

# Lean UX In The Enterprise

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# Classic System Solutions, Inc.

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- Software, training and consulting company with offices in San Francisco
- Business partners throughout Canada, Europe, Asia and South America
- Worked with over 300 of the Global 2000 since 1996

# What We'll Discuss

- What is Lean UX?
- How is it different than traditional UX?
- Incorporating Lean UX into the enterprise
- Case Study of Lean UX – Enterprise Design
- What it takes to succeed

# What is Lean UX?

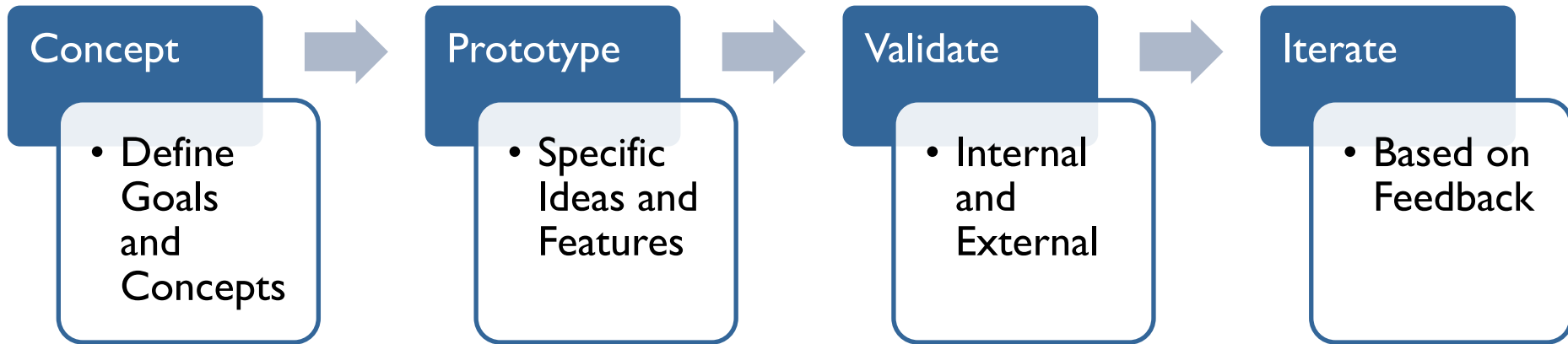
- Uses principles from Agile to lighten the UX deliverables needed for design
- Less focus on heavy documentation
- More focus on the actual UX
- Joint collaboration and ownership



# Lean UX Realities

- Lean UX does **Not** mean less work
- Deliverables change but still exist
- Must adjust to the team culture
- Set up phase gate checkpoints
- Adapt process to complexity of project

# Lean UX Process - Overview



# Enterprise Lean UX Tips

- Show work early and often
- Many more iterations
- Tighter collaboration with team
- Focus is on Design – **Not** Documentation
- Continuous user validation
- Use tools appropriate depth for problem being solved

# How UX Tools Help

- Using the right tools at the right level





# Tools To Improve Agile / UX

- Online user research / personas
- Rapid prototyping tool competency
- Design pattern repository
- Video library with customer highlights
- UX information 'Radiators' (Walls)
- Anything that enhances collaboration

# Traditional Agency/Enterprise Approach

- Creative Director
- UX Designers
- Information Architects
- UI Developers
- Graphic Designers
- Content Creators
- Project Managers



# Persona: Experienced Team Leader



Susan

Prior Occupation: Physician's Assistant

## Key Tasks

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Speaking engagements  
Review Performance  
Set Goals and Incentives  
Provide vision to success line

## My Role

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### My Goals

Add value to my team by:

- Providing leadership and vision to help them meet their goals
- Answering consultant questions and providing guidance on how to grow their business

### My Frustrations

- I need a comprehensive view of staff to help them
- System outages or slow response times
- Manually calculating recognition awards
- Solving low level problems like PIN issues

## My Info Needs

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- Downline performance figures
- Trends in the business
- New product information
- New promotion and incentive details

## First-Person Comments

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"The system should let my managers know where they are at, congratulate them when they achieve a goal. They shouldn't have to call me to see where they stand."

"I still have to calculate my leader stats with a pen and a piece of paper each month"

"It's important for me to see what the trend is with a consultant so I can figure out how to help her"

