

Malcolm Lewis: Please tell us about yourself and why you're so interested in the user experience and usability testing

Moira Edwards: I'm not a provider of usability testing or user experience design, but a consumer. I love to see good design in software. I started my career as a software developer in Ireland but where this really became real was several years later, when I was in the US, and working for an association that developed custom software as part of our services to members.

So, I came to see that good software design is about member value. Their experience is what drives their satisfaction with the technology we offer and ultimately with the association.

At the time, they would ask us for software changes, and we were very careful not to make those changes turn the system into an old Victorian house, with strange additions and renovations, and multiple staircases, some leading not where you'd expect.

We wanted the elegant solution, the change that blended with the rest of the features in a way that made sense. I still do.

ML: So, this is all about making software better?

MHE: It's also about avoiding the disaster!

I actually came to this the hard way. A program that we offered at that association, had developed a brand-new interface. It had lots of cool elements, like pop-up windows for answering each question. But when it was launched, constituents were completely confused about how to use it. And the complex design of the software made it perform badly, and the volume of traffic to the site brought the server to its knees.

And it was a complete failure. Our President and CEO, every time he met a member organization's CEO, had to say "I'm sorry about the software issue" and when he stood up to give his address at the annual meeting, had to start with apologizing again for it and talk about how we were going to fix it.

So, one of the things we did was bring in usability experts. And they did assessments and interviews, and we brought in members to try out the software, we analyzed the results. We paid a LOT of money to understand that the software was confusing, slow, and just smug! Full of itself! Not about the user.

And I think that's the big thing. Technology is about people. Not just about the functionality. And when we forget that, we can be in for a fall

ML: But the user experience is secondary to the functions of a system, right?

MHE: Yes, but the distance between those priorities is smaller than you might think.

We work a lot with non-profits on their Certification Management Systems and Association Management Systems. I've seen great systems, with lots of great features and functions, get tossed out because the staff just couldn't use it. They couldn't find all the data for a constituent's history, couldn't get the right data on a query or a report, couldn't extract a group of people with a certain set of characteristics. It just wasn't clear to them.

And organizations do try different remedies, right? Like offering training or having IT staff generate reports. But it doesn't matter how great a system is if people cannot use it. It doesn't matter how much IT loves it, if every time staff do a series of steps, they consult the cheat-sheet they wrote 5 years ago.

That's a problem. Eventually that just slows everyone down, makes things inefficient, and they complain a LOT (if they are staff) or leave (if they are constituents). And eventually senior management hear it and respond.

ML: Are you saying that a system has to have a cool interface to succeed?

MHE: It's not really a cool interface, or even a pretty one. It's thoughtful. And empathetic. It's intentional. It is not thrown together; someone clearly took time to understand what was being done

It comes from a thoughtful process. It's context and narrative and understanding during development. And during testing, it's a willingness to change the interface.

ML: If I decide I do want to focus on the user experience, how do I go about it?

MHE: Like all things, there are levels that you can take this to.

- You can also Do It Yourself with staff running usability tests with constituents at a meeting or conference
- There is Do It Yourself, using online tools, to test how usable your software and websites are now.
- There are professional services you can get, particularly as part of other services. If you have a web developer work on your website, usability and mapping the online journey of several typical persona is often offered. Usability is hopefully baked in, though it's always good to test a new site either before launch or shortly afterward.
- And then there are professional services for usability assessment and testing and offering recommendations for improvement.

The main thing is to identify where your constituents feel the pain. I recently talked with two members of an accounting association, and they have best of breed tools – a really lovely website, fresh and inviting; a member dashboard, with easy links to different places; and an online community, where they share ideas and information. But they got lost. They were in the online community, and when they clicked Home, they didn't know where it went. It didn't look like any home page they recognized.

It is always illuminating to have our constituents share a screen for 5 minutes to show us where things are difficult. Sometimes we can't see how difficult it is until we see it from their perspective.

ML: So, if we want to do usability testing ourselves, is it hard to do?

MHE: No, it's not hard to do.

At the most basic, get a room at your conference, invite people in 30-minute time slots, and have them complete a series of tasks on your website. You ask them to do the task and don't give them any hints on how to do it. Just ask them to find a recent article on health insurance changes. Or register for a webinar next month. Ask them to say their thought process out loud as they do it. Have staff observe them and take notes on what was easy and what was hard to do.

You can do this test with your current website to see the issues or test a new one to make sure it does what you hoped it would do.

You can also use online tools. One we've used a lot, I just subscribe whenever we need it, is Optimal Workshop, but you can Google others. It has options for testing the menu structure and also for testing the layout of specific pages. It will record where they look, where their mouse goes, before they get to the right answer. It will time how long it takes, and then report that data for you.

You know, in exams, we test our questions before making them live. In marketing, we typically send a test email. But we don't really test our software as much in real life situations before we launch it.

ML: Shouldn't off-the-shelf software be already designed for a good user experience?

MHE: Yes and no.

Yes, if it's been intentionally designed from the ground up but the application process or certification renewal process YOU put in place impacts that.

Also, we're all using more platform-based solutions, things like Salesforce or Microsoft Dynamics CRM. If we customize those, then we change how they work.

So, after we've made these changes, we need to make sure that our constituents can navigate them successfully.

