

EPISODE 11

[INTRODUCTION]

[0:00:00.0] SS: Hello hackers, thanks a lot for joining us for another episode of the Hacking UI podcast where we hack our way through design, development and entrepreneurship. I'm Sagi Shrieber.

[0:00:09.4] DT: I'm David Tintner.

[0:00:10.4] SS: We're your hosts and today's show is the first time that we're explicitly covering this part of the product development process.

[0:00:17.1] DT: Yeah, this is a great conversation with author and UX researcher Victor Yocco where we discuss how UX research fits into the flow, what it takes to create a really good experience, and some deep analysis of user psychology, which he covers in his brand new book *Design For the Mind*. I especially enjoy this conversation because I come from a startup background and like many of you I imagine, I've never had the chance to work with a dedicated UX researcher as part of the everyday workflow.

[0:00:40.0] SS: Yeah, I actually haven't either and I think that there are definitely some gems in this conversation that shine a new light on user psychology and UX. So D, you ready?

[0:00:48.9] DT: Ladies and gents, we bring you Victor Yocco.

[0:00:53.0] SS: Let's get hacking.

[INTERVIEW]

[0:01:05.1] DT: All right, we're here with Victor Yocco. Thank you very much for joining us today Victor, how's it going?

[0:01:10.6] VY: It's going great David, thank you for having me on the show, I'm excited to be here. Hi to all the Hacking UI listeners.

[0:01:20.3] DT: Definitely. So Victor, tell us a little bit about yourself, give us your background.

[0:01:24.1] VY: Sure, I started out doing research on visitors to zoos and science centers. My background is really in psychology and communication and that's what I went to school and studied, I got my PhD and my research was all about how do people learn in these settings and this experiences that they have where they're encountering information in a zoo, say around a zoo exhibit or something like that and they're supposed to learn more?

Well you have to talk to people, you have to develop studies where you observe people and see how they interact with their environment. Fast forward five or 10 years and suddenly there is an opportunity for me to take a job at a digital design firm doing research. I was like, "Well, I have no idea what digital design is but I know all about research with people." That's really where things gelled for me. I started working at Intuitive, this design firm in Philadelphia and things just really made sense to me.

Even though people were interacting with digital platforms and through digital medium, no longer the physical space of a zoo or a science center, I saw all the psychology and all the communication that I had studied coming out into play. "Oh, people want to feel like they're in control of their experience." That's a very psychological principle, a very core psychological principle and people like to feel control and when you have a poorly designed website or a poorly designed payment portal, the first thing people feel like is, "Whoa, I don't feel like I'm in control of this experience and that's a bad thing."

I started writing and talking about it and really, it's led up to this point where I was telling you this week, my book, *Design For the Mind* was released and that's something that I sort of never thought was going to happen in that area, I never expected, "Oh I'll come in and do research around digital design as a UX researcher and then I'll write about it and write enough that I'll have a book to put out."

[0:03:25.7] DT: Very cool. So just to get this clear, you had no design background at all before you were hired at Intuitive?

[0:03:30.7] VY: Yes, no. Yes Intuitive, no I didn't have a design background in any meaningful way. My focus was all on people and communication and so the greatest part of design prior to coming here would have been more around like physical designing, physical spaces like the exhibit spaces in zoo's and science centers. So I was able to bring that into my current experience. But yeah, I didn't have any experience with visual design or graphic design.

[0:04:07.7] DT: Very cool. So tell us — okay, so what was it like when you first started working in digital design and graphic design and what were the, you saw a lot of the similarities from the physical world, but what were some of the biggest differences?

[0:04:19.3] VY: Well, I had no idea what a lot of the terminology was so when people... I don't know if we realized it once we've been in the field for a while or if you sort of went to school for interaction design. We use so many things like hierarchy and navigation and terms that seem to just roll off your tongue and now of course they do for me as well, but I was like on Google constantly during meetings like, "Okay, what does main navigation mean? What is a hero image?"

So that was where my shortcoming was. My strength was very much in research, in working with people but my weakness was, I didn't know what this design principles actually were and so that's what I was able to fortunately pick up pretty quickly and I think that as that happen, that's when I made the connection was that, "Oh, we're talking about very similar things." A main navigation for a website is maybe the same thing as a really good label on what type of exhibit space is you're going into.

So there's the African feature at exhibits, there's the Asian feature at exhibits, that might be main navigation categories for a zoo whereas on a website, it's going to be like mobile payment center and FAQ's. So I start to make that connection and then also then see how important it is that we account for psychology and this experiences online.

[0:05:48.7] DT: It's a really cool to hear because I think it's kind of the opposite direction that most designers and people in the field come from. You're coming from totally the opposite way, having the experience of psychology, understanding people, understanding the physical world and learning how to apply that technically. I think this is, as I know at least, it seems pretty rare in our field, it seems like it could be a huge advantage.

[0:06:11.5] VY: I'd like to think so. When I was first, I was immersed because I wasn't hired in as a junior staffer and I was supposed to be up and running on my own. So I was just sitting in meetings and like I said, I sort of looking up the terminology and not understanding the mechanics of what a wireframe was and how you sort of go from, throughout the design process but I really did understand, okay how do we put together an interview where we will now understand what people's needs are around this product? How do we design a contextual inquiry where we're going to go in and watch people how they exist in their current situation and what products and tools they use?

So for me, that's what I brought to the table but it took a lot of studying to get comfortable. Then the fun part too, in a weird way, is that Intuitive is a consulting agency so we don't have our own product, I would have to learn banking terminology one day and healthcare terminology the next day and eventually you find yourself using so many different acronyms that it's all just a bunch of letters and numbers that are coming out of your mouth but you start to understand them and you're like, "Oh wow." But I've also been a part of a professional organization here in the Philly area and I know that some people who are wanting to transition into UX and into design careers also say a lot of the stuff feels like jargon when you first start working on the field.

