

**USER EXPERIENCE AS ORGANIZATIONAL ETHOS FOCUSED ON QUALITY:
A CASE STUDY OF UX-RECEPTIVE AND UX-RELUCTANT WORKPLACE
CULTURES**

by
Kimberly Schnaderbeck Baker

A Dissertation Submitted in
Partial Fulfillment of the
Requirements for the Degree of

Doctor of Philosophy
in English

at
the University of Wisconsin-Milwaukee

December 2018

ABSTRACT

USER EXPERIENCE AS ORGANIZATIONAL ETHOS FOCUSED ON QUALITY: A CASE STUDY OF UX-RECEPTIVE AND UX-RELUCTANT WORKPLACE CULTURES

by

Kimberly Schnaderbeck Baker

The University of Wisconsin-Milwaukee, 2018
Under the Supervision of Dr. Rachel Spilka

User experience (UX) research is a workplace approach to improving the quality of texts and technologies an organization produces to advance its business goals. Across the industry, UX roles, job titles, and responsibilities are widely varied, and the inconsistency is also reflected in the quality of outcomes; successful, effective research depends on complex, interrelated factors, and the influence of workplace culture and context are largely unacknowledged and unexamined across the technical communication (TC) field. Such examination is warranted because UX professionals face unique workplace challenges that impede their ability to conduct effective research that will improve the quality of outcomes that meet user needs. These challenges arise from 1) limited access to necessary resources for research, 2) limited agency over the goals and direction of research, 3) resistance to research findings that challenge or conflict with organizational identity.

I conducted an exploratory, qualitative study to investigate the perceptions of UX professionals in working within and against workplace constraints. The study includes four case studies, each focused on a UX professional in an organization that incorporates UX research as a quality-

assurance practice. To analyze the data, I used a combination of theoretical lenses, including rhetorical analysis and the cultural approach to organizations.

The resulting data indicated that some organizational preferences and norms do not align well with UX methods and practices and may impede UX professionals from fully executing their research, applying findings, and delivering high-quality outcomes. A wide variety of professional relationships also influence the UX research context and shape the conditions for research activities, and responses to research initiatives.

This study highlights key implications for Technical Communication (TC) theory, including a need to deepen and broaden the field's understanding of the rhetorical situation for UX work within organizations, and the intersections of UX and quality. I offer recommendations for UX professionals, including closely observing the workplace with its key relationships and power structures, networking within the organization to build alliances, and framing the goals of UX research to align with strategic organizational and departmental goals. I advocate for TC academic programs to help students understand the complexities of the rhetorical situations within and across organizational boundaries in workplaces, and to help students develop a sense of “organizational literacy.”

The TC field benefits from a deeper understanding of the complex relationship between UX research, perceptions of quality and the role of rhetorical context in workplace settings.

©Copyright by Kimberly Baker, 2018
All Rights Reserved

TABLE OF CONTENTS

LIST OF FIGURES	ix
LIST OF TABLES	x
ACKNOWLEDGMENTS	xi
CHAPTER 1: BACKGROUND AND RATIONALE FOR STUDY	1
THE STUDY: A BRIEF OVERVIEW	5
Exigencies for Deeper Knowledge of UX Work Within Organizations	7
Investigations of Quality	12
Problems of “Identifiable” Quality	12
Problems with Process-Dependent Quality	15
Narrowly-Defined Usability Limits its Potential Impact on Quality	19
TERMS, DEFINITIONS, AND CLARIFICATIONS	20
NARROW USABILITY APPROACHES LIMIT UNDERSTANDING OF USABILITY IN ORGANIZATIONS	22
CHAPTER 2: METHODS	27
RESEARCH GOAL: UNDERSTAND THE UX OF UX IN ORGANIZATIONS	27
RATIONALE FOR A QUALITATIVE STUDY	29
Case Studies Provided Insight into Authentic Contexts	32
Variety of Business Sectors and Organization Types Across Research Sites	33
Semi-Structured Participant Interviews Focused on Context and Insights	35

Corporate Websites Communicate Organizational Identity	36
Theoretical Frameworks.....	38
DISCLOSURES, LIMITATIONS AND THE RESEARCHER’S ROLE	39
Amending Initial Research Question	39
SUMMARY	40
CHAPTER 3: THE RESEARCH PARTICIPANTS AND THEIR EMPLOYERS.....	42
RESEARCH SITES	43
UX-RECEPTIVE SITES OF RESEARCH	46
ConsultTech: technology consulting agency and UX professional, Beth.....	46
Publicly-traded Retail Organization, Style Store and Customer-experience Researcher, Travis	54
UX-RELUCTANT SITES OF RESEARCH	63
State-funded University, Midcity University and IT Professional, Kyle	63
Healthcare Procurement Firm, Goods Plus and UX Professional, Matt	68
SUMMARY	76
CHAPTER 4: FINDINGS	77
UX-RELUCTANT WORKPLACES	79
Matt, UX Professional at Healthcare Procurement Firm, Goods Plus	79
Kyle, IT Professional at Midcity University	89
UX-RECEPTIVE WORKPLACES	96
Travis, CX Professional at Style Store	96

Beth, UX Professional at Technology Consulting Firm, Consulttech	102
CONCLUSION	106
Issues of Access Reflect Misunderstanding of UX	106
Project Ownership Influences Research Goals, Criteria, Data Interpretation.....	107
Findings in Alignment with Organizational Identity Suggest Connections to Risk Tolerance	108
 CHAPTER 5: THEORETICAL FINDINGS AND IMPLICATIONS	110
FOUNDATIONAL PREMISES	111
How Findings Address the Research Question	113
Theoretical Standpoints Central to this Study	115
IMPLICATIONS FOR TECHNICAL COMMUNICATION THEORY	118
UNDERSTANDING THE INTERSECTION OF QUALITY & UX AT THE SITES OF RESEARCH.....	118
Approaches to Quality at UX-Reluctant Workplaces	121
Approaches to Quality at UX-Receptive Workplaces.....	129
CONCLUSIONS AND SUMMARY	137
 CHAPTER 6: IMPLICATIONS FOR PRACTICE, PEDAGOGY AND FUTURE RESEARCH.....	141
IMPLICATIONS FOR UX PRACTITIONERS	143
Identify the Organizational Values and Power Structures	143
Make Connections that Get UX in the Room	144

Align UX Research with Organizational Goals	144
IMPLICATIONS FOR TEACHING TECHNICAL COMMUNICATION	145
Develop Students’ Sense of Organizational Literacy	146
OPPORTUNITIES FOR FUTURE RESEARCH	150
Deeper Examination of Workplace Types	150
Organizational Identity, Risk Tolerance, and Perceptions of UX Work	151
BIBLIOGRAPHY	153
APPENDIX: INTERVIEW QUESTIONS	157
CURRICULUM VITAE	158

LIST OF FIGURES

Figure 1.1: Smart, Seawright and DeTienne’s two-dimensional quality model	14
Figure 1.2: Peter Morville’s User Experience Honeycomb infographic	21
Figure 4.1: Goods Plus UX-Stakeholder Influence Model	88
Figure 4.2: Midcity University UX-Stakeholder Influence Model	94
Figure 4.3: Style Store UX-Stakeholder Influence Model	101
Figure 4.4: ConsultTech UX-Stakeholder Influence Model	105

LIST OF TABLES

TABLE 3.1: Sites of Research in this study are categorized as having receptive or reluctant dispositions to UX research.	45
--	----

ACKNOWLEDGMENTS

This study would not have been possible without support, dedication, and generosity. I wish to gratefully acknowledge the encouragement and guidance of my mentor, advisor, and friend Rachel Spilka, who introduced me to UX research, and supported my academic and professional growth throughout the process.

I am grateful for the support, thoughtful feedback, and generosity of my committee members, David Clark, Shevaun Watson, Sarah Freeman, and Tammy Rice-Bailey.

I acknowledge the thoughtful and insightful contributions of my study participants, whose challenges at work inspired this research.

I am grateful for the love, support, and encouragement of my family, and many friends and relations, especially David and Sharon Schnaderbeck, Craig and Staci Schnaderbeck, the Baker family, and the late Russ and Rosemary Baker.

Most of all, this project is dedicated to my husband, David who always believed in me, encouraged me, talked through my ideas with me, and read all my drafts.

CHAPTER 1: BACKGROUND AND RATIONALE FOR STUDY

The seeds of this research project germinated when I attended a presentation at my local user-experience professionals group. The organization offered local professionals opportunities for both networking and knowledge-sharing; local members and other area practitioners delivered presentations on a range of topics, including the user-experience (hereafter, UX) industry job market. The presenters deconstructed a selection of recently-posted job ads from across the United States for UX designers and related jobs, trying to parse, what, precisely, each job would entail, which qualifications were necessary (or merely ideal), and what a job-seeker might learn about a particular role and its responsibilities within the team and the company by reading between the lines.

UX job roles, as the presenters revealed, are inconsistently defined, and in their talk, the presenters addressed the lack of consistency in the qualifications for the UX role across all experience levels. Many of the job ads the presenters included in their talk described what may be termed a “unicorn” candidate – a (quite possibly mythical) individual possessing a unique combination of specific, diverse, and sometimes incongruous skills. The label “unicorn” has become a job-search commonplace across industries, and it is often applied to poorly articulated job descriptions, design-by-committee descriptions that read as wish-lists of qualifications from across a wide array of disciplines. Highlighted in this relatively small sample of ads, the repeated call for UX unicorns raised concern among the professionals in attendance because the job descriptions suggested significant misunderstanding of UX and the people who practice in the discipline.

While the UX practitioners at the event would have appreciated some clarity from the hiring organizations about what a UX job really means, UX is, in reality, a diverse field with

many routes into the discipline. In a 2011 Journal of Usability Studies article, for example, coauthors Janice “Ginny” Redish and Carol Barnum reference the varied disciplinary backgrounds of usability professionals, citing Whitney Quesenbery’s (2011) research. Computer science and software design, marketing and branding, psychology and anthropology, as well as technical communication and library science are among the fields in which usability professionals began their respective professional careers and built relevant skills they apply in their current UX roles (Redish and Barnum 2011, p. 91). The UX discipline’s origins in a wide range of related fields, and the fact that to do this work, UX practitioners draw on skill sets honed and located in a diverse range of disciplines mirrors the origins of a related field, technical communication.

Redish and Barnum coedited a special issue of the 2011 Journal of Usability Studies (in which that article referenced above appeared) focusing on the connections between UX and technical communication (hereafter, TC). In their introduction to the issue, Redish and Barnum cite several key similarities between the related disciplines, including a focus on audiences and their needs, the goal of producing clear, effective, usable, understandable information, and a process model that includes preliminary user research that informs the development of drafts (or prototypes), revision, and evaluation with the intended users (92). The authors note that TC theory and practice have made significant contributions to the UX field, and that TCs share three broad themes across the work they do, specifically 1) collaboration with others in their work, both within and across disciplinary boundaries; 2) communication with diverse audiences, for many purposes; and 3) change, and the ability to adapt to shifting audiences, media, tools, and technologies, as well as to effect change for the benefit of others (94). Barnum also acknowledges the challenges technical communicators face in their own organizations, and

across the industry, as well as in academic programs. She makes the case for the interconnected nature of TC and UX by acknowledging these central ideas: UX focuses on the user, and analyzing user needs. TC's long history of focusing on the reader or end-user align here, and like UX professionals, TCs often see themselves as user advocates. Academic TC programs frequently address rhetoric (especially when these programs are housed in English departments), and the influence of Aristotelian audience, context, and purpose can be easily recognized in the most basic of UX needs-analysis questions: who will use this text or technology (audience), under what circumstances will people use the text or technology? (context), and what do users want to do with the text or technology? (purpose) (95).

Like UX professionals, TCs have also experienced challenges such as (a degree of) marginalization in their workplaces, often based on misunderstanding or misperceptions of what the TC is supposed to do, or what value the data generated by the TC should have for the organization. (i.e., The TC should accommodate the user to the technology by writing work-arounds for the documentation, not the other way around; findings are set aside, not used to inform the design process, and thus, make a better product.) (97). These central points of alignment indicate a shared, user-centered focus among both TC and UX professionals, as well as a shared set of potential workplace challenges that may hinder progress toward those shared goals. Writing about the identities of technical communicators for a special issue of *Technical Communication*, Craig Baehr concludes that a wide variety of role definitions, job titles, and organizational relationships apply to people who identify as TCs; importantly, sometimes this label is connected to the product they help to create, sometimes to workplace processes (2014, p. 106), but definitions and boundary lines vary across organizations.

