

Mentoring to Build UX Skills in Business Environments

Deborah Sova
Perficient, Inc.
deborah.sova@perficient.com

Laurie Kantner
Tec-Ed, Inc.
laurie@teced.com

ABSTRACT

Mentoring employees may be a key to business survival in today's economy. Two experienced practitioners describe different circumstances and needs for mentoring employees and discuss what they discovered is a shared methodology for building new skills and responsibilities within their existing organizations. They also present the results of research from a survey of UX practitioners about mentoring best practices.

BACKGROUND

Two experienced UX practitioners each have been mentored in their UX careers and have subsequently mentored others. Working in different companies with different UX focuses—one an IT services company, and the other a UX consultancy—they each found a need to start and maintain an ongoing UX mentoring program. Though the needs and circumstances leading up to beginning their mentoring programs were different, the approach that each developed for their programs was remarkably similar.

Both experienced UX researchers, they have developed a survey for UX professionals who have mentored, or who have been mentored, to gather mentoring best practices. While they want to gauge how closely their programs match other real-world experience, their overriding goal is to share the results of the survey to contribute to a larger body of mentoring knowledge.

They each will share a case study that describes their companies' different mentoring needs, how they acquired or chose their mentoring candidates, and what they each needed to accomplish to ramp up their mentoring programs within the confines of their company requirements.

IT CASE STUDY

IT Mentoring Needs

In a medium-sized IT company, the proposed usability staffing budget was spent entirely on hiring a highly experienced UX professional to lead the company's UX effort. The UX Lead was tasked with reincorporating UX into the development, design, and sales/marketing processes with education, evangelism, and exemplary projects. Only after the UX Lead made sufficient inroads and began booking more UX services than one person optimally could handle was she able to prove that additional staff, and thus increased UX work, would benefit the company.

The high-level executive, who was committed to investing in UX and had hired the UX Lead, was not willing to take the risk of hiring additional experienced (and presumably costly) UX professionals from the outside. However, the executive approved finding 2-4 interested and apt UX mentoring candidates within the company and developing their UX skills.

Acquiring IT Mentoring Candidates

The UX Lead created a list of employees and managers with whom s/he had worked and who had seemed receptive to and supportive of UX activities. She then met with:

- Several staff members, who in their own current work were naturally acquainted with trying to understand users' needs—BAs writing requirements, developers and designers creating prototypes, tech writers preparing documentation, and trainers teaching customers how optimally to use company-created solutions.
- Managers who might be willing to
 - Allow their staff members “get the UX talk”
 - Designate 10, sometimes more, hours per week for their staff members to be trained in user experience.

None of the resulting candidates had had exposure to formal UX practice prior to the UX Lead's efforts and had not yet articulated a desire to become involved in UX. To push forward, the UX Lead—already overbooked—needed to set aside additional time to evangelize, educate, motivate, and recruit potential candidates for UX mentoring. After interviewing people and whittling down the list of candidates to a handful, the UX Lead began ramping up the program.

Structuring a Formal IT Mentoring Program

Activities that helped ramp up our program include:

- **Resource library.** Ensuring the company had a small library of usability resources—published books and research, an organized online directory of current and past project planning and deliverable documents, and a collection of links to online UX communities such as UTEST and UX/Design blogs and discussion groups. The company purchased a few resources, and the mentor also lent personal copies of resources s/he owned as needed to learners.
- **Lab software.** Ensuring the company's lab had the latest version of useful software for capturing screens, recording UX study sessions, and creating video-clips.
- **Develop a goal plan** that includes planning and updating learning and practice goals for each candidate at regular intervals.
- **UX projects.** Create a list of current and upcoming projects in which the learners can observe, shadow, and/or in low-risk ways, more fully participate.
- **Establish processes.** How mentoring sessions will proceed, possible homework assignments, review of and feedback for ongoing UX activities and deliverables, tracking progress against goals, and, later in the program, learners cross-mentoring each other.
- **Blocking time and venues for mentoring sessions** is critical in a larger company, where these resources tend to be overbooked. Whenever possible, we tended to use the company's lab facility. We planned that when the lab was booked for actual studies, we would hold mentoring sessions during study breaks and make use of an actual project for learning.

