

Creating an Empowered UX Team

In an engineering-centered organization

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Show of Hands . . .

How old is the UX team at your organization?

- Under one year?
- Two years?
- Three years?
- Five or over?



Built to Last

An empowered UX practice for the long term



Institutionalizing UX

- Brand new to the organization
- Renewed or additional investment
- Reboot

A hobby of mine . . .

- Built brand new teams five times
- For startups, Fortune 500, and agencies
- Three (maybe 4?) have outlived me

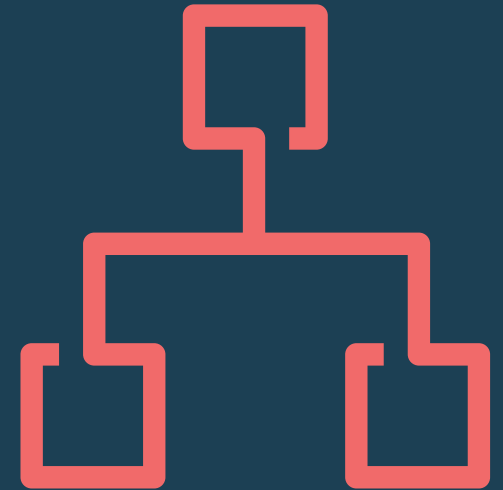
Stages of Maturity – Embedded UX Teams

	Engineering	Product	User Experience
Proof of Concept	✓		
First-Round Funding	✓	✓	
Second-Round Funding	✓	✓	✓
Critical Mass of Customers	✓	✓	✓

Establishing a UX Practice

Goal is to create an embedded team

- Making regular, impactful contributions
- Integrated into the product-development process
- Responsible for end-user productivity
- Long-term impact



Common Challenges

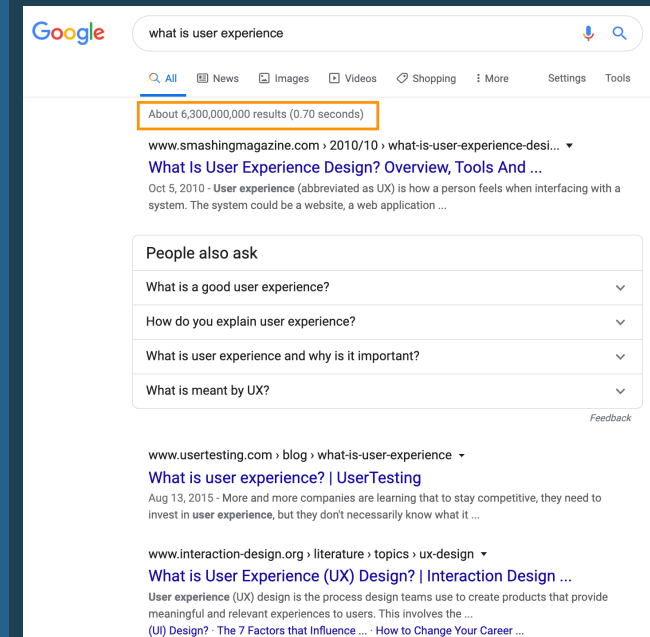
Do these sound familiar?

- Org lacks experience working with UX
- Under-resourced or immature product function
- Lack of infrastructure to integrate UX
- Poor-quality or non-existent end-user research



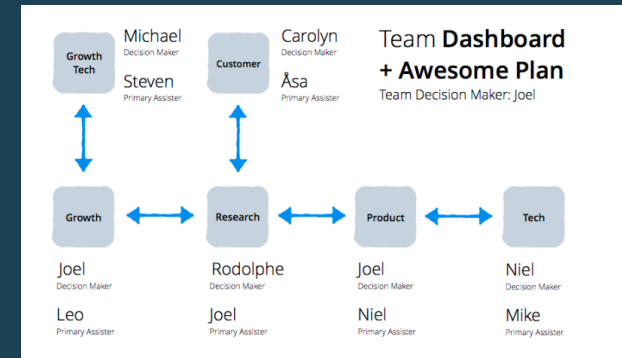
Inexperience and Infrastructure

- Few have worked with UX
 - *Do you make things pretty? Do you build things?*
- No deliberate inflection points in process
 - *No accommodation for research, design*
- No shared understanding of expectations
 - *Time it takes to design, outcomes of research, when and how you should be involved*