The existence of diverse job titles, varied definitions and job roles, and the fact that current practitioners come to their respective UX careers through a range of other disciplines suggest a bit of a disciplinary “identity crisis” for UX, and thus, both challenges and opportunities in contending with this variety and diversity. The opportunity lies in the still-growing interest in UX. The open positions that the presenters at my local UX event identified and discussed in their talk suggest that diverse organizations see value in UX as an approach to meeting stakeholder needs, and that these organizations want to include UX in their workplace practices. Complicating this interest in UX is a degree of uncertainty about how to “do UX” in organizations – the UX of UX within organizations. The incongruity of qualifications, responsibilities, and expectations reflected in the sample of job descriptions the presenters examined suggest that organizations struggle to define UX roles within the organizations themselves. The variety of job descriptions suggests that organizations are also struggling to integrate the new UX roles they wish to add into existing development processes and organizational structures.

Integrating new UX job roles into an existing workflow process requires thorough knowledge of the organization along with a deep understanding of UX practices that may often be lacking. If a job description articulates the responsibilities the organization assigns to a job role and the contributions this role will make to the organization’s work, a poorly-defined job role highlights potential concerns and misconceptions. First, the UX professional’s colleagues in other departments are unlikely to understand UX research, and second, the organization may struggle to integrate the new UX role into the existing workflow and effectively apply UX research to the organization’s work. While it may appear unrealistic to expect that organizations thoroughly cross-train all employees to develop deep understanding of each other’s work,

misunderstanding UX can pose problems. In other words, partial or vague understanding of how UX findings were gathered may mean that those findings are not put to the best possible use, and thus, fail to influence the product development process as intended. This knowledge gap and potential for misinterpretation have wide-ranging impact for the professionals and their work with others in the organization. The knowledge gap surrounding UX creates challenges within the organization itself for UX professionals in conducting their work and implementing their findings.

THE STUDY: A BRIEF OVERVIEW

To better understand how UX professionals negotiate the challenges of their own organizations and the affordances and constraints of these corporate contexts, I designed an exploratory, qualitative study that focuses on the experiences of UX professionals. The study focuses on four participants who have a UX role in their respective organizations. The participants' workplaces vary in size and business sector; one participant works for a large, publicly-funded educational institution, one is employed at a large, retail organization, one works for a small technology-consulting firm, and the fourth participant works at an organization that serves the healthcare industry. I recruited these participants (who are affiliated with my local UX practitioner group) specifically because their organizations do not specialize in user-experience work (as in a UX consulting firm); UX roles exist in each of these organizations to support the organization's main line of business – education, retail, consulting and design, or supply-chain management. These circumstances place the UX professionals in sometimes challenging rhetorical situations within their own work teams because they must advocate for their own legitimacy as professionals and for the value their work can contribute to the organization's

work. While recruiting participants to whom I already had a professional connection may constitute a convenience sample, this choice allowed me to ensure that the participants' job roles, tenure at their jobs, and the general UX-receptiveness of the organizations aligned with the criteria I set out for this exploratory study. I sought to include different organizational dispositions to UX work, and to limit some of the workplace factors that might shape how UX is conducted and understood. Casting a wider net for participants who self-selected for the study would, I believe, have resulted in less conformity with the workplace-disposition criteria among interested potential participants.

To gain insight into the workplace contexts and to identify the specific challenges these UX professionals face in their respective roles, I conducted a series of semi-structured interviews with each participant as he or she planned and completed a project. Interviews focused broadly on the key goals and stakeholders for the project, as well as the organization's structure, organizational mission, and how quality is characterized. I intended that this preliminary study would focus on the standpoints of the UX professionals to identify specific rhetorical challenges and strategies for negotiating the affordances and constraints of their roles within their respective organizations.

I initially also intended to balance the views of each UX professional in the study with the views of a workplace superior, and I intended to include in my study rhetorical analysis of workplace documents the participants used to plan and organize their UX research efforts. Confidentiality policies at the participants' workplaces did not allow them to share such materials with me, and workplace superiors for each of the participants were not available to join the study, so I narrowed the scope to focus on the four participants and their perceptions of their own rhetorical agency within their respective organizations.

This study contributes to the TC academic field's understanding of the rhetorical challenges that individuals face in conducting UX work within organizations, and in trying to advocate for their own value as employees and for quality outcomes that benefit the end-users of the products and services to which these professionals contribute. A deeper understanding of how UX professionals themselves perceive their own situations and the options available to work within and against the affordances and constraints of their own organizations may help us learn how marginalized sub-groups within organizations may exercise rhetorical agency.

Exigencies for Deeper Knowledge of UX Work Within Organizations

Research has told the TC field (and others) that disruption in workplaces is problematic, and this might appear so obvious that it need not be mentioned, but two points about how to deal with disruption are relevant to this discussion. In medical contexts, disruption has serious consequences for patient safety, and the field has put forth significant effort to studying disruption's effects and how to manage it. Often, disruption is harmful and employees actively strive to avoid it. However, in the case of new technologies, significant gains in efficiency and effectiveness can be realized, but only if the new tool is properly integrated into the workflow, according to Akash P. Kansagra, Kevin Liu, and John-Paul J. Yu, whose article about disruption focuses on solutions for radiology workflows where technology has reshaped practice. In workplaces where UX professionals have been newly added to the workflow, it is likely the UX professionals themselves will have to help guide the process of integrating their own role into the workflow patterns and negotiating established hierarchies. Writing for the Interaction Design Foundation, Muriel Domingo advises UX professionals to prepare to tell several uninformed audiences about the benefits of UX, including family and friends who don't understand the UX

job role, bosses, and skeptical colleagues (2016). To gain workplace acceptance as legitimate and valuable contributors, Domingo advises UX professionals to make a business case for their value, and to empathize with resistant colleagues as they negotiate the workplace and advocate for their own value.

If the industry snapshot of UX job descriptions presented at my local UX group accurately represents wider trends, it is my hypothesis that UX professionals are likely to enter workplaces and teams where they will face unique rhetorical impediments created by their own organizations and the corporate cultures where they work. These obstacles typically arise from two contributing factors: misunderstandings of usability research, and a poor fit for UX practices within the existing organizational structure. Misunderstandings of user research and usability testing persist throughout organizations, distorting the practice of usability research and the use of the resulting data. Second, UX research cannot deliver successful results under all workplace conditions and in all organizational structures. Organizations eager to benefit from UX research may simply add UX professionals to the existing workflow. This addition of UX professionals is a valuable first step, but if organizations only add a role to an existing organizational structure and fail to account for the full range of practices necessary for effective UX work, this first step toward improved quality and user experience is wasted. The addition of UX professionals disrupts organizational norms, workflows and processes. The disruption impedes acceptance and successful application of UX research that benefits end-users and improves overall quality.

The related field of TC has experienced similar patterns of disruption when new roles are added to organizations and those roles do not experience a universally smooth transition within organizations. TC scholars have analyzed the organizational roles of TC professionals and observed similar, broad trends as well as noted the potential for disruption when a new role is

integrated into the organization, and the way that colleagues understand the potential value the new role can contribute to the organization and its goals. Organizations create roles for TC (or UX) professionals with good intentions, excitement, and high expectations about the potential value their contributions will bring. However, the organizations and the employees also simultaneously experience disruption brought about by the change. This disruption can result in considerable employee resistance due to a perceived replacement or minimization of long-held norms.

Johndan Johnson-Eilola connects disruption and undervalued TC work to the outcomes of workplace processes that devote half measures to TC work (because TC work is perceived as less valuable) and he presents an example of disruption and resistance associated with undervalued TC work. In his 1996 article, “Relocating the Value of Work,” Johnson-Eilola describes a workplace situation in which the work of technical communicators is devalued and characterized as unnecessary; in such organizations, simplicity, speed, or accuracy only are prioritized, rather than becoming visible through the systematic examination and analysis that would help determine the quality of the work and whether that work is, in fact, useful, usable, and effective. In this article, Johnson-Eilola calls for TCs to counteract potential criticism arising from resistance to change within the organization by reframing how technical communication is labeled, discussed, and valued. By framing TCs’ contributions through symbolic-analytic work as “added value,” the professionals themselves change the way organizations view TCs (or UX professionals). To accomplish this reframing of symbolic-analytic work, Johnson-Eilola recommends that TCs focus on communication and strategic action within their own organizations to influence processes and produce valuable outcomes. Essentially, he concludes

that technical communication professionals advocate for themselves and their work to ensure that colleagues regard TC work as valuable, essential, and significant.

Undervaluing the contributions of these professionals creates a problem of distraction. If a professional must regularly advocate for the value of her own work to colleagues and others, that activity should be understood as a distraction and interruption; the more time and energy a TC or UX professional must spend justifying her involvement in a work team, or proving to others that her research findings are valuable and useful, the less time is spent adding actual value to the project (i.e., Brady and Schreiber, 2013; Rice-Bailey, 2016). This rhetorical labor to validate one's involvement and professional legitimacy within the organization is notable because such work is not equally necessary across all positions and organizational roles. For example, few people would question the necessity of most roles that focus on building or creating; these jobs are automatically deemed essential and valuable because the organization exists to produce something digital or physical that others will consume and use. But job roles focusing on maintenance, refinement, adjustment, or critique, such as technical communication or UX, are far less likely to be automatically afforded the same valued status. In fact, some may question why the designer's, engineer's, or product developer's vision needs to be modified at all, arguing that "good" design doesn't need to be fixed; that fussy attention from TC or UX professionals simply adds cost, complexity, and delay, not actual value; that "prettying up" the design should be an afterthought, if time permits.

Little is known about the specific issues facing UX professionals. Thus, this study contributes to the TC field's knowledge about the challenges that UX professionals face in advocating for their involvement in work, integrating the UX role into existing workflows, and for establishing the validity of UX research findings within the organization. The potential

impact of UX as a research methodology is diminished if UX professionals must divide their time between lobbying to be included in projects, convincing colleagues and co-workers to communicate and work with them, and then advocating for the validity of the work they do so that UX findings can be accepted and applied. In short, adding a UX role to a workflow doesn't automatically guarantee that UX work will be done well, or be implemented so it can effect positive change.

This study examines the interaction and overlap of contextual and situational definitions of quality and the rhetorical affordances and constraints that UX professionals confront in their workplaces as they strive for quality. Next, I will provide an overview of TC academic scholarship that contributes helpful insights toward understanding how quality is defined, and how workplaces endeavor to achieve quality.

INVESTIGATIONS OF QUALITY

Usability testing and user-centered design approaches are, by definition, focused on a contextual understanding of quality. A usable, useful text or technology must help the audiences accomplish particular goals within specific contexts. It logically follows that to evaluate whether a text or technology achieves those goals, we need to examine the evaluation, including what criteria are involved, and how the assessment is conducted. The following section identifies key academic scholarship on quality as well as opportunities for more investigation.

Problems of “Identifiable” Quality: How Will We Know It When We See It?

For user-centered research to be implemented in ways that can bring about useful and beneficial changes for all stakeholders, it is important to understand the end-goal – quality – and what that means to people hoping to achieve it.

TC academic scholarship informs our understanding of how quality has been defined and measured, where those ideas originated, and important scholarship has established a foundation for an inquiry into definitions of quality. A renewed interest in quality and an examination of our progress toward helping these groups has implications for user- and stakeholder advocacy; by better defining what constitutes quality, for whom, in what circumstances, we may be able to better understand how to create the optimal conditions to achieve quality or to work toward it.

The TC field’s approach to quality informs the way we see the relationship between quality and technology; namely, methods and tools or technologies are strongly associated with (if not guarantees) ensuring quality outcomes. To date, TC academics have not yet achieved consensus or reached success in defining quality of work processes and products, or in

developing a sufficiently theoretical and holistic approach to understanding how best to define and measure quality at work sites.

I believe it's productive to group significant academic research into a few broad categories: 1) how quality is examined or identified; 2) attributes or features of something that achieves quality standards; 3) contexts and standpoints for quality.