CONSULTANCY CASE STUDY

Consultancy Mentoring Needs

In a small company, higher relative fixed costs must be offset by high utilization of staff on client projects. Senior staff, while having a lot to offer less experienced staff members, must focus on keeping clients satisfied, meeting the project goals, and transitioning efficiently from one project to the next. Project pace and client demands can challenge a consultancy's need to mentor less experienced staff.

While a formal mentoring program is not feasible in this setting, a company that is committed to growing employees makes time for informal mentoring. The informality is in the ad hoc nature of less experienced staff having access to senior staff for wisdom, training, and practice.

Acquiring Consultancy Mentoring Candidates

Our consultancy has enabled informal mentoring to candidates in the following situations:

- Staff members from support areas who wanted to transition to user experience
- New hires with relevant but informal training and junior-level experience who needed to learn how to handle complex, challenging projects
- College students filling internship roles
- Clients requesting training of their product team members in UX practices

Structuring an Informal Consultancy Mentoring Program

For us, an informal still requires a structure or it simply won't happen. Activities that have helped structure our mentoring program include:

- **Develop a plan** that includes 1-month, 3-month, 6-month, and 12-month goals for each candidate.
- **UX projects.** Identify types of projects where a junior team member can make a useful contribution without high risk. Real projects provide real experience (and opportunity for learning the “real hard” way).
- **Project activities.** Within those projects, identify tasks and activities that train the junior team member, give them practice, and (if possible) enable them to make a contribution while gaining a learning experience.
- **Establish processes for mentoring exchanges:** work sessions, checking-in meetings, review and feedback of deliverables, tracking progress against goals.

DESIRED QUALITIES OF PERSON BEING MENTORED

For both a structured program and an informal process, the authors agreed on the following characteristics that enhance a person's ability to benefit from mentoring:

- Actively seeking training to increase skills in a current or a new field of endeavor
- Ability to use synergy of current skill sets, such as documentation and prototyping, that naturally align with UX work
- Quick understanding and buy-in of the value of usability and of the methods to achieve it
- Willing to “do anything” on sample and real projects to gain experience as soon as possible
- Excellent communication skills, both oral and written
- Open and eager for feedback
- Willingness to commit to weekly mentoring sessions, even during busy times in their own departments
- Comfortable with group and one-on-one UX activities, where one may be “in the spotlight” or in the background as an observer
- Desire and aptitude for research rigor, design, and working directly with stakeholders and end users

MENTORING APPROACH

The approaches the authors have used to mentor individuals contain many common threads, as described in the table below:

Activity	Informal Approach	More Structured Approach
Regular meetings/ mentoring sessions	Weekly or more often, in which to review goals and discuss progress and next steps	Weekly or more often, in which learners: <ul style="list-style-type: none">• Receive a short lecture on a UX topic• Are assigned UX-related “homework” (book chapters, past study reports and preparation materials, reviews of design comps, etc.)• Discuss ongoing learning goals and how to meet them• Each learner receives individual mentoring, as well as overlap time in which learners share information in a formal setting with each other
Working on actual,	If available, begin the person's learning	Use whatever current, ongoing project is

Activity	Informal Approach	More Structured Approach
repeated, or mock projects	on actual project work, working in parallel with experienced staff	available for working in parallel, or after the fact, with the mentor. <ul style="list-style-type: none"> • Rather than waiting for a basic usability test to ease learners into actual UX work, dive in with the projects at hand. <ul style="list-style-type: none"> – Even complex projects, such as a multiple-locale contextual inquiry or an in-depth heuristic evaluation of a complex system. - Learners can observe contextual inquiry sessions and take notes. If internal users are involved, and learners are showing promise, they may conduct some interview sessions with internal users. • If no current projects are available, use materials from a previous study and allow learners to facilitate sessions with volunteer internal users
Progression of learning activities	<ul style="list-style-type: none"> • Begin with a heuristic evaluation project as the third evaluator • For user testing, contribute toward later deliverables first (data collection and reporting), then facilitation, then test designing and materials preparation. • Add recruiting and lab setup when and where appropriate 	Same
Deliverables	Allow time for redoing of deliverables, even if the junior person's version will not be delivered to the client	Same