So I think it's nice to remember if you're in a more senior position or if you've grown up in design that when you say things, even as simple as "navigation" or "UI" or "IA" or "architecture" that people don't necessarily know, especially if you're working with a client who maybe their background is all in banking that we sometimes need to really build people up with a basic understanding of what we're talking about.

[0:08:05.5] DT: Definitely. So today, can you talk about the UX researcher role as you see it? Exactly what is going on a day to day basis, how you can get the most out of it and what a UX researcher should be bringing to the rest of the team?

[0:08:20.4] VY: Sure, I wrote an article a couple of years back for Boxes and Arrows on just that. I called it I think, *UX Researcher: A User's Manual*, thinking along the lines of trying to draw an analogy to a user manual for a car, how to get the best out of your product and...

[0:08:39.7] DT: It's a great title actually, I saw this article and immediately thought about that because I think of a UX researcher as, at least I'm coming from a startup world where smaller companies where usually they don't have a UX researcher and they want someone else to play this role. They want the designer or they want the product manager to kind of fill this role until they can finally hire one.

But after reading your article and talking to you a little bit, I think that this is not a role that you can just say someone else needs to play. This is totally on position and can you kind of enlighten us a little bit about how you see that fitting in on the team?

[0:09:12.1] VY: Sure, that has been strongly impacted by the position I came in with and the place that I started working for, Intuitive, they had the luxury, it wasn't even a luxury, they made having research as part of their model being something separate, they didn't ask their designers to also go out and conduct interviews. So it's always been this cross disciplinary thing and I think it's really important because as a researcher, you have training in certain things, you know how to design studies and you get that experience either through school or through on the job training that you know which questions need to be aligned with certain methods.

It's not, "Oh I just always want to interview people, or I always want to do usability testing." It's, "When is that appropriate?" And that's why I think that having someone dedicated to research is really important because they're going to have this experience and this insight. I also think, if you're going to offer a position as a researcher and only asks somebody to engage in those types of tasks, you have the right to ask a lot out of that person. That was part of the point in my article as well which was saying, you might have this resource and there's a really good way to utilize it.

Researchers, people who tend to be involved in research really liked to think about problems, think about questions and what they tend to do is generate more questions. So they'll do

research collect some data, analyze the data and say, “Oh well I’ve solved some things but here are six more questions that I have about cracking this nut.” So understanding how your researcher might think and what types of provisional developmental opportunities they want, it’s going to go a long way towards making sure that they’re happy.

But then on the other side, you should feel like I have this person that I can trust to give me insight around my product. I can trust that they’re going to take this knowledge that we learned working with our banking clients and they’re going to understand how it might be applicable to our healthcare client and they’re going to work and learn the language of my designers so that when we’re in these meetings and when we’re wire framing and building out a product and designing the workflows, the researcher’s going to play a really active role, giving insight from their experience and then also hopefully using data that will be collected from actual users or potential users of the product. So I think a researcher should be expected to be on multiple projects and be able to really provide this sort of bridge or sort of an ambassador among the different disciplines that exist in UX.

[0:11:48.8] DT: Can you walk us through the kind of workflow and where the UX researcher fits in? Before you were planning on a project and you’re researching it and then it’s going back to the product manager or to the designer or how it’s happening after something’s already been built and you want to get feedback on it. Walk us through that flow and where they fit in?

[0:12:07.5] VY: Sure David, that’s a great question because it’s like, I think there’s opportunities for research to be fit in at all the different points. Of course I’m biased, I’m a researcher so I wanted to be involved everywhere but when you’re in the beginning and you’re in this fledgling state of what should my product be? You’re trying to define, most products come about, maybe all products come about to try to solve a problem.

So you need to define what is that problem, do people need to bank better, do they need to apply for going to college better? And so having a researcher with the ability to develop questions and different research methodologies to answer that question of, “What is the need and how is it being currently met? Where the shortcomings in that method?” I think research upfront is really critical and then once you start designing, you can start doing things like usability testing with even as simple as black and white wire frames that have just the different

functions and work flows laid out. You can start putting those in front of people and I advocate a researcher for that because they're not the designer, they're not going to be as sensitive around the topic. Hopefully they will be really good at just letting people go about their business and not asking leading questions that get the right answer in their minds.

[0:13:27.9] DT: Those damn sensitive designers.

[0:13:30.4] VY: Oh man, yes. I love designers. let me tell you, I love my job and I love working with designers and I understand, as a writer, I totally understand how having your work critiqued by people who, especially people you feel are very novice can be really just like, "Ah, why do I want to expose myself to that?" But at the same time, what I really admire about the designers I work with and the ones that I see on a day to day basis even if they're not my direct colleagues is that they're very focused on the goal of solving a problem and designing a solution.

And so therefore, when they get to the point where something is going to be released into the real world, they want to have already incorporated feedback from people. They want to have had a chance to try to get some insight into where maybe an incorrect assumption was made or people aren't going to find an experience to be as straight forward as we assumed and so in the end, most designers and all that I've met have been very open to the process of putting their work in front of people. But again, I totally understand when you want to just bang your head on a desk and be like, "The button is right there, the one that you said doesn't exist, it's right in front of you, your cursor is hovering on it." Definitely happens.

[0:14:48.3] DT: Yeah, I think one of the hard parts for designers about getting feedback and getting criticism is that when they show a final design, they don't necessarily have — it's hard for the person they're giving this to, to see everything that led up to it and see that it wasn't just, this was not the first thing. There's tons of thought that went into it, it's not just this flat design you're looking at the final outcome.

So can you give me some tips about, you must have tons of tips about giving feedback to designers and giving criticism, especially from a New York's research perspective based on data or anything that can kind of smooth that workflow?