Examination-focused definitions of quality depend on broad groups of criteria that we identify to determine if it meets predetermined standards for quality

This study aims to contribute to the field by exposing some difficulties and benefits of defining and modeling quality for each organization prior to a UX project, adding depth and breadth to our understanding of how UX research works in workplaces. I find Karl L. Smart, Kristie K. Seawright, and Kristen Bell DeTienne's model the most relevant for understanding the connections between quality and the value propositions of UX. Smart, Seawright and DeTienne's 's model (1995) is arguably the most impressive effort toward defining and modeling quality in workplace contexts, and it offers a helpful vocabulary for discussing quality that I apply in this study. The authors call for a holistic approach to defining quality in technical communication. Smart, Seawright and DeTienne's research coincided with a Society for Technical Communication initiative in the early 1990s to study quality, propose that TCs use a model (Seawright and Young, 1995) that identifies four factors by which quality is assessed: internal, external, subjective, and objective factors.

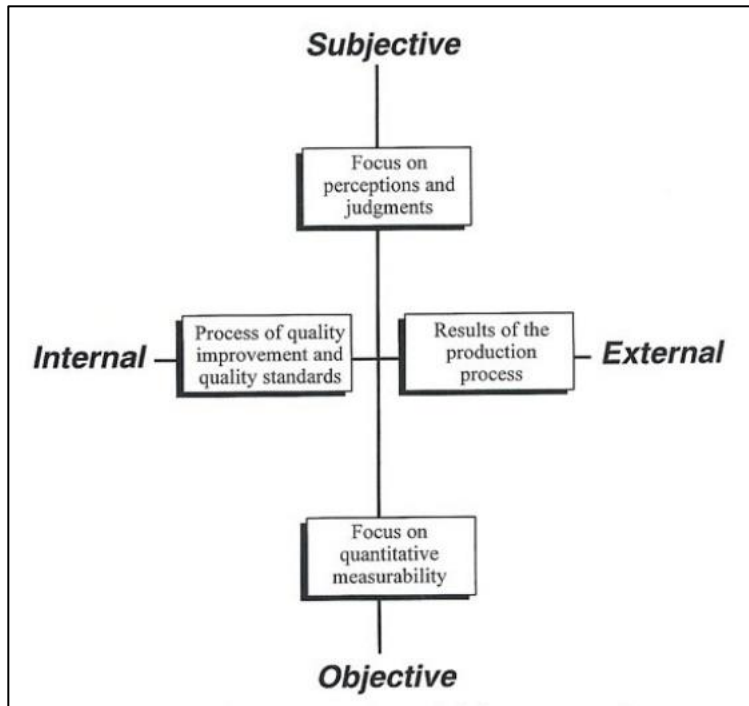


Figure 1.1: Smart, Seawright and DeTienne's two-dimensional quality model

In this model (reproduced above as Figure 1.1), *Internal* factors are connected to the process of quality improvement and quality standards within the organization. *External* factors focus on the results of the production process and the end product, after it leaves the organization. *Subjective* factors focus on peoples' perceptions and judgments of the product in question, while *objective* factors focus on aspects of the product which can be quantitatively measured using tools and a repeatable process; essentially, quality is assured if the item was made according to these approved methods (475).

Attribute-focused definitions of quality depend on characteristics used to determine quality

Smart, Seawright, and Bell DeTienne offer a typology of qualities distinguishing between quality that arises from characteristics of the product itself, perceptions of the product based on the production or design process, the product's usefulness and fitness for purpose, and its

perceived value to specific groups (477). This diverse set of criteria offers a helpful vocabulary to label and categorize approaches to quality that we can observe in their respective contexts, but it offers less to help create a definition of quality as a goal which people strive to meet in their work; every one of these attributes are positive, and ideally, a “good” product or service would meet all of them.

TC academic researchers have also created or adapted frameworks and tools for assessing qualities of specific kinds of texts. Such examinations pinpoint advantages and potential drawbacks of the specific technology itself and that tool’s use for a particular activity or rhetorical goal, but the narrow and specific context of use for these cases suggests that this approach to evaluation criteria is not suited for wider application. Scholarship on content management offers such examples as Rebekka Andersen’s work (2007) that examines organizations that adopt enterprise content management. Andersen identifies several key shortcomings, including issues of incompatibility between the content management tool and the organization’s development cycles (62), as well as concerns stemming from the use of the tool itself. These and similar systems limit, if not remove entirely the TCs’ rhetorical agency (79), focusing on the system to guide output (see also, for example: Batova, 2014; Tomlin, 2008; and others).

Problems with Process-Dependent Quality: Can We Trust That the System Works Properly?

It is my hypothesis that process-dependent definitions of quality are easy to adjust or manipulate to satisfy internal exigencies, thus deviating away from the practices that would ensure quality outcomes. Reliance on processes can permit organizations to believe they have

sufficiently attended to matters of quality. Gregory Cuppan and Stephen Bernhardt (2012) analyze two case studies of document review processes for clinical study reports at a pharmaceutical company focusing on whether these review processes influenced quality improvements. In these cases, the stated goals for the review process and the actual practices differed, vague feedback was difficult to interpret, and standard operating procedure or previous successful approaches were prioritized over rhetorical approaches such as audience considerations (145) and key issues remained unresolved (151). The reliance on the process (which tends to focus attention on less substantive elements of documents) is a significant factor limiting the communication professional's ability to achieve quality improvements.

Contextually-located definitions of quality are based on situation-dependent factors such as the intended audience, circumstance, or rhetorical purpose.

The multifaceted approach that Smart, et al. advocate, aligns well with contextually-located definitions of quality, those based on localized factors such as audience, circumstances and rhetorical purposes, but definitions of quality tied to a unique setting within a given context also means that it's easy to dismiss any generalized observation or recommendation as irrelevant to this distinct situation. That distance (perceived or actual) poses a challenge for those who advocate for the relevance of academic research to practitioners' work. Rachel Spilka (2000) calls for more attention to matters of quality with an eye toward how academic research and scholarship can influence quality, advocating for a multifaceted approach similar to that outlined by Smart, Seawright, and deTienne, Spilka observes in a literature survey that there is little consensus about defining quality, there are a range of ideas about where to begin investigating quality and whose perspective matters in the evaluation. Spilka observes that much of industry's

information sources such as “the Internet and R&D operations,” (208) are disconnected from academic contexts. Possible exceptions might be when academics carry out research in workplace contexts or conduct in-house training for practitioners, and recent graduates entering workplaces and incorporating academic knowledge into their work but generally academic influence is limited, “indirect, and sporadic.”

Quality has, however, been of greater interest in workplace contexts, while academic contexts have been less interested in issues of quality, how to measure and define it. Thus, quality – specifically, a deeper understanding of quality – offers an opportunity, Spilka says, for TC scholarship to influence industry and strengthen potential connections between academia and industry (208). Scholars in TC have used the idea of quality in ways that are highly contextual and specific, such as analyzing the products of single-sourcing and content management systems, or with identifying the criteria by which a document or device is evaluated. The highly contextual nature of these examinations helps us to identify specific limitations or advantages of that set of evaluative criteria in that context, but such a specialized and localized set of criteria is of limited use for broader applications elsewhere.

Workplace approaches to quality provide helpful context for understanding organizational cultures and production processes, and the influence they have on individuals striving for quality, but these approaches offer limited progress toward the goal of a holistic understanding of quality. Workplace approaches to quality and business management systems such as Total Quality Management, Lean management, and Six Sigma, gained popularity in manufacturing where they were developed to eliminate waste and streamline processes, have been adapted and adopted across a range of other fields. (These systems have featured in PTC scholarship [e.g. Schreiber, 2013; Gelinis, Rama, & Skelton, 1997] as case studies.) Such

management systems focus on process-driven approaches to development and production and are valued in many organizations as a cost-cutting measure. Because such systems focus on standardization of development processes, they naturally constrain employees in possible approaches to problem solving, and thus, they offer a narrow, potentially circular approach to defining and achieving quality. Essentially, the organization adopts a production system that is believed to deliver “quality;” therefore, something produced within that system will by definition, meet the standard for “quality.” In such a system, context of use and user needs are minimized at best, if not altogether absent.

Spilka asserts that

to many academics, the very existence of a diversity of perspectives about quality would call for a social constructionist or contextual approach to the quality issue, and would seem a clear signal that defining and measuring the quality of documentation should be done uniquely in each workplace culture, according to what is valued and sanctioned there. Along the same lines, significant cultural changes taking place in an organizational context would require redefining quality of documentation within that context, and determining new ways to achieve it (210).

Therefore, it would seem a natural fit that if locally-specific, situational definitions of quality align with ideals in both academic and industry contexts, that usability testing and other means of user-centered research would best assist us in understanding the relevant contexts and audiences.

Narrowly-Defined Usability Limits its Potential Impact on Quality

The academic TC field needs to better understand the way UX practitioners appreciate the relationship between UX and quality, and we must also understand the workplace context for UX, and how these professionals are negotiating workplace constraints to strive for quality. Identifying contextual constraints that might exist and that might impede attempts to pursue and achieve quality may help us better address these issues through further scholarship, as well as TC classroom pedagogy. Effective UX professionals need significant rhetorical skill. Not only must these individuals understand the context for evaluating a document or device with its intended users and stakeholders, but the practitioners must also negotiate potential resistance and constraints imposed by their workplace contexts.

TC scholarship can help inform our understanding of where these definitions and representations originate. The TC field has generated some scholarship toward answering this question and defining quality, but more can and should be done to achieve the field's goals of helping improve conditions for end-users and other stakeholders. Without such analysis and examination, the field, industry professionals, and others may persist in believing – perhaps wrongly – that our efforts are, indeed working, that products and processes are effective and truly helpful, regardless of reality or contradictory evidence. When we believe that the process itself is paramount, and we discount the outcome or neglect to verify our results, we create conditions where substandard and ineffective outcomes are rewarded. Put simply, if we believe that just because UX was involved in the development process, good things will naturally happen; that the resulting outcomes will work efficiently and effectively and be truly useful to the intended stakeholders, we are stopping short – at the expense of users and other stakeholders. If we truly believe that UX work plays an advocacy role for groups who lack a voice in a

traditional top-down production process, we need to make sure that those stakeholder voices can be heard.

This study takes preliminary steps toward that goal of understanding with the following contributions: Giving voice to UX professionals and identifying rhetorical affordances, constraints, and strategies relevant to their user experience activities in their organizations. We don't know what we don't know about how UX professionals work to establish themselves as credible, valuable contributors in their organizations. In focusing on these professionals, and inviting them to identify and articulate the rhetorical affordances and constraints that effect interactions within their organizations, we can begin to understand what constitutes productive interactions and rhetorical strategies within these organizational structures. This knowledge about effective rhetorical strategy within an organizational context supports both the narrow goals of UX professionals in making valuable contributions to their organizations' products and services, but also serves broader goals for academic research in technical communication. Advocacy for user-experience means elevating the contributions of stakeholders and audiences not traditionally involved in conventional, top-down development processes, specifically, end-users of the texts and technologies.

TERMS, DEFINITIONS, AND CLARIFICATIONS

To clarify key terms used in this study and provide helpful definitions, the next subsection focuses on usability testing and user-experience research as a research methodology and workplace practice focused on identifying the needs of end-users and other stakeholders and ensuring that documents and devices are truly effective in meeting their needs.

As the UX practitioners who presented at my local networking group (and others, to be detailed later) have explained, “user experience” is many things to many people. I will preface this subsection with working definitions to help clarify my use of terms and intended meaning for this research effort. I will also provide an overview of key scholarship focused on user experience and usability testing relevant to technical communication.

User Experience is typically a broad term for a diverse range of approaches to the interaction of an individual “user” and a text or technology. Information architecture professional Peter Morville’s user experience honeycomb is frequently cited in defining user experience (2014), as it represents a multifaceted and holistic approach encompassing seven factors concerning a person’s interaction with a document or device.

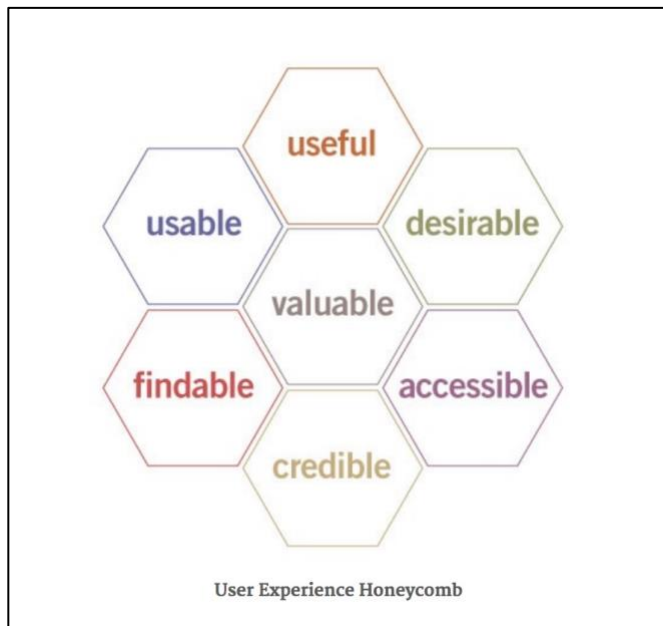


Figure 1.2 Peter Morville’s User Experience Honeycomb infographic

A positive user experience means the text or technology in question is usable, useful, desirable, valuable, findable, accessible, and credible.