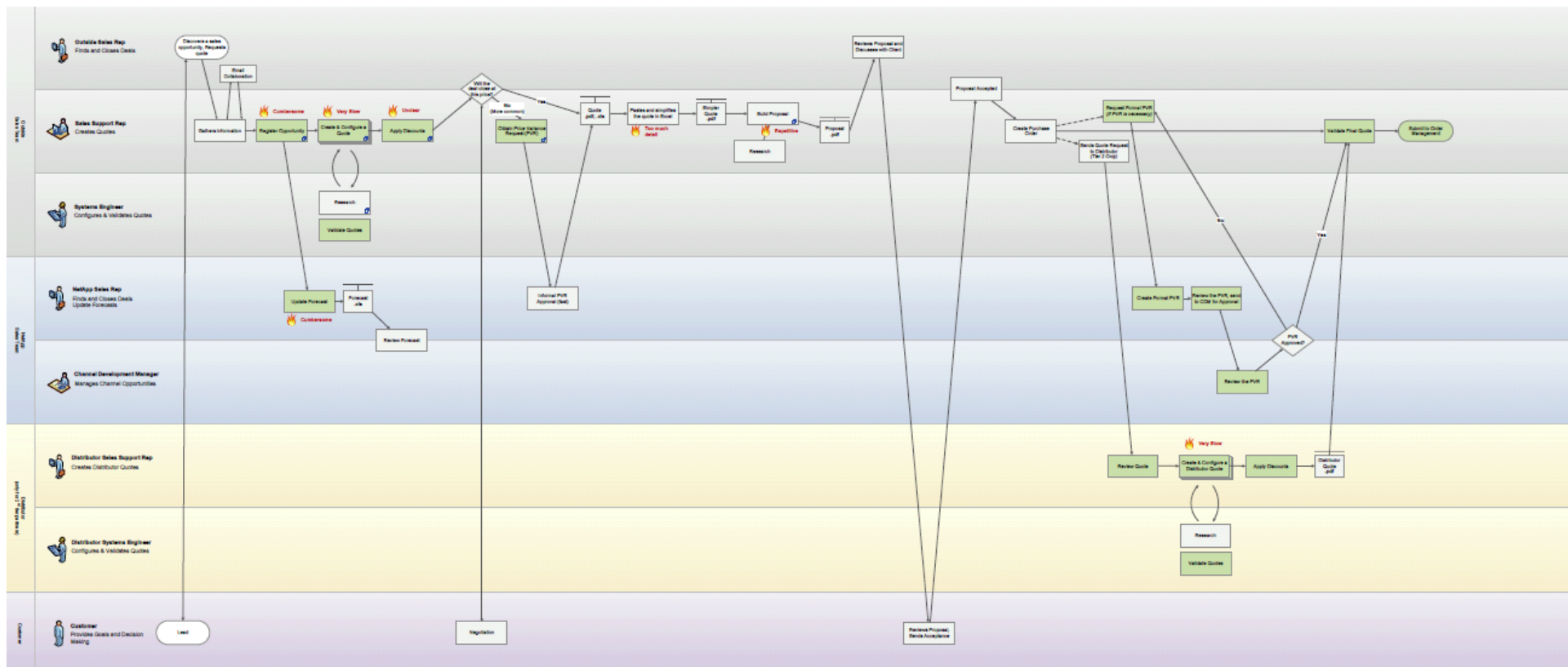
"I was trying to check Webstats on my phone while taking kids trick or treating on Halloween" so I could help motivate my team at meet our end of month goals

## My Motivations

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- Creating a growing, successful team
- Growing my business
- Sharing the vision with my team

# Journey Maps with Pain Points



# Polished Enterprise Deliverables

- Perfect Wireframes



# Detailed UX Specifications



Footnote	Label	Interactions	UX Description	Text	ToolTip	_Label	List Options
15		OnClick: Case 1: Open AF-800 Consultant Profile in Current Window		Sue Smith			
16			All excel export dealing with consultant/PC/C must include their Arbonne ID, regardless if these IDs shown on screen or not. This will make it easier for the consultant if they want to use ID as primary key to link their data together in a spreadsheet or database			"Excel Export"	
17	help icon	OnClick: Case 1: Show AF-131 consultants tip Pop_Up/AF- Consultants tip Pop_Up Bring AF-131 consultants tip Pop_Up/AF- Consultants tip Pop_Up to Front					
18			25 (default), 50, 100, 500, All. This pattern applies to all places where pagination is needed.				25 (selected) 50 100 500

# Functional Requirements

## 2.6 - Generations Tab – View Upline and downline

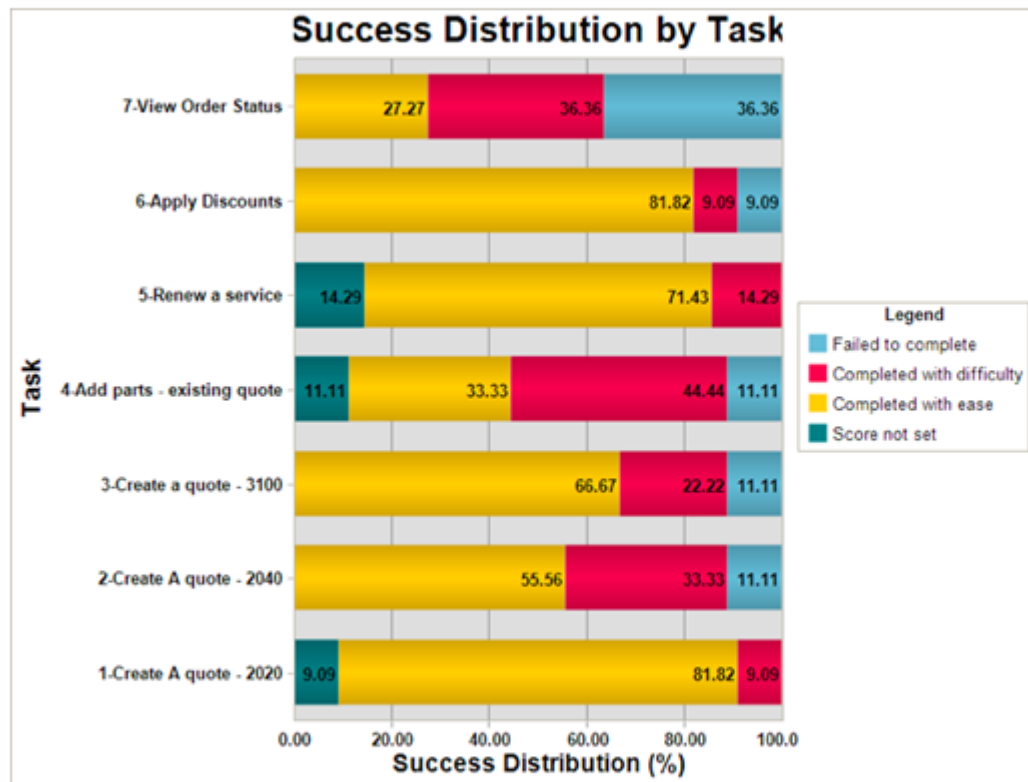
Function FID #	UI Element	Functional Specifications/Business Rules/UI Validation Rules (FS ID #)
1.	Customer information in Title Bar	6. User enters client id and clicks "Find" 7. System displays customer information
2.	Upline Consultants Window	8. The following data will be listed for the upline consultants. Scroll bar will be provided Pay-as title Cons Id Name Sponsor's id Name
3.	Generation Amounts window	9. To be aligned with FRD for Web stats
4.	Downline window	10.This window will display the contents from corresponding web stats page for this consultant 11.Presently the entire downline is not shown. Webstats will require changes to show full downline. The same content will be displayed here. To be aligned with FRD for Web stats