[0:15:22.0] VY: Sure, well I would say that one thing is that always going in with the attitude of “this is to create the best product” and not really be super critical of your work, it’s not about “do I like your work?” One of the best things though is to have a relationship where you’re doing more than just critiquing, right? I work closely with my designers and whether or not you have to be friends with them is not what I’m saying but when you have a relationship with somebody and all you’re doing is critiquing them in a meeting, that can start to feel shut down or not be open to your suggestions because they think all you do is critique.

So you have to compliment that with friendly conversation, with also telling them what they’re doing right and saying, “This worked really great. Here are two things that we could maybe improve on and so really couching it in language around improving and not “oh you didn’t do this right”. I also like to talk about opportunity and I also like to talk about opportunity and I guess I’d do that with clients as well as designers but saying, “This worked pretty good but here is some opportunities.”

Then trying to get them to think of it again because every designer I know loves a challenge to think of it as a challenge, “Okay, you thought this might work, it didn’t seemed like it when we took it out and tested it but you know what? Now we have some real valuable insight. Based on this insight, what do you think might be a way of working around this or setting this up?”

So I also know that a lot of conferences that I’ve gone to lately have had some sessions around design critique and I know that here where I work are designers, regularly engaging critiques, to the point where it’s scheduled and so that way I think you start to expect it and it can start to feel less abrasive if somebody is critiquing your work. But you’re like, “Okay, well I’m also going to have a chance to critique my colleagues and I know that this is something that’s supposed to be for my growth. I think it’s really important area though and what about you as a designer in terms of how have you found it to be? Are there certain ways of approaching you that makes you feel more or less open to being critiqued?”

[0:17:39.5] DT: Well actually I’m coming at it from the development side. When I’m approaching Sagi, definitely, this is something that we deal with a lot. Sagi is usually making a design and then I’m going and developing it and it’s something, we’ve been working together for a long time and trying to build this repertoire of how to critique but there’s still times where you know, it

comes up with a design and I'm just, "Sagi, you idiot, this is all wrong, you don't know what you're doing."

We definitely I think, it's not an easy process to give someone constructive criticism especially on design from all angles, it's something that definitely has to do like you said, build a relationship over time, look at it from an opportunity perspective and not just form an "I'm right, you're wrong" and really work on it. But I think that the UX researcher is really just an interesting role that can come at it from a totally different perspective than a developer or a product manager.

You kind of have — everyone on the team as much as we like to be unbiased and we're all a team of trying to achieve the same goal of building the best product than today, everyone does have their bias. If the designer wants something super complicated done, it just doesn't fit the way that you've already coded the system, the developer does have a bias to let it be against that kind of thing or the product manager has some bias. So I think that the UX researcher is kind of interesting coming at it from potentially the least amount of bias as possible of the other roles on the team, you say that's correct?

[0:19:09.5] VY: Yeah, I would say that that's a really important piece to it, which is so many times we find ourselves in meetings and the product owner will say one thing, the designer will say the other thing and a lot of times it's a guest like, "Oh I think people will like this or I don't think people will like this." It's like, "Well okay great. My role is to put that in to a question for our next round of usability testing or you don't think people currently behave like that, let's find out by I'll go observe some people on the job," and yeah, I get to in a non-biased way in that I'm just wanting to collect data and say okay, here's what I saw and then turn that into recommendations for the designers but yeah, if it's something where people truly are struggling or something's working just fine. There's no reason for me to put a spin on it in any other way.

[0:20:04.4] DT: Give me some kind of techniques that you have for collecting this data. What are some of the experiments you're running, surveys you're creating and any other techniques that you're using?

[0:20:14.9] VY: Sure, one of the things that I really do frequently it seems is interviews and a lot of that is to try to get high amounts of information with smaller sample sizes because we don't always have the luxury of a ton of time on our projects. So it's like, you want to talk to as many people as possible but you have two weeks to do it. So how do you go about setting up something where you're going to find valuable feedback? And I found interviewing to be really valuable because you start to build a rapport with people and you don't just have this survey that's out there for a few days that maybe people will respond to or maybe they won't.

Also it depends — so I will go back and initially I would say, the answer, the method is always going to depend on the question being asked. If somebody is asking, "How does this currently work?" I might think about doing some usability testing so that I can put a product in front of people and say, "Okay, here is where people are struggling, here is where things are working wonderfully." If the question is, "What are people currently doing to do their online banking while also shopping and sitting at work." I might say, "Okay, that sounds like something that would be answered by contextual inquiry because I want to go into a setting where people are doing this things and actually see how they're going about accomplishing this.

Are they doing manual tasks while also working on their computer, are they going from room to room? Are they making phone calls because they have to bring other people into the conversation? I want to see all that because a lot of times, people's memories and recollections aren't necessarily accurate. If I'm just interviewing somebody and I say, "How many times did you make a phone call while you were checking your email yesterday?" You might say, one, you might say 10, you might actually be somewhere in the middle but if I watch you and I record it then I can have a pretty accurate depiction of an understanding of what you go through on a daily basis.

So I love contextual inquiry because that's really like going in to the setting and seeing how people function and then there's UX assessment, which is where you go in and look at the property and you have like a set criteria and you try to grade it. That's something where you have to really build up your experience to be, I think, super proficient at it because a lot of what you end up doing is falling back on. What are best practices that I'm familiar with that I've seen work in the past does this property have some of this characteristics or does it seem to be lacking in a lot of this areas?

What would I recommend to improve that? There's a handful of methods that I would say I use much more frequently than others. There's things like eye tracking that I don't get to do very often but I see value in trying to understand where people are looking on a screen, what information catches their eyes.

[0:23:11.5] DT: Let's take like the method of doing the user interviews? Say you have something specific you know, okay, we want to — I want to dive in the usability of a certain page or maybe a signup flow and then you say okay, the way that we're going to do this, we decided we're going to do interviews on this. How are you — take us through that, exactly what can someone do if they want to replicate the process?