Usability Testing in the context of this research project is: the application of a set of evaluative workplace tools intended to ensure that documents and devices are effective, easy to use, and genuinely useful in helping someone accomplish the task at hand, as well as generate new ideas or solutions, to help someone make an informed decision or to convince someone to take action.

Carol Barnum explains usability in her textbook *Ready, Set, Test* as “the process of learning about users from users by observing them using a product to accomplish specific goals of interest to them,” (6). The International Organization for Standardization (ISO) definition of usability – “The extent to which a product can be used by specified users to achieve specified goals with effectiveness, efficiency, and satisfaction in a specified context of use,” (Barnum, 11) is frequently cited by academics and practitioners. This definition emphasizes usability as a measure of quality for a particular group and purpose, in a particular setting. A variety of qualitative methods including comprehension tests, perception surveys, read-and-locate exercises, observation of typical tasks that users narrate in think-aloud protocols, and interviews help researchers understand users’ experience with the text or technology. Traditional usability testing practices are formally structured, typically guided by a test script to ensure an equivalent testing experience for each participant.

NARROW USABILITY APPROACHES LIMIT UNDERSTANDING OF USABILITY IN ORGANIZATIONS

Despite the prevalence of usability testing in workplace contexts, in industry the typical approach to usability testing is unexpectedly narrow, focusing on quickly addressing “client” needs, often in opposition to the needs of “users” and other rhetorical stakeholders; quality for

many technical communicators has devolved to mean satisfying client priorities. Often, usability testing has tended to take secondary importance toward achieving this client-focused quality. Even if workplaces do prioritize users at some level, usability testing is often misapplied, focusing on micro-level problems, too late in the process to influence macro-level changes that would affect quality in a broader, more holistic way. Usability testing might be used to spot-check isolated features of a document or device with a few people from key audience groups to ensure that those features “work” but, despite passing those tests, the document or device may still not be truly useful, nor helpful in accomplishing the task users need to complete. Unfortunately, the outcome of these narrowly-focused approaches to quality can be a diminished experience for the users who have little influence on the process of production.

This phenomenon works against key values of the TC field in which usability is often considered a means to champion perspectives that are not typically heard in a traditional top-down production process. I argue that it is especially important for the TC academic field to investigate (a) whether workplace approaches to usability testing fall short of the goal of improving experiences, as well as (b) the effect of rhetoric and the ability of technical communicators to drive change in these workplace systems.

Compounding the limited approach to usability testing, current workplace approaches to defining and measuring quality also tend to be insufficient, narrowly defined, and may accomplish little more than enable employees to “check a box.” Similarly, brief, after-the-fact “quality assurance” activities like reviewing customer comment cards or tallying customer calls only scratch the surface as investigative tools and have little influence on actual work practices. However, these cursory measures may enable employees to satisfy (if in name only), a

requirement to “address customer needs,” even if the effort does not solve any real problems for either producer or consumer.

In the edited collection, *Critical Power Tools*, Bradley Dilger’s chapter raises concern for a trend he terms “extreme usability.” Characterized by the over-arching goal of “making it easy,” (47) extreme usability favors simplified investigative processes that facilitate commercial interests; such a process would likely result in an oversimplified product that is easy to use, but not genuinely useful for its intended users. Extreme usability also tends toward black-boxing¹ facets such as the systems of power that socio-cultural studies advocates wish to expose (47).

While ease of use might seem a worthy quality, as the sole focus of testing, prioritizing ease of use can skew outcomes in an unhelpful way. In workplace contexts, ease of use tests conducted late in the design process as verification measures can also bias the results in unhelpful ways. For instance, a technology could meet the testing goals for ease-of-use evaluations for some of its features but still not be genuinely useful or usable. If those features are tested individually, in an isolated way, the individual features will work, but the technology is not helpful and users may find it difficult or impossible to do what they want to accomplish.

Data from testing may easily be misapplied, and Stanley Dicks outlines several key areas of misuse and misapplication, including conflating usability and empirical tests, misapplying statistics in relation to usability (or empirical) test results, using usability tests for verification only, and testing for ease of use, not usefulness (26). These issues, Dicks warns, will damage the credibility of usability tests, and the practitioners and researchers who churn out the resulting faulty findings.

¹ Black boxing refers to a commonplace, but highly effective technology that works so well it goes unnoticed, and its inner workings are hidden behind an abstraction (the black box).

Usability in workplaces is sometimes described in terms of industry-centered or “discount” usability. A recognizable, and (best-selling) how-to-manual author, Steve Krug, provides an excellent exemplar of this branch of usability and Krug’s titles – *Don’t Make Me Think* and *Rocket Surgery Made Easy* – frame usability as a helpful, accessible design strategy that should not be complex, but is perhaps made unreasonably so. Krug and other advocates for integrating user-centered perspectives into workplace design and development processes seem to acknowledge the realities and constraints common to project management (where every project starts behind schedule and over-budget). The simplified, casual language permits readers to approach usability with flexibility; any attempt to involve a few real users in a design and development process that strives to identify and address users’ actual needs is a positive step. The democratization of usability would appear to be a positive development because more organizations feel that user needs are important, that identifying and addressing user needs is a worthwhile and attainable goal. In practice, however, this standpoint of simplification may lead to inaccurate testing and ineffective results for workplace usability research.

Anecdotal evidence from my local UX practitioner group and discussions on a UX academic-practitioner online indicate that usability professionals are frustrated by a lack of understanding of usability testing and the value that these practices can bring to product and document development, and more importantly that organizational conflict and compromised work result from such conditions. Practitioners concede UX goals to other organizational priorities and trim back UX methods and practices to work within constraints imposed by compressed timetables, restricted access to representative users of the text or technology, reduced budgets, and a mischaracterization of usability as “making things easy,” rather than seeing usability as a measure of quality. Such concessions mean that usability professionals settle

for a limited, minimalist approach to testing without adequate staff, time, or resources. These limitations are unlikely to deliver adequate insights or comprehensive data necessary for usability testing to truly improve the quality of a person's interaction with a text or technology.

The UX foundation young professionals gained in the university-level TC classroom may contribute to these adverse conditions. Classroom approaches may leave novices unprepared to identify the valuable outcomes their work contributes to projects and stakeholders, or to navigate the culture of the organization to determine what constitutes quality and value *to the organization itself* as well as to project stakeholders. It is essential that we better understand the realities and conditions for UX project roles in workplace contexts so that TC university program graduates can be prepared to not only produce work that contributes to high-quality experiences for users of texts and technologies, but also to advocate for their UX work's value within and outside of their organizations.

While we consider rigorous standards for our use of usability testing methods and practices, we also need to examine how usability and the professionals who serve UX roles are integrated in workplaces, and the affordances and constraints imposed on them by the organizations and workplace processes.

In Chapter 2 I address choices made in designing and conducting this study. The chapter includes the rationale for a qualitative study; the research participants, sites, case studies as components of the study design, decisions concerning data collection, as well as specific decisions about the approaches to analyzing data.

CHAPTER 2: METHODS

As described in Chapter 1, the main purpose of my project is to better understand the complexities user experience (UX) professionals face as they work within and against rhetorical constraints in their own organizations and strive for high-quality outcomes. The study explores ways that the organizational setting complicates and, at times, impedes the contributions that UX professionals bring to projects and work teams. In this chapter, I explain my goals for the study and why qualitative case studies offer an opportunity to study this kind of issue in sufficient detail and depth. I outline the research design including defining “site,” “case,” “participant,” and other key terms relevant to this study. I explain why I chose these sites of research for this study and the participants who work at these sites. I also explain how I designed the study’s pre-study, study, and post-study phases. I explain my approach to data analysis and collection, and I explain my data analysis methods and identify relevant theory that influenced these decisions. Finally, I clarify my role as a researcher in conjunction with my respective personal or professional relationships with study participants.

RESEARCH GOAL: UNDERSTAND THE UX OF UX IN ORGANIZATIONS

My study was guided by a desire to better understand how usability testing is employed in organizations as a quality-assurance workplace practice, and how this approach to quality influences UX professionals, or the UX of doing UX work in organizations. I understand the situation of UX practices in organizations in this way: organizations regard UX research methods and practices as a means to enhance development processes in ways that add value to products and services. To realize the benefits of UX, these organizations bring UX professionals into work

teams and include UX practices in their development processes because they believe that the process of engaging in UX activities will deliver “quality” outcomes. Adding a UX role into an established development process, or adopting UX methods and practices does not lead to a universally smooth transition. Rather, it constitutes changing established methods and processes, and disrupts existing systems and hierarchies. Further, the outcomes resulting from products and services produced using the revised development process (that now includes “UX”) do not universally deliver evidence of the improved quality for end-users that the organization intended. While the outcome quality may not meet users’ needs, the organization has established a development process that includes UX as a means of quality assurance. If process-dependent quality is the goal, products and services produced through that system are “of quality,” by definition.

I believe that producing “quality” is not an inevitable outcome of UX work. Rather, producing quality outcomes is more complicated than adopting a development process or integrating a “UX role” into a work team. (As my late basketball and track coach told us, “practice makes perfect, but only if you practice perfectly. This truism extends to UX and other quality-assurance processes. The process alone is not a guarantee of success, and the quality of ingredients or components are of equal importance to the process itself. Thus, UX processes carried out with flawed data, inaccurate audiences or other misalignments are unlikely to deliver high-quality results.) My hypothesis when beginning this study was that organizations and their internal cultures may actually impede UX work. Organizational norms and adherence to established processes and internal hierarchies may challenge some of the findings from UX research, prevent those findings from being accepted as relevant and from being applied to the project. Or put another way, the organization itself can hinder UX work from being fully

realized. Deeper knowledge of the experiences of UX professionals in their organizations will strengthen the TC field's understanding about how to approach pedagogy, practice, and future scholarship to better prepare and guide UX practice.

To investigate this phenomenon of UX professionals working within and against cultural constraints within their own organizations, I designed a qualitative study with four sites of research. A qualitative study is an appropriate choice for this investigation because it enables deeper examination of a single research site than does a quantitative method of inquiry (Yin, 2009). This narrowly-focused approach also aligns with key research goals, specifically investigating 1) the application of usability research in particular workplaces, 2) the impact of usability research as a workflow-management technique on the organizational culture, and 3) the culture's impact on the employees' rhetorical agency and capacity to advocate for change as supported by usability research findings.

RATIONALE FOR A QUALITATIVE STUDY

Qualitative research methods and practices provide a way to understand the experiences of the individual participants with a goal of drawing comparisons or uncovering commonalities between them. To learn more about each participant's experience and understanding of their own degree of rhetorical agency, I wanted to focus on each participant's descriptions of important relationships and situations at work, and the process of doing UX research within that organizational culture. Since the study did not focus on behaviors or particular actions taken in natural settings, it was not necessary to observe the participants in their workplaces, or to examine participant behavior in a laboratory setting where contextual factors can be minimized. An exploratory, qualitative study offered me an opportunity to ask "how" and "why" (Sullivan

and Spilka, 2010; Yin, 2009) and develop a better understanding of how organizational context influences UX work, as well as to form new hypothesis about the role of context, and generate ideas for further study in this area of TC scholarship.

A qualitative study allowed me to ask open-ended initial questions and specific follow-up questions to clarify or encourage the participant to elaborate on statements with the goal of a deeper examination that would help me uncover new knowledge (Sullivan and Spilka, 2010). A semi-structured interview format allowed me to focus on the possible contextual influences each participant experienced in the workplace that helped shape the organization's approach to achieving quality, as well as how workflows and other organizational settings wielded influence. A case study research design offered me the ability to compare the experiences and circumstances of individual participants to draw conclusions.

