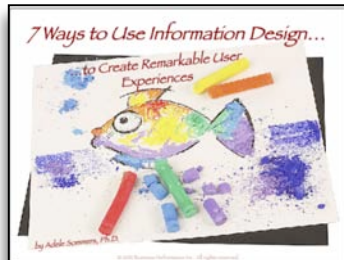


"Seven Ways to Use Information Design to Create Remarkable User Experiences" – Note-taking Guide



As a technical or business communicator, you may be wondering, "What do I need to know about designing information in my area of expertise? Can I do it in a way that **deeply engages my audience** and leads to measurable increases in user, learner, viewer, visitor, prospect, or customer satisfaction? Are there universal guidelines I can follow, regardless of my goals, purpose, subject matter, and audience?"

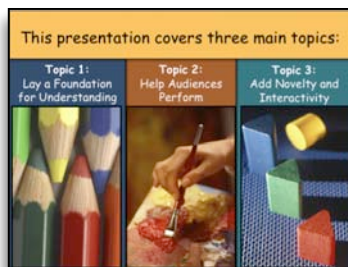
The answer is **yes!** Although there are many reasons why we generate content (such as for technical manuals, business communications, Web sites, training, presentations, marketing, and multimedia productions), **timeless, classic, research-based** principles do exist!

Introduction:



- **This is a story about you:** A business, technical, marketing, and/or training content creator
- **This is also a story about your audiences** — users, visitors, customers viewers, learners, or prospects who are distracted, multi-tasking, and busy
- **And, it's a story about organizations** that want your help with boosting their customer experiences and their bottom line

- **Your challenge?** Design content to corral interest and spur people to take fast, potent, and satisfying action
- **How?** By lassoing viewer attention with 7 information-design tips, regardless of the medium you're using or message you're conveying!



- **This presentation covers three main topics:**
 - Topic 1:** Lay a Foundation for Clear Understanding
 - Topic 2:** Help Your Audiences Perform — Do What They *Really* Need to Do
 - Topic 3:** Add Novelty and Interactivity to Stir Emotion and Spur Action

- **Why does "understanding" matter?**

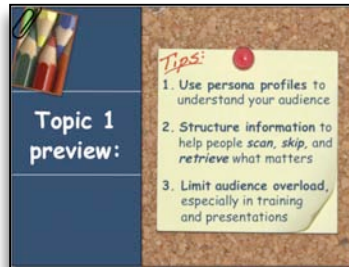
A 2008 IDC survey* of 400 U.K. and U.S. corporations found that companies lose an estimated \$37 billion annually because of mistakes caused by employee misunderstanding.

*Source: "\$37 Billion: Counting the Cost of Employee Misunderstanding" (2008)

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Topic 1: Lay a Foundation for Clear Understanding



■ Topic 1 preview: We'll be covering these 3 tips:

1. Use persona profiles to understand your audience
2. Structure information to help people scan, skip, and retrieve what matters
3. Limit audience overload, especially in training and presentations



■ Tip 1: Use persona profiles to understand your audience — what makes them tick?

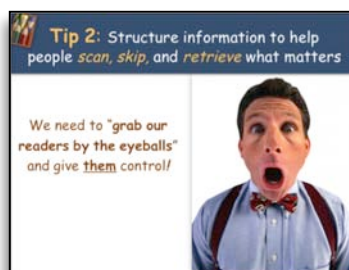
- **Why?** Understanding your audience's frame of reference can help you craft a truly compelling message

- **For example:** Will your audience reflect certain **demographic characteristics**? Members of a particular age group? Specialists in a certain field? Experienced in a specific industry? Leaders or members of a community?
- **Also:** Could your audience members share certain **psychographic characteristics**? Specific beliefs? Common morals or values? Particular political views? Similar consumer behaviors?



- **Key:** Identify personas who represent your audience's characteristics and concerns

- For example, see **Rosa Ramirez's** fictitious persona profile (for a Web design project) — in your handouts
- Key characteristics to sketch out include **age, education, occupation, attributes, worries** (fears, problems, and challenges), and **goals** (aspirations, hopes, and dreams)



■ Tip 2: Structure information to help people scan, skip, and retrieve what matters

We need to "grab our readers by the eyeballs" and give them control!

- **Why?** Poor visual representation can delay or even prevent understanding and action...

- **Next, 5 techniques** help audiences **scan, skip, and retrieve** information, and **act, fast...**

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Five "structured authoring" techniques are...

