



Usability on a Shoestring
Guerrilla Usability Tactics

Andrea L. Ames
Owner/Consultant, Ucentrics
Certificate Coordinator and Instructor, UC Extension, Santa Cruz
Assistant to the President for Recognition and Recognition
Advisory Committee Manager, STC
Principal Technical Writer, Vertical Networks

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About Andrea

- Technical communicator since 1983
- Online information presentation focus since 1989
- Consultant since 1995
 - User-centered design and development process and start-to-finish usability—analysis, design, testing
 - Focus primarily on software product user interfaces and interactive information systems, including Web
- Coordinator of two University of California, Santa Cruz, Extension technical communication certificates
- Society for Technical Communication Board of Directors



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Discussion Topics

- Overview of usability and a user-centered design and development process
- Objections to usability you're likely to hear
- Strategies and tactics you can try
- When to call it quits
- Resources

Usability > The Problem

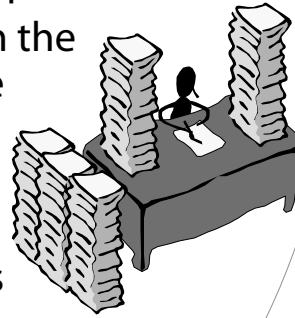
Products Are Hard to Use

- Emphasis on products and selling, not end users—product *buyer* may *not* be *user*
- Design? What design? Designing usable products is difficult due to the human factor—need to understand users' mental models
- Development organizations have little to no process—forget user-centered!
- Information development processes are at the mercy of product development—typically not integrated



How Usability Issues Affect Documentation

- Compensation for unusable products
- Documentation is a finger in the eroding dam of an unusable product
- We're losing the battle, because traditional documentation deliverables are not working



The Solution: Usability

- One of many product characteristics—includes
 - Usefulness
 - Intuitive or intuitive
 - Ease of use (aka usability)
 - Ease of learning
 - Likeability
- A result of an iterative, user-centered design and development process