Note: CU.STAT, CU.DN-D and CU.UL-D screens in Accuterm will not be modified. These screens will be available only to view the historical data under old plan.

# Detailed UX Research Reports

## Data

### Success Rate



The above chart shows the success rate for all seven tasks. The "score not set" show data that had to be rejected due to exceptions in test methodology / systems. An interesting observation comes from task 7, which was foreign to most of these users (who were generally highly trained



# More Research and Analysis

## Affinity Diagrams, Contextual Inquiries



# Precise Visual Comps

## National Home: Container One Structure Grid:



1 FPO Video Image sample:  
(w) 103 px X (h) 57 px



Do you **Know** your **User?**



# Lean UX Is About the Experience

- Focus is on the user, not the deliverables
  - Do you like studying people?
  - Be willing to live with the results of your findings?
  - Can you identify unintended uses
  - Do you enjoy right/left brain thinking?



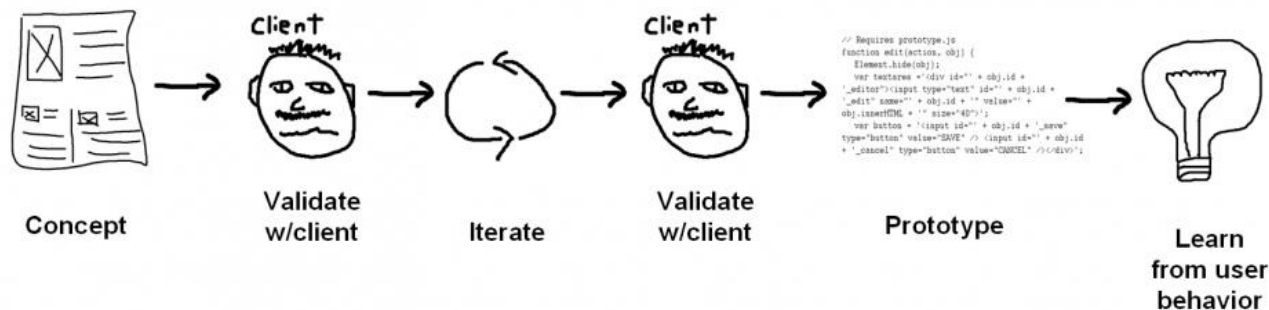


How People **Behave** Is Often

**Different** Than What They Ask For...

# A Lean Approach to Enterprise UX

- Choose a few features and iterate
  - Fast (Hours vs. Days or Weeks)
  - Refine 3-4 ideas into possible solutions
  - Validate internally and externally
  - Focus on low cost, low overhead techniques