[0:23:32.4] VY: Okay, well depend on what your product is, a lot of times again I work with clients and so, the first thing you want to define is what your question is and so let's say it's "how do people currently use this home page?" Like you were saying, or how do people currently use this website and you've decided interviews is the best way to go about that, you want to figure out who do you want to interview. Do you want it to be like power users, do you want it to be people who have never seen this site, do you want to mix, do you want it to be people that use the site for certain reasons but not others?

What you do is you create what we call a screener and that's what you use to screen in and out participants. Is there an age range for summaries and do you feel like that impacts who your interview participants are going to be? Are there certain jobs like a lot of times will say, if we're going to be doing a study on a pharmaceutical websites, we don't want to include people that work in the pharmaceutical industry. So you need to think of all the characteristics of the people that you want to be in the interviews and then create a screener for that. Then you actually need to find how you're going to interview this people, a lot of the times, we'll go through and use a third party to recruit.

Or if it's a client who let's say, we're working with financial organization that has stocks and bonds and does financial services for their customers, we'll need them to put u in touch with a pool of customers that we'll be able to recruit from to say, "If you meet this characteristics, we'd like to interview you," and then from there, you actually can schedule the interviews and a lot of

times, if we're trying to do a lot of people in a short period of time, 20, 30, 40 people in a couple of weeks, we make the interviews remote, we do it over the phone because that removes the added time and expense of traveling and we can screen share and do a video and audio chatting just as easily as being in person.

I always do prefer to be in person, but it's not always something that we have the luxury and the budget for doing but yeah, so you want to make sure you screen for the right people that you want to interview then while you do that, you also need to be working on your actual script. It's always good, even if you're going to have sort of this free flowing interview style, it's always nice to have the questions that you want to ask critically in front of you to make sure that you cover them, there's definitely different takes on that.

Some people will go in with a script and they won't stray from it. Some people will go in and they'll say, "Here are the questions I want to ask, they might come up in different order based on how the discussion goes." Then you can also just have like a general open interview where you completely want to learn from the perspective of the person and you don't make any assumptions, that's a little more difficult to have it completely unstructured because you don't necessarily know where you're going to go and if your time is going to be spent well.

[0:26:37.5] DT: I think this is something that, as you're talking about, like something all of us want to do with every new product we're releasing or launching, we of course want to do this stuff but it doesn't sound cheap. First of all, from a financial perspective but also from the aspect of how much time it takes. So can you give us a general ballpark figure, how much does something like this cost to do?

[0:26:59.0] VY: That's a good question, I guess it varies and so in terms of using a third party to recruit and setting everything up, I guess it would probably be around the \$10,000 range to do a project where you're paying a third party to recruit them and you're paying I guess that's not going to include the salary of the researcher but for all the logistics associated with that.

[0:27:23.5] DT: The study itself.

[0:27:25.5] VY: Yeah, and so I guess that can be pricey but there's also, if you're familiar with the term like guerrilla research, there's people who advocate this more quick and dirty method which you don't necessarily have the luxury of screening people out when you engage in guerrilla research, but you're doing it like in a public setting and you're hopefully going to get people who are involved in a way that you want them to be.

So for example if you're testing and banking application, you might stand outside of a bank and try to intercept people and ask them if they are willing to spend five minutes with you. That's a quicker dirtier way of doing it and certainly I think the expense piece that you mentioned and also the timepiece is why UX research and general isn't necessarily always a part of the project because it's really hard to make that justification, "Okay, I'm going to dedicate budget to this research or spend time doing research," while other things are being held off because the research is going to inform their design and development.

[0:28:30.5] DT: that's exactly what I wanted to ask you about. Let's say you're doing a really large research study for a client, from whose side is that request, is that the clients specifically is asking for that? Or is that something that you guys have identified that in order for you to do this project correctly, we have to allocate the time and the money for it? Which side is it coming from?

[0:28:50.4] VY: Typically it's our side saying, "This is how we work." If we were going to have an ideal relationship, we're going to start off with what we call like a researching strategy phase and the thing about that is, it doesn't have to take months, it doesn't have to add so much time that you feel like your product is never going to actually start having its work done on it. We can schedule some things and within a period of a couple of weeks, start getting data and designers can start designing and we can work iteratively with them as we start to get more information and inform the design.

Because I think that when we've had clients say, "Whoa, no thank you," to the research piece is when they're very nervous that it is going to slow things down, it's not that they don't see the value in the research. It's there on certain timelines, they have releases that are scheduled and they know when one's coming up that they can't fall behind on getting their design into production. So it's really, it's learning to work at a pace that is pretty fast for a researcher and I

talk about that in my article as well about if you are a researcher whose background is in academia and you went to school and you were surrounded by academics, those research projects that you're doing take two, three, sometimes four or five years, you will never have that luxury when you're working with the private industry. There will be no place that says it's acceptable to take even six months to do a research project, you have to learn to work at a break neck pace for what would be considered an academic researcher's schedule.

[0:30:26.6] DT: Definitely, definitely. I was going to say, in environments I've worked in, the UX research phase has been cut down to a matter of days, if that. Sometimes you're lucky if you even have those days and a lot of times it's actually done, like you said, very iteratively. Do you see any disadvantages to working that way or not preparing beforehand, do you lose something when you're only kind of delivering the research and the results after the projects has already started?

[0:30:54.7] VY: Yeah, people start to feel invested in the design immediately. So then if you find, if you uncover something where you feel like, "Oh wait, maybe you want to think about taking this a little bit of a different direction," you encounter an argument versus starting with a clean slate and just saying, "Okay, here's what we saw and we don't have anything already down that road," and I can give you real life examples where we make assumptions and we say, "Okay, here is the kind of tool people are going to want to solve this problem. Like people are going to want this website in order to sell this product because they'll be able to sit down with their potential clients and show them this website."