Maturing Product Practice

- Domain expertise > PM expertise
 - Has merit for a growing company, but a tradeoff
- Engineering-led agenda
 - More expert in the product, entrenched, strength in numbers
- Lack of business experience
 - Market assessment, backlog prioritization, decisions based on gut instinct

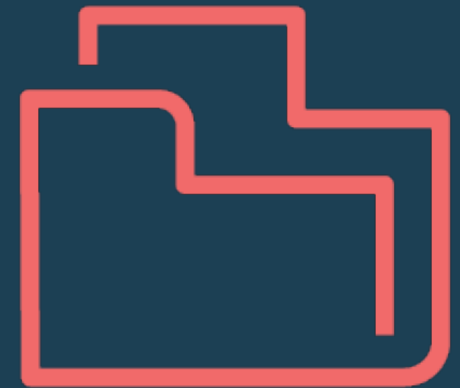


Early-stage product structure at Buffer
<https://open.buffer.com/product-team-evolution/>

No Foundation of Data

- Decentralized VOC research
 - *In growing companies, often the loudest customers prevail*
- Poor quality
 - *Likely consists of asking what customers want*
- Lack of quantitative data
 - *Even if GA is in place, it may not be optimized for analysis*
- Enterprise: no end-user insights
 - *B2B companies focus on the sales relationship*

"If I'd asked customers what they wanted, they would have told me, 'faster horse!'"
- Henry Ford



Common Opportunities

- A low bar
- A honeymoon period
- Coach colleagues on UX responsibilities
- Frame the business value of UX work
- Set the tone for collaboration and consensus between Product, UX, and engineering

Biggest impact: Empower your product team



Cherwell's Story

A case study



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- 2004: Founded
- 2007: Flagship product launched
- 2016: Hired Frog Design to redesign product
- 2017: First Chief Product Officer is hired
- 2017: UX Director hired, fired
- 2018: New UX team is formed


Cherwell Service Management (CSM)

ESM Services Platform

- IT service management
- HR service management
- Facilities management
- More . . .

Our product helps your company serve its employees.

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“After I came on board, I asked our engineers how they viewed the role of product owner. They said, ‘They’re the note takers.’ I was horrified.”

Steve Rodda, Chief Product Officer at Cherwell Software

Cherwell Challenges

Do these sound familiar?

- Newly formed, inexperienced product team
- Engineering-centered culture
- Complex product (industry and architecture)
- VOC is from developers, not end-users
- Rebranding of our corporate identity



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Cherwell Opportunities

- Strong executive support
- A low bar
- Exposure to process and best practices (Frog)
- Long release cycles
- Uncommon access to customers
- Maturing product practice



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Strategy & Objectives

Goal

Develop a sustained, impactful user-experience team to make Cherwell the best ITSM tool on the market.

Strategy

- Align end-user productivity with customer KPIs
- Empower Product Management with end-user insight
- Deliver solutions based on insights and best practices

Strategy & Objectives

Objectives

- Focus on the most used, business-critical features
- Leverage Frog Design foundation
- Extend foundation
- Socialize findings and designs early and often

Focus on Critical Features

Incident Redesign

- Analytics says it is the most-used part of our product
- Heuristic review identified severe usability issues
- Lots of anecdotal complaints about our visual design

The screenshot displays the 'Incident 10238' form in the Cherwell Service Management system. The interface is divided into several sections:

- Header:** 'Incident 10238' with a 'New' status and 'Next: Begin Work' instruction.
- Priority:** A green bar indicating the incident's priority level.
- Requestor:** A field for the requestor's name, with a 'Attempts Contact Info' link.
- Owned By:** A field for the owner, with a '- select owner -' dropdown and a '- select team -' dropdown.
- SLA:** A section for Service Level Agreement, currently set to 'Corporate (Default SLA)'. It includes options to 'Respond By: (choose a priority)' and 'Resolve By: (choose a priority)'.
- I Want To:** A list of actions: 'Take Ownership', 'Escalate to Level 2', 'View Detailed Date/Time Information', 'Link to Existing Major Incident', 'Submit to Knowledge Base', and 'Track Time'.
- Form Steps:**
 - Step 1: Record the Details:** Includes 'Short Description' and 'Description' text areas, and a 'Call Source' dropdown menu.
 - Step 2: Classify:** Includes 'Service', 'Category', and 'Subcategory' dropdowns, and 'Priority', 'Impact', and 'Urgency' dropdowns.
 - Step 3: Investigate the Incident:** Includes an 'Additional Details' text area.