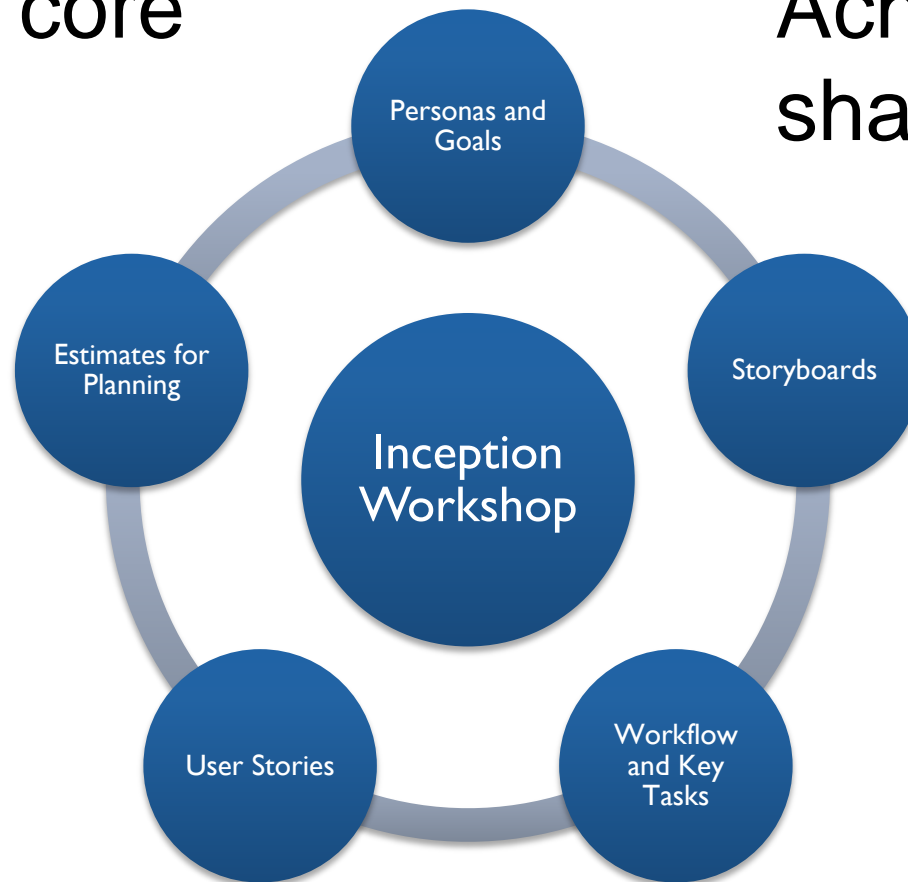
# Inception Design Sessions

- Align proposed UX with MVP (Minimum Viable Product)
- Think like a Startup...
  - What problem are we REALLY solving?
  - Does it REALLY matter?
  - How does the UX solve the problem (Without gold-plating)

# Bring Concepts To Life...Quickly

Engage the core team in the solution

Achieve a shared vision





# Achieving 'Flow' During UX Design Sessions

- Design sessions should be active vs. passive
- Use low fidelity tools to allow focus on the problem and not the design tool
- Use team sessions to drive creativity and collaboration
- Engage a cross-functional team in the design

# Usability Is a Reflection Of How Your Team Makes Decisions



# Lean UX Tools For The Enterprise

- Sketches
  - Whiteboard, Pencil & Paper
- Post It's
  - Taxonomy and Ideation
- Photos, Summary Personas, Journey maps
  - Empathy
- Quick Prototyping Tools
  - Axure, Balsamiq, Protoshare

# Integrating UX with Scrum

- Tightly involve UX in daily meetings
- Allow UX input from non UX team members
- Work out designs concepts prior to scrum cycles where possible
- Close collaboration with Product Owner
- Don't lose sight of "Product Vision"

# Identify Roles for Success

- Shared understanding of UX role on team
- Joint, shared collaboration
- Shared ownership of design
- Welcome UX input from non-UX members
- Involve scrum team in research
- Share early iterations with team

Are you willing to

**Fail** to

**Succeed?**



# Case Study – Ecommerce Transformation

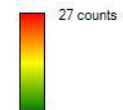
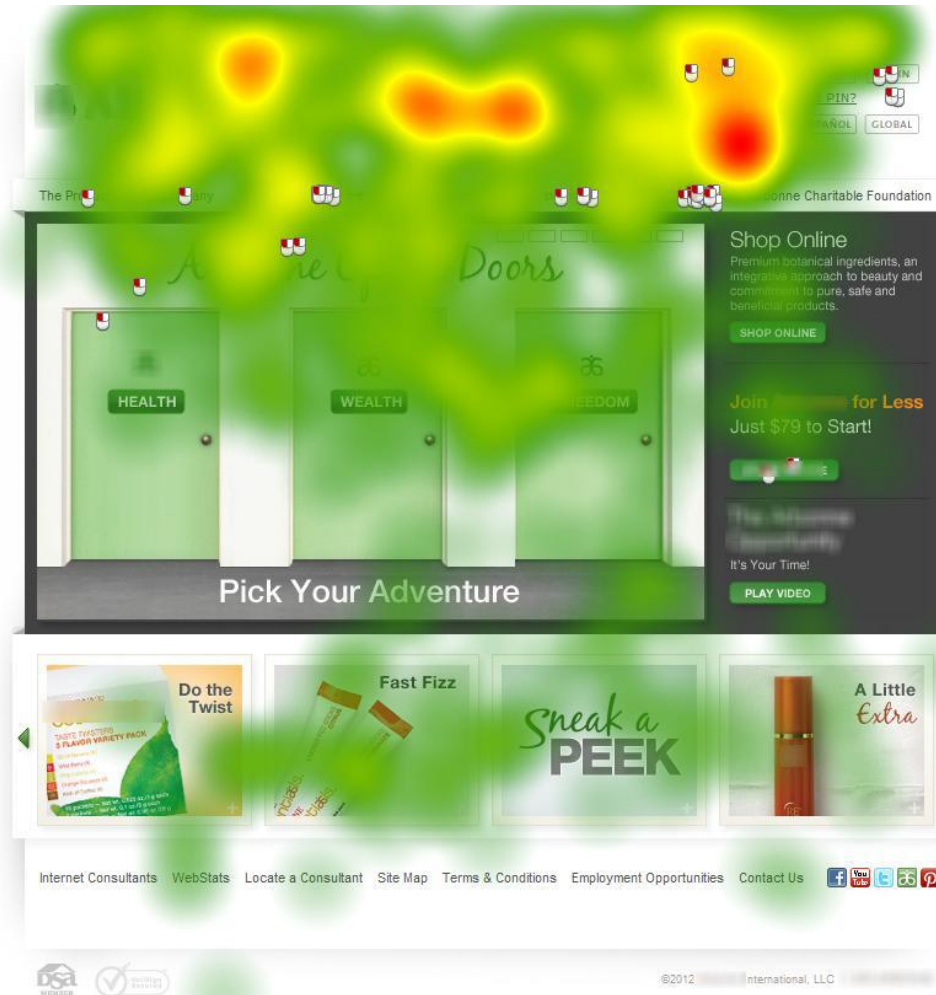
- Global Ecommerce Site (10 Countries)
- \$500m Annual revenue
  - New Home Page / Theme
  - New Taxonomy
  - Updated Product Pages
  - New Brand Concept Pages