To prepare for this qualitative study I consulted several areas of scholarship. Both academic and practitioner-focused literature on UX in organizations offered insight into UX job roles and the evolution of the field, as well as applications and best practices for UX as an evaluative tool. I also examined academic literature that addressed teaching UX principles to emerging professionals. I believed at the start of the project that UX professionals entered their fields with a set understanding of UX work, gained from their training and career backgrounds, and that some sort of disconnect occurred in the process of reconciling that training and background experience into the job at hand. I focused my research in business and technical communication scholarship on quality, assessment, and evaluation to gain a sense of how organizations defined quality and applied assessment systems to their work. I also examined literature that applied communities of practice theory and organizational communication theories, focusing on how these theoretical lenses inform what observers are able to conclude

about the values and norms that are developed and sustained within organizations through shared work goals and ways of working together as co-members. This area of scholarship helped me to better understand shared norms within organizations and groups, and the communication of those norms within and across boundaries.

I define the pre-study phase as the time during which I finalized the participants and sites of research. I also conducted the majority of the reading described above during this phase, prepared interview questions, applied for and received IRB approval for the study.

During the data collection phase (roughly June through September 2016), I conducted the majority of interviews. I mentioned above that one of the participants' projects was put on hold – we believed indefinitely – but was reinstated later. This participant and I discussed the terminated project at what we presumed to be the final interview meeting and I planned to address this change of plan in my reporting on the project. After learning that the project was reinstated, I returned to this case study and followed the same process as the other interviews and we completed the case study interviews on an extended timeline.

During the post-study phase, I analyzed the interview notes and keyword coded them to highlight similarities and differences across the sites of research and began to refine the observations and takeaways I deliver here. In this phase, I also analyzed the organization websites and I created visual models (which will be introduced in Chapter 4) that help explain the influence of stakeholders and the perceived agency of the four UX professionals in their respective UX projects at their workplaces.

Case Studies Provided Insight into Authentic Contexts

I decided to conduct discrete case studies to gain key strategic advantages for gathering and analyzing data for this project. Yin defines a case study as “an empirical inquiry that investigates a contemporary phenomenon within its real-life context; when the boundaries between phenomenon and context are not clearly evident; and in which multiple sources of evidence are used” (23). The nature of this inquiry – examining the rhetorical affordances and constraints within workplace contexts – aligns with Yin’s definition. Collecting case study data for this investigation would mean understanding a complex mixture of interrelated factors: 1) the highly contextual relationships between individual participants and their colleagues and workplaces, 2) the nature of each participant’s UX project and the contextual definition of quality relevant to that project’s rhetorical and functional success, and 3) the variation among workplaces in the relevance of additional rhetorical devices such as planning documents, and strategies such as appealing to a key internal stakeholder, to the workflow, for example. This description mirrors the factors Yin outlines for alignment with case study methods.

For this study, I defined “case” as a specific organization. I chose to conduct four case studies for this study – each participant’s workplace is a “site” of research and a separate case. Separating the sites as cases allowed me to adjust to the widely-varied timelines for projects. For example, one participant’s project took place over just 6 weeks while another’s project was placed on hold, then reinstated nearly six months later.

I define “participant” as a specific research participant who negotiated UX work within his or her organization as a TC professional. The study focused on the four UX professionals themselves and their understanding of their roles and relationships with their organizations rather than on their workplace environment as a whole because I wanted to examine how organizational

contexts can influence a UX professional's quest for quality. This study follows the four user-experience professionals as they plan and complete a project that involves user testing. All the participants had at least one year of experience in a UX role, and had been in their current job roles for at least a full year at the beginning of the study.

Variety of Business Sectors and Organization Types Across Research Sites

To gain insight into a range of different workplace environments, I sought to limit the examination to workplaces where UX work is used as a tool that helps employees achieve quality outcomes. It is important to note that UX work could also be the product that an organization produces for clients, as in the case of a consulting agency that conducts research on a contract basis for projects that other businesses are pursuing. In a consulting-agency situation, the UX research itself is the product for sale, and not a component that helps facilitate the main business of an organization – others contract out for UX research expertise which they want to apply to specific projects in pursuit of their main business. To ensure that all the workplaces in this study were using UX as a workplace process (and not as a product for sale) I chose organizations specifically from my professional network that fit this criterion.

I recruited research participants from among my professional network of local practitioners, seeking to include in this study representatives who work in places where UX research data is highly valued and embraced, and, as a counterpoint, places where UX is less enthusiastically received. I acknowledge that this recruitment choice has both benefits and limitations and I will address them later in this chapter. I intended for this choice of different organizational dispositions toward UX as a workplace tool would help me to identify and better compare the ways in which UX work was conducted, applied, and valued.

I have termed the organizations in this study “receptive” and “reluctant.” It is important to note that the “UX-reluctant” workplaces are not necessarily skeptical that user-experience and usability practices deliver significant and valuable knowledge, but rather, that leadership in these organizations does not consistently embrace the practice of user research. UX activities are not always part of every development cycle in these organizations, or UX methods are perhaps deemphasized, or alternate data collection methods or sources of data are, perhaps more highly valued than UX research.

As an example of a “reluctant” culture, one organization represented in this study believes that equivalent knowledge can be gathered from customer service representatives, a highly-esteemed role at this organization. In that organization, seeking data through usability testing activities is often regarded as a duplication of efforts because data about the client can be obtained from the reps instead. In contrast, “UX-receptive” organizations include significant amounts of user research in their project workflows, and the organization’s leaders consider usability-testing data essential to projects, processes, and achieving organizational goals.

Semi-Structured Participant Interviews Focused on Context and Insights

I chose to collect data through interviews and I conducted interviews away from the participant's workplace to ensure confidentiality and anonymity in talking about their workplaces, interactions with colleagues, and possible constraints on their work, all topics that they might be hesitant to discuss without such assurances. Shadowing individual participants would have proved prohibitively intrusive, especially, considering the role rhetorical affordances and constraints play on how participants advocate for their findings and project participation. Further, an outside observer would doubtless alter the workplace environment and study participants would face an inauthentic situation under such conditions. While soliciting the participant's own description of the workplace culture and his or her approaches to the rhetorical challenges may not be a strictly objective source of this data, it affords participants an opportunity to explain their own situation and strategies, in their own words, thus emphasizing the way these UX professionals understand their own degree of rhetorical agency and workplace factors that support or limit it.

During the time the participants planned and completed a project that involved user research and usability testing practices, I met with each of them for periodic, semi-structured interviews to help me learn about the participant's role within his or her team or department, and that department's role within the broader organization. Participants described how a project was planned and completed, and how usability testing and user-research activities featured in the planning and completion processes. I designed my initial questions for the participants to prompt discussion and invite participants to provide the contextual details they deemed most relevant to explaining and describing the day-to-day activities of their professional experience. Depending

on the participant's respective project, these meetings took place over a duration of two months to eleven months, (after one of the participants' projects was reinstated).

The question list (See Appendix) offered a direction for the interview – I provided the broad questions to study participants in advance, to help them understand my goals for the study and how their insights would contribute to the project. In addition, using the same set of questions across all the interviews established a basic level of standardization for the interviews and the nature of the discussions. This standardization serves to help generate similar kinds of information from which readers can understand a qualitative study's validity through discerning a pattern from the findings (Cohen and Crabtree, 334), and see for themselves the research's foundations.

Corporate Websites Communicate Organizational Identity

While my initial goals for this study included collecting and analyzing workplace artifacts such as planning documents and project requirements, workplace documents were eliminated from the scope of the study. In case studies, textual analysis of artifacts such as meeting notes and planning documents can provide insight into the ways that research participants are thinking about their work, and forming strategies to achieve their rhetorical goals. However, the participants' respective data-confidentiality obligations limited the nature of what information could be shared with me, and so workplace documents were excluded to maintain confidentiality. Additionally, the study participants themselves also took care to mask identifying details and maintain confidentiality during our conversations and interviews. Correspondingly, all names for organizations, participants, and other individuals used throughout are pseudonyms, and I have masked identifying details.

Instead of using project planning documents as artifacts, the individual perspective of each of the participants is balanced by analyzing the voice of the organization in the form of a rhetorical analysis of each organization's web presence. Web presence is a primary communication vehicle for organizations to cultivate identity (e.g., Cornelissen, Christensen, and Kinuthia, 2012; Balmer, 2015; de Chernatony, 1999, and others), which is a valuable means of communication within and across organizational boundaries, tied to reputation and image, as well as organizational culture (de Chernatony, 1999, p. 158).

Leslie de Chernatony outlines significant contributions to marketing scholarship including the following observations: The growing body of literature on corporate identity is shifting from an emphasis on graphic design to a more holistic approach that integrates the values of an organization with a unique aesthetic appearance, as well as signaling ideal behaviors to staff, working to align their values with brand values (158). Brand management, de Chernatony asserts, is a means to "minimize the gap between the brand's identity and its reputation," (159). This advice focused on managing brand identity through website design occupies considerable space in practitioner-focused publications, too, where marketing professionals offer such advice to businesses. These publications consider the website as one component of a combination of social media platforms and other communication vehicles to deliver a desired message. Similarly, practitioner-focused publications also advise professionals to manage their own personal identity as they would do for an organization or product, through cultivating consistent, coherent, focused messaging of an individual's "personal brand" across social media and other digital platforms.

Theoretical Frameworks

To conduct systematic investigation of the interview transcripts and notes, I relied on rhetorical analysis, along with the cultural approach to organizations as practiced by Michael Pacanowsky. Cultural anthropology offers countless examples of ethnography in use, but Pacanowsky's work focuses on American corporate settings and the metaphors and language used within an organization. (See also: Kwon & Farndale, 2018; Pacanowski, et al. 2017; and others.) Scholars consider Pacanowsky's research as strongly associated with that of cultural anthropologist Clifford Geertz, who is known for significant contributions to the development of ethnography as a research methodology (1973).

Significant research conducted since the 1940s, across industries, including recent studies in the healthcare, construction, and business sectors, to name a few, indicates that cultural factors and organizational norms influence behavior such as the manner and degree to which people in an organization form subcultures, maintain an existing social structure, imbue symbols and symbolic behavior with power, among others (Hatch, 1993, p. 658). Broadly, a combination of organizational values, artifacts, and assumptions can be examined to understand organizational norms as values that originate with an organization's founder or leader, are communicated to new members, and are validated through the organization's success (Hatch, 660). The cultural perspective of organizations offered an opportunity to discover significant trends and norms in each site of research, and compare the outcomes and contexts to identify similarities and differences across this small sample of organizations, and the flexibility to adapt to the specific research context.

DISCLOSURES, LIMITATIONS AND THE RESEARCHER'S ROLE

As a researcher incorporating elements of ethnographic research, my activities and interactions with the participants have the potential to affect their responses and actions. I disclose that I had a degree of personal and professional relationships with the research participants before I invited them to participate in this study. I have addressed this matter earlier in this chapter in my explanation of the research decisions I made about choosing participants and sites of research.

My relationships and casual conversations with each of the participants about their work in the context of the local user-experience professionals group inspired this study. However, my existing relationship with the participants may appear problematic because this degree of familiarity may have encouraged them to share more information than they otherwise might have done with a researcher who they did not know.

Amending Initial Research Question

When I began planning and organizing this study, I intended for my primary research question for this project to help me interrogate the way that UX functioned as a quality assurance measure in the organization, but through analyzing the study data, I understand the situation differently. I initially believed that UX research drove the way people thought about their UX work and I wanted to learn more about how the organization's setting, organizational structure, hierarchies and internal culture might either help or hinder that UX work from reaching its full potential. As I worked, I realized that the organizational culture itself played a much more significant role in shaping the work environment and participants' understanding of their respective rhetorical affordances and constraints. I amended my research question to more

accurately reflect the study and what it helped me to bring to light. My revised research question is: **How does an organization's definition of quality and its approach to achieving quality shape the organization's approach to using usability testing as a quality-assurance workplace practice?** The revised question addresses the significance of organizational culture and its influence on the ways that employees work and interact, and strive for quality.

SUMMARY

To address the research question, *how does an organization's definition of quality and its approach to achieving quality shape the organization's approach to using usability testing as a quality-assurance workplace practice*, I conducted an exploratory, qualitative research study. The study follows four participants who work at four sites of research in different industries, as they plan and complete a project involving UX research. I met with the participants to conduct semi-structured interviews during their work on their respective projects. To provide a counterpoint to the participant insights, I sought artifacts to support or contradict the participants' perceptions and opinions, and I also analyzed the corporate websites of the participants' employers, focusing on the characterization of quality. Scholarship in management and marketing establishes that corporate websites communicate organizational identity. Other factors specific to an organization serve to foster a sense of organizational identity, and the lens of the cultural perspective can help highlight similarities and differences across organizations through analyzing the interaction of values, assumptions and artifacts. This theoretical framework aligns with the exploratory nature of this study. I disclosed my prior personal and professional acquaintances with the research participants in this study, and I explained the modification to my research question to more accurately reflect the goals of the study.