The bottom of the screen shows a navigation bar with 'Service Catalog Templates', 'Journals', 'Tasks', 'Last 30 Days', 'Configuration Items', 'SLM History', 'Change Request', and 'Problem'. Below this is a table header with columns for 'ID', 'Title', 'Description', 'Portal Description', and 'Business Owner'.

Frog Design

- Field research with technician
- Stakeholder interviews
- Exposed management to UX best practices
- Redesign of primary features
- Comprehensive style guide

The screenshot displays the Cherwell Service Management interface for a ticket titled "Incident #3122" with a status of "In progress". The interface is organized into several sections:

- Header:** Includes the Cherwell logo, "SERVICE MANAGEMENT", user profile (Paul Lee), and navigation links (Home, Link, Link, Link, Dropdown, Dropdown, Link). A search bar is also present.
- Ticket Information:** Shows "P3" priority, "HARD DRIVE STORAGE" category, "Incident #3122" title, "In progress" status, customer "John Smith", owner "Paul Lee", "2 hours" response time, and "48 hours" resolution time. Buttons for "Saved" and "Save & Close" are visible.
- Navigation:** Tabs for "Detail", "Attachments", "Tasks", and "Related Items" are shown, with "Detail" selected.
- Customer History:** A table listing previous incidents:

ID #	CATEGORY	STATUS
1221	Desktop	In progress
912	Network	In progress
881	Printer	Resolved
841	Software	Closed

- Overview:** Contains a "DESCRIPTION" field with placeholder text and a "Required*" label. Below it are "TICKET SOURCE" (Customer Portal) and "SITE" (San Francisco) dropdowns.
- Classification:** Includes "SERVICE" (Desktop Support) and "SERVICE LINE" (Desktop / Laptop) dropdowns.
- Configuration Items:** A table listing items:

ITEM	STATUS	OWNER	+ Add
Computer	Active	John Smith	+ Add
Cloud Storage	Active	Mark Wettrath	+ Add

- Followers:** Lists "Mark Wettrath" and "Jessica Chen".
- Tags:** Includes "Desktop", "Laptop", "Power", and "Boot Failure".
- Activity:** A log of events including messages from John Smith and Mark Wettrath, an assignment to Paul Lee, and a status change to "In Progress".

Push Beyond Frog

User Interviews

- Tier 2 and 3 technicians
- Come in "blind"
- Can take 60 min to assess
- Most activity happens in a tab at the bottom of the page

* Product owner participated in all user research

The screenshot displays the Cherwell Service Management interface for a new incident. The header includes the Cherwell logo and 'SERVICE MANAGEMENT'. A navigation bar contains various menu items like 'New', 'Searches', 'One-Steps', 'E-mail', 'Dashboards', 'Pages', 'Reports', 'Visualizations', 'Calendars', and 'Tools'. Below this is a toolbar with actions like 'Save', 'Abandon', 'Lookup', and 'Record 1 of 1'. The main content area is titled 'Incident 10238!' and features a 'New' status with a 'Next: Begin Work' link. The form is divided into several sections: 'Requestor' with an 'Alternate Contact Info' link, 'Owned By' with 'select owner' and 'select team' options, 'SLA' set to 'Corporate (Default SLA)' with 'Respond By' and 'Resolve By' options, and 'I Want To' with links like 'Take Ownership', 'Escalate to Level 2', and 'View Detailed Date/Time Information'. The main form area is divided into three steps: 'Step 1: Record the Details' with fields for 'Short Description', 'Description', and 'Call Source'; 'Step 2: Classify' with dropdowns for 'Service', 'Category', and 'Subcategory', and checkboxes for 'Priority' and 'Major Incident'; and 'Step 3: Investigate the Incident' with an 'Additional Details' text area. At the bottom, there is a table with columns for 'ID', 'Title', 'Description', 'Portal Description', and 'Business Owner', and a toolbar with 'Service Catalog Templates', 'Journals', 'Tasks', 'Last 30 Days', 'Configuration Items', 'SLM History', 'Change Request', and 'Problem'.