Additional Product Characteristics That Affect Usability

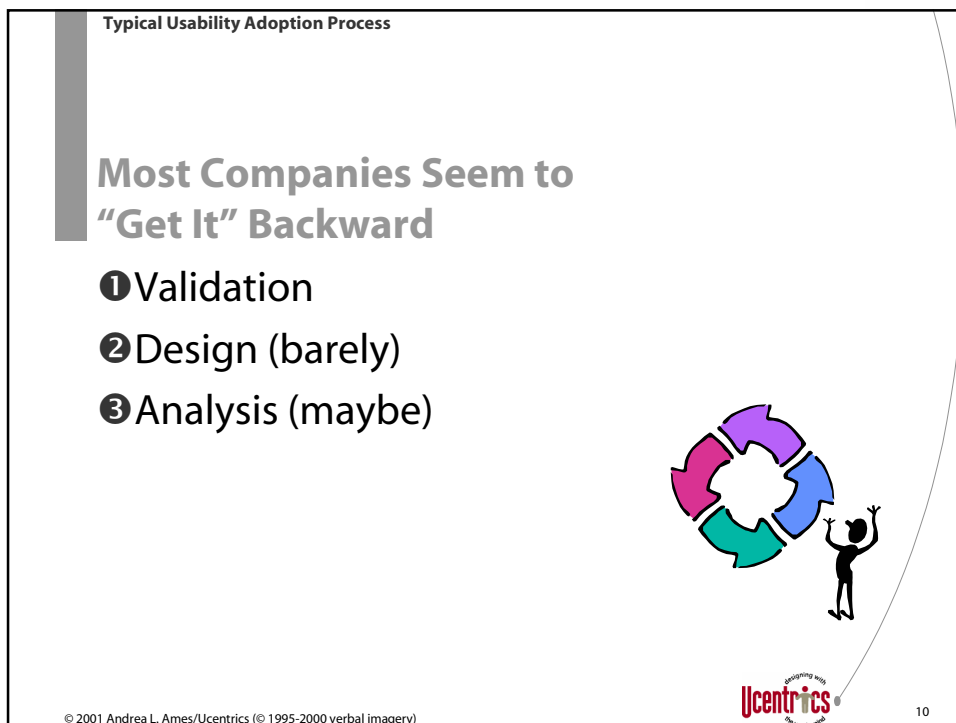
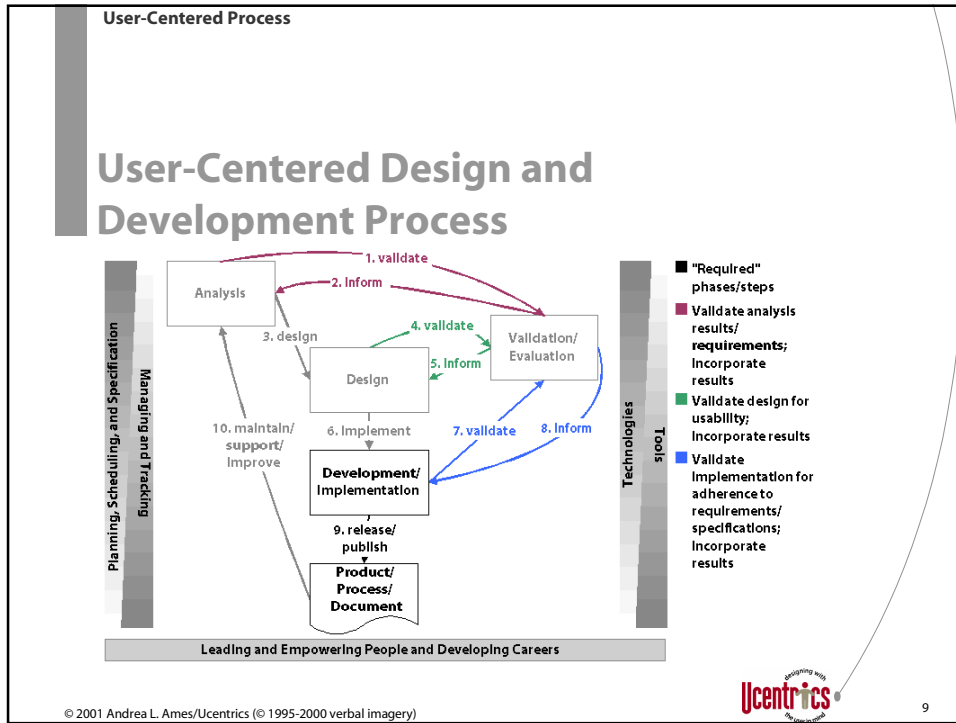
- High-performance
- Maintainable
- Reliable
- Manufacture-able
- Functional
- Compatible
- Portable
- Localize-able/internationalize-able



Usability Is Not...

- *Only* usability testing
- *Just* a back-end attempt to rectify design problems
- Occurring *only* late in the design/development process





It's Your Turn!

What Objections Have You Heard? How Do You Respond?

- What do your cohorts in tech pubs say?
- What does your manager say?
- What do your engineers say?
- What do *their* managers say?
- How about your execs? Support? Field?

- What do you say to them?

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Strategies and Tactics > Shoestring Style

No Time, No Money, No Talent

- How to
 - Find out about your users
 - Get more involved in product design
 - Determine whether your design is usable
- Guerilla tactics

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Finding Out About Your Users

- Interview internal people, and build a profile
 - Different roles (engineering, marketing, support, publications)
 - Different levels (individual contributors, management, executives)
- Volunteer to take on the task of writing the profiles (send surveys, etc.)

Finding Out About Your Users (cont.)

- Hold user group meetings
- Access virtual user groups—e-lists, e-groups, news groups
- Target professional organizations for likely users
- Take a survey to trade shows

Finding Out About Your Users (cont.)

- Team up with training
- Team up with tech support—ask them
 - What's on the users' minds
 - To survey callers
- Review monster.com dbase of resumes

Getting More Involved In Design

- Get help and buy-in from engineers
 - Find their pain
 - Figure out how you can relieve the pain
- Try to give engineers direction via style and standards
- Suggest testing paper designs to settle disputes—mitigate personal attacks

Determining Whether Your Design Is Usable

- Get information after release from tech support
 - What are users' issues?
 - Query support-call database
- Get feedback from training sessions
- Attend training and observe participants
- Watch QA—what problems do they have with the product?

