

Get the Best Usability Expertise

You're sold on the value of Web site usability and you're ready to hire outside help. Here's what to look for, what to expect, and how to maximize the benefits of your relationship. **By Kevin Scoresby**

Does outsourcing help you design a more usable Web site?

YES!

- Many companies don't have the internal staff—or understanding—to create a user-centered development process
- If you're not focusing on usability, chances are your competitors are
- Web site usability involves new ways of thinking—it's still a nebulous concept for many businesspeople

But . . .

- Not all usability experts focus on the same specialties
- You must understand your audience and requirements
- Since usability engineering is still a new field, watch for snags in your project

Editor's Note:

This is the second in a series of articles on Web site usability. See the June 2000 issue or www.Advisor.com/MEB for the first article and the August 2000 issue for the final article in the series.

Not too long ago, most software came in a box. In those days, the feature list was king, because software with a long list of features would sell better than software whose box had a lot of blank space. In a way, that made sense, since the customer's purchase decision was based primarily on the selling points outlined on the box.

However, the Web has altered the sequence of the transaction. A company's success is connected to (and affected by) the consumer's experience with a company's Web site before any money changes hands. As noted in last month's article (see "Win Consumers with Better Usability," *e-BUSINESS ADVISOR*, June 2000), this means that web site usability is now a selling point potentially equal to (or at times beyond) the value of the features a site provides. Unfortunately, many business cases still focus on the value of providing specific functionality in the new system without regard to whether users are able to easily and efficiently access that functionality.

Features vs. function

A "feature-focused" mentality may persist because usability is still a nebulous concept for many businesspeople. Nearly all companies realize the value of usability, but they often don't understand what it can do for them, let alone how they can achieve it. As a result, they continue to emphasize the aspects of sales and marketing that worked in a boxed software world—developing ballooning feature sets.

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There's been a sudden jump in demand for usability services, fueled in part by negative press about the "un-user-friendliness" of some prominent Web sites. More than one of my clients has noted this, confessing their worries about appearing unfavorably in *The Wall Street Journal*. These clients know that their web sites must be easy to use, but they don't know what that entails. In addition, they worry that because they don't understand enough about what to expect, they may not effectively monitor the usability group.

This article helps you understand what you can do to ensure a user-centered process for designing your Web site—both before and after the project begins.

Before the project begins

Understand your audience

A successful user-centered project naturally begins with clear picture of the user. Understanding your audience will not only give the selected vendor a head start; it also provides a vital foundation for system requirements, which influences every area of the system. Leverage the expertise your organization to gather consumer demographics and psychographics. Understand the user's domain knowledge, environment, background, familiarity with the Internet and technology. If possible, conduct a user-needs analysis which helps you develop a business case outlining user-centered requirements and measurable objectives.

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A usability test of any existing system helps you better understand your current user base. It will identify specific problems that must be rectified through the redesign, as well as provides a baseline for measuring success of that redesign.

Develop a solid set of requirements

Whether you're creating a new product or enhancing an existing one, there's a reason to look for outside expertise. Maybe your site isn't getting enough repeat visitors, or maybe you feel your internal staff can be more productive if technology carries more burden. Your perceived need is the foundation for your system requirements.

The following suggestions will help you: (a) maximize the probability that your need will be met; and (b) establish an appropriate level of specificity to provide the greatest value to the usability group.

1. **Go beyond the features list.** Don't let your requirements become simply a list of features the new system must contain. Such lists are built with an underlying assumption that if the new system has these features, it meets the perceived need. While a list of expected features is worthwhile, the assumptions behind them mustn't be lost. To let the vendor correctly assess the applicability of requirements (and provide strategic direction), you must expressly state the needs that the requirements are intended to satisfy.

2. **Explicitly require the achievement of specific goals.** For greatest impact, you must define success criteria that are performance-based and that implicitly tie the system's usability to achievement of business objectives (i.e., the satisfaction of the underlying need). Here are some examples of criteria whose attainment is directly affected by a Web site's usability:

- The average number of repeat visitors per month must increase by 20 percent.
- The calls to the help desk must decrease by 30 percent.
- First-time users must be able to successfully complete checkout in an average of four minutes or less.