1. Classifying
2. Chunking
3. Arranging
4. Simplifying
5. Illustrating

■ **Five "structured authoring" techniques are...**

1. Classifying
2. Chunking
3. Arranging
4. Simplifying
5. Illustrating

Technique 1:

Classifying organizes content into 5 distinct types

■ **Technique 1: *Classifying*** organizes content into 5 distinct types: Facts, Concepts, Procedures, Processes, Principles

- **Fact** Example: "Over 200 breeds of dogs exist around the world."
- **Concept** Examples: "Dog," "Book," "Weather"
- **Procedure** Example: "How to Teach Your Dog to Sit"

Technique 2:

Chunking organizes and groups content into collections of digestible blocks

■ **Technique 2: *Chunking*** organizes and groups content into collections of digestible blocks, for example, by explaining a relevant **fact** and a **concept** before explaining a **procedure**

Technique 3:

Arranging text, graphics, and visual cues helps people interpret quickly

■ **Technique 3: *Arranging*** text, graphics, and visual cues helps people interpret quickly

For example, use headings, labels, section dividers, white space, groupings, bold text, and bulleted or numbered lists

Technique 4:

Simplifying content uses very direct, "plain talk" to get ideas across fast

Use active voice, simple words; indicate who takes action

Good: "The technician **removes** the tray from the table."

Good: [You] "**Remove** the tray from the table."

Not so good: "The tray **is removed** from the table."

■ **Technique 4: *Simplifying*** content uses very direct, "plain talk" to get ideas across fast:

- Use the **active** voice, **simple** words; indicate **who** takes action

Technique 5:

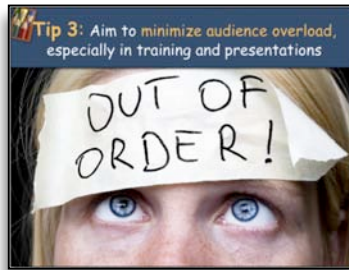
One picture is worth a thousand words...

Illustrating reinforces or replaces text with graphic elements

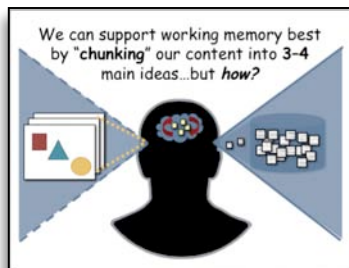
■ **Technique 5: *Illustrating*** reinforces or replaces text with graphic elements

- **In summary:** Classifying, Chunking, Arranging, Simplifying, and Illustrating help people **scan**, **skip**, and **retrieve** fast!

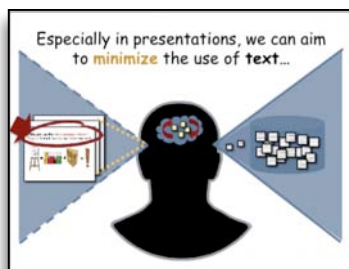
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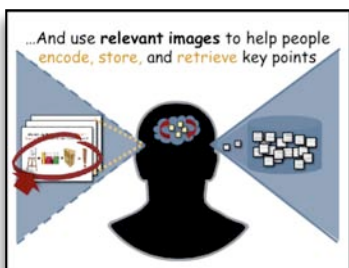
- **Tip 3: Aim to minimize audience overload, especially in training and presentations**
- **A major dilemma:** We love telling people everything we know about our subject!
- It's natural to start collecting your thoughts by quickly brainstorming "idea lists"
- But presenting a loose series of "idea lists" will force your audiences to organize them
- And, presenting too many main topics can reduce your audience's ability to absorb your key points Here's why...
- "Working memory" has an extremely limited processing capacity
- Further, we are limited by how we process what we see — it's not a uniform "pipeline" ...Little of what we see gets stored in memory
- Research shows **people can process only 3-4 chunks of input at a time!** What does that mean?
- It refers, in part, to how many items we can juggle in memory without writing them down...



- We can support working memory best by "chunking" our content into **3-4 main ideas**...but how?
- Especially in presentations, we can aim to **minimize** the use of **text**...
- And **use relevant images** to help people encode, store, and retrieve key points



- Research shows we comprehend best when relevant **pictures accompany words**...
- Research also shows that people learn much better **without extraneous details:** Less is more!
- So, use a clean, billboard approach to design...



- Organize all of your key points into primary topics: **3 to 4 big "suitcases" of ideas**...
- And present only **one main point per slide**
- Plus, **handouts** will help your audience digest and retrieve the main topics and details of your content!