And then you start to make that assumption and then all of a sudden you find out, "Well hey actually, where the placed value is the ability to interact without a computer in front of them while they're on site with a client and so we need to think about how we deliver this tool or this service that they can sell using not a website but something completely different and it's like, "Okay, but we thought this was going to solve all our problems."

Often times you'll find that like a product manager or somebody who is at an executive level has a vision for something and you have to come in and say, "Well that's not necessarily what your client's visions are or what your customer's visions are."

[0:32:22.0] DT: Break the news to them softly.

[0:32:23.9] VY: Yeah. That can be very difficult when that ball is already rolling, you don't want to say, "Well actually, we might want to look at somewhere else." Nobody wants to be the guy that says "well actually" about anything, but when it's being informed by research, really want that to play a role and so if you can get that upfront before people start feeling super invested in the direction you're heading. So yes, the answer to your question is, there are some disadvantages to that.

I think the advantages are that you try to show the value of research because people can continue to put it off and then when you get two years down the road and they say, "Well why doesn't this work the way we wanted it to?" All you can say is, "Well we spent the last two years making assumptions and then now that people are using it, we made a few guesses that were wrong." So how can you get ahead of doing something like that, it's really important, and it will save you time and money in the long run.

[0:33:26.8] DT: Okay, let's say like a scenario here, let's say you have a small startup that doesn't have a dedicated UX researcher on the team but they appreciate the value of it and also they don't have a large budget. Give me like kind of the hack it out, most value for money kind of method you could say before you're building a product, or as you're building a product to kind of do the UX research and get the most out of it.

[0:33:51.1] VY: Depending on how you feel about getting out in public and doing things, I would say you really need to try to put it in front of people who are not your peers, whatever it is you're creating and at whatever ever stage you feel comfortable doing that, try to get it in front of some people who don't know who you are or what you're trying to accomplish and will give you some unbiased feedback. And whether that means standing around outside of the coffee shop and offering to buy people their coffee as they spend 10 minutes with you.

Just getting it in front of people, when I've worked with designers who aren't used to having research as part of the process, even when we have quick interactions with potential users that they get feedback on, the lightbulb that goes off is really amazing. It's like, there's very little that compares to getting feedback from somebody who doesn't have any investment in your product

and hearing in what they say. It could be good, it could be bad or it could be just right in the middle and what they say matters in that it can help you in your thinking and it helps inform decisions.

I don't advocate that you only talk to two people and then everything they say should be what you run off with and do. That's actually why I like psychology so much because I think that even if you don't have the luxury of including a whole bunch of information from users and from research, the psychology piece can help inform the design as well because there's been a lot of research done around psychology and how people do things that we can then apply.

And that's the little space that I've made myself comfortable writing in, which is taking a look at the academic side and the research and saying, "This is great but it's not written in a ways that really makes it easily applied by a practitioner. Here's what I think the psychological principles would look like in real life and why they would be meaningful to you as a designer."

So translating that and making it useful can become another tool along with data from users, along with all the experience and training that designers and design team members have to make sure that you're trying to account for what the user's needs will be.

[0:36:12.7] DT: Could you give me a couple of those principles that you find most designers don't know or don't apply until you've discussed with them or shown to them that they can apply to that situation?

[0:36:21.9] VY: Sure, something that is pretty easy is around what is called framing communication and it's thinking about whether the information needs of your users and then how to actually apply different ways of saying what is essentially the same thing but in a way that makes it meaningful to somebody. So let's say you have a certain set of users and there's a topic that's really important to them and around why they should be using your product.

How are you communicating with them in a way that immediately makes your product relevant to their lives? And then taking that and making it so that say it's something where people have information on their profile where you can actually then generate messages based on what it is that their interests are or their background is and then tweaking that so that other people who

have different interest are going to get basically the same message prompting them to use your product or prompting them to enrol in something or make a certain action.

But it's going to be framed in a different way to try to inspire them to engage in that behavior and what that does is it's not tricking people or lying to them, it's saying, "I acknowledge that everybody needs to understand why something is relevant to them. So how you present it will make a huge impact into them understanding why it's relevant and from there, they're going to actually pay closer attention to what it is your product does and determine whether it meets their needs."

So thinking hard about how we frame communication is one way of doing that, that I found to be rewarding in a way because to see how people start to then think about the needs, the information needs of their users and so like do we design something that has a very friendly and open feel to it in tone? Is that what our users are looking for, or is it something that we need very serious and structured and provides them with reassurance that your money is safe here kind of feel to it?

And experimenting with that to see what types of users respond in different ways is something from psychology that I think doesn't necessarily seem like, when you're designing something, that you instantly think of how will different users perceive this and really trying to think about the fact that not everybody is the same in how they'll perceive communication whether it's visual or words or audio.

[0:39:11.6] DT: Okay, definitely, I actually, I really like your article, *Using Heuristics To Increase Use of Your Product*.

[0:39:18.4] VY: Okay.

[0:39:19.5] DT: Really well written. By the way, everyone should definitely check this out on Smashing Mag, right?

[0:39:23.1] VY: Yes. Well thank you David, I appreciate that.

[0:39:25.1] DT: No, really excellent article. Because what you did there was you took all of the different psychological principles and kind of gave the real world application of them and then brought them to the digital world. I really liked, maybe you'll explain, you talked about, is it the default theory?

[0:39:42.6] VY: The default effect, yeah.

[0:39:44.1] DT: Default effect, that's right. This was really interesting to me.

[0:39:47.3] VY: Right, so it's like people instantly think of the thing that comes to mind first is what people think is the best answer. A heuristic is a mental shortcut and I have a chapter in my book that talks about holistic as well but this article from Smashing covered different heuristics. Researchers have looked like 20 or 30 different heuristics to try to understand how to do people make decisions and something that we know is people are constantly making decisions.