Chapter 3 will detail the research participants and their employers. This chapter includes an explanation of the distinctions I have drawn between the labels “UX-receptive” and “UX-reluctant” sites of research, descriptions of each of the four research sites, the main business of each organization, and a rhetorical analysis of the organization’s website with a focus on the characterization of quality. I also explain the relevant educational and career background of each participant, as well as summarize the job role of the study participant.

CHAPTER 3: THE RESEARCH PARTICIPANTS AND THEIR EMPLOYERS

In this chapter, I present an overview of the study participants and their respective places of employment.

The participants included in this study were recruited from my own professional network, and members of the local UX professionals group. I selected these people for specific insights they could provide toward investigating my research question: *How does the use of usability testing as a quality-assurance workplace practice shape the way people in that organization understand quality and influence their ability to work toward quality?* To investigate that question, I sought out people who self-identified as doing UX work; participation in the UX professionals networking organization satisfied that criterion. It was not necessary to my research goals for the participants to have job titles that explicitly stated “UX,” but rather, that each participant used UX methods as part of project workflows.

In listening to the conversations among the local UX organization members, it became clear that UX research was sometimes misunderstood within the organization. This matter was addressed in greater depth in Chapter 1, but to summarize briefly, even in organizations that claim to value UX, the methods and practices common to UX in any organization that does that kind of work are not consistently employed across all projects or effectively employed to deliver high quality results that truly improve quality for end-users. It was important to me to learn more about what UX professionals understood as the reasons UX isn’t thoroughly or consistently applied during projects, and what these professionals do to achieve quality outcomes in spite of the challenges they encounter.

What stood out from those conversations among the UX professionals, though, was a shared sense of frustration that sometimes, try as they might, their workplace situations kept

these UX professionals from doing what they knew to be good work. For example, perhaps their colleagues and supervisors just didn't share the same vision of "quality," or perhaps obstacles like budgets or scheduling just didn't allow for research goals to be met, or perhaps the UX work itself was marginalized in some way. The shared sense of struggle indicated to me that something more significant than mere complaining about work was happening across these workplace contexts; I believe understanding the dynamic better between organizational contexts and UX work will offer important insights to the TC academic field about how individuals are working with and against their own organizations in UX contexts.

RESEARCH SITES

To construct an exploratory study that could examine these diverse workplace situations and the rhetorical challenges they imposed on UX professionals, I sought participants from workplaces where UX research was common practice and consistently used, and organizational leadership professed to value the findings. In this research project, I refer to such workplaces where UX is a regular part of project workflows as "UX-receptive" organizations. I also sought participants from workplaces where UX research was less frequently integrated into project workflow; UX research is still used, but not on every project. In this study, I refer to the organizations where UX research is inconsistently used as "UX-reluctant." The categorization of "UX receptive" and "UX reluctant" sites is based on the research participants' understanding of their organizations' typical response to user experience (UX) research.

I chose these approaches to focus the study on how participants understood their own rhetorical affordances and constraints, given their respective workplace contexts, and whether and how each person took action to advocate for quality, and by extension, for the end-users

affected by their work. In another important research decision, rather than examining UX professionals in one industry, or in one kind of workplace, I wanted to gather a range of experiences, contexts and workplace situations with the goal of discovering broader commonalities or trends.

To gain a better understanding of what these professionals understood about their options to circumvent problems, resolve issues, gain access, and effect positive outcomes, I selected four individuals from among my professional contacts and invited them to participate in this study and contribute to this research project. These professionals work in a variety of organizational settings and industries.

It was also important to my study design and research goal – to understand how UX research functioned as a project management practice and way of working toward quality – that the study participants’ employers did not regard UX research as their core business. Rather, all of the organizations consider something else, such as education, consumer goods, or consulting services to be the main product that the enterprise produces for sale. UX research may be a key component of the services, or important to the production process, but in all of the organizations where the study participants work, UX itself is not the organization’s core product. An organization where UX research itself was the product, such as a UX design firm, would use UX research differently within the organization because that research is itself being packaged for sale, rather than employed to produce something for sale. This decision to focus on UX as a workplace process highlights the participants’ understanding of how UX research fits into the organization’s workflow, and what role UX played in achieving specific outcomes, or in meeting goals. Therefore, in this project, I focus on that use of UX research as a workplace tool for quality assurance.

I will next introduce the organizations where the study participants work. The UX-receptive organizations (technology consulting agency, ConsultTech, and publicly-traded retail company, Style Store) will be described first. The section will conclude with descriptions of the UX-reluctant organizations (publically-funded college, Midcity University, and healthcare industry procurement and facilities management firm, Goods Plus). In each site’s description, I begin with a brief summary of the organization’s core business, I provide a rhetorical analysis of key aspects of the organization’s websites, focusing on the ways the organization characterizes itself, and in addition to whether its concept of quality matches or contradicts perspectives of quality held by research participants. I conclude each research site description with a profile of the study participant who works at each site, and that participant’s understanding of the workplace context as it relates to delivering something of quality. The following chart shows the organizations, classifications used in this study, and the relevant business sector. All names of people and organizations are pseudonyms.

	UX-Receptive Organizations		UX-Reluctant Organizations	
Organization	ConsultTech	Style Store	Midcity University	Goods Plus
Industry	Technology consulting	Commercial retail	Higher education	Procurement and facilities management

Table 3.1 – Sites of Research in this study are categorized as having receptive or reluctant dispositions to UX research.

UX-RECEPTIVE SITES OF RESEARCH

As described earlier in this chapter, I define UX-receptive organizations as places where UX research is highly valued and included in most if not all project workflows. The label “receptive” refers to the disposition of organizational leadership toward UX research; the data is considered useful and essential to the organization’s goals for serving their customers’ needs, and producing high-quality goods or services. Below I provide descriptions of two UX-receptive sites of research in this study. The technology consulting agency ConsultTech and its UX professional, Beth, will be profiled first, followed by the clothing and home goods retailer Style Store, and its customer-experience professional Travis.

ConsultTech: technology consulting agency and UX professional, Beth

A small technology consulting firm, ConsultTech, specializes in serving clients in financial and manufacturing and claims several prominent local companies in both fields as long-time clients. The firm of approximately 60 employees is an independent group owned by a larger company based in another Midwestern city. While many client projects are conducted so that the consulting firm employees complete most of the necessary project work at the firm’s own office, some projects are “in-house” where the ConsultTech employee works at the client’s offices, as part of a team of the client’s own employees.

ConsultTech Website and Target Audiences

ConsultTech’s website can be understood as appealing to two audiences; the primary audience consists of potential clients of the firm’s consulting services, and its secondary audience, potential future employees. The text on ConsultTech’s home page seems to create a

need for the firm's services by using a fear-based question to raise concern about whether the reader and his or her company are prepared for rapid technological advancements. The consulting firm emphasizes its potential value to clients by resolving uncertainty, guiding them through the integration of emerging technologies. This text is displayed in white, reversed out of a dark blue background. The background color has scattered lighter patches, similar to a nature photograph of deep-water marine environments with floating particles against the dark water – perhaps a nod to the lack of clarity potential website visitors must be facing in their approach to technology. The firm's logo stands out in red, especially against the dark, smoky blue section-headings, while body copy appears in grey against a white background. The red logo, along with red text describing value propositions (i.e., benefits potential clients would gain by hiring the consulting firm) seems significant in light of the firm's focus on the target audience's presumed feelings of uncertainty. Red text can be understood as a nod to the Western cultural norm that red signals warnings.

The website balances the implied threat of oncoming technology with an events section. The text blurb states that ConsultTech employees are both teachers and learners. The implication seems to be that consulting staff host and perhaps also attend knowledge-sharing events. Three equal-sized square text boxes feature upcoming events on technology-related topics and a link expands the events listing to include past events. The text implies that ConsultTech employees' disposition toward knowledge constitutes added value to the reader (the potential client or potential employee). While the text does not explicitly state how or in what capacity the consultants "teach" or "learn," both activities are supposed to be positive.

Throughout the site, explanatory text combines positive commonplaces and clichés about partnerships, trust, challenges, and boundaries with expressive language about overcoming

challenges, including a few references that equate business challenges with military combat or wilderness survival. The mixture of metaphors implies two ways of working with this organization. Some passages imply that the firm provides all-inclusive service (i.e., that hiring these consultants means all aspects of the project will be handled by ConsultTech employees), while other passages suggest that the firm serves clients in an advisory role, and works in that capacity only, that potential client's employees would carry out the recommended work. The presence of text that implies both work arrangements suggests that ConsultTech intends to adapt to an individual client's preferences. The website text can be read both ways, leaving the precise interpretation open to the client; each reader will see in the text the style of working relationship he or she would wish to establish with the consulting firm.

Clients are framed as "partners" and the consulting firm endeavors to rhetorically steer the audience, positively characterizing "who we work with" as forward-thinking. This compliment allows readers to begin thinking of themselves in a particular, favorable way² in this case, as a visionary with the savvy to hire the consulting firm to solve future problems before they happen.

Frequent use of industry acronyms and shorthand also help rhetorically construct the reader. Abbreviation of technical terms and use of jargon suggest an expectation that readers of the website are already familiar with the technologies alluded to in the text. This familiarity also implies that readers would recognize the value that implementing such technologies would have on one's business. This rhetorical move may also suggest that, in combination with the "partners" framing and the jargon use this rhetorical approach is intended to prime the readers

² This phrasing reminds me of the American television advertisement for Jiff peanut butter, which used the tagline "choosy moms choose Jiff." The rhetorical implication here is that good mothers are careful about the products they select for their families; choosy is a positive trait. Buying Jiff puts you among the ranks of those in the know, making good choices.

and encourage a receptive disposition to the forthcoming sales pitch. To choose not to work with the consultants would imply a missed opportunity to implement the benefits of security and certainty that are implied in the text.

While security and certainty are named on the landing page as beneficial outcomes of working with ConsultTech, additional benefits are not directly stated in the text, but instead, are suggested through framing the firm's work as solving unspecified technology problems. Specific numbers are used to highlight quantities, such as the firm's "number of projects," years in business, sponsored events, and volunteer hours served by employees. Value or outcomes for clients, such as cost savings, increased sales, or other evaluation metrics that would explain how ConsultTech clients benefit are implied but never stated.

The combination of pseudo-technical business-speak with the lack of explanations of specific technology applications suggests the intended reader and website visitor is already fluent in this language and part of a knowledgeable in-group. The uninitiated would presumably require some level of explanation, (such as examples or case studies of ConsultTech's successful work, in-text synonyms for jargon, spelled-out acronyms, or other similar tactics) that would help communicate more explicitly the value or benefit of the firm's services to readers who did not intuit them from the somewhat vague language.

Website Depiction of Quality at ConsultTech: Implied, Not Quantified

Quality is approached obliquely on the website, when it is addressed at all. It is approached most directly in the text that explains the value proposition of working with the organization, and in text that addresses working for the organization itself, its recruitment message. Under the website's capabilities section, ConsultTech approaches the idea of "quality"

by explaining how the consulting arrangement will be carried out, essentially hinting at a process-oriented definition of quality. Four steps are highlighted in red text: strategy, alignment, focus, and execution; each phase is described in broad, general statements of the strategies or typical tasks undertaken by ConsultTech employees such as holding a needs-assessment session or drafting a focused action plan.

In contrast with the generalized text elsewhere on the ConsultTech website, the text in the careers section lists specific benefits to employees of the work environment and organizational culture: choice of projects, flexibility, creative colleagues, mentorship and career guidance from management, community-service opportunities, games in the office, off-hours social events, and free snacks and drinks.

The ConsultTech webpage footer (reversed out white text on a red background) also features two notable markers of quality: recognition by an outside organization, and a certification by a technology leader. The city's business periodical named ConsultTech to its lists of Fastest Growing Firms and Best Places to Work. ConsultTech highlights the logos for both lists on its website footer. ConsultTech also claims an affiliation with software firm Microsoft as a "gold partner" of the tech company. This formal relationship provides a vendor such as ConsultTech with ongoing technology support and training opportunities for Microsoft applications and products, licensing of cloud-based Microsoft products, and use of the corporate logo, provided that the vendor meets several requirements including an annual investment (presumably a spending benchmark for purchasing Microsoft products for the gold partner's own use and for implementation in client projects) and customer references. Technology professionals employed by the gold partner must also complete a competency assessment and pass technical exams. Thus, quality has been defined and certified using another organization's standards and

credentials, in this case, the prestigious software and technology firm, Microsoft. Quality or value from the perspective of ConsultTech's apparent website audiences, clients and employees is absent.

