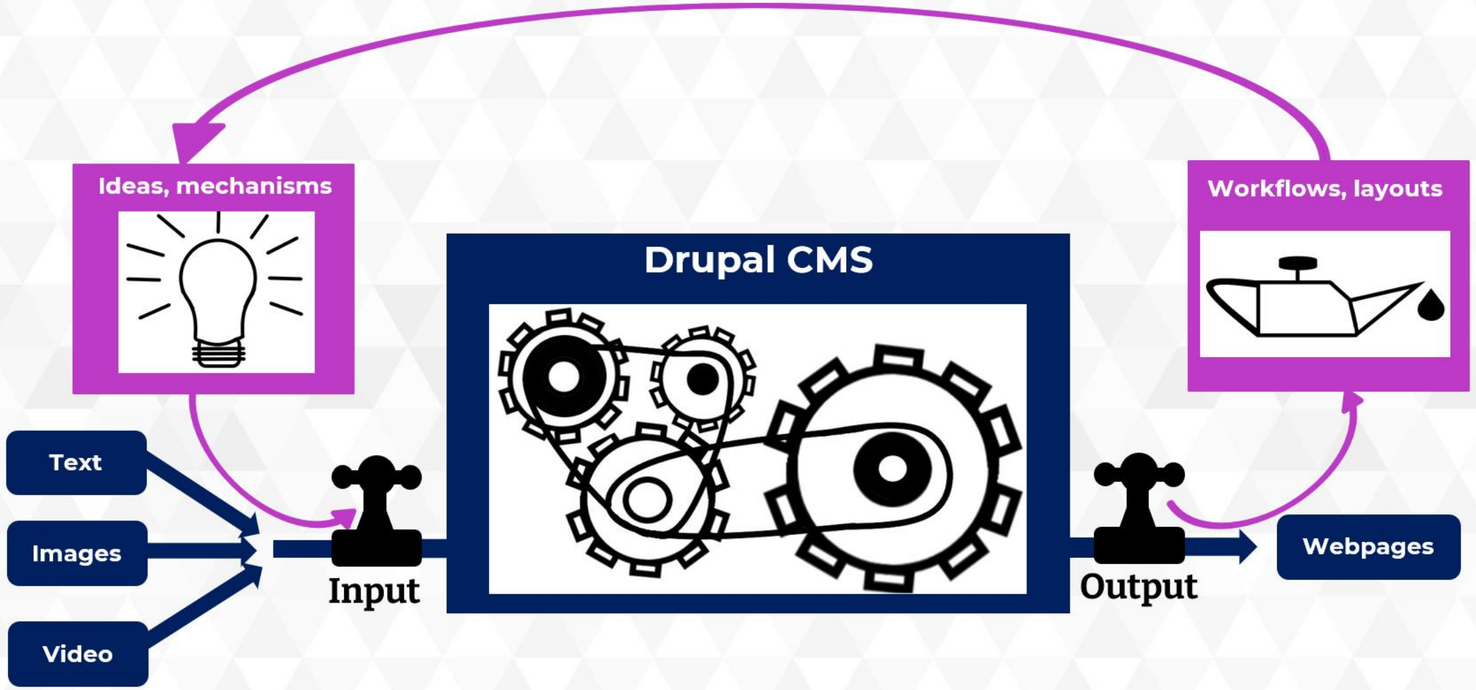
Features that are prioritised are:

By the people for the people:

- Solutions geared to editor workflows
- Driven by editor needs
- Editors invested in development

Not wholly reliant on configuration

- Part of a holistic solution package
- Carry less risk of technical debt
- Acknowledge interdependencies
- More sustainable longer-term



