

How to Find Your Executive Usability Champion

White paper

Susan Weinschenk, Ph.D., CUA
Human Factors International

February 9, 2006

Human Factors International
410 West Lowe
PO Box 2020
Fairfield, IA 52556
800-242-4480
hfi@humanfactors.com
www.humanfactors.com

Table of Contents

About the Author3
Introduction: Why you need an executive champion4
The need for an executive champion5
Prerequisites for getting an executive champion6
The characteristics to look for in an executive champion8
How to find your executive champion10
Support your executive champion11
Letting go12
Useful books for your executive champion12



Susan Weinschenk, Ph.D., CUA
Chief of Technical Staff
Director of Training
Human Factors International

About the Author

Susan Weinschenk is the Chief of Technical Staff and Director of Training at Human Factors International (HFI). Prior to working with HFI, Susan was the owner and principal consultant with Weinschenk Consulting Group. For 25 years she has used her expertise in psychology to design technology products, including Web sites and applications, for the Fortune 500.

Dr. Weinschenk's work spans legacy systems, graphical user interfaces, Internets, Intranets, and Web applications. She has developed dozens of leading-edge seminars, and is a highly rated speaker at national conferences. Her consulting expertise includes work on speech applications, integrating software methodologies with user-centered design methodologies, and the design of interfaces for complicated Web applications. One of her specialties is the mentoring of executive and practitioner staff in the process of user-centered design and the transition within an organization to a user-centered design culture.

She has three books published by John Wiley and Sons and was chosen as one of the "Top 100 Women in Computing" by Open Computing magazine. She has a doctorate in Psychology from Pennsylvania State University.

Acknowledgements

I would like to acknowledge HFI Marketing Manager Jesse Berkowitz for his dedicated support in the writing and organization of this paper.

Introduction

Making usability a mature discipline within your organization is a daunting task—you're asking people to change. If you don't have an executive champion, your efforts will be frustrating and slow at best, and at worst, fail entirely—no matter how compelling your argument or how many colleagues are behind you.

Usability is no longer a “nice to have” attribute—it is a critical component of your company's products/services *and* internal systems. In order for customers and employees to use and benefit from the technology you develop—whether it is a Website, software application, remote control or washing machine—it must be easy. Given a choice, people will walk (or click) away if your products and services are hard to use. If usage is required (e.g., an employee intranet that is the only means of accessing certain information), users may not go away, but they will likely waste time and make costly errors as a result.

Usability is a competitive differentiator. There are clear ROI metrics to demonstrate this (see *Usability: A Business Case* by Susan Weinschenk). However, if a company does not appreciate the value of user-centered design, deadlines and budget pressures can relegate usability to a low priority.

This is a huge mistake!

Organizations eventually find they can either apply usability methods from the start of a project (cost effective), or expect to start fixing problems after the release (cost prohibitive). In the face of these diametrically opposed alternatives, how can you ensure a proactive approach towards usability? How do you make user-centered design a systematic, routine part of your development process? The first step is to find an executive champion to support this effort.

In this white paper we present:

- The need for an executive champion
- Prerequisites for getting an executive champion
- What characteristics to look for in an executive champion
- How to get an executive champion and support him/her

Why you need an executive champion

To create usable technology, designers/developers must use proven user-centered techniques to:

- Find and document who the target users are
- Discover users' mental model for completing tasks
- Create a user interface that reflects this process

The simplicity and intuitiveness of a product are proportional to the amount of energy spent on user-centered design. While it takes longer to develop an easy-to-use product than a complex one, you typically save time and money on the back end because it works properly the first time.

Most large companies have some type of usability effort underway. In certain companies this takes the form of usability testing on mission-critical projects; in others it means involving users during the initial design phase. Unfortunately, for many organizations these initiatives are done in piecemeal fashion, project-by-project. While creating some impact, this ad hoc approach is less likely to achieve the cumulative, long-term ROI benefits that usability offers. There is no infrastructure in place, no formal process for knowledge transfer, and no user-centered activities integrated into the development cycle. In short, usability has not become institutionalized.

However, as with introducing any kind of new approach, adopting consistent usability practices requires a shift in the corporate mindset. Usability practitioners often encounter resistance when they try to blend a user-centered methodology within an existing development process.