# Home Page Validation

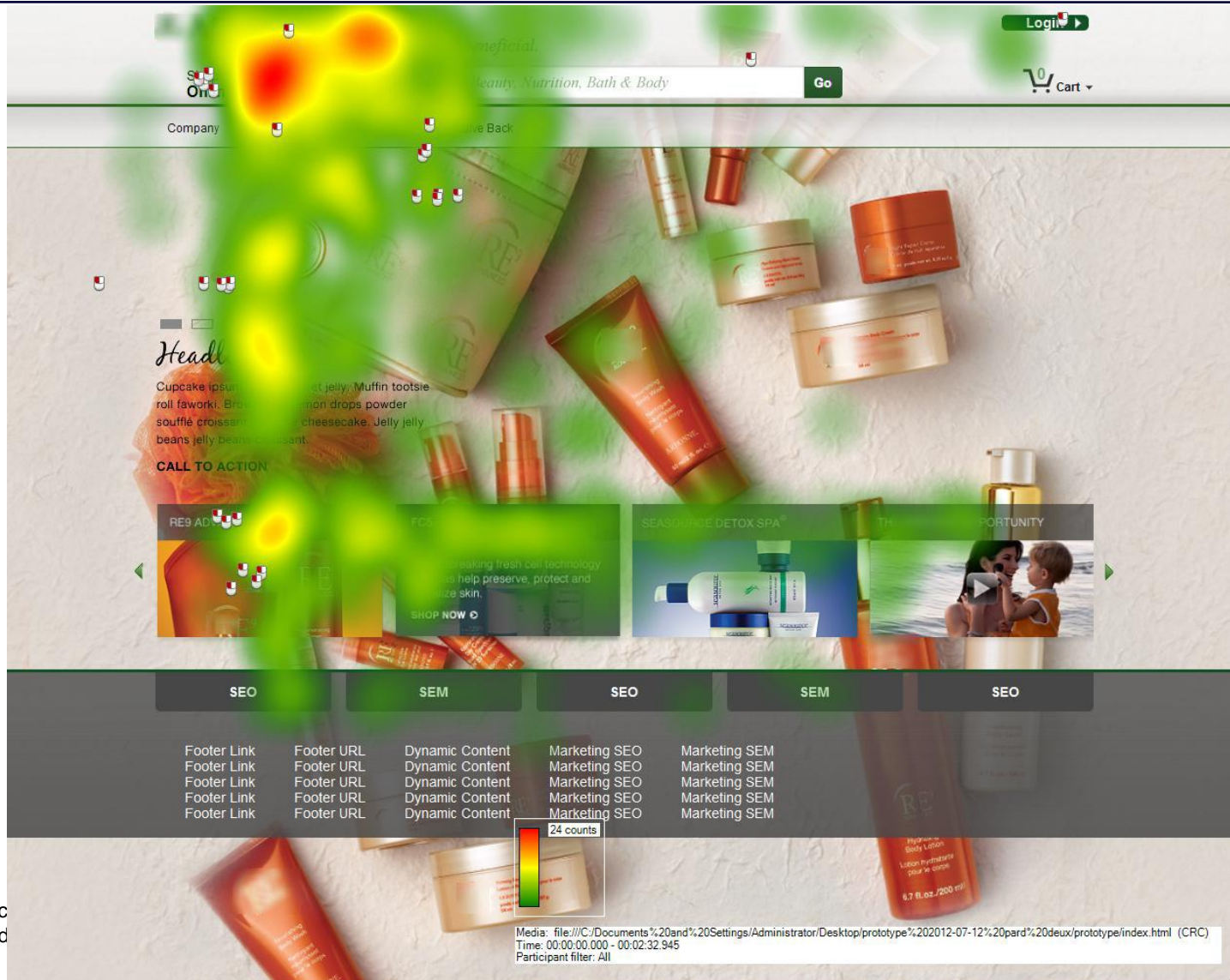
- Quick Concept Iterations (*Executive Alignment*)
- Collaboration: Brand and Product Managers (*Inception Design Sessions*)
- Early sketches for quick alignment
- Early validation with developers/CMS team
- Validation with users (new and existing)