Activity	Informal Approach	More Structured Approach
Shadowing on all things UX	Attend staff meetings to learn what other people are working on and their challenges. Attend company meetings to understand the business situation and goals for sales and marketing.	In addition to working on actual projects, the learners shadow as many other UX activities work as schedules permit. The learners can: <ul style="list-style-type: none"> • Sit in on real-time design reviews with the mentor and BAs, designers, and other stakeholders • Attend UX project planning meetings with internal clients, and as experience increases, with external clients • Observe the mentor conduct heuristic evaluation, as the mentor verbalizes design flaws and potential recommendations • Contribute and discuss the pros and cons of possible solutions • Attend all UX educational presentations given for the company’s Executive, Design, Development, Product, Marketing, and Sales teams
Communication skills	Teach communication skills throughout the process	<ul style="list-style-type: none"> • Teach communication skills throughout the process • Provide resources for writing and speaking skills, and use some mentoring time specifically to work on writing skills
Project management support	Though discussion, and by example, teach how to support the work of the project manager	Same
Client and team perspectives	Explain work expectations from client perspective as well as study team perspective	Allow learners to sit in on client meetings and debrief on expectations afterwards
Additional and cross mentoring	Ask other available senior team members to contribute mentoring time—their feedback can help improve the overall approach in the process	After a few weeks of mentoring sessions and working together on homework assignments, the learners are expected to critique one another’s work, and report back to the mentor on progress and issues during mentoring-session overlap time

LEVELS OF SUCCESS

Structured Program—four people

- **“Mary”** at first showed great aptitude for UX evaluation, but lost patience for learning about and applying in-depth rigor in research. She returned to training.
- **“Janet,”** an analytics intern, embraced UX learning and practice so completely that she requested to work full-time in UX. However, the company waffled in hiring her full-time outside her original area of expertise. She subsequently accepted a full-time analytics position with a clothing manufacturer. She no doubt continues to infuse awareness of UX into her analytics work.
- **“Diane”** emerged more successful in supporting the UX effort with astute observation and careful note-taking, a knack for recruiting study participants, and willingness to perform needed lab coordination activities. However, the company would not agree to create a discrete full-time UX support position. Diane continued to provide part-time support through the mentoring program and subsequently moved on to provide UX support

for a small UX consultancy. She eventually returned to her training roots, working for a large insurance company. She takes a full awareness of the user experience needs into her training career, and she is very active in her local SigCHI chapter.

- **“Marc”** is now the Lead UX Researcher for the IT company where he was mentored. After his mentor left the company, he took over the position for which his mentor was originally hired. He continues to evangelize UX and to mentor design and development teams in UX. He sits on the board of his local SigCHI chapter and continues lively discussions of UX theory and practice with his mentor.

Informal Program—four people

- **“Jeremy”** is exhibiting much more rigor in his usability research techniques. He is also serving as a project manager on complex projects, juggling multiple roles and responsibilities.
- **“Delores”** went from recruiting coordinator to senior researcher in only a few years’ time. She now works for a large company, designing and conducting usability research for a variety of clients and industries. She holds leadership positions in UX organizations.
- **“Matilda”** did not want to adopt the more rigorous techniques that her mentor was teaching her, and ultimately took a job with another company.
- **“Tate”** is just beginning his mentoring program as he completes his Master’s degree. We have as much to learn from Tate as we have wisdom to impart to him. By the time of the UPA conference, Tate will have graduated.

CONCLUSIONS AND LESSONS LEARNED

- **Look for quick-studies.** Those who can grasp concepts easily make good candidates for mentoring. But don’t turn away people who may need more explanation; the latter can embrace a strong commitment to learning and to rigor, and become successful UX practitioners.
- **Hold regular meetings.** Don’t skip the regular mentoring meetings, especially when everyone is busy—regular checking-in keeps the momentum going, while a drop-off in communication can bring the learning to a standstill.
- **Encourage additional mentoring** from available senior team members—their feedback can help improve the process.
- **Capitalize on cross-mentoring.** As learners gain more experience, allow them to critique one another’s work—it will force them to organize their thoughts and ideas and allow them to present feedback in a non-threatening environment.
- **Seek feedback from the mentored person** about satisfaction with progress—their perspective about how much they are learning is a way for the mentor to evaluate his/her own progress.
- **Validate and applaud evidence of learning**—it encourages the learner to stay committed to continued growth.
- **Provide feedback to managers.** Make time to meet with mentored people’s department managers about their staff member’s progress—it encourages those managers to continue to allow promising candidates to flourish in new learning.
- **Understand that learning is a two-way street.** Stay open to the opportunities to learn from the person being mentored.