You have hundreds if not thousands of decisions you make in a day. So many that you don't even pay attention to most of them. What you're going to wear in the morning, what you're going to eat in the morning. So the default effects is that what people see in terms of default settings, they're not going to change and what that means is when you put something out for your users, they are going to assume you had the best intentions in mind. That might not even be a conscious assumption but it's like, they don't think about what the settings are.

So we saw this, there is a study that was done like in the 90's around people who had sent in their files for Word Documents and this was done by Jarred Spool who is very highly regarded UX researcher and also designer, right? He found that most people hadn't changed their default setting to have the auto save feature on. When they went back and asked users why, it's because they thought that Microsoft had their best intentions in mind and so they had not set the auto save to being automatically on, why would they mess with it?

He knew people at Microsoft and he asked them the same thing, "Well why is your default setting to have auto save off?" And it wasn't that they had the user's best intention in mind, it was that that was the easiest thing to program, you just did like all zeros and there was a

complete disconnect there, which was the user was thinking, “Oh, Microsoft knows what they’re doing,” and Microsoft was thinking, “This is really easy, this is the easiest way to ship a product.”

[0:42:10.9] DT: Thinking if the users wanted to, they can change it. I think it’s something that...

[0:42:13.0] VY: Exactly.

[0:42:14.1] DT: That we’re probably all guilty of even on a smaller scale but it sounds like there can be a few quick wins if you are in our products that we can do sometimes just by changing default settings or just by actually having the user’s best interests in mind from the beginning and not necessarily thinking that your interface is so simple that they’ll change it or they’ll adjust it, but just giving them what they need from the beginning.

[0:42:36.3] VY: Yeah, and I strongly advocate that you’ll never be able to guess what every user wants default right out of the package but you can make some assumptions around things like the auto save and saying that most people are probably going to want their work to be saved at least every now and then. But also, I think it points to having a good onboarding experience where you show people, “Here are some things that are set by default and you might want to consider changing them,” because most people, if they can dive right in and understand how to use a product, they’re not going to start digging around into the preferences and the settings.

So like I point out, I think in the article I talk about slack being something that does a good job at showing you, “Oh hey, you’re getting this messages right now when people send you a message,” you get the message pops up on your screen and I think after it does that a couple of times out of the box then it says, “Do you know you’re getting this message because that’s how your default is set.” You might want to click here and adjust your defaults. That’s really, instead of somebody saying, “Why am I getting this damn annoying pop up every time?”

I get a message on slack and it’s happened for three years straight and they just think that’s what they have to live with, it’s like, “Okay, you’ve gotten this message, some people find it helpful but maybe you don’t? If you click here there’s other options for how you could have this set?” I think it’s good to provide that kind of guidance to users and also in general just thinking like designers and developers very often are the ones who want to tinker with things but Joe,

average Joe, average Jill on the street, they just want it to work and they want it to be fast and they can get on with the next thing, and so they're not necessarily going to dig around in the defaults and change things.

[0:44:27.8] DT: Definitely. I really like that actually that Slack experience. I noticed that exactly when I joined too and was in there in saying, it's so simple, this is how you adjust the channel settings, I have one channel that I wanted to be a certain way, one channel that I want that I don't need the notifications in every message and it's so true that they actually use the wording, "These are the default settings, here is how you adjust."

[0:44:48.9] VY: Yeah, I think it's very smart on their end to do that.

[0:44:52.3] DT: I want to change kind of the flow a little bit on to you a little bit more.

[0:44:55.6] VY: Okay.

[0:44:55.8] DT: I want to ask you, we did a design salary survey a few months ago and one thing we realized from our readers is that most people are designers followed by developers, followed by product managers and there were actually very few UX researchers that at least completed our survey and we hope that that's somewhat representative of the industry. Obviously bias towards our audience but somewhat representative of the industry that there are not that many UX researchers out there. Tell me, what kind of advice do you have for someone who wants to be a UX researcher and wants to advance that direction of their career?

[0:45:29.6] VY: Good luck. No, I'm just kidding. Well, I get that question quite a bit, I'd say a few times a months, somebody reaches out to me and says, "Hey, I'm interested in being a UX researcher, what do I need to do?" And my first piece of advice based on my experience is you need to know people, you need to do everything you can to be involved in studies or interact with people and it's hard to put that on a resume but the more experience you have with products where you have not been shuttered behind closed doors but you've actually been out and you've had to talk to people and you've had to learn how to deal with all kinds of people with varying opinions, I think that's a really valuable skill to have.

Just the ability to negotiate and to talk to people and understand that some people are very outgoing, some people are very reserved. Some people look unfriendly but they're really friendly when you start talking to them. So to just have this life experiences is really critical, and from the perspective of where I work, we look for what I'd call a social science background. So degrees or training and things like anthropology, sociology, human computer interaction, things that have typically been more soft science, psychology as well that people develop a lot of the methodological training that we use. So how to conduct interviews, how to build a survey that's going to be administered to people either online or in person, how to observe and take notes really well.

Then also how to turn that data into recommendations or analyze it to create strong themes. I don't always do research and then tell my designer, "This button needs to be pink and located in the left hand corner." I say, "It looks like people are really struggling with this area and here are some of the reasons why. Let's think about a solution," and you just need to just get comfortable working with data to try to solve problems that will end up being owned by the designers in the design team and how they go about thinking a problem should be solved. So working together with other people.

[0:47:52.7] DT: Okay. Just to give you some perspective here with our survey, we found only 1.5% of our audience actually was UX researchers. So I think it's really interesting to give people an idea of how they can get into the field and actually full on into UX research and kind of this blend of a designer or product manager who happens to be doing that on the side.