Having an executive champion is the key determinant to make this transition successful. An executive champion should be someone in a position of leadership and authority, with access to key influencers and decision-makers. The executive champion is:

- Personally excited about usability and what it can bring to the organization. The executive champion does not just pay lip service to usability, but must have the force of his/her own belief and conviction behind it.
- Able to communicate (both up and down) how usability should fit into the company structure and has a keen sense of what will “sell” internally
- Not afraid to make or ask for changes.

Why Support from Senior Management is Crucial

by Harley Manning, Research Director, Forrester Research

The person at the top of the organization must believe that user experience is important and must require people to follow good practices. Unless that person is committed to this idea, good usability is not going to happen.

The companies that really get it tend to have C-level people who care deeply, like Charles Schwab. Charles Schwab himself, the guy who runs the company, uses the site every day. The woman who headed up the site design came to a workshop I ran a few years ago. She said that Schwab called down on a pretty much daily basis. Certainly, she didn't go a week without hearing directly from him about some problem that he or his mother or his friend had with the site or something he thought could be better. So this guy was very engaged, very demanding. And the site works as well as it does because, from the top down, it's critically important that the site deliver great user experience.

We come back to this time and again—the executives must understand the importance of user experience to the business. Because no executives will put up their hands and say, let's do something that's bad for business, or let's do something that hurts our customers—they won't do that on purpose. When they do those things, they do them out of ignorance.

You don't get widespread attention to user experience unless its importance is understood at the top. That's where the leverage is.

—From *“Institutionalization of Usability: A Step-by-Step Guide”* by Dr. Eric Schaffer, page 40

Prerequisites for getting an executive champion

There are four main criteria that must be met before you begin to look for an executive champion:

1. Have a usability staff of at least 1-5 people already in place.

In their early stages, good usability teams are like good sports referees—when they're doing their job well, no one notices them. It may seem that establishing this core usability group would be easy, but it's actually quite difficult. The activities of a usability team are not functions that develop naturally within an organization. Usability doesn't just appear organically—it takes people who understand the discipline and how to introduce it within a company. In order to be noticed by a potential executive champion, the usability group will have to be in existence and functioning already. The executive champion you are looking for needs to have an “aha” moment and grasp the value of

usability. That is unlikely to happen unless an existing usability group (even if small) has had some success that can capture this person's attention.

2. Document at least 2-3 successful usability projects.

Executive champions are usually ambitious and career-minded individuals. While they may get excited about the “altruistic” aspect of usability, they will only take up the cause if it can ultimately advance their career. For them to take the risk of getting behind a usability effort, you must have successful projects to which they can refer. Having specific ROI calculations or sophisticated metrics are not an absolute necessity (though these are helpful). Your usability team may not have applied a start-to-finish user-centered design process on a development project. If this is the case, then it is sufficient to highlight visible, meaningful improvements you've made. For example, perhaps you worked on a familiar intranet site and can show before-and-after screenshots. Ask people, “Do you remember what this site used to look like? Now look at the difference since we applied usability principles. See how much better it is?” It will be even more powerful if you can find someone outside the usability group to provide a testimonial and speak about how your usability work helped his/her project.

3. Show examples of usability works that still needs to be done

Most potential executive champions won't be interested in promoting usability if it already seems established and well-known internally. They want to be the hero and save the day—not just take on extra responsibility for the sake of it. Demonstrate that there is still plenty of work you can do that will have an impact. Try evaluating some of your company's products/systems that you haven't touched yet to point out their shortcomings (you might have to take time on the side for this). Also, keep a log of potential projects during the course of your normal work. While performing a usability test on one part of a site, for instance, you may notice problems tangential to the ones you've been asked to solve that represent substantial work in the future.

4. Draft a 6-12 month usability plan

This is the prerequisite that often makes usability practitioners freeze. What should be included in the plan? How much detail should be covered? What type of cost data needs to go in? The main point to remember is: tackle what you know. Address the next steps of your usability efforts, and research the variables to the extent you can. Perhaps you recommend a usability testing lab but don't know whether to suggest a portable vs. permanent set-up or the costs associated with each. That's OK. Maybe your goal is to get involved in a development project from end-to-end but you aren't sure what that entails yet. Fine. Just write

down what you know...the plan may be two pages or 30 pages. The point is, you've begun to think through a course of action. Having a draft plan helps potential executive champions to understand the growth potential of the usability group. Your eventual champion will probably change the plan anyway, so don't get too attached—it's a starting point.

Now you're ready to start looking!