Beth, UX Professional at ConsultTech

Beth's educational background is in software engineering and she holds a bachelor of science degree from a STEM-focused institution. Beth explains that she sought to move away from software engineering into user-experience roles because she enjoyed the human-interaction aspects of development more than coding. To strengthen and formalize her credentials in UX, Beth completed a Master's degree in human-computer interaction through a private, urban university in a nearby, large city in a neighboring state. She credits this part of her education for helping her develop a productive vocabulary to describe the concepts and practices she learned during her undergraduate education. Beth finds this vocabulary especially helpful in translating between other groups at work. At the time of our first meeting, Beth had worked at ConsultTech for approximately one year.

Three UX professionals (including Beth) work at ConsultTech and Beth's UX colleagues have backgrounds in advertising and web design. Project roles for UX professionals are all "general UX roles;" the consultants don't get assigned to projects based on sub-disciplinary specialties, though it is expected that ConsultTech employees will confer with each other about strategy or design decisions when a project involves a colleague's area of expertise.

Beth describes the workflow as modified Agile³. Project work begins with preliminary background research, persona development, and this phase of work with the client usually lasts two to three weeks before bringing in other specialists such as developers. After producing the promised technology product (i.e., a custom web application) the team conducts reviews, but Beth finds that the iteration process is less formal than in typical Agile projects where design sprints are more structured and the same development steps are repeated in each sprint.

During the project development phases, modified Agile tends to mean adjusting to client needs and expectations for reporting and approvals. Some clients are detail-oriented and thorough; others are overwhelmed by too many decisions at once. To minimize the number of decisions that need to be made in a single review session, ConsultTech teams break up larger chunks of content with the goal that a smaller, isolated section could be approved each day rather than once a week.

A business analyst and UX professional conduct the initial meetings with clients, including a “discovery workshop” during which the goals are to determine 1) the target audience for the technology and the audience’s goals for using the technology, 2) understanding what difficulties or problems audiences are facing, and 3) segmenting the user groups. Persona development concentrates on segmenting users based on job roles and the person’s goals for interacting with the software; the team avoids embellishing personas with demographic details because this can lead to projecting irrelevant, unhelpful assumptions onto the design. Similarly,

³ Agile project management is adapted from software development. Projects are divided into smaller segments, and project components are developed, built, and tested in a set sequence of phases (“sprints”). Standard practice for Agile projects often eliminates formal presentation of work to clients; instead, clients collaborate with the designers and developers throughout the process, and approve low-fidelity sketches and mock-ups or white-board drawings instead of waiting to receive more polished versions. By eliminating the need to produce and deliver these presentation materials, projects can ostensibly move at a faster pace than in traditional waterfall project management. Usability testing aligns well with an Agile project; design prototypes can be tested, findings can be incorporated, and then re-tested to verify that the modifications have addressed the problems.

the ConsultTech team considers specifications documents from the clients to be helpful, but not necessarily the most useful document, because the client-derived specs may not accurately reflect actual user needs, though the specs do represent the client-side stakeholders' priorities well.

Cross training among teams helps build familiarity with others' work and how this component fits into the whole project. As an example, Beth presented to her colleagues to explain journey mapping⁴ with the intent to help differentiate between wireframing, mock-up, and prototyping as ConsultTech applies these terms to their client projects. This cross training helps client-focused team members serving in project management roles to better understand how to explain and sell this way of working to the clients. ConsultTech also incentivizes more formal continuing education for employees, and colleagues are expected to consult with each other to apply specific sub-disciplinary expertise wherever it is needed.

For Beth, the challenge at ConsultTech is securing enough time and budget to conduct thorough research and multiple rounds of testing. Clients understand that they need UX, but don't necessarily understand why, and this knowledge gap can obstruct the process of UX research at ConsultTech. Beth described one such situation: mid-project, a client requested that ConsultTech cut short the UX time allotted for the project and requested that those remaining work hours be applied to other parts of the project as a cost-saving measure. UX work stopped, as requested, but the incomplete research wasn't usable. Projects at ConsultTech are pitched to clients as a process that includes UX work, and that workflow is explained as a money-saver.

⁴ Journey maps help organizations learn about their customers or constituents. A journey map details the customer's experience with the technology or service and includes the person's motivations, goals, and questions at key points throughout the interaction.

(i.e., projects are built right, based on solid research, and tested to make sure they perform as expected.) Those concepts aren't universally understood and accepted across all clients.

Quality at ConsultTech is client-centered, with a few broad, guiding principles. Beth characterizes the organization's conception of quality as "software that meets client expectations and has no coding issues." The ConsultTech UX colleagues would also include several criteria: being accessible and "not terrible." Beth hesitates to use the word 'enjoyable' because not all the software ConsultTech builds is used for fun tasks, but using the tools shouldn't be awful. In short, a successful project for ConsultTech means happy clients who don't have complaints. ConsultTech has not yet established formal, shared, internal quality metrics, though this is a future goal for the organization. UX team members are rarely assigned to work on a project together, so it's not clear how closely their definitions of quality would align (or whether such alignment across the department would be necessary, given that client-based outcomes are prioritized). Most of ConsultTech's clients use Google Analytics to gather metrics about web use, but those information categories may not deliver the necessary data to resolve the specific problem, and Beth's experience indicates that clients may not be able to identify their own knowledge gaps involving users, or where to find data that can help address the problems users are experiencing.

Publicly-traded Retail Organization, Style Store and Customer-experience Researcher,

Travis

Style Store is a publicly-traded retailer of clothing and home goods. The company is headquartered in a large, Midwestern city and has administrative satellite locations on the east and west coasts of the United States that specialize in fashion design and technology; retail

outlets are distributed across the continental United States and the organization also maintains an online retail presence.

Style Store's website serves a commercial purpose, selling clothing and home goods online, in support of its brick-and-mortar retail locations across the United States, and while this general audience of the shopping public is obviously important to the organization, I focus on the organization's characterization of itself in this analysis. The corporate section of Style Store's website is accessible through the webpage footer and it subdivides into a "company," "corporate, responsibility," "careers," "investors," "news" options, plus a "shop" option that returns visitors to the main e-commerce part of the site.

The company content describes Style Store's strategic corporate objectives, which I will refer to here as the "superlative plan" that entails aspirational statements about how the organization will be the best in delivering product, value, customer experience, personalization and employee teams, all in service of those goals. Each of these statements begins with "we," emphasizing a collective approach to the organization's activities. The company section also summarizes Style Store's history, including its initial public offering in the 1990s, and subsequent expansion.

The corporate responsibility section rhetorically links 'customer service' with 'community service' and the text emphasizes Style Store's corporate giving. Not only does the text quantify the amount of volunteer hours, service events, and corporate grants to nonprofit organizations, the organization also encourages its employees to drive up its numbers for this community outreach. Style Store awards several hundred dollars to qualifying organizations for every five associates that volunteer at the same event. This arrangement would likely result in an

environment where colleagues exert social pressure amongst one another to recruit larger numbers of volunteers to earn greater financial support toward the cause.

Nonprofit organizations (defined by United States tax-exempt status) can register with an organization called Benevity which facilitates corporate charitable giving and also functions as a screening mechanism for requests to Style Store for charitable giving. In addition, Style Store highlights its affiliation with children's charities and family-health initiatives, as well as women's health.

Style Store also details its sustainability efforts in the corporate responsibility section of the website. Memberships in industry partnership groups, including United States Environmental Protection Agency designations are listed along with awards for Style Store's buildings, green power, and waste-reduction efforts. Specific efforts such as plastic-bag recycling, and clothing-hanger return initiatives, electric vehicle charging stations, and logistics planning that minimizes wasted fuel miles are among the efforts highlighted. These efforts are framed both in broad terms, as aspirations, and as specific, detailed data points to signpost progress toward the goal. The precision of the sustainability data is equal to that of the volunteer-hours and donations content.

The careers section of the website offers visitors an option to connect their LinkedIn profiles to receive personalized suggestions for suitable open positions at Style Store. The language in the careers section shifts slightly to a more casual style; text contains references to the reader's friends (whom the reader would tell about their great, inspirational jobs), as well as colloquialisms like "ton of" and "oh, yeah." This casual approach seems to emphasize transparency, especially in light of the text that describes "what we do" for employees. Style Store is trying to speak to the real people who will apply to join the team using the same style of

voice as those real people. While this subsection's heading specifically uses the second person pronoun "you" to address the reader, throughout the section, the text says "we" when describing the organization's approaches to benefits, workplace norms, as well as three video profiles that feature associates' stories. The videos profile an associate who experienced a health scare who is influencing others to be more active, another group of associates who met an emotional customer request to obtain a specific, meaningful piece of jewelry, and a third group of associates affected by natural disasters who spoke about the relief grants and paid time off they received. The use of the pronouns "you" and "we" draws a dividing line between the existing, cohesive, Style Store family who receives these benefits and the yet-to-be-hired employee who would gain by joining the organization.

Website Depiction of Quality at Style Store: Informal Contracts, External Metrics

Throughout the careers section quality is not specifically addressed, but appears to be communicated to visitors as an informal contract: Style Store has corporate norms that function to serve the organization's mission, so employees give to the company in these ways. In return, Style Store offers a list of specific benefits to employees, including health and dental coverage, fitness centers, merchandise discounts, and adoption support. The placement of the associates' story videos immediately following this contract serves to demonstrate that Style Store is likely to meet those workplace promises because the organization and its staff also exceeded expectations to help in these situations.

Quality is also measured by reference to ratings from the employment website Glassdoor. In addition to hosting a job-search function, Glassdoor collects interview reviews, company reviews, salary reports, and other anonymous information gathered from current and former

employees. Style Store earned a 3.4 out of five possible stars, the CEO earned a 78 percent approval rating, and 70 percent of respondents reported a “positive” interview experience. These measures directly speak to quality as it is defined by the individuals motivated to post on the Glassdoor website. Similar to product reviews on retail sites, such as Amazon, reviewer complaints and compliments sometimes have limited relevance to the reader’s information needs (i.e., comments such as “poor work-life balance – too many hours during Christmas shopping season,” or “nice that Style Store gives to charity,” or “didn’t like dealing with rude customers” lack context and don’t necessarily help a reader understand the reviewer’s overall experience of working for Style Store). Both positive and negative employee reviews are included, further demonstrating Style Store’s transparency.

Travis: Customer-experience Researcher at Style Store

Travis is a UX professional at Style Store. He is a recent graduate with a bachelor of arts degree in technical communication from a large, urban, publicly-funded university. Travis gained UX experience through an introductory course in usability research and he completed an internship in which he worked for a university department that was conducting a user-experience research project. Travis credits the usability course and internship with giving him relevant experience to secure a post-college job in UX research – working at Style Store as a lab specialist. In this entry-level role, Travis assisted higher-level professionals at the company with their research. Travis was regarded by Style Store as having relevant experience from the internship and undergraduate class to assist others, but not yet enough experience to design and conduct independent research. Travis notes that his own educational background stands in contrast to those of many of his colleagues who have master’s degrees in human-computer

interaction or who joined Style Store after participating in its summer post-baccalaureate internship program.

After several months on the job, Travis was promoted from his entry-level position. He reports that he joined the organization at a time of rapid growth for the customer-experience (CX) group and his team quickly doubled from four to eight people. Style Store uses the term “Customer Experience” to describe the organizational role charged with developing and refining the interactions individual customers have with the physical spaces and digital environments (online and through in-store kiosk screens). Travis emphasizes that this distinction is important for Style Store; the company emphasizes the “customer” part of Travis’ work group to distinguish their tasks from marketing activities.

While Style Store’s corporate headquarters is located in a large Midwestern city, Travis’ employer has a satellite location in a large, West-coast technology center, and half of his CX-department colleagues (four of the eight CX team members) work there, two time-zones away. Travis explains that Style Store perceives its Midwestern location as having a hiring challenge for UX professionals, and sees the West coast location as having a larger quantity of qualified UX professionals as potential hires and therefore a deeper market for this specialization. The CX team is split geographically between the Midwestern and West coast branches and projects are staffed collaboratively, with one Midwestern researcher and one West coast researcher working together on a project.