# Before: Heat Map



# After: Heat Map



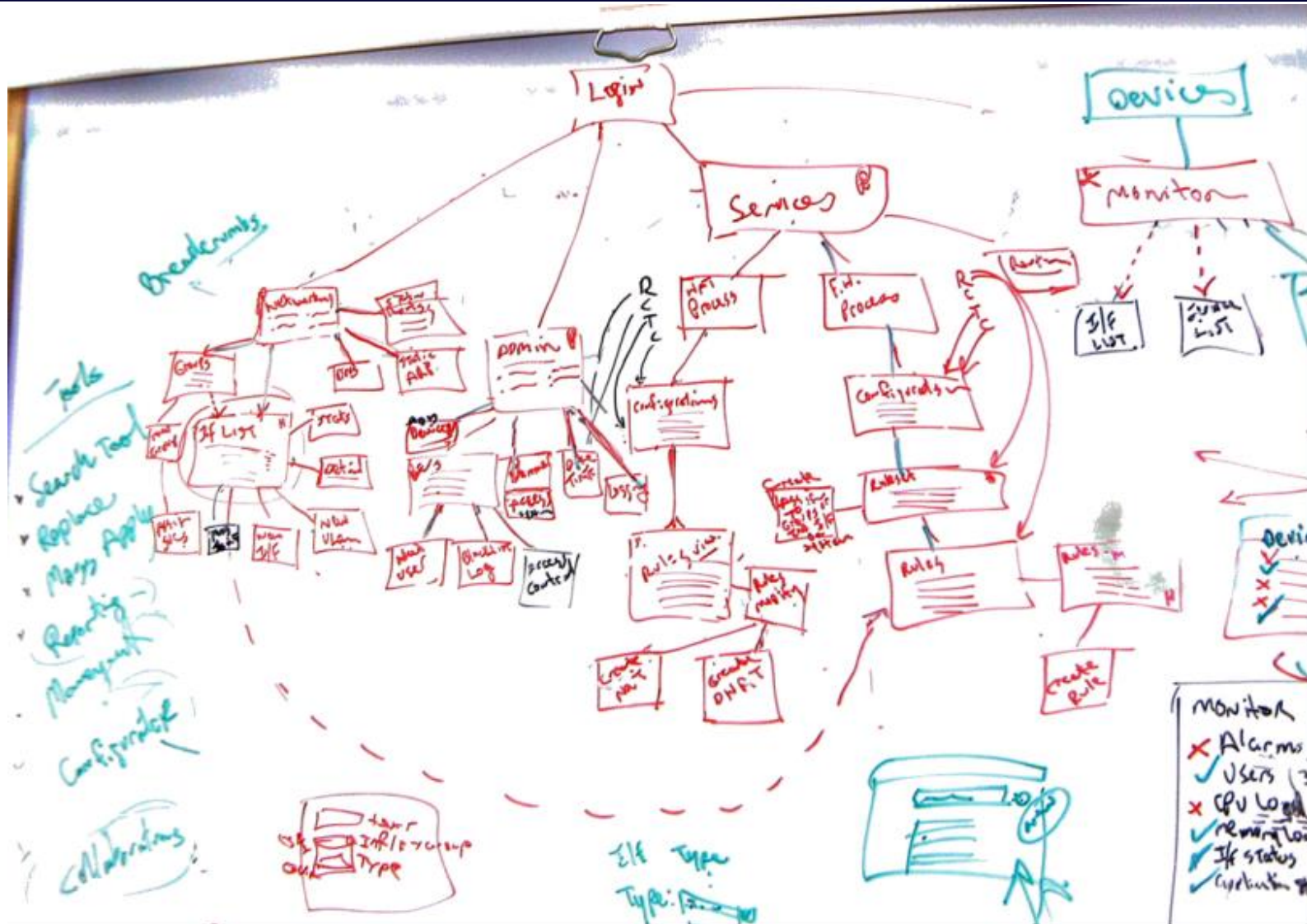
# Taxonomy Validation and Build

- Quick Online Card Sort
  - Websort (Now Optimalsort) ~300 participants
- Menu Prototyping
  - Post It's, Whiteboard, Axure
- Development Prototyping
  - Bootstrap/Oracle Webcenter CMS

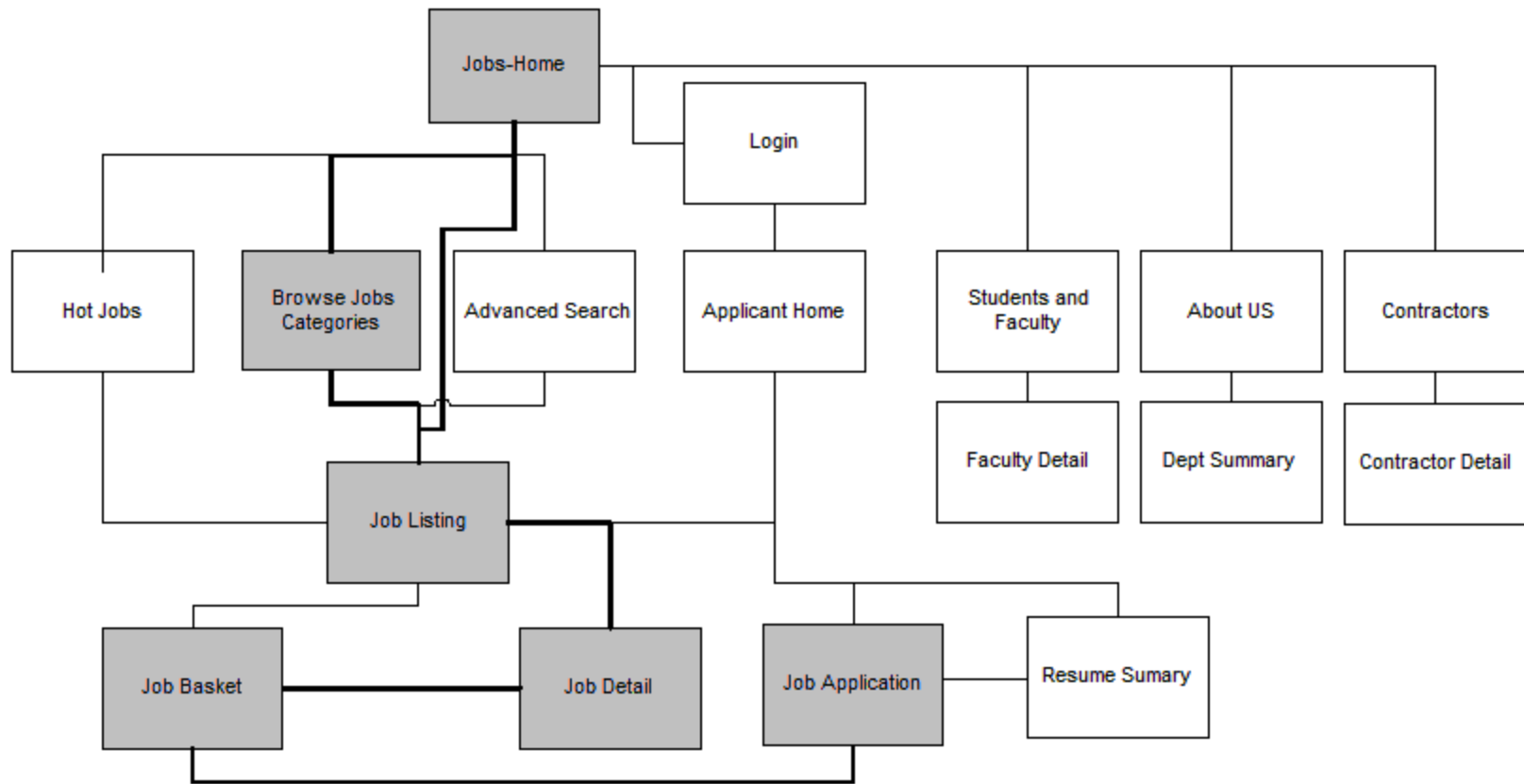
# Use Quantitative Data To Speed Decisions

