

Building UX capabilities at a technology firm: A shared success story

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ABSTRACT

Over the past several years, experience design consultancy Informaat and climate control specialist Priva have delivered a series of successful projects. Informaat's UX design, service design and recruitment and placement services have supported the growth of what is today a mature, in-house design capability. Our learnings – along with those of our Priva – offer other UX practitioners insights that we hope will deliver value to their roles.

Author Keywords

User experience; experience design; design management; product design; service design.

ACM Classification Keywords

H.5.m. Information interfaces and presentation (e.g., HCI): Miscellaneous.

INTRODUCTION

In 2008, Informaat began what would become a rewarding client relationship that continues to this day. What began with a UI design project grew into a service design one, and since then we have supported Priva in creating their in-house UX design capabilities, through further tactical projects and on to staff selection and recruitment. In this shared paper, we present our observations and learnings as a design agency supporting Priva's UX maturation, and our Priva's learnings throughout the process. We hope to share our combined experience earned through more than 20 completed projects with the wider community of UX practitioners.

PRIVA AND INFORMAAT

Priva is a long-established Dutch company which supplies systems (hardware and software) to manage indoor environments, either for residential or office buildings or horticulture. Informaat are a customer experience design consultancy that started in 1986, and carries out service design, interaction design, and content design projects.

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THE INITIAL BRIEF

In late 2008, we were briefed by Priva to address three specific requirements: Create (user interface) consistency between their different products, improve their usability and learnability, and support their localization and translation (allowing them to distribute products internationally and in different languages). However during our initial project — which was dedicated to the UI of a specific product — it became apparent that any user experience design efforts would need to be broader in scope. We proposed a service design project to deliver broader, more informed insight on the customers and end users, rather than immediately focusing on interface design issues. This involved an in-depth look at all the customer and end-user touchpoints with Priva products and services, and resulted in the creation of a service ecology.

LAYING THE GROUNDWORK WITH SERVICE DESIGN

Together, we conducted the service design project, and achieved a better understanding of the scope of their services, the way products were used, and the interactions between different roles in the service lifecycle. These were visualized in the form of personas, customer journeys, and service ecosystems.

Led by a newly-hired internal brand manager within Priva, this project represented the introduction of a truly new way of thinking for the company. For the first time, there was a shared understanding - across the organization - of who their customers were, supported in large part through a series of service design workshops. Customer insight was no longer the exclusive territory of sales and marketing, and a series of successful service design workshops disseminated this new form of "design thinking" across the organization.

APPLYING STRATEGIC DESIGN TO TACTICAL PROJECTS

In the years following our first service design engagement, the focus shifted towards UI design projects on specific product lines. These coincided with efforts to relaunch these products, and built upon our service design work. One particular project successfully demonstrated how UX design delivered excellent results.

"Touchpoint" is a small, touch-screen device that allows installers and building operations managers to directly configure aspects of a building's environmental control systems, without using full-screen, computer controls.

During this three-month project, design considerations were put at the core of the project; rather than squeezing design activities into an IT-oriented Rational Unified Process (RUP) or waterfall approach, adequate time was allowed for user research, and to test and iterate designs. For example, in situ user research carried out in the Netherlands, the UK and Germany, helped to precisely pinpoint the exact users and precise use cases in which the product would be used. This allowed the team to significantly narrow the scope of requirements to deliver a precisely targeted, fit-for-purpose product that didn't overlap with other products. In turn, development activities could be focused on building only what was necessary, saving considerable cost and time.

Usage scenarios developed in this project built upon what was learned during service design work, and were further honed by user research. In a further example of how this insight improved the UX of the end-product, research uncovered that end-users sometimes carried out configuration or troubleshooting activities on the device while on the telephone with a third party. This meant that the interface and navigational structure needed to be simple enough to support voice-based guidance. As with many aspects of this project, this UX improvement would not have made it into the final product if design didn't play its new, significant role within the organization.

A NEW DESIGN APPROACH PAYS OFF

The service design project was considered a great success by the design team and high-level management, but the wider recognition of the value of this new design approach came when stakeholders throughout the business started to see very positive reaction to the new UI designs that were developed and released to customers as part of our later projects. For them, the activities that generated things such as personas and service ecologies could be seen to have delivered a tangible, bottom-line result.