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Distill success criteria down to two or three fundamental needs to keep the project focused, and to prevent a lengthy assessment period at the project's end.

3. **Express what must be done, not how it should be done.** It's appropriate to have specific ideas about how you want the product to look and act, but don't become too constrained by your ideas, and prevent those ideas from leaking into the requirements. Instead of embedding design into requirements, keep the implementation purposely ambiguous to avoid implicitly dictating designs. Here are two examples:

Instead of: There must be a Chat Area link in the standard header of every page;

Use: The site's Chat Area must be readily accessible from any point in the site.

Instead of: Pressing the Add to Cart button must take the user to the Shopping Cart page;

Use: The user must have clear and immediate confirmation of success when he adds anything to the Shopping Cart.

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Dictating what goes on what page, talking about links as "buttons", etc. are clear indications that designs have crept into your requirements. When you discover an implied design, ask yourself, "What am I trying to achieve here?" The answer is nearly always the actual requirement.

Develop a quality RFP

A request for proposal (RFP) is sometimes all consultants have to go on as they begin preparing the pitch. As such, your RFP must contain all the necessary information for a consultant to develop a proposal to meet your needs. Be prepared to invest some time developing the RFP. Here are some issues to consider:

1. Include the requirements and performance-based success criteria.
2. Define all unusual terms and use consistent terminology across the document.
3. Provide as much information about your target audience as you can.
4. Include the results of any usability tests you've conducted.
5. State the expected educational and experiential background of the vendor
6. Include time and budget constraints.
7. Walk through your own requests to make sure the constraints are realistic.

Select the right vendor

There are three general classes of vendors that may be able to provide usability outsourcing:

- General IT consulting firms, such as Andersen Consulting and KPMG
- Pure-play Internet consulting companies, such as marchFIRST and Sapient
- Usability consulting companies, such as the Nielson Norman Group and Cognetics

There are a wide variety of focuses and skills within each class of vendors. Some may solely provide usability testing, while others have a methodology that weaves usability throughout the lifecycle. Some may have more experience with graphical user interfaces (GUIs), while others excel at Web design. Different projects necessitate different types of vendors, but here are a few general questions to ask before you make your choice:

1. Do they have a dedicated usability group (rather than developers or graphics designers doubling as usability specialists)?
2. Do they have a proven track record? Can they provide tangible evidence of their expertise, such as examples of web sites they've designed?
3. Can they clearly articulate their usability methodology and describe the techniques they use?
4. Can they provide examples of the deliverables they're describing?
5. Does their methodology employ usability throughout the lifecycle (in contrast to simply after-the-fact testing)?
6. Will they follow up to ensure initial successes are not just novel effects due to marketing?
7. Will they provide an original usability strategy, or does it seem just create what you tell them to create?

Executing the project

Develop a user-centered project plan

A user-centered process doesn't typically adhere to the traditional waterfall method of development. Depending on the situation, there are many ways to approach a user-centered project. Here are a few broad guidelines whether you or the consultants actually create the plan.

1. Provide sufficient time in the analysis/discovery phase for the usability group to develop user profiles, analyze user tasks, evaluate the current Web site, etc.
2. Ensure usability begins up front and continues throughout the lifecycle; set up dependencies and arrange project tasks so that usability actually drives the process in many respects.
3. Plan to test achievement of stated success criteria at the end of the project.
4. Build iteration into the plan to (a) integrate evaluation into the design/development process; and (b) the evaluation to affect the user interface, as necessary.
5. Don't begin development of any underlying technology until the usability group has developed a strategy and has completed *at least* the first iteration of design.

Note

Some people are uncomfortable with iteration because it seems unclear when you should stop. Usability goals established in the requirements document (and at the beginning of each iteration) helps iteration from continuing indefinitely. You should stop iterating if:

- You get it right (you meet success criteria/ usability goals),
- You don't have enough time for another iteration; or
- You can see that any more iteration puts your budget at risk.