[0:48:14.7] VY: I think that your survey is fairly accurate then in terms of what I've seen. So when we have a job interview or we post a job, we'll get a lot of applicants who are designers that also do usability testing and often times we'll say, "We are really looking for someone who is pure research." I guess the problem is, there's not so many jobs out there. So it's like a good thing and a bad thing. It's a good thing when you have the job but it's a bad thing if you're looking for one. I don't necessarily myself even have the capability of just looking next door and saying, "Well, if I want to leave where I'm at now, they'll have a job for UX researcher, they will probably expect me to do a lot of different tasks as well around the design," and I'm not

completely comfortable with that at this time because of my experience and the fact that I do have a pure research position at this point. So we do get a lot of people — go ahead.

[0:49:14.6] DT: Is it something that you see yourself getting more into? Do you feel that because you don't have a design background, you're less able to kind of solve the problem, you're able to show what the problem is but not solve it? Or it's not something you're interested in going even more into your research?

[0:49:31.2] VY: I think that for my own personal interests, I'm definitely focused on the research piece and then the writing and talking about applying psychology to design. I'm very happy in that space. I do think that I would be able to wire frame out some things, but as far as getting deeper into a more polished design, I'm not the person for that, I already know that. I respect what designers do so much that I would only make their lives worse if I was considered a design colleague.

But seriously, I think that for my interests and what I feel like what my skill set is that I'm doing the right thing for me by focusing on research and that the design stuff I have learned and picked up while working closely with designers is something that more in my personal side, I find value to or if there was a need to do some quick wire framing I would be comfortable doing that but when it comes down to effectively utilizing resources, designers are much better at how they spend their time and the solutions they come up with quickly than I am.

I would say though going back to your question then also about getting into research that that's going to be a problem when a lot of employers will put out a job and research is part of it but they also want people to be able to design or they want them to be able to code. I think that we really do have this mixed message that we send then around the value of research when we combine it like that. I do advocate having a dedicated UX researcher or somebody who you bring in on projects as a paid contractor to do the UX research or the research because of what I feel like is necessary in terms of background and training and experience.

[0:51:32.3] DT: I really think we have a new — the classic going on right now in Andrew street is should designers code? I really think we have a new one of this debates on our hands here. Should designers be doing UX research?

[0:51:44.0] VY: I would be willing to participate in that.

[0:51:49.3] DT: Yeah. Because it's definitely, as you said, companies want to hire this kind of all in one person. But it is truly a field on its own and from talking to you I understand the depth of it. I'm only beginning to understand the depth of it and how much needs to be done there.

[0:52:05.6] VY: I think that we have where I work a successful model of interdisciplinary research, works with design, works with development, works with engagement, we all sort of function on these teams that really high level. I think that's part of why it works is that we trust each other to take care of our own space but we're also closely connected on these projects to where we know what's going on.

The designers know what stage the research is in and what we're finding, they're welcome to join calls and testing sessions so that they have firsthand insight into what we're finding and then I don't just do the research and go away. I stay and I say, "What can I do to keep helping moving things forward? What can I do to explain what I think these research findings mean to designing a feature or concept?"

[0:53:00.4] DT: Why do you think that your company, it sounds, I got to say it sounds different than many other companies. Now, why do you think that they are putting such an emphasis on it on your research and that they've given the time and the money and the budget for it? What's different about your company, why do they believe in it so strongly when other companies don't or don't allocate the budget?

[0:53:19.5] VY: I think it's a basic philosophy of our principles when they founded the company that they knew they wanted to be user focused and the way to do that was to always have somebody in touch with the actual user and that there wasn't going to be a realistic way to have designers out there, constantly engaging in research and then expect them to come back and design everything and then have a meaningful work life balance but also balance between design and research and where is that balance?

And so having dedicated research staff has really been something that's been part of the philosophy when it was a four person company and then when it was 50 person company that it's something that it's just been baked in from the beginning, and sometimes that's meant trying to sell a project where the research isn't there but then having to researcher play a role anyway and try to show a client that in the long term research would be a valuable thing to invest in as well. I think that as a researcher, I have found myself very frequently having to justify my presence.

So I've started to somewhat get comfortable with that and to say, "I'm a researcher, I won't slow down the process, you'll see the value very quickly," and I don't literally have to say those words at the table but I sort of do at time and I do actually say, "I won't slow down the process," because that's the look of horror I see sometimes in a clients' eyes like, "So how long is this going to take?" And it's like, "We're looking at days or weeks, not months and years." But the biggest hold up is often times getting the client to get us access to the right people.

We're very upfront about that when we start new engagements that if research is part of the upfront plan and we tell you that we need to have 30 people in two weeks that means in two weeks that you have those two weeks to get us the 30 people that we need to talk to, if that's how the plan is written up because we don't always have direct access to people, depending on what our clients product is and what their sort of agreements are with nondisclosure amongst the people that use their product.

[0:55:48.7] DT: Where do you kind of cross the lines with a BI analyst or how much are you doing if any at all getting into the user stats of when it's a website or are there overlaps between the two or are you doing this work?

[0:56:04.0] VY: Not sure necessarily, with the term BI, what do you mean? Like a business analyst?

[0:56:09.7] DT: Yeah, someone who is looking at Google Analytics stuff, someone who is looking at hard numbers and not interviewing people, not going out and finding like an individual. They're looking at patterns, traffic, page visits, are you doing...

[0:56:25.4] VY: So I would look at that as something that's very complimentary, it's not part of my role currently. We do have, and a lot of our clients will have people who are in charge of keeping track of their analytics and I think that that's a really great value ad. So let's say for example, I find out through my interviews or through some usability testing that people are really struggling with a certain field in a form.

I might go back then and ask the analytics person to say like how many people are dropping at this point in the work flow? Because then I have that to say like, "I saw people struggle here and look, you're losing 75% of your conversions because people stop at this feel or this page on the form or and then they navigate back to the FAQ's and they don't seem to be able to figure out how to move forward through this form, and if you tweaked it slightly, you might see an amazing amount of traffic getting through to completion."