PREVIEW OF SURVEY RESULTS

The authors posted an online survey about UX mentoring practices in early March 2010. Below is a brief summary of the results collected as of 10-March-2010 from 50 UX practitioners who have participated in a mentoring program, whether structured or informal. The authors will provide an update at the UPA conference and post the results through UPA after the conference.

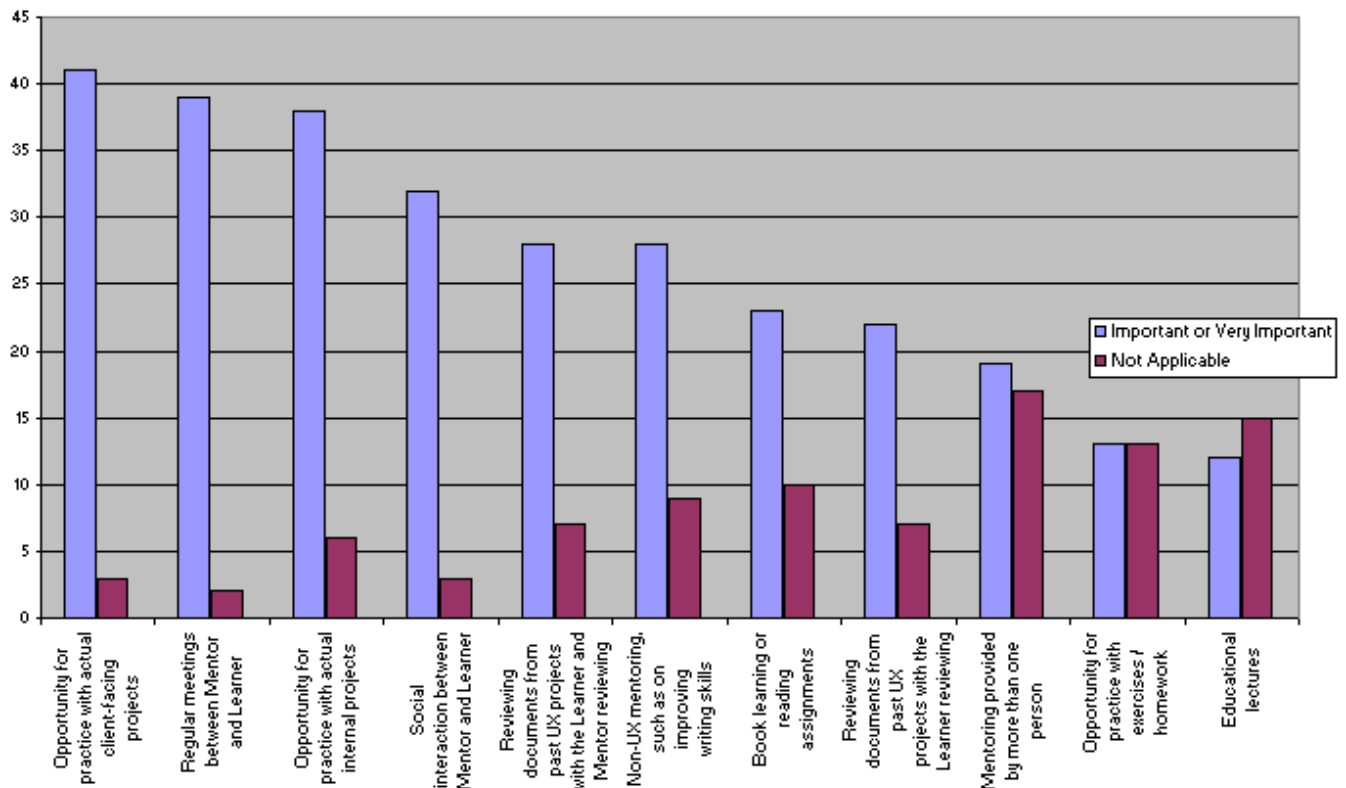
In your opinion, what does it mean to mentor or to be mentored?