User Interviews

"Journal" tab located at the bottom of the previous page

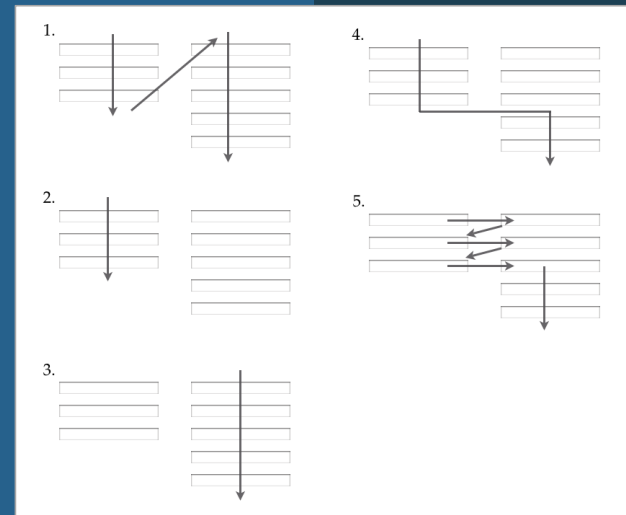
The screenshot displays the Cherwell Service Management interface. At the top, there is a navigation menu with options like 'New', 'Searches', 'One-Steps', 'E-mail', 'Dashboards', 'Pages', 'Reports', 'Visualizations', 'Calendars', and 'Tools'. A search bar is located on the right side of the header. Below the navigation menu, there are several tabs, including 'Service Catalog Templates', 'Journals', 'Portal Comments', 'Tasks (2 Open)', 'Similar Incidents', 'John's Open Incidents', 'Last 30 Days', 'Configuration Items', 'SLM History', 'Change Request', 'Problem', and 'Linked Incidents'. The 'Journals' tab is selected, and a table of journal entries is displayed. The table has columns for 'Type', 'Created', 'By', and 'Details'. The first entry is selected, and its details are shown in a separate pane on the right. The details pane shows the text: 'The value in the field Priority was set from the value 2 to the value 3 on 8/19/2016 by CSDAdmin.'

Type	Created	By	Details
Journal - History	2/13/2018 1:45 PM	Cherwell Admin	The value in the field Priority was set from the value 2 to the value 3 on 8/19/2016 by CSDAdmin.
Journal - History	2/13/2018 1:45 PM	Cherwell Admin	The value in the field Urgency was set from the value Company to the value Medium on 8/19/2016 by CSDAdmin.
Journal - History	2/13/2018 1:45 PM	Cherwell Admin	The value in the field Impact was set from the value High to the value Department on 8/19/2016 by CSDAdmin.
Journal - History	11/9/2017 12:48 PM	Cherwell Admin	The value in the field Short Description was set to the value E-mail down on 3/3/2014 by CSDAdmin.
Journal - Customer Request	10/28/2017 10:09 AM	John Allard	
Journal - Customer Request	10/8/2017 9:38 AM	Andrew Simms	Added by Andrew Simms on Friday, December 20, 2013 via the Company Portal. Please contact me Added by John Allard on...
Journal - Customer Request	10/6/2017 9:28 AM	John Allard	
Journal - Customer Request	10/1/2017 10:32 AM	Andrew Simms	Added by Andrew Simms on Friday, December 13, 2013 via the Company Portal. Hey Added by John Allard on Friday, Dec...
Journal - Customer Request	10/1/2017 10:29 AM	John Allard	
Journal - Customer Request	10/1/2017 10:21 AM	John Allard	
Journal - Customer Request	9/27/2017 10:54 AM	John Allard	
Journal - History	9/24/2017 12:38 PM	Andrew Simms	The value in the field Urgency was set from the value High to the value Company on 8/5/2013 by andrew.
Journal - History	9/24/2017 12:38 PM	Andrew Simms	The value in the field Impact was set from the value Company to the value High on 8/5/2013 by andrew.
Journal - History	9/24/2017 10:26 AM	Andrew Simms	The value in the field Status was set from the value In Progress to the value Pending on 10/30/2013 by andrew.
Journal - Customer Request	9/9/2017 12:26 PM	John Allard	
Journal - Customer Request	8/24/2017 12:15 PM	John Allard	8/7/2013 1:14 PM by John Allard Please inform me of the status of this Incident
Journal - History	8/24/2017 11:55 AM	John Allard	The following changes were made to the Incident 101326 by john on 8/7/2013: Field Priority was changed from the value 1 to 1...