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- Here are **three excellent resources** on structured authoring and cognitive research:

- **"Developing Technical Training"** by Ruth Clark
- **"Multimedia Learning"** by Richard E. Mayer
- **"Dynamics of Document Design"** by Karen Schriver
- See also: **Information Mapping®** training (InfoMap.com)

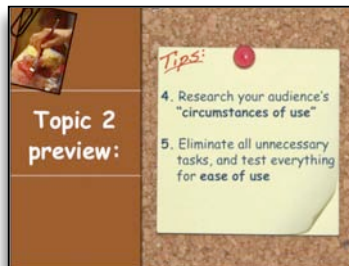
- **Topic 1 summary:** We've just finished covering these 3 tips:

1. Use persona profiles to understand your audience
2. Structure information to help people scan, skip, and retrieve what matters
3. Limit audience overload, especially in training and presentations

- **Action steps:**

1. **Identify the personas who represent *your* audience**
2. **Practice the 5 techniques of structured authoring**
3. **Review your content for sources of overload, and simplify it as needed!**

Topic 2: Help Your Audiences Do What They *Really* Need to Do



- **Topic 2 preview: We'll be covering...**

Tip 4. Research your audience's "circumstances of use"

Tip 5. Eliminate all unnecessary tasks, and test everything for ease of use



Tip 4: Research your audience's "circumstances of use"

- **What does "circumstances of use" mean?** It pertains to when, where, and how people use your "stuff"

- **Why does "ease of use" matter?**

Two key studies* of consumer behavior found that customers rank ease of use as much more important than features after they buy and use a product

*Published by the American Marketing Assn., 2005; Harvard Business Review, 2006



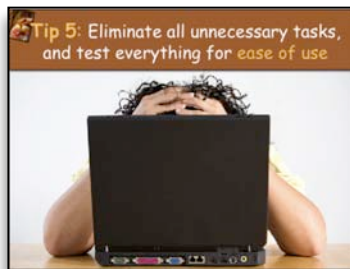
- **Routine circumstances** are the normal or typical ways in which people consume what you offer

- **Routine situations** include at school, on the go, exercising, at home, or in the normal workday

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- **Non-routine circumstances** are the unusual or even extreme situations in which people need to use your products, systems, and content
- **Unusual circumstances include** off-hours, in bad weather, being lost or stranded, in disasters, and in remote locations
- In any non-typical situation, how would your products, services, and information react? (Before you respond, see the next tip...)



Tip 5: Eliminate all unnecessary tasks, and test everything for ease of use

- Ever thought about how we, as consumers, expect things to work exactly as advertised?
- Yet many products don't help us at all — and instead, introduce complex demands and burdens of their own.



- **Some things are so difficult to use** that they can actually prevent us from doing our jobs!
- They make us do tedious, **annoying busywork**, like searching, installing, setting up, assembling, configuring, troubleshooting, and calling tech support!



- **So, can your products pass the "midnight test"?** (Let's consider a few examples...)
- **Example 1:** What happens when you add frustrating busywork to high-pressure, off-hours tasks?



- **Meet Dan.** Dan has exactly 12 hours to install enterprise-critical software, or he'll have to wait 6 months before trying again.
- **6:00 PM:** Dan: "The documentation says this should only take 4 hours... so let's do it!"
- **7:00 PM:** "This is weird...I'm not seeing the status info the docs says I should see...but no error messages!"

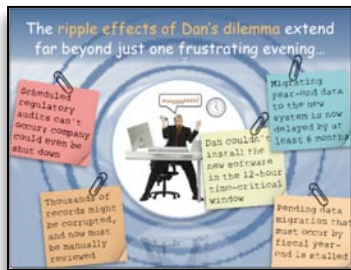
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- **7:00 PM:** "I'd better keep going, and just hope the discrepancy doesn't mean there's some kind of problem!"
- **8:00 PM:** "Now I'm really getting worried... I'm starting to see error messages, but I can't find any details!!"
- **9:00 PM:** "This is nuts! I'd better call their Tech Support and find out what the heck is going on here!!"
- **9:00 PM:** "What do you mean there's no tech support after 6:00 p.m.?! I can't wait till tomorrow to call!"



- **9:00–12:00:** "Erika, this should have been done by now! Now I have to decide whether to abort the whole thing or forge ahead!"
- **4:00 AM:** "You know what I think of your system? It STINKS! You haven't even tested it, and you treat your customers like DIRT!"
- **5:00 AM:** "Error code M00034428: Abnormal termination"
Dan: "Aaaagggghhhh!!!"



- **The ripple effects of Dan's dilemma** extend far beyond just one frustrating evening...
 1. Dan couldn't install the new software in the 12-hour window
 2. Pending data migration that must occur by year-end is now stalled
 3. Migrating year-end data to the new system is now delayed by at least 6 months
 4. Thousands of records may be corrupted, and now must be manually reviewed
 5. Scheduled regulatory audits can't occur; the company could even be shut down
- How might customer advocates like you **fix and prevent** the kinds of problems Dan experienced?
- Here are some ideas...
 1. Support your customers' **actual goals** for doing their **real jobs**.
 2. Make sure **all elements** of your product, system, or content are **compatible and consistent**.
 3. Make sure the system, product, or content is **easy to use from** your customers' point of view.
 4. **Guide people through exploring more complex features** when they're ready.
 5. Make sure the system or item is **straightforward to maintain and test** from your point of view
 6. **Test, test, test** as much as possible — before release!