Comments ranged from career coaching to skill building. Nearly half mentioned “guidance” and “guiding,” and many more mentioned career guidance than skill building or training. Here are some sample comments:

- Mentoring is a relationship between an inexperienced and inexperienced person. The person with more experience has a responsibility to share their experience, acquired wisdom, tools and network with the inexperienced person.
- Mentoring means listening to, supporting, and helping young(er) professionals and/or students to figure out what they need and want, or to sort out answers to questions—either technical or (more often) personal and organizational.
- Having (or being) someone who will help guide another’s career (or work) with the tacit knowledge. Not usually about skills development, but helping frame the problems of career trajectory and the daily decisions and attitudes that shape it.
- A mentor is someone who oversees the performance of a novice. The purpose of this oversight is to permit novices to engage in activities that are slightly beyond their abilities in a controlled environment where feedback can be provided and corrections applied to work products.
- To have someone more experienced than you help guide you in both research and career decisions. Someone who teaches about the profession and the work world in general.

Opportunities/activities present in most recent UX mentoring experience and their importance

Survey respondents rated the importance of UX mentoring opportunities and activities, the results of which are shown below. It is clear that opportunities to work on real projects are considered highly important, compared to book learning, lectures, or practice exercises. Almost equally important is time the mentor and learner spend in each other’s company—regular meetings and social interaction.