The characteristics to look for in an executive champion

Once the prerequisites are met, there are three main qualities to look for in prospective champions:

1. Someone high up and well-established in the organization

An executive champion should be someone in a position of leadership and authority, with access to key influencers and decision-makers. This person does not have to come from your department. An effective champion must be able to:

- *Evangelize usability within the organization* The executive champion conveys the value of usability in terms specific to the organization. It isn't enough to talk about how wonderful usability is. This person must frequently emphasize the concrete benefits (e.g. "Making our Websites more usable will improve our customer retention rate by 25%").
- *Take usability public* The executive champion makes public statements about the importance of usability efforts. Whether at meetings, in lectures, on video, or to the press, the executive champion must go "on record."
- *Work behind the scenes* The executive champion is well-connected and can network within your organization. A lot happens in small asides, quiet telephone calls, and chance meetings in the elevator.
- *Deal with resistance* By anticipating the opposition that comes with any organizational change (institutionalizing usability being no exception), the executive champion can create a plan to manage and deal with this resistance effectively.

2. Someone who is NOT a usability expert

While an executive champion must understand the basics of usability, he/she does not have to be a usability expert. In fact, the executive champion should NOT be a usability practitioner, since the roles of practitioner and champion are very different. If one person tried to do both, there wouldn't be enough time or energy. Also, most usability practitioners are not as well networked or in a position with sufficient authority and influence. Thus, the executive champion should not do actual usability work; instead, this person helps practitioners get

usability programs moving and builds momentum. The champion can help articulate the benefits and challenges of usability—both on a project level and an organizational level.

Getting Middle Management “On Board” with Usability

by Janice Nall, Web Content Manager, Office of Communications, National Cancer Institute

We’ve got a usability engineering department here at the National Cancer Institute, and there is support from on high. People like our director are saying the right words and being supportive of it. The next step is to translate that message down to middle management to get resources, tools, and the ability to move forward. We need to make it more than lip service and to make it so integrated into the development cycle for communication products that, just as you would not consider putting up a Website without having somebody “QC” it or run multiple platform testing, you would not let a site go live without designing it through usability engineering.

The Office of Communications has been in a huge transition. The previous director didn’t know anything about usability but was sold on the concept immediately after hearing about it. We actually arranged for her to be in the room during testing and to watch videos. Even though she wasn’t a technical person, we got her support. Plus, we have taken a business approach. Usability saves money: We can show how usability saves clicks, we can show how it saves time, and we can show how it saves development money.

Who’s going to say that they’re against something that will make our cancer information more usable for all audiences? Nobody is going to be against it, but we need to help people in middle management understand what every agency needs to accomplish that. We need qualified staff and qualified contractors, and we need a portable lab, a permanent lab, or access to a lab we can rent. When we can get 40 people in a room from 40 different offices across the National Institutes of Health, as we do with our training and education sessions, we immediately sow the seeds of this concept, and the participants are always hungry for more. Then they can start working on their management. We try to do it kind of “grassroots up,” and we have the support of senior management. However, it’s that middle layer that’s hard to get into meetings, hard to convince to see the testing, hard to communicate the message to. It’s not the Web community, and it’s not even the communications community—it really is the middle layer of management.

—From “*Institutionalization of Usability: A Step-by-Step Guide*” by Dr. Eric Schaffer, page 45

3. Someone looking to carve a niche for him/herself

Some executive champions take up usability as a “lateral” extension to their sphere of influence, a means of creating a new “kingdom.” This

How to find your executive champion

is especially true for executives who perceive a ceiling on their growth or feel constricted by a narrow career path. While it's possible to find your executive champion in any department, some places are more likely than others. Executive champions may come from IT, but ambitious IT managers and directors often have enough challenges and perceive usability as tangential to their core knowledge and skills. You're more likely to find receptivity among marketing executives or others involved on the business side—such as managers of a particular business line or product.

Once the precursors are in place and you know which characteristics to look for, it's time to close the deal and find your champion. Many would argue this is where the real challenge begins. You need an executive champion as early as possible to gather resources, help you create a strategy, and keep the usability process moving. As Eric Schaffer says in *Institutionalization of Usability: A Step-by-Step Guide*, “Without a champion the usability staff will not be held as part of a cohesive strategic effort, they will not be protected, and they will not survive.” But the difficulty of finding an executive champion represents the classic chicken-or-egg dilemma: you need a champion early on to make usability successful, yet in the beginning not many people know about your usability work. So how do you get their attention?