So there's lots of opportunities around that and when people say something like, "Oh this frustrates me," I always want to go back and look at analytics and ask, "What change in traffic do we see at that point? Do we see people just leave the site? Do we see that people go somewhere else on the site, or do we see that they're constantly struggling at that point?" I think there's a lot of opportunity to learn using the background analytics, but it's not necessarily my role isn't to dig in to the analytics. I mean that's something that we could do but it's usually not. It's often times, "Okay, now I've looked at how people seem to be behaving due to analytics support this?"

[0:58:13.1] DT: Okay cool, definitely. It sounds like there's a lot of cooperative stuff that can be done there.

[0:58:16.5] VY: Definitely.

[0:58:17.6] DT: Supporting you, going down at that research or if this study will be worth there how much time to allocate sort of based on, like you said, if 70% of people are dropping out then I guess you'll be doing a more serious study to determine why.

[0:58:31.0] VY: Yeah, exactly.

[0:58:30.7] DT: Then you find out, they're barely losing money or it's only a small drop off or something like that.

[0:58:36.8] VY: Yeah, it could really help with prioritization and validating what you think you're finding on the qualitative research side when you're doing interviews or something like that.

[0:58:49.4] DT: Well Victor, we've already passed an hour and I feel like I can go on forever, but I think we got to wrap this up soon.

[0:58:56.0] VY: Sounds good.

[0:58:56.4] DT: Any things you want to share? You just published your book, like you said, and I got to say, I instantly, we were talking about before, we started recording the podcast, read a couple of your articles. I haven't read the book yet but I definitely want to and instantly after reading the articles, I saw, "This guy knows how to write." Really, all of your articles are so well written, to the point, structured so I imagine that the book will be of the same style.

[0:59:23.8] VY: I hope that then you find that that's the case I certainly tried to use the same voice that I write my articles in and I mean, thank you so much for the kind words, I really appreciate that and something — go ahead.

[0:59:39.2] DT: But I really think, I really believe it, I think anyone who reads an article you've written will notice it right away as well. So tell us a little bit about the book and...

[0:59:47.6] VY: Sure, well *Design For The Mind*, it's subtitle is *Seven Psychological Principles of Persuasive Design*. Sorry, I've only said it a million times the last year, but what I did was I took a lot of the content that I was writing articles about and I thought, "Well there's so much more here that I could explore," and so it's not just rehashing the articles that I've written in any way. It's new psychological concepts, it's just trying to give people a really broad taste of all the different types of psychological series that exist around behavior and around decision making and how we could apply them to our practice as designers and members of design team.

So I think that people who read it don't need to have a background in psychology in any way. I've written it in a way that practitioners should be able to feel very comfortable coming in and saying, "Okay." I've used a lot of screenshots to provide again like the real life example of how a principle might play out so that people can see, "Oh this is something that some web properties that I'm familiar with or already using and this is how they use it. Now I know how to talk about it too because I understand, it's like from a psychological perspective, why this would be something that works."

[1:01:08.4] DT: Cool. Very cool. We will definitely check that out. Where can our listeners find you?

[1:01:13.4] VY: Sure, I'm on twitter @victoryocco and my website is www.victoryocco.com and if you ever want to send me an email, you can email me at victoryocco@gmail.com and I will respond to you. I always appreciate it when people take time to send a personal message so I'm willing to take time to do that back. Then one last thing I wanted to mention David is that I'll give you, if you're okay with it, a code that would give your listeners 39% off of the book if they order through my publisher's website, which is manning, is the publisher of my book. It was just released this week as we're recording this week and I'm very excited about it.

[1:01:58.8] DT: Do we have that code yet or we'll publish it on the website?

[1:02:01.2] VY: I can give it to you now, there is one — are you ready? It's "smayocco" and that's good for 39% off if you enter it on Manning's website and I'll give you that code and link to the book on Manning. It's also available for purchase over at Amazon and I know that they have different price points over time as well.

[1:02:30.3] DT: Cool, we'll link to everything on the blog post on Hackingui.com and Victor, this has been really, really awesome so thanks again for joining us.

[1:02:38.4] VY: Yeah David, I loved our chat.

[1:02:39.3] DT: I appreciate your time.

[1:02:40.3] VY: No problem, have a great day.

[END OF INTERVIEW]

[1:02:55.0] DT: This week's episode is brought to you by WooCommerce. WooCommerce is the most popular eCommerce platform in the world powering more than 30% of all online stores. It's completely free to set up, and has no monthly fees. All basic functionality is free and it's certainly more than enough to get you started. As you grow and need customizations, you can buy extensions and plugins and the community is huge.

It's built on WordPress so getting started is as simple as it can be and what I love most about WooCommerce is that it's open source and fully customizable. You can make your store as unique as you'd like with virtually no limitations. WooCommerce is also perfect for side projects and is one of the tools that we're recommending now to students in the Side Project Accelerator. When I start a project at the beginning, I don't want to waste time.

I just want to get something out there quickly and then as it grows, I can customize and scale it. WooCommerce is perfect because it fits for every stage at the project and I don't have to waste time changing to another platform later. It's also nice that it integrates with all the major payment gateways, Stripe, PayPal, Amazon and tons of smaller regional services and you own your data forever. If you ever decide to leave, there's no risk of losing data or not being able to transfer over your sales information.

If you have an online store or thinking about starting one, check out WooCommerce. Like I said, it's completely free to get started and easy to set up. You have nothing to lose and if you like to purchase any extensions, themes or plugins for your store, enter the code "hackingui" and check out. You'll get 30% off all your purchases.

Again, you don't need to buy anything to get started. It's completely free but if you want to customize or need some of the events functionality, you have a ton of extensions and plugins to choose from. You will get 30% off everything with the code "hackingui" at checkout.

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