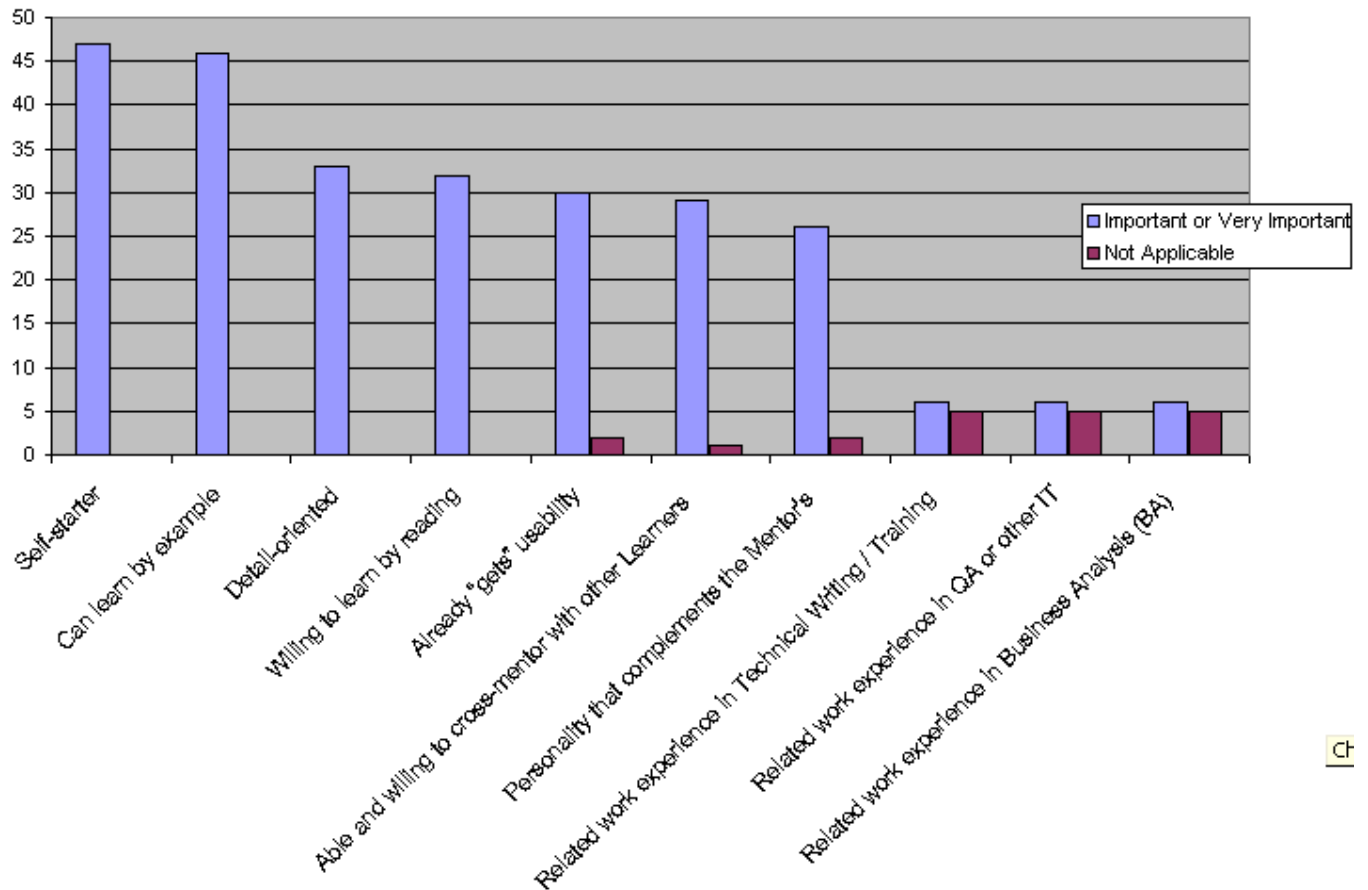


Respondents were invited to suggest additional opportunities and activities beyond the ones listed in the survey. Suggestions included:

- Networking skills and contacts
- Public speaking practice
- Critiquing the learner’s deliverables and performance
- Teaching skills in persuasion, sales, proposal writing, and functioning in a corporate culture

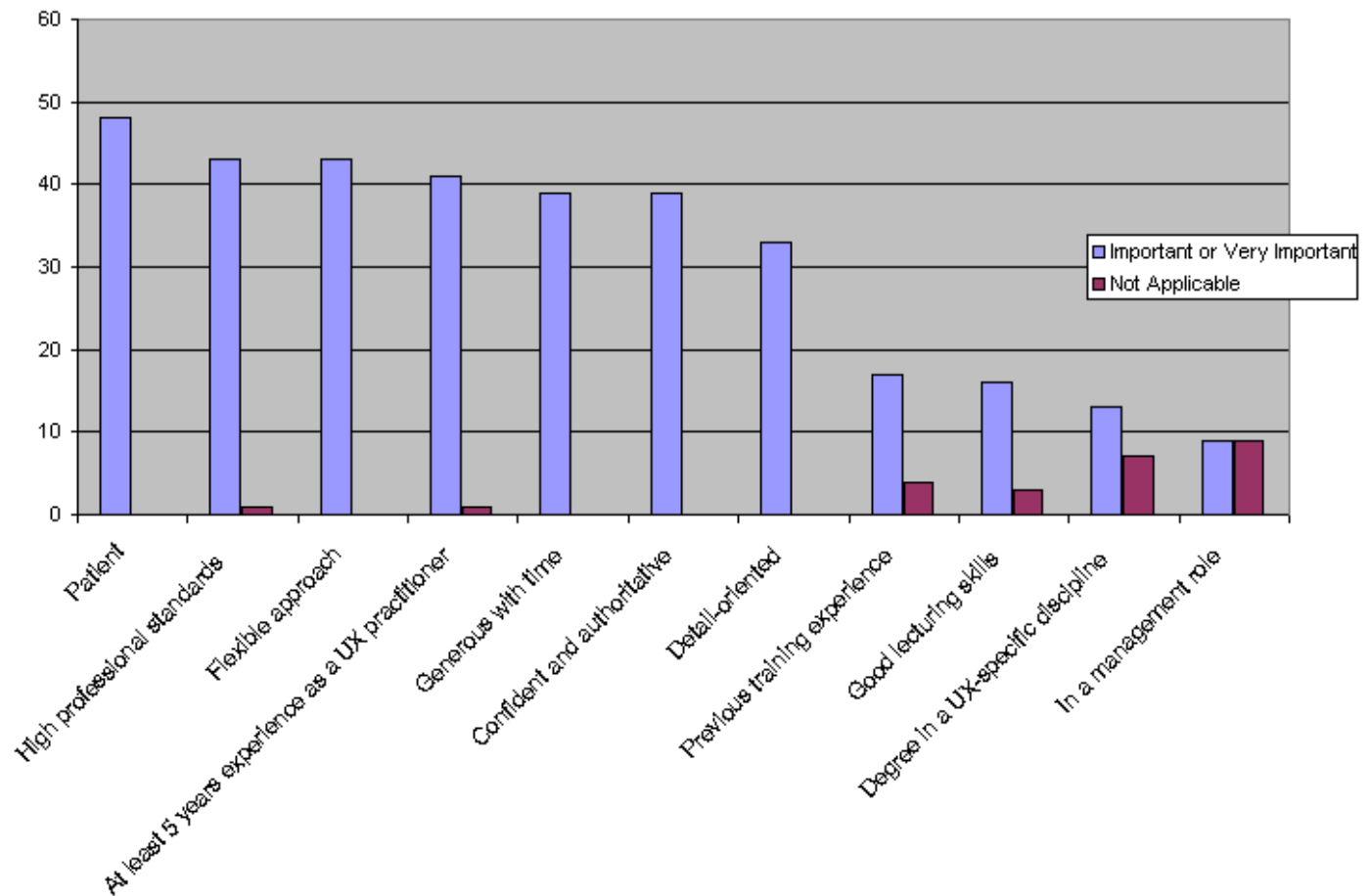
Learner characteristics that contribute to successful UX mentoring, and how important

