UX practitioner?
On an Agile virtual team?

6 ways to bridge the distance
If you want to go fast, go alone.
If you want to go far, go together.

--Old African Proverb

No Dream Crushing: Human Centered Solutions Using Design Thinking by Kathryn Kuhn, Skip Angel

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What does it mean to work on a virtual team?

**Definition:** *Group gathering online to collaborate*

- Not everyone is in the same location during a workday
- Still need to brainstorm and work thru stories
- Have the in-person office experience through online channels
Types of Virtual Teams

1. Everyone works from home
2. Multi-location offices (worldwide?)
3. Offshore/co-location hybrid offices
4. Offshore teams
5. Others?
Benefits of virtual teams

• Fewer interruptions
  – Conversations are requested and planned

• Feels like life is more organized and balanced

• Easier to:
  – Be focused
  – Be creative
  – Get things done!

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Challenges facing a virtual team

- Team environment (in spirit)
- Participation
- Honesty
- Authenticity
- Real listening
How we learn how to communicate today

From Rosenfeld Media, Julian Treasure

Writing

Reading

Speaking

Listening

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7 Points from Listening Talk

1. We all want to control what we listen to
   – Our way to reduce information overload
2. We mistakenly assume that all people listen the same
3. Listening includes multiple senses
4. In the past, we had an auditory tradition and listened better
   – If you missed it, you missed it.
5. We are AWESOME at personal broadcasting
6. Need to stop that and interact with others in conversation
7. Communication is personal and messy

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6 ways to bridge the distance

- Meeting in person isn't the only way
  Use your communication tools wisely

- Makin' friends
  Build relationships online

- Broadcast
  Work live and in real-time

- Nobody reads
  Be sure people read your work

- Make it real
  Share your work

- Call a member of the audience
  Keep people involved

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Who am I?

Mary Brodie

Working in UX for about 20 years
  – UX strategist
  – Project/Product Manager

Part of virtual teams for over 15 years
  – Multi-locations, offshore teams, remote offices
I have been there
Meeting in person isn’t the only way

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Sherry Turkle Claims...

...We clean up human relationships with technology.

Control what is heard – control what is said.

Illusion of companionship without demands of friendship
Do we do this at work too?
What’s available for communication?

**Chat**
Google, Skype, AIM, Yahoo, ICQ, MobileMe, etc.

**Phone**

**Screensharing**
WebEx, GoTo meeting, Join.me, Fuze, etc.

**Hybrid Tools**
Skype, Google, Wire, Slack, Yammer

**Video**
Skype, Google Hangouts, WebEx, etc.

**Project Tools**
Basecamp, Trello, @Task, WorkZone, Project Spaces

**Texting**

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**Story Tools/Project Management Tools**

**Story Management**
- Pivotal Tracker
- Mingle
- Rally
- VersionOne
- Axosoft
- Leankit
- Workfront

**Time Management**
- Toggl
- RescueTime
- Freckle

**Project Tools**
- Basecamp
- Huddle
- PlanBox
- Trello
- MSProject/Sharepoint

**Hybrid Tools**

**Organization Tools**
- Trello
- Evernote

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How will the tools help you replicate the in-office work environment?
4 Things to consider when working virtually

What do you do at live, in-person meetings?

As a group, how do you want to collaborate and write stories?

How do you prefer to communicate virtually?

How do you want to work as a virtual UX professional?
What do you do at a live, in-person meeting?

• You participate and interact
• You present
• You draw on a board
• You discuss ideas with others
• You move post-its/stickies on whiteboards
• Other activities?
How do you want to collaborate and write stories?

What are the team dynamics? How close is the team?

Has the long-term vision for the product been communicated?

How are stories being written offline today?

Do you need visuals/prototype references?

How does the team like to show progress? Kanban boards? Charts?

Is there version control?

When do you include QA/Test validation with your story?

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Make sure how you work offline...

....Is reflected online...
How you prefer to communicate virtually?

- Online Chat
- Phone/Skype
- Video
- Email
- Texting
- Hybrid tools (Slack, Basecamp)
- Social Media

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How do you want to work as a virtual UX professional?

- How do you reference stories?
- Do you want to save files and conversations outside email or to a server?
- How close are you to the business vs developers?
- How do you work with the team?
- For your work: Do you sketch/draw? Do you share that?
- How do you like to receive comments/feedback?
- How would you do this in “real life?”
- Are you ok working live in a prototype?
UX Process

Working towards specifics

Concepts & Visualizations
- Diagrams
- Wireframes
- Infographics

Collaborate with the business to make their vision tangible

Structure & Framework
- Navigation
- Page layout
- Drawing, rough prototype

Create a framework for functionality

Requirements & Stories
- Prototypes
- Wireframes
- Specs – include cases

Determine how the user will use functionality

Enhancements
- Same as Requirements & Stories

Add to existing app

Drawings, pictures, sketches

Prototypes, specs

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A word about testing...