Category	Participants	Total items	Unique items	Agreement
<b>ANTI-AGING</b>	15	521	48	0.72
<del>ANTI-AGING</del>	11	11	1	1
<b>BODY</b>	11	141	45	0.28
<b>COSMETICS</b>	13	62	20	0.24
<b>Cosmetics for Eyes</b>	15	110	12	0.61
<b>Cosmetics for Face</b>	15	154	16	0.64
<b>Cosmetics for Lips</b>	15	48	6	0.53
<b>FACE</b>	15	193	35	0.37
<b>Fragrances</b>	15	115	17	0.45
<b>Give Back</b>	11	13	2	0.59
<b>HAIR</b>	14	45	5	0.64
<b>HEALTH &amp; WELLNESS</b>	15	450	58	0.52
<b>Share Success</b>	12	43	13	0.28
<b>Shop Online</b>	13	84	29	0.22
<b>Skin and Body care</b>	15	329	59	0.37
<b>Start a business</b>	15	132	21	0.42
<b>Supplements</b>	13	172	39	0.34
<b>The Company</b>	15	238	29	0.55
<b>UNSORTED</b>	1	4	4	1

# Navigation Model Sketches



# Mid Level Detail Navigation Model

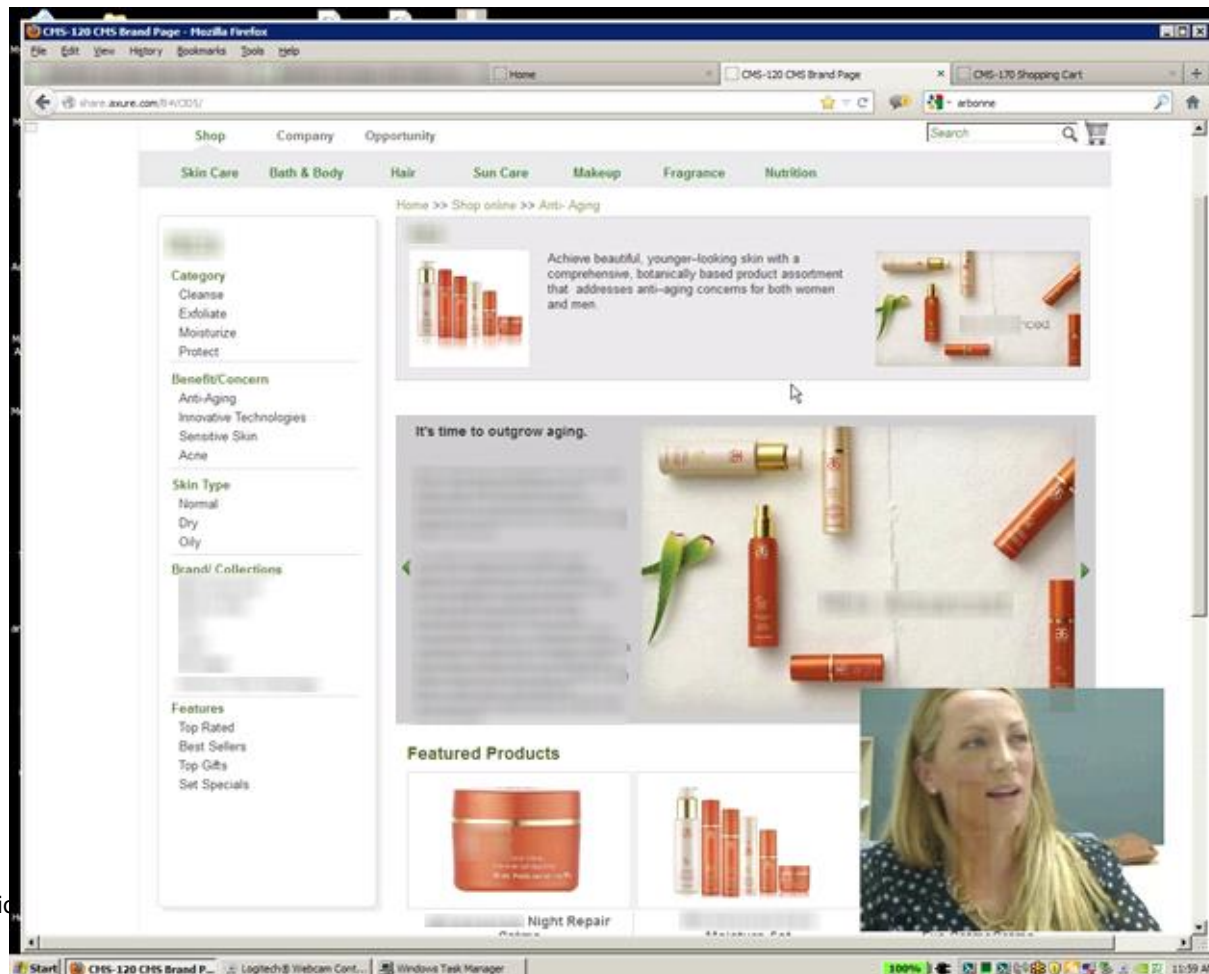


# New Taxonomy in Context

The screenshot displays a website interface with a new taxonomy for product categories and filters. The main navigation bar includes 'Shop | Company | Opportunity'. Below this, a secondary navigation bar lists product categories: 'Skin Care', 'Bath & Body', 'Hair', 'Sun Care', 'Makeup', 'Fragrance', and 'Nutrition'. The 'Shop' section is divided into five filter categories: 'Category' (Cleanse, Exfoliate, Moisturize, Protect), 'Benefit/Concern' (Anti-Aging, Basics, Sensitive Skin, Acne), 'Skin Type' (Normal, Dry, Oily), 'Brand/Collections', and 'Features' (Top rated, Best Sellers, Top Gifts, Set Specials). Below the filters, there are three placeholder boxes with the text 'Duis uma dolor, omare sollicitudin elementum sit amet, luctus vitae lacus. Curabitur non justo sem. Cras vel sodales purus.' A large image of a woman's back and shoulder is visible in the center. Below the image, there is a carousel of product images with titles like 'See Source', 'The Artisan Opportunity', 'REB Advanced', 'A Little Extra', and 'A Little Extra'. At the bottom, there is a footer with navigation links for 'Shop', 'Company', 'Opportunity', 'Independent Consultant', 'Contact Us', and 'Follow Us', along with social media icons for Facebook, Google+, YouTube, Twitter, Pinterest, and Blog.