Some measure of independence on the part of the learner creates a more productive mentoring relationship. Other related work experience was not considered as critical to the success of mentoring as was being a self-starter who can learn by example, handle details, and learn on one’s own.



Mentor characteristics that contribute to successful UX mentoring, and how important

Soft qualities that make a mentor easier to work with were given high importance, along with UX experience. Patience, high standards, flexibility, and generosity with time were given high ratings. Experience with training and lecturing was not considered as important by many respondents, nor was being a manager or having a UX-specific degree.



What Did We Miss?

Several survey respondents identified gaps in the characteristics we listed in the survey of UX mentoring. A few mentioned the importance of trust in the relationship between mentor and learner, and the need for the learner to feel nurtured rather than judged by the mentor. One respondent described the value of fellow practitioners mentoring each other when neither is less experienced, just differently experienced, and how willingness to share professional wisdom with one's colleagues helps everyone grow professionally.

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ABOUT THE AUTHORS

Deborah Hinderer Sova
Senior Usability Consultant
Tec-Ed, Inc.

Voice: 414-762-6584
Email: deborah@teced.com

Deborah Sova has over 15 years of experience evaluating software and website usability for clients in a variety of industries, including financial, healthcare/medical, bibliographical, wireless, multimedia, enterprise software, security, and insurance. She has served as the UX Manager at Trisept Solutions, principal consultant for Sova Consulting Group, and senior UX researcher for Tec-Ed, the Nielsen Norman Group, and other consulting firms. She has mentored staff members and client teams on user experience. Deborah co-authored with Jakob Nielsen “233 Tips and Tricks for Recruiting Participants for Usability Studies.” She has presented at multiple professional organizations’ conferences on UX-related subjects, and she has served on 10 UPA conference committees. Deborah has Bachelor and Master Degrees from The University of Michigan.

Laurie Kantner
Senior Usability Consultant
Tec-Ed, Inc.

Voice: 734-995-1010
Fax: 734-995-1025
Email: laurie@teced.com

Laurie Kantner has been a UX practitioner since the early 1990’s and manager of the UX staff at Tec-Ed since 2006. Laurie has defined and carried out scores of user research projects over her career, from small to extremely large, using lab and field methods, evaluating software, Web applications, services, and devices. She has mentored staff members as well as client team members on the principles and techniques of user experience. Laurie is a member of the Usability Professionals’ Association, ACM SIGCHI, and the Society for Technical Communication. She has contributed chapters to *Essays on Usability: Design by People for People* (UPA, edited by Russell J. Branaghan) and *User-Centered Design Stories: Real-World UCD Case Studies* (Morgan Kaufmann, edited by Carol Righi and Janice James).