1. Prepare specific ROI data for your company

Have some conservative ROI calculations that illustrate how usability pays for itself many times over. This kind of information can make the whole undertaking seem much more feasible. It also helps to know what your competition is doing. An executive champion will have to convince others internally, and if your competitors are already further along in terms of usability maturity then this will strengthen his/her argument. If your company can become a usability front-runner, this obviously serves as a key differentiator.

2. Do your own PR

If only you could just advertise the role of executive champion in the corporate newsletter! Sadly, it's not even an official job—the candidates you are trying to reach already have formal positions. So you must cast a wide net to get the message out. The trick is to have them find you. Speak to as many people as possible about usability and what you want to accomplish. Possible outlets include:

- *Internal IT expos or technology fairs*
Arrange to set up a booth. Talk about your successes. Show video clips from usability tests.

- *In-house educational events, quarterly meetings, small group sessions*
Create a presentation that includes:
 - a) the case for usability in your organization,
 - b) the usability work you've done thus far and areas that still need help,
 - c) what others companies in your industry are doing about usability.
 Look for any and all internal meetings and activities at which you can present.
- *Sponsor a usability session or seminar*
Prepare a talk about usability and your team, or host an outside firm to present. Choose a topic that is of interest to potential executive champions and keep the session short (1-2 hours) to be sure they will attend. Cast a wide net by making the invitation list as large as possible. At the meeting, be sure to include a short section that addresses the pre-requisites discussed above—set the stage for an executive champion to become interested. Talk briefly about the usability group, your successes so far, and all the work yet to be done.
- *Have a small “institutionalization of usability” session*
Make a list of potential executive champions. This is probably a “secret” list (i.e. the people on it don't know you are trying to hook a big fish). Invite everyone on the list (and a few other people if it will make your intentions less obvious!) to a special two-hour meeting to discuss how to move usability forward in the organization. During this session, walk through the steps that need to happen for usability to truly permeate the organization (See Dr. Schaffer's book for details). One of these steps is obviously finding an executive champion.

3. Consider outside help

Bringing in a high profile speaker for some of the above events is a great way to capture people's attention. This type of exposure may spark the interest of the right person. Make sure that you can give a short presentation, though, to address the points mentioned above.

Support your executive champion

Once you finally have an executive champion, this person will need your help. Don't assume that this person will know exactly what's needed—you can't expect the champion to be your manager. Plus, the role of usability champion may not be his or her only job. You want the executive champion to have enough time to spend evangelizing usability and raising awareness, so it's incumbent upon you to do the preparation and legwork. Proactively support your champion with presentations, statistics, references and case studies.

Sometimes this can be difficult because you may already be working beyond capacity to meet a whole organization's usability demands with a small team. But supporting your executive champion at the outset is critical. Invest this time up front and you'll be rewarded with the support you need later.

Letting go

The hardest step in the process of finding an executive champion is often letting go of the idea you have to do everything yourself. It's ironic how practitioners might spend months looking for the right champion and then have difficulty allowing them to take over, but this happens often. The people looking for an executive champion are usually the same people who have built usability within the organization from the ground up. You have probably struggled up to this point just to stay in existence. But for the executive champion to take usability to the next level, you have to surrender control and ownership. Let the executive champion focus on the evangelizing that you did before—after all, the purpose of doing so was to find a champion. Give them the limelight.

Your champion may have different ideas about what aspects of usability to concentrate on, which work will have the most impact, or how to get the most exposure within the organization. Be willing to change. Certain fears are natural: "What if the Executive Champion blows it? What if I picked the wrong person?" You must let go of these concerns and try new ideas. In a sense, you're starting over again. But the end result—the realization of your vision—will be worth it.

Useful books for your executive champion

Bias, R. and Mayhew, D., *Cost-Justifying Usability* (1994). Different ideas on how to calculate the cost benefits of usability work.

Krug, S., *Don't Make Me Think: A Common Sense Approach to Web Usability* (2000). A short, powerful book appropriate for the executive champion on the basics of what makes Websites usable.

Nielsen, J., *Usability Engineering* (1994). A basic primer on usability engineering, with some early metrics.

Schaffer, E., *Institutionalization of Usability: A Step-by-Step Guide* (2004). A thorough discussion of the phases needed to make usability routine.