Best Practices: Forms

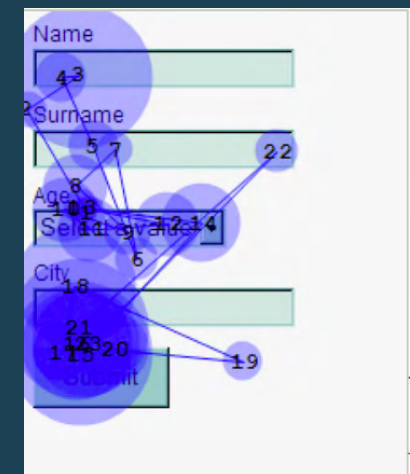
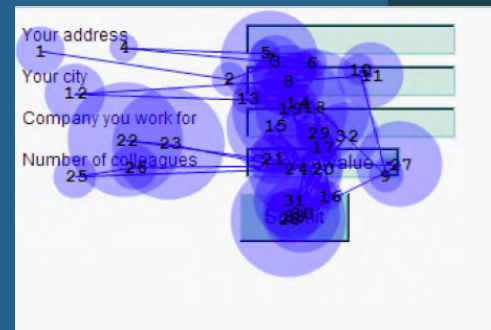
Baymard Institute

- Large-scale usability testing
- Multi-column forms can be interpreted in multiple ways
- Misinterpret forms, but also misinterpret inconsistently



Luke Wroblewski (Luke W.)

- Eye-tracking studies
- Vertical alignment
- Top-aligned labels



Comparison

The screenshot shows the 'New' incident form in the Cherwell Service Management system. The incident is titled 'Incident 10238' and is in a 'New' status. The form is divided into three steps: 'Step 1: Record the Details', 'Step 2: Classify', and 'Step 3: Investigate the Incident'. Step 1 includes fields for 'Short Description', 'Call Source', and 'Description'. Step 2 includes fields for 'Service', 'Priority', 'Category', 'Subcategory', and 'Additional Details'. Step 3 is currently empty. The interface also shows a 'Requester' field with a contact icon, an 'Owned By' field with a dropdown menu, and an 'SLA' field set to 'Corporate (Default SLA)'. A sidebar on the left contains various actions like 'Take Ownership', 'Escalate to Level 2', and 'View Detailed Date/Time Information'. The bottom of the screen shows a table with columns for 'ID', 'Title', 'Description', and 'Portal Description'.

Before

The screenshot shows the detailed view of Incident 102256 in the Cherwell Service Management system. The incident is titled 'INCIDENT 102256' and is in a 'Printing > Network > Submit Incident' category. The status is 'In Progress' with a 'Next: Resolve' action. The incident was created by Henri Bryce on 12/15/2018 3:31 PM and last modified by Henri Bryce on 1/3/2019 8:10 AM. The customer is Tracy Aubin (tracy.aubin@rivert.com) and the assigned support level is Level 2. The interface shows a 'Solution Search' panel on the right with a search for 'Outlook Sync'. The search results show 'CodeTwo Outlook Sync' as a top result, used 6 times. Below the search results, there is a 'Description' field with a text area and a 'Service Classification' field with a dropdown menu. The bottom of the screen shows a table with columns for 'ID', 'Title', 'Description', and 'Portal Description'.