EMBEDDING UX CAPABILITIES

Since our initial engagement, we have delivered more than twenty projects for Priva, bringing UX expertise to their organization and supporting the team's own growth and development. Between 2008 and 2012, this included work on their corporate website, graphical asset library, software application identity, web applications and product innovation activities.

Over time, however, it was Priva's goal to become self-sufficient. There was the recognition that too much UX knowledge and specific experience was being carried by external staff, and risked being lost when projects were complete. Moreover, UX had - in the meantime - been chosen to become an internal core competency of the client.

In response to these demands, we adapted our engagement to assist them in building their in-house UX capability, both in terms of recruiting staff as well as providing concrete guidance on how to put it into place. This aligns with Informaat's approach to our client engagements as well, which we describe as "deliver, co-create and support" (in

Dutch: "voordoen, meedoen, zelf doen"). In other words, we often carry out work on our own for clients with no in-house UX capabilities, however we progress to shared projects and finally aim to leave clients with the tools, skills and expertise to run projects independently.

Another important role we played was to raise the profile of the design team as it grew and took on greater responsibility. In our role as external consultants carrying out long-term projects, we built relationships with internal stakeholders, and continually reinforced the role and value of design.

In Priva's case, our service design and UI design projects culminated in efforts to find and recruit staff to build their internal UX design department. We carried out these activities over the course of 2012, and currently, half of the six-person team was placed by ourselves. More and more, we find that this approach is desired by our clients. The capability to execute UX projects independently, or with the support of an agency, is preferable to long-term reliance on a third party.

THE VALUE OF UX TODAY

Priva's relatively recent focus on UX fits within a broader historical context. Since the late 1950s, they have recognized the value of good design, and have maintained a relationship with TU Delft, centered on product design. In fact, design has reaped business benefits too; since that time, more than €20m in business value can be attributed to this focus on the value of good design. Today, UX is considered internally as a key differentiator and USP for Priva, and the company aims to continue improving UX to set themselves apart from their competitors.

INFORMAAT'S LEARNINGS

Our on-going relationship with Priva has taught us several things that we feel are worthwhile sharing with practitioners such as ourselves:

- Consensus, high-level design representation, and patience are all required to introduce design thinking throughout an organization. And it can only be accomplished with someone on the client-side leading the effort.
- A "deliver, co-create and support" approach meets a client's short- and long-term goals, yet still offers the possibility of fruitful, multi-year relationships which can include activities such as organizational consultancy services, and the placement of contract-based designers on an interim basis.
- Unlike consumer-focused industry sectors such as travel, retail and finance, B2B technology and industrial clients are often lower on the UX maturity scale, and offer greater opportunities for varied types of UX work.
- A workshop-based approach (especially during service design and strategy-level work) allows multidisciplinary teams to visualize and co-create in a creative and unstructured environment. The results (which engage and surprise participants in equal

- measure) can be shared and hung as large-format visuals, reinforcing the work long after the workshops finish.
- The ability to follow up a strategic project (service design) with tangible, concrete ones (UI design) significantly raised both the impact and long-term durability of our work. Too often, standalone strategy projects that don't result in actionable deliverables fail to deliver long-term value.
 - Those wishing to find UX work (especially recent design graduates) can find promising opportunities for challenging, rewarding in-house design work away from the traditional marketing- and communication-led agency world.

PRIVA'S LEARNINGS

- Service design is an ideal way to introduce design thinking and the value of UX within an organization, because it can be carried out at a strategic level, and see its outcomes applied tactically in the future.
- A documented UX design process is crucial for ensuring that design plays its role in projects at the

right time, every time. In addition, explicitly including design activities in projects by making it part of a structured process helps reduce the risk that it is ignored or overlooked.

- Design deliverables that can be broadly applied across different stages of different projects (such as personas) serve to reinforce the value of UX consistently. Training the audiences of these deliverables - such as developers - pays dividends too.

CONCLUSION

Looking back on many years of fruitful collaboration between Informaat and Priva, we have seen firsthand the value that UX awareness and efforts can deliver to an organization. Our approach - from strategic to tactical, and from fully outsourced to in-house - has paid dividends in terms of the profile and responsibility of the internal design team. It has also delivered learnings that can be applied by other practitioners seeking long-term client engagements, and for internal designers seeking advice on how to position UX within their organization's overall strategy.