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- **Example 2:** What happens when you apply creative thought to meeting your customers' off-hours needs?
- We can move from "**despair**" to "**delight**" — let's talk cupcakes! Have **you** ever experienced midnight cravings?



- In March 2012, Sprinkles Beverly Hills opened its very first **24-hour "cupcake automat."** How does it work?
- The interface lets you choose any flavor for yourself (or even a "doggie" cupcake treat for your dog!)
- An arm retrieves a fresh cupcake, which arrives in a tidy box
- Even at midnight, bon appétit!

- What a lovely way to pass the "midnight test"!
- What if your team could focus on generating ideas like these to delight your customers?

■ **Topic 2 summary: We've covered...**

Tip 4. Research your audience's "circumstances of use"

Tip 5. Eliminate all unnecessary tasks, and test everything for ease of use

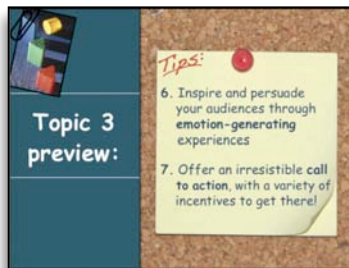
■ **Action steps:**

Observe how you feel when products don't support you

Observe how you feel when products do support you

Think about how to better support your audiences' circumstances of use!

Topic 3: Add Novelty and Interactivity to Stir Emotion & Spur Action



■ **Topic 3 preview: We'll be covering...**

Tip 6. Inspire and persuade your audiences through emotion-generating experiences

Tip 7. Offer an irresistible call to action, with a variety of incentives to get there!

■ **Why do customer emotions matter?**

Gallup's research found that customers who have the most rewarding emotional relationships with a company buy 184% more than customers who are merely "satisfied" with its products and services.

*Source: "Human Sigma," by John H. Fleming and Jim Asplund (2007)

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■ Tip 6: Inspire and persuade audiences through emotion-generating experiences

- Studies show that people make many types of decisions based on emotion rather than logic (imagine Dan with a *happy* reaction!)
- For that reason, the field of **usability** is no longer just about assessing **ease of use**



- Today, usability also measures how people feel about their user experiences, such as through Web analytics on click-through rates, sign-ups, purchases

For related information, see Human Factors International's (HFI's) webcast, "**Why Usability Is No Longer Enough: The Need for Persuasion, Emotion, & Trust**" — scroll down the page to find it at humanfactors.com/downloads/webcasts.asp



- To influence visitor behavior, a Web site may need to spark an array of **strong emotions**

- So, whatever the purpose of a Web site, it must motivate visitors to take the next step, such as sign up, buy, or donate



■ Tip 7: Offer an irresistible call to action, with a variety of incentives to get there

- When we add novelty and interactivity to our content, we invite people to dance with our ideas



- But once we whirl our audiences around our content a few times, **what happens next?**

- **Motto:** Don't leave your dance partners (or yourself!) vague about their next steps

- **Why?** Understanding what you want your audience to do next helps you convey it clearly in your message

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■ Here are two action examples...



- **Example 1: My own "Treasure Hunt Quiz"** (an interactive, adventure-based self-assessment)

To view the 3-minute intro video and interact with the quiz, please go to LearnShareProsper.com/explore.html and look for "Take the Treasure Hunt!"



- **Example 2: Hanna Phan's 90-second "présumé"** (presentation résumé) to SlideRocket.com

To view Hanna's outstanding presentation résumé, go to portal.sliderocket.com/AIWCI/Iwanttoworkatsliderocket

■ **Topic 3 summary: We have covered...**

Tip 6. Inspire and persuade your audiences through emotion-generating experiences
Tip 7. Offer an irresistible call to action, with a variety of incentives to get there!

■ **Action steps:**

Assess your content for ways to engage emotions
Watch and interact with the two "action examples" above
Think about ways you can increase your "calls to action"!

In conclusion, we've covered 7 information design tips under 3 main topics:



Topic 1: Lay a Foundation for Clear Understanding

Topic 2: Help Audiences Perform — Do What They Really Need to Do

Topic 3: Add Novelty and Interactivity to Stir Emotion and Spur Action

- You might have only one opportunity to "lasso" your audience's attention...help people do what they REALLY need to do...and communicate your call to action...

■ **Use these 7 information design tips** to make your audience experiences truly remarkable!

1. Use persona profiles to understand your audience — what makes them tick?
2. Structure information to help people scan, skip, and retrieve what matters
3. Aim to limit audience overload, especially in training and presentations
4. Research your audience's "circumstances of use"
5. Eliminate all unnecessary tasks, and test everything for ease of use
6. Inspire and persuade audiences via emotion-generating experiences
7. Offer an irresistible call to action, with a variety of incentives to get there!