# Brand Concept Design



- Quick Usability Validation





# Brand Focus – Final Design

Welcome, null null | [Logout](#) | [Home](#) | [Contact Us](#) |  [US - English](#) ▼

[SHOP](#)   [COMPANY](#)   [OPPORTUNITY](#)

[SKINCARE](#)   [BATH & BODY](#)   [HAIR](#)   [SUN](#)   [COSMETICS](#)   [FRAGRANCE](#)   [NUTRITION](#)   [HOLIDAY](#)

[PRODUCT CATALOG](#)  
[WHAT'S NEW](#)


**SHOP**

**SKINCARE**

[Brand/Collections](#)  
[Category](#)  
[Benefit/Concern](#)  
[Skin Type](#)  
[Specials](#)

**BATH & BODY**

[Brand/Collections](#)  
[Category](#)  
[Benefit/Concern](#)  
[Specials](#)



## Bottled Up Youth

**Our #1 Anti-Aging Skincare Collection**

After 4 weeks, 92% reported an improvement in the appearance of wrinkles.

\*Based on independent clinical study of 72 women

[GET THE SET](#)

# Case Study: Lessons Learned

- Adapt deliverables to meet goals
- Minimize waste (Unused deliverables)
- Watch for waste beyond core team
  - Documentation, QA, Release Mgmt
- Open, daily collaboration is crucial
- Educate entire team on UX activities
- Attain 'Team Ownership' of UX

# Understanding The UX Role

“Make it look good as soon as I build in my features”



# Solving Agile / UX Challenges

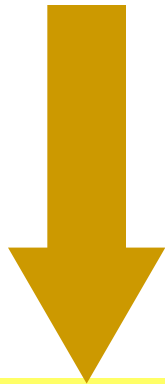
- **Conflicting expectations on UX**
  - Fit / Finish vs. MVP
  - Gold Plating vs. Diminished UX
- **Improve UX Visibility**
  - Product roadmap
  - Strategic direction
- **UX Impact on Scrum Cycles (*Bottlenecks*)**

# Improving Lean UX in the Enterprise

- Embrace some specialization roles on the team vs. generalists
- Provide UX training to entire team
- Set expectations about UX involvement and deliverables
- Improve UX in real-time discussion – Skype, chat, etc.
- Scale UX team quickly to support scrum

# Thank You!

- Please contact us for a free “Lean UX in the Enterprise Checklist”.



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