Also, we expect things to be 'intuitive', 'user friendly'. But we didn't know how to use the iPhone until we were told, or tried something or we might look at cool tips or the

tutorial. So, we always have to recognize that new software is not always easy to navigate. We don't know what we don't know.

The knowledge you gain from doing usability testing, will give you insight into so much else that is important to members.

I'm reminded that Design Thinking, the model for developing new products that really meet the needs of the consumer, starts with observing. So, time that we can spend observing how our constituents interact with our technology is time well spent.

ML: How would anyone listening convince their executive leadership that this is necessary?

MHE: Fear! One of the best motivators.

But we're not scared of what we don't even know about. So, start first by gathering data. Maybe a question in the member survey, even open ended, that asks about the biggest issues you encounter in using our website.

Or when you go to your conference, sit with people at breakfast and lunch and just ask them what issues they have with your software and what they'd like to be improved.

Or you do a limited test of the software using an online tool, and show that a large number of people cannot do the main thing you want them to do on the site.

Or you do a tiny little poll on your website, "Tell us about your online experience" and see what they say.

Show the pain.

ML: If we were to look for professional help, how much does it cost?

MHE: To bring in a professional firm, can add \$20K to your website or application development, more if they do true Focus Groups. It's well worth it upfront, because you'll design a better interface overall.

The Do It Yourself version, the online tool costs maybe \$200 for a month, and then you unsubscribe when you're done. In-person, it's the cost of getting a room at your conference. Maybe you do a focus group the first year, before design, and usability testing the second year, after launch.

ML: What does a usable interface mean?

MHE: A usable interface is one where it is quite easy to figure out what to do or where to go. There are clear visual cues. There are clear pointers to deeper information.

Typically, that's done through text and icons, and also where you place things on a screen. Those visual cues seem intuitive in that you don't have to think about them. Most likely, you are using the same cues as other interfaces they have used, such as a little magnifying glass means search! Or I can typically find basic information about an organization under About Us or at the bottom of the home page. There will be menus somewhere near the top of the page and when I click on them, I understand what information is buried deeper in there.

When people used to talk about the 'hamburger menu' I didn't know what they were talking about. But it's the three little lines, stacked up, that indicate a menu on a mobile device. I'm totally used to it now, but at first I didn't realize that's where the menu was. For a while, tutorials would have to point out that was the menu. Now we know. Or I do. Do your constituents? That's why doing usability testing with YOUR website and YOUR audience is so important.

But it's not the same in every system. It's based on empathy and observation and understanding the people who will use the website or system.

UX designers will often do persona development, thinking about who the users are, what their background and interests are. And the problems they want to solve. As a

result of those, thinking through the journey through the website, the content they will be looking for, and the tasks they have to complete.

ML: What are warning signs that a system is not usable?

MHE: Some that we've seen include staff having a cheat sheet that they use EVERY time they do a specific task. OR they do something and then call the 'expert' to make sure they did it right. Eventually, they stop trying to do it themselves and always ask the 'expert'.

Or constituents keep clicking in the wrong place for something, or keep calling and asking for the same information.

For me, it's when I don't know what to do next, or I'm AFRAID to click on what seems like the next step, because I don't know what it will do.

ML: What are some easy things we can do to make a site or application more usable right now?

MHE: First get information. I heard a great user experience expert (Rhoni Rakos who did a lot of work for the American Speech Language-Hearing Association) talk about the data you get when doing usability testing:

- What you already knew they love – that's great!
- What you already knew they didn't like – it's not great, but at least you know about it and so can plan to fix or mitigate it.
- What you didn't know they love – that's also great!
- What you didn't know they don't like – that's the gold! You don't know the depth of the pain there.

The data is essential, because otherwise you'll spend time making changes that either your constituents won't like, or that have no impact on them. We think we know good design, but even UX designers don't always know what will work and what won't.

But as general rules of thumb:

Remove the clutter.

First of all, the mobile screen doesn't have room for everything we used to put on it.

But also, leave some white space to rest the eyes, so that we don't get overwhelmed.

Help people learn the system

Provide a short, easy initial tutorial for new visitors. Think about the 'guide', and I use the term loosely, that comes with a new iPhone or iPad. It's sparse, but it gets you started. And then once you power up the device, it leads you through the key steps to get started. Good online tools, like when I use Basecamp for project management, it always leads me through starting up a new project, if I want it to.

But we worked with an organization that had 10 step instructions on how to print a certificate. And it was just confusing, overwhelming in the detail it provided (click here, and login if it asks you, then look at the tabs, and the third tab is courses ...). Really it was just 3 steps – go to your profile, find the course, open and print the certificate.

Know what people want to do, and prioritize the things they do most often. That's where the data comes in.

Provide consistent visual cues to navigate the site

- Use 'breadcrumbs' so people know where they are on a site
- Use color to differentiate different parts of a site
- Clicking the logo gets me back to the home page
- Top right is for login, profile, account

- Search is at the top, and uses magnifying glass (or binoculars, less common now)
- In mobile apps, top left corner for Back

Make it easy to find things. The biggest thing we see on member surveys where lots of people say “I can’t find things on the website”. This is NOT just an argument for a better search. While you want a good Search, search is hard, otherwise Google wouldn’t be so rich.

So you have to really support browsing to the content or task. Linking information together that is related in a way that makes sense to the person visiting the site And also bringing people things they didn’t know they’d be interested in knowing, such as exam resources related to the certification they just selected.