Does usability testing need to be in-person?

...That depends....
Testing Recommendations

**In-person Testing**
- Minimum 3-5 participants
- Emotional experience
- Possibly mobile to observe any challenges
- Not possible to mask emotional response

**Virtual Testing**
- **Live discussion**
  - Minimum 3-5 participants
  - Include phone conversation
  - Able to observe action, see face, hear response
  - Possible to mask emotional response
- **No discussion**
  - Minimum 5 participants
  - Activity-based
  - Direct questions - yes/no answers
  - Able to record reactions
  - No conversation - only fixed questions

**Online A/B Testing Site Metrics**
- Many participants - statistical significance
  - Behavior-based
  - Response to a situation
  - Test multiple executions

---

Explore new ideas

Validate Approaches

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Testing Tool Recommendations

In-person Testing
Minimum 3-5 participants
- Leverage traditional, in-person process
- Morae
- Other screen recording options (Camtasia)

Virtual Testing
Live discussion
Minimum 3-5 participants
- Morae
- WebEx, GoTo Meeting – meeting tools
- Ethnio

Virtual Testing
No discussion
Minimum 5 participants
- UserTesting.com
- UserZoom
- Loop 11
- Userlytics
- Ethnio
- Card testing: Optimal Workshop Suite, UserZoom

Online A/B Testing
Site Metrics
Many participants - statistical significance
- Adobe Target
- Click/Heat Maps
- Other tools integrated with site metric/tracking programs

Explore new ideas
Validate Approaches

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### More recommendations

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<th>URL</th>
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<tr>
<td>Nielsen Norman Group</td>
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The biggest communication sin on virtual teams

Not listening to understand
The second biggest communication sin on virtual teams

Multi-tasking
"People don't multitask because they're good at it...They do it because they are more distracted. They have trouble inhibiting the impulse to do another activity."

--David Sanbonmatsu, Professor of Psychology, University of Utah


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Why do we do it then?

• Deadline pressure
• Perception that meetings are a waste of time
• Think because listening isn’t an “activity” we can do that in the background
  – Treat meetings like a radio talk show
• We just aren’t engaged in the conversation
But you should ask yourself....

Would you do this in an in-person meeting?
Be present and stop multi-tasking

1. Focus on your call
2. Stop checking/responding to email, surfing the Web, Twitter, Facebook – And the other usual suspects
3. Get in the habit of presenting/sharing your screen
4. Participate and join the conversation
Makin’ Friends

Meeting in person isn't the only way
Use your communication tools wisely

Makin' friends
Build relationships online

Broadcast
Work live and in real-time

Nobody reads
Be sure people read your work

Make it real
Share your work

Call a member of the audience
Keep people involved

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Makin' friends
Build relationships online

Difficult to build relationships out of thin air

Need to find common interests to bond

*Remember: distance miles are just number*
It’s all about feeling cared for

Learned in *Rewire Your Brain: Practices to Use Brain Plasticity to Become a Better Coach*

--by Sarah Baca

*If you feel cared for, you can access the executive parts of your brain*

Value your team as people AND contributors!

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Time zones require flexibility

If you wanted to talk to a friend in a different time zone, wouldn’t you plan that and be flexible?
Why online relationships fail

1. Live in the land of make believe
   - Reinvent yourself (online dating)
   - Forget that you may eventually meet these people
Why online relationships fail

2. Virtual people aren’t real people
   – Anonymity gives license to “anything goes”
Authenticity

1. Be honest
2. Be transparent
3. Be present and accountable
4. Speak up
5. Stop proving and just be
6. Get personal about you
7. Be yourself
What makes online relationships work?

1. Word choice
2. Tone
3. Being clear, direct and to the point
4. Using the phone
Attitude: Finding common ground

How am I contributing to the team?

Strategy
Design
Visualization
Testing
More...

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Integrate UX into team

• Demystify UX – part of process
• Balance participation, collaboration with UX and design leadership
• Augment team weakness to make strength
• Show value UX brings
Where add value?