Provide ongoing support

The right environment can make a big difference in the success of the user-centered design process. Here are some ideas to keep in mind:

1. Give the usability experts some creative license. Don't create a situation where the constraints are so stifling that the experts end up simply putting down what they expect you want. Let them know you support that exploration within the project's boundaries.
2. Ensure they have all the tools. Provide any user information you have, such as demographic information, to the usability group, even if it's already stated in the RFP. (Sometimes those who actually do the work have never seen the RFP.)
3. Make the target audience available to the usability group. When developing public Web sites, assist in recruiting for usability tests directly and/or supply incentives (such as gift certificates) to participants. For intranet projects where internal employees are the target audience, eliminate negative impacts for assisting with system development (for example, higher workload because employees missed a day of work), and maximize rewards (such as bonus pay).

Watch for red flags

Since usability engineering is still relatively new for many people, there's the potential for snags along the way. Here are a few things to watch out for:

1. **Developers complain that usability makes their lives harder.** This is a fairly common complaint because the usability expert's job is essentially to shift the burden from the user to the underlying technology. This situation can be lessened throughout the project if management

and the requirements place the emphasis on the user experience rather than on the technology, and developers have internalized the goal of a usable system.

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Make sure the usability specialist's suggested designs are truly reasonable before placing all fault with developers

2. **Graphic designers feel their territory is being invaded.** Usability professionals must be sensitive to roles—especially when they're outsiders working with in-house designers. The usability experts should establish site organization, navigation, and vocabulary, but they should purposely avoid dictating aspects of the screen that belong to the graphic designer.

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If graphic designers have traditionally handled all aspects of the user interface, try positioning the usability specialist as someone who can shoulder the burden of functionality to let the designers focus on what they do best: aesthetics.

3. **There's a lot of redesign going on.** Some redesign is natural because of the iterative design process, but substantial redesign can mean the vendor's methodology is broken. The usability process typically looks at the system as a whole, staying general as long as possible before beginning to design for specific areas of the system. When the design moves to the specific areas too quickly, rework is often the result—especially on large Web sites. That's because the usability group sees patterns as they move from one system area to the next and they need to create a general design that handles all the examples. The fix is to back up and spend time designing at the broad, general level before going deep and specific.
4. **The usability vendor doesn't seem to need real users.** Sometimes the situation calls for a simple, heuristic approach. Other times, budget and/or time constraints may prevent the inclusion of real users in the process. However, more often than not, the usability professionals will need to interview and evaluate designs with real users. (Feel free to challenge them if they say they don't.)

5. **The usability designer is also doing the final usability test.** There's a potential for biased results when the person conducting the final usability test is the same person who designed the screens. It's fine for the usability designer to design the usability test and be involved, but someone else should interact with users and interpret the results. This prevents the usability specialist from involuntarily making results come out as expected.

What you can expect

Imagine you are writing a brochure to promote your company. If you invest the time and effort to thoroughly understand your audience and write and rewrite, your result effectively carries your company message to the reader. The brochure itself becomes almost a transparent vehicle to the underlying message.

Conversely, if you don't invest the necessary resources, readers get bogged down in the condescending tone, unfamiliar terms, poor grammar, etc. and never fully grasp your intended message. In fact, your company image can be tarnished because of the difficulty you caused the potential customer.

Usability is analogous to writing a brochure. Done right, usability is something that most people won't notice; but done wrong, it's something that gets you bad ink in *The Wall Street Journal*.

If your system is truly usable, you can expect to meet your business goals, including:

- Increased customer satisfaction and loyalty
- Reduced support and maintenance costs
- Increased sales and productivity

Don't be fooled into thinking that "easy to use" implies "easy to create". If the usability team has done their job well, the result is a product that is extremely straightforward, clean, and usable. Therefore, while you will meet your business goals, you may discover that the vehicle for meeting those goals appears much simpler than you expected. **ADVISOR**