Aligning UX and Agile practices

Setting out dual tracks recognises different velocities

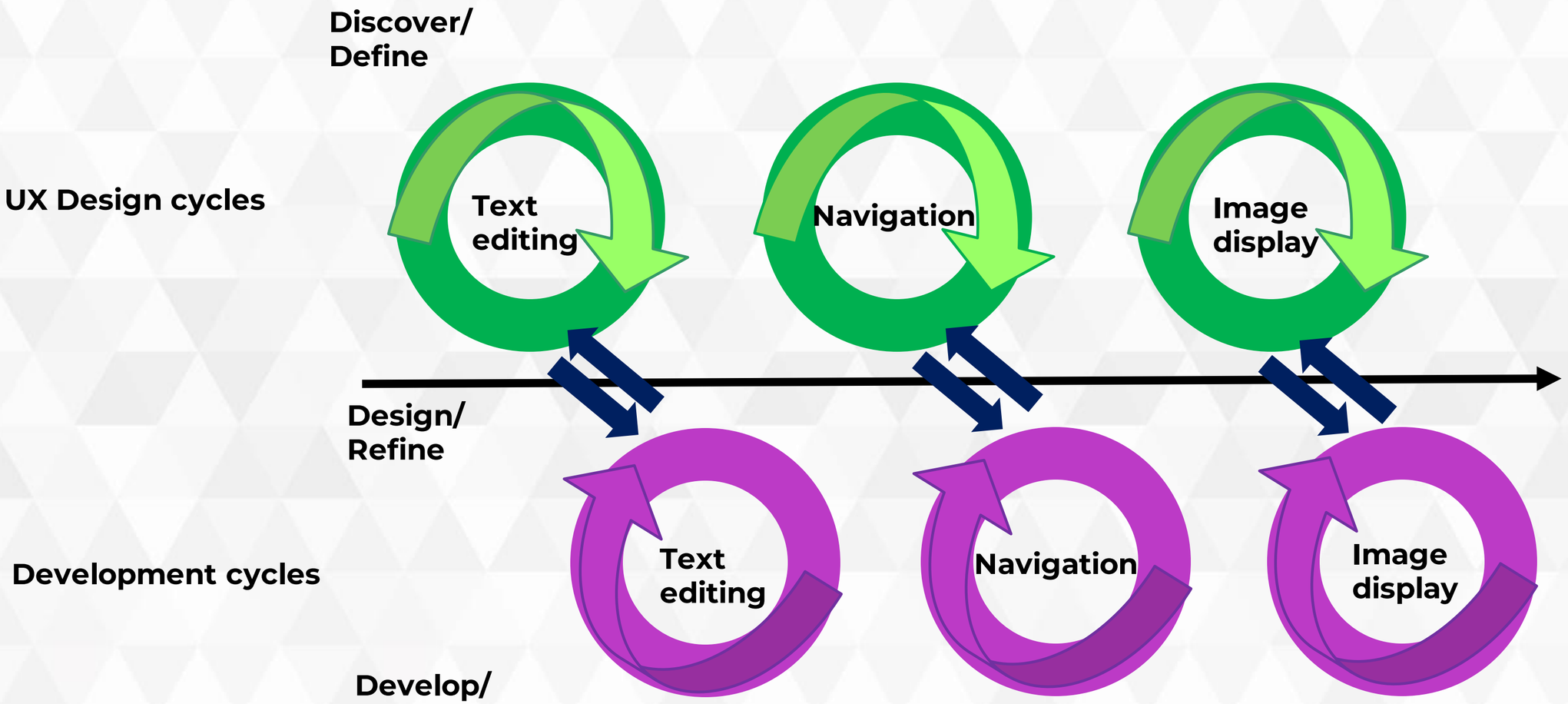


Diagram adapted from Jeff Patton blog 'Dual Track Development'

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Respect different processes and priorities

Invest time learning from each other

Developers

Processes
- Thorough, methodical documentation
- Local environments before going live
- User Acceptance Testing before merging

Priorities
- Getting things working
- Experimenting with functionality to learn potential
- Identifying sources of errors/bugs

Tools
- Drupal, Bootstrap, Github

Designers

Processes
- Double diamond – broad discovery then narrow focus
- Sketching and prototyping
- Mapping user flows

Priorities
- Sharing user research findings
- Establishing UI elements to support user flow
- Improving interface against user needs

Tools
- Figma, Miro, Adobe

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Look for common ground

Meet each other where you are

Developers

Designers

Thorough, methodical documentation → **Double diamond – broad discovery to narrow focus**

live

User Acceptance Testing before merging ← **Sharing user research findings**

Tools

- ~~DDEV, Docker~~

→ **Pictures and drawings, Shared sandbox** ←

Tools

- ~~Figma, Miro~~

‘Product Management for UX people’ by Christian Crumlish

Summary

Reimagined editor-focussed CMS

- Built with, not for

Co-design starts with relationships

- Real life user stories/mental models open opportunities for co-design

Features are only one part of the solution

- Supporting and empowering editor behaviour underpins success

Design and development in Agile

- Acknowledge differences and look for common ground

Resource list

Thank you!
Questions?

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LinkedIn: linkedin.com/in/emma.horrell

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Resources

Reimagining editorial interface

- ‘Thinking in systems’ by Donella Meadows (book)

Co-design

- ‘Beyond Sticky Notes’ by KA McKercher (book and website)
- ‘Top tasks’ by Gerry McGovern (book and website)
- ‘Practical Empathy’ by Indi Young (book)
- ‘Mental Models’ by Indi Young (book)

Editor empowerment

- ‘Designing for behavioral change’ by Amy Buchan (book)

Aligning design and development in Agile

- ‘Dual Track Development’ by Jeff Patton (blog)
- ‘Product Management for UX people’ by Christian Crumlish (book)