After

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After – Post Creation of Ticket

cherwell SERVICE MANAGEMENT

Home | New | Searches | One-Steps | E-mail | Dashboards | Pages | Reports | Visualizations | Calendars | Tools

< Back | Record 1 of 10 | Locked by You | Saved | Cancel | Delete

P3 INCIDENT 102256
Printing > Network > Submit Incident

Created by Henri Bryce on 12/15/2018 3:31 PM
Last Modified by Henri Bryce on 1/3/2019 8:10 AM

STATUS	RESPONDED	RESOLUTION BREACHED	CUSTOMER	ASSIGNED TO
In Progress Next: Resolve	12/15/2018 3:31 PM	12/19/2018 9:32 AM	Tracy Aubin tracy.aubin@rivert.com	Henri Bryce Level 2 Support

Overview | **Activity** | Tasks (3) | Approvals (1)

Create Internal Note

All Journals (26) | Internal Notes (4) | External Communication (7) | System Audit (15) | Pinned (2)

Search All Journals [] [] Oldest to Newest []

16 July 2017 9:05 AM
Clair Wu (1st Level Support)
Value Changes
The value in the field Urgency was set from the value Standard to the value Standard on 7/16/2019 by clair.

18 Jul 2017 9:05 AM
Sandia Blundell (IT Management)
To: Juliana Albert (Customer)
[show message details](#)
Hi Juliana, To continue working this Incident could you please provide me some additional information? Just to make you aware as this is a DR and the Incident has been linked I will be placing this as "Pending Development" for the time being until the issue has been resolved. Thanks I am going to place this Incident on hold until I hear back from you.

Attachments (3)
Communication
Event Timeline
Customer History (3)
Affected CI

After – Dashboards

Global IT

Incidents and Requests (659)

- My Work
- My Open Incidents & Requests (5)
- Incidents
- Total Open Incidents (5)
- Requests
- Total Open Service Requests (5)
- Problems
- Total Open Problems (5)
- Changes
- Total Open Change Requests (5)
- CMDB
- Total Assets (35)
- Reporting
- Annual Incidents & Requests (756)
- Knowledge
- Articles (5)

[View additional dashboards](#)

Global IT

Friday, November 2, 2018 View: Any time ▾

SLA Responses

On Time **166**

Warning **12**

Breach **12**

SLAs Resolved

On Time **266**

Warning **32**

Breach **32**

Closed on 1st Call

36%

Open Incidents

350

Open Service Requests

309

Open VIP Incidents & Requests

20

Open Tasks

350

Open Problems

309

Open Change Requests

20

Incidents Opened Today

20

Requests Opened Today

5

VIP Issues Today

20

Unread Incident Journals

135

Unread Request Journals

75

Unread VIP Journals

75

Powered by

Team Workload

of Records

Legend: Level 1 Support, Level 2 Support, Level 3 Support

Team Task Workload

Legend: New, In Progress, Acknowledged

Open Incidents / Requests by Department

Legend: IT, Finance, Sales, Product, Executive, HR

Daily Help Desk Closure Rates

	Resolved Incidents & Requests	Help Desk Resolved	1st Call Rate
11/6/2018	30	10	0%

Socialize Findings & Designs

Build trust and frame the conversation.

Design reviews - Prod & Eng

- Product owner is evangelist
- Precede with findings
- Tied findings to business goals
- Tied solutions to findings



Internally

- Product team
- Engineering team
- All hands
- Sales roundtable

Externally

- Conferences
- CAB
- User groups
- Prospect calls
- Customer calls

Outcomes

Did this strategy work?



The Results . . . So Far

- Product roadmap is proportionally end-user focused, no longer developer focused
- UX-initiated projects added to the roadmap
- Competitors are using our designs, nomenclature
- Lauded by analyst community for being customer-centric, innovative (Gartner, Forrester, Ovum)
- UX embedded in project teams
- Redesigned the product-development process to include UX upfront and added a design phase



Ovum's 2019 Market Radar Report

"Of particular note, Cherwell's UX research is aimed at making their software more aligned with how employees want and need to work."

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Questions?

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