Collaboration

<table>
<thead>
<tr>
<th>Business Team</th>
<th>Developer Team</th>
<th>QA Team</th>
<th>Users</th>
</tr>
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<tbody>
<tr>
<td>• UX helps visualize features</td>
<td>• UX helps make UI’s look good • UX helps us make sense of system for users</td>
<td>• UX helps them understand how it works</td>
<td>• UX represents interests</td>
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Broadcast Your Work

Your work includes:

– Sketching, drawing and writing
– Live updates and edits

Also share what goes into your work:

– What you do
– How you think
– What’s your process

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Show don’t tell

People understand your job when you show them what you do
Share your screen, prototypes....

Get used to sharing your screen on WebEx, Fuze, GotoMeeting, Skype, etc.

- Share the prototype
- Share the PowerPoint
- Share the wireframe
Get them to draw!

• Give the team control of your screen to draw
• Encourage them to create a PowerPoint slide
  – Or other drawing

Let them try to create a solution
Working with users? Do the same!

• Include the team in your testing process
• Review the methodology you will use, questions asked
• Broadcast the test/review if you can
• Review the results with your team
One approach to connect...

• Be like a test participant

• Speak everything you were thinking thru the process
  – Broadcast your brain

• Don’t just present the result – present how you go there

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Nobody Reads

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Nobody reads

Don't assume that people are reading your emails or documents
“The Pew Research Center reported ... that nearly a quarter of American adults had not read a single book in the past year [2014]. As in, they hadn't cracked a paperback, fired up a Kindle, or even hit play on an audiobook while in the car.”

--Jordan Weissman, The Decline of the American Book Lover

Hey Matt,
I've attached a 30 page document which I need you to download, print, sign, and fax back to me ASAP.
Thanks! -Bill

In other words:

Hey Matt,
Would you mind sailing the mayflower back to Spain and signing this parchment with a quill? We don't have web forms in the ancient land where I come from, and every nobleman must complete the obnoxious task of riding a majestic steed across the lands to deliver a signed word .doc to prove his valor.
Thanks! - Lord Jimmers
Story Time

Adding site navigation or...

....A Tale of Arrogance
Lessons learned

1. Actively review your documents, prototypes, etc. with the team regularly
2. Show – don’t tell
3. Make sure everyone understands what you are trying to do
4. Get people involved to help you
Turn reviews into an event

Like a multi-player interactive game where everyone contributes
When it comes to testing results...

Same methods apply

If you can’t broadcast your usability testing to the team during testing day...
  Make sure you present the results
  Get your team involved
  Incorporate the results in your design presentations

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Why not just over-communicate?

Just remember the Tale of Arrogance story

Over-communication gets tuned out

Need to get team engaged and involved to understand the vision and what’s happening

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Make it real

Create and share prototypes / documentation

“I need to see it!”
Show – don’t tell!

• Show how something works
• Show multiple options
  – All options asked for – show how they work and why one approach may be better than another
• Show how you think
• Show how you got there – iterative thoughts
Provide Links for Review

- Self-sufficiency and independence
- Let people play and contribute
- Provide the basis for innovation and new ideas
How do you share?

Where are you in the process?

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**Drawings, pictures, sketches**
- InDesign, Illustrator
- InVision
- UXPin
- Vision/Omnigraffle

**Prototypes, specs**
- Axure
- UXPin
- Moqups
- Sketch
- Balsamiq
- Proto.io
- InDesign/illustrator/Photoshop
- Flinto
- Sketch
- iRise
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Call a member of the audience

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To zone out or not zone out...that is the question
Call a member of the audience

Your mission:

Stop multi-tasking on your team

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Techniques to try

- Ask questions
- Encourage banter for engagement
- Be unpredictable
- Special guests
  - Encourage others to present on your call
- Musical facilitators
  - Make the team part of the experience
Online Innovation Games

• Needed to better understand the businesses and what they needed
• We played Speedboat and Buy a Feature
What we learned

• It was the most fun and memorable call they were on - EVER
• Brutally honest – but necessary – conversations
• Sense of bonding and breaking barriers
• Enjoyed participating
Remember multi-player game...

• Include/involve others – pass them the mic
• Make sure everyone has something to do
• Get everyone to generate an idea
Wrap up

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Related talks

- Enterprise UX: The Next Generation (Virginia Cagwin)
- Keynote: Want better collaboration? Don’t be so defensive! (James Tamm)

Get the notes for:
- Can you be remotely agile? (Mark Kilby)
- Can you hear me now? Start listening instead (Judith Mills)

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Share Your Stories

• What worked for you? What challenges did you face?
• How does your team work?
• What makes you proud of your virtual team?