Determining Whether Your Design Is Usable (cont.)

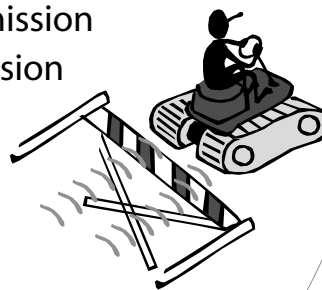
- Follow field techs—watch installations, observe issues
- Look through training evaluations for users' anonymous complaints
- Use likely internal people (like marketing) as stand-in test participants
- Invite engineers to watch testing

Determining Whether Your Design Is Usable (cont.)

- Employ some informal feedback mechanisms on Web-based products (links to feedback forms, surveys, bulletin boards, etc.)
- Test new users just prior to training class
- Perform a heuristic/expert evaluation
- Perform a cognitive walk through with your team

Guerrilla Tactics

- Start small—just do what you can do
- *Just do it!* Sometimes it's easier to ask forgiveness than to get permission
- Do a little bit without permission
 - Pretend you're typing
 - Spend a day or two
- Focus on documentation—take away the threat to the product (initially, anyway)

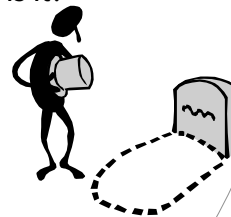


Guerrilla Tactics (cont.)

- Enlist support one-on-one from various functional areas
- Make a pain of yourself
- Be or become the most knowledgeable usability and user-centered process “expert” in your company

When It's Impossible

- Determine your pain/frustration threshold
- When you reach your threshold, leave
- Interview for a usability culture
 - Have a development process? What is it?
 - How is documentation considered within the process?
 - What do they think usability is? Think it's important?
 - Are their products usable? How do they know?



Finding Out More

- Beyer, Hugh and Karen Holtzblatt, *Contextual Design: A Customer-Centered Approach to Systems Design*
- Bias, Randolph and Deborah Mayhew, *Cost-Justifying Usability*
- Carrol, John, *The Nurnberg Funnel*



Finding Out More (cont.)

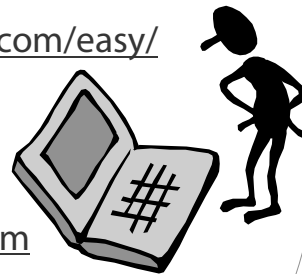
- Constantine, Larry and Lucy Lockwood, *Software for Use: A Practical Guide to the Models and Methods of Usage-Centered Design*
- Cooper, Alan *The Inmates Are Running the Asylum*
- Dumas, Joseph and Janice (Ginny) Redish, *A Practical Guide to Usability Testing*
- Hackos, JoAnn and Janice (Ginny) Redish, *User and Task Analysis for Interface Design*

Finding Out More (cont.)

- Nielsen, Jakob, *Usability Engineering*
- Redish, Janice C. and Judith A. Ramey, "Special section: Measuring the value added by professional technical communicators." *Technical Communication*, 42(1), 2/95
- Rubin, Jeffrey, *Handbook of Usability Testing*
- Velotta, Chris, ed.: *Practical Approaches to Usability Testing for Technical Documentation (STC)*

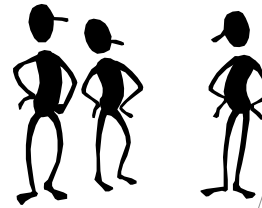
Finding Out More (cont.)

- IBM's Ease of Use site: www.ibm.com/easy/
- uidesign.net Interaction Design Webzine: www.uidesign.net
- Usable Web: www.usableweb.com
- Jakob Nielsen's site: www.useit.com
- Ask Tog: www.asktog.com



Finding Out More (cont.)

- Usability Professionals' Association
(www.upassoc.org)
- STC's Usability SIG
(www.stc.org/pics/usability/)
- ACM's SIGCHI
(www.acm.org/chi/)



Contacting Andrea

- Web: www.ucentrics.com (coming soon!)
or www.verbal-imagery.com
- E-mail: andrea@ucentrics.com
- Phone: 650.365.7520