During the course of this study, Style Store was undergoing a corporate reorganization process. Travis was hesitant to define the corporate culture because it was in flux; a new Chief Operating Officer had recently been hired, and Travis expected that this new leader’s background in user-experience and understanding of the UX field would result in positive

changes and increased prominence for his department and elevation of their organizational role. The new COO places “UX at the forefront of the agenda,” a disposition which Travis anticipated would result in a net positive for his department (which had lost a senior vice president role in the reorganization, and had gained an analytics team and a C-suite-level advocate in the new COO). In the current chain of command, Travis reports to a “senior manager of design research,” who reports to a manager, who reports to the organization’s CEO.

Travis finds he has developed strong bonds with his CX colleagues, but others at the organization remain a bit distant. He attributes some of the “UX tribe” attitude to the perception at Style Store that the Midwestern market for UX employees is limited. Everyone knows everyone else, and people remain friendly with their former colleagues after leaving the organization and continue to cheer them on. Travis likens this community mentality to “fighting for each other inside the industry. Teams take a mentoring approach; questions from new members are expected and welcomed.” Style Store’s learning culture is intended to foster a growth mindset, and 15 percent of employees’ time is allotted to continuing education, a measure intended to strengthen employee retention and combat the perceived hiring challenge.

Project workflows are managed in a modified waterfall system and typically last six months. Agile and Lean UX project management systems have thus far been incompatible with the other departments and organizational needs. Style Store has a formal hierarchy, and budgeting for projects is a complex and lengthy process. Projects are negotiated by upper-level managers, and the funding that is approved is typically reduced from the original project proposal, so it’s common to “dream big” in the proposal and hope to be allocated enough funding to successfully complete a smaller-scale version. Autonomy and internal ownership of projects is also a concern; large projects are sometimes broken up and distributed among several

departments, regardless of the approach specified in the original proposal. In addition to the challenge of receiving enough funding, projects are often influenced by requests from other departments, or invitations to participate are last-minute and too late in the process to effect meaningful change). Travis finds that the developers are aware of CX, but may lack a strong enough understanding to appreciate why certain approaches are necessary; the marketing department poses similar challenges in terms of acknowledging what needs to be changed and why. Designers wanted to make a design, put it up and see if the new version garnered more sales than the old version, and integrating customer-research data into the design decision-making process has been challenging. Travis believes that his designer-colleagues are resistant to the CX data because of their previous work experience. Several of the designers worked previously as the sole designer in a smaller agency, a role that afforded them autonomy to make all the design decisions concerning user interaction and experience design.

Travis and his CX colleagues understand their role in the organization as advocates for the customers. They have endeavored to sell this stance to other departments as better customer experiences mean more money will be spent. UX decisions, however, are not as easily quantified as sales figures, so each team carefully frames its approaches.

The CX team conducts frequent user tests for interfaces such as for the website and in-store kiosks, often using remote-testing software such as User Zoom. Style Store contracts with recruiting agencies to find participants, but this tactic has delivered mixed results, often due to the “professional survey-takers” who often respond to the agency’s calls for participants. These individuals make money responding to surveys and similar online research initiatives, and they may not consistently meet the study criteria. In one testing initiative, 87 of the 100 participants recruited by the agency did not meet the criteria. While this is clearly a problem with the

recruiting agency, the ability to test with a representative sample of the user group in question is strongly connected with the quality of the research.

Style Store's mission statements position the company's identity as tied to lofty goals about leading the industry and high levels of achievement. Travis finds that, in practice, Style Store is financially conservative and avoids risk, a strategy that is believed to have carried the organization through the economic downturn in the late 2000s. Since aversion to risk is considered to be positive, organizational leadership is reluctant to depart from past practices, despite the goal of wanting to be an industry leader. This conflicted disposition is also reflected in the Style Store internal budgeting process, where return on investment is a significant factor in allocating funds for projects. Travis and the CX team find this risk-averse environment a difficult one in which to advocate for their approach to customers because many CX initiatives can't be explicitly linked to customer spending as easily as a specific sales code or discount offer that the marketing department can claim. Instead, the CX team is gathering longer-term data on customer spending in an effort to argue that good customer experiences mean longer-term relationships with customers, and long term relationships with loyal customers are overall more financially lucrative than one-time coupon users. To support this effort, the CX team is also trying to establish a measurement scale that can be used to define success criteria for projects, and apply a standardized scale to experience-based questions (i.e., "how likely," or "how satisfied," and similar). This process is challenging for Travis and his colleagues, as they are also trying to establish the criteria for 'loyal customers' and debating factors such as the level of spending as opposed to the frequency of purchases, or a combination of the two.

UX-RELUCTANT SITES OF RESEARCH

As described early in this chapter, I define UX-reluctant organizations as places where UX research is conducted, but where the practice is not necessarily the most frequent means of obtaining data. This is not to say that the UX-reluctant organizations do not value UX research, but that it is not always included in project workflows. The label “reluctant” refers to the disposition of organizational leadership toward UX research; UX-research data is considered useful to the organization’s goals for serving their customers’ needs, and to producing high-quality goods or services, but UX research is not considered the only way or the preferred way to obtain such data. In the next section, I provide descriptions of the UX-reluctant sites of research in this study. The publicly-funded college, Midcity University and UX-professional Kyle will be profiled first, followed by the healthcare-industry procurement and facilities management firm, Goods Plus, and UX professional Matt.

State-funded University, Midcity University and IT Professional, Kyle

Midcity University is a publicly-funded institution of higher education located in a large Midwestern city. The university offers degree programs at the bachelor’s, master’s, and doctoral levels, as well as non-degree programs for continuing education. The university serves more than 25,000 students enrolled across these degree programs.

Midcity University and its Audiences

Midcity University can be understood as appealing to several key audience groups: its primary audience is prospective students, and its secondary audiences include the community at large, along with current and former students and employees. These priorities are demonstrated

through the landing page which emphasizes the undergraduate experience. The text suggests that the website visitor is visiting the site because he or she is looking for a college to attend; the particular benefits connected with this particular institution, specifically, research opportunities are featured. A clean, confident, upbeat aesthetic is communicated through consistent use of white background, grey sans-serif text with large headlines, and a repeated design feature of text boxes and photos arranged in a grid pattern. The grid of boxes highlight individual students with pull quotes about their personal educational or career choices. Text boxes showcase facts about the university, alumni, and the student body in a by-the-numbers approach. The university's shade of bright yellow appears throughout.

The focus on individuals in the images indicates that the university is appealing to prospective students as its primary website visitors. Second-person pronouns (“you”) are used frequently in the text, and this rhetorical choice creates a voice of the university that speaks directly to the website visitor. This use of “you” also rhetorically frames the university experience as a prediction of what will happen for the website visitor; “you’ll study alongside our faculty... you’ll learn this and do that...” This matter-of-fact approach to the undetermined future invites the individual viewer to personally engage with this idea of attending this university, joining the community, and participating in its programs and activities. This straightforward approach also demonstrates confidence and certainty, a noteworthy choice if the primary website audience is prospective students who have not yet made decisions about which university to attend. The content focuses on those individual students and their statements about how this university was the right choice for their education or career choice. The site also calls attention to the impact that specific graduates have made in their respective fields. This move to

highlight individuals and serves to frame their success stories as evidence of the potential positive outcomes and benefits of studying at the university.

Website Projection of Quality at Midcity University: Audience-focused, Individual, and Quantified

Quality is not explicitly mentioned as such in the text of this website, but it is implied through the promised opportunities available at the university, specifically, the opportunity to achieve success, and make individual contributions to society, community, or a field of industry or research. Quality is also communicated through the use of numbers. The university has been awarded an especially prestigious designation by an outside organization for its research activities, the Carnegie Classification of Institutions of Higher Education's R1 status. This noteworthy label is not featured on the home page, but is one click away, and the specific definition of R1 designation is further buried, as website visitors must click a hyperlink to learn more. The location of this seemingly important information suggests that the R1 label would not be universally meaningful content for all website audiences. Research is clearly important to the website visitor, but the website text focuses on the degree to which research happens across a broad array of academic programs, and numerous opportunities to engage in research will be available to students outweighs the R1 label's importance. This information about research opportunities is prominently featured on the university's website landing page, but the details of the R1 designation are secondary to the perceived values of the prospective student, the ability to do research. Other markers of quality are quantitative. For example, prominently featured on the website's main content are the number of students, student organizations, Division 1 sports teams, graduate and undergraduate academic programs, and prominent alumni.

Kyle: Information Technology Professional at Midcity University

Kyle has worked in information technology (IT) for Midcity University for five years. In his “division-level” role, he served as a business analyst with significant project-management responsibilities for work groups from two internal divisions at the university – a college within the university, and an IT support role for an administrative group. This distinction is important because Kyle’s data-management responsibilities include significant work connected with “reporting” or ensuring that particular categories of information can be pulled from interconnected databases to respond appropriately to a variety of internal and external needs such as for federal- and state-level accreditation, and similar regulatory mandates as well as to generate enrollment statistics and other data requested by high-level institutional leaders to inform institutional programmatic decisions. A second group of data users, internal decision-makers of equal rank to Kyle, require data for a variety of system maintenance and infrastructure decisions.

Kyle transitioned into an “enterprise-level” role, and he took over his new role from an experienced colleague with 40 years at the institution. He describes the “hand-off” process as receiving “about six to nine months of one-on-one mentorship and training” by the retiring employee to transfer data, methods, and institutional knowledge as well as formal training, including several seminars during the first few weeks in that job role.

Kyle holds a bachelor’s degree in technical communication from Midcity University and has completed master’s-level coursework in professional communication specializing in data visualization and document design while an employee at Midcity University. He sees this

background as foundational knowledge especially relevant to his business-analyst and project management responsibilities in the division-level IT role.

Kyle describes Midcity University as hierarchical, with various levels of management within sub-structures (i.e., individual colleges within the university). Employees at Kyle's rank in his division-level role in IT administration for the academic college are responsible for a significant amount of self-directed work and collaborative, cross-departmental work teams are the norm. Regarding his current job roles and his expertise or prior relevant experience, Kyle says that "it would be rare for anyone to be hired to do a single role or a single job task to be that person's sole work." To Kyle, the reality of cross-departmental collaboration "doesn't necessarily translate into consistent mission and prioritization of employee activities." Employees are "volun-told" to contribute to some projects (a tongue-in-cheek characterization of the situation Kyle and his colleagues face when they are expected by workplace superiors to volunteer for specific tasks), while individuals have full autonomy to choose among other collaborative initiatives.

Kyle describes project development in this division-level role as "templated," but based on necessity, and "highly-reactive." For example, a data infrastructure project is propelled by a hard, external deadline: A software vendor is discontinuing the version currently in use at Midcity University and will no longer support the aging product. The university must redevelop its data infrastructure to smooth the transition to a current, supported version of the software.

Though individuals within the organization and the work groups that Kyle supports state that they wish to transition to more Agile-based methods, projects are organized using more traditional waterfall management practices. "First, next, etc. is how projects are conceptualized,"

Kyle states. “We don’t believe we have time to break projects into manageable chunks.” He adds that on some projects “we lurch from this to that.”

Healthcare Procurement Firm, Goods Plus and UX Professional, Matt

Goods Plus is an employee-owned company that specializes in procurement services and facilities management for healthcare institutions, specifically those providing long-term care in residential settings. The firm is headquartered in the metro area of a large, Midwestern city and operates a downtown technology center separate from the main headquarters.

The Goods Plus website functions primarily as an e-commerce portal for the organization. Customers (who serve as managers of long-term, nursing and care facilities) use the site to purchase a wide range of goods and services for stocking these residential facilities. Diverse items such as plates and cups for the dining hall, furniture for common rooms and resident rooms, specialized equipment for accessibility and mobility needs, and medical training equipment for staff are available, as well as a range of services related to the design, construction, and management of such facilities. Customers can handle procurement themselves with online ordering or a customer service representative, or they may outsource procurement and facility management duties to Goods Plus through complex, integrated technological systems with just-in-time supply-chain capabilities. Goods Plus has distinct business units that serve these needs. Its procurement and sales group operates separately from the design-and-build services, and from the operations management group.

The internal divisions of the Goods Plus organization are reflected in its website design. Website visitors find a six-image rotating feature on the landing page that cycles through images that represent key website sections. The “about” section describes the organization as a whole.

Other tabs are focused on the individual business units that comprise the organization (e.g., product sales and procurement, facility design and construction, and operations management). The website's white background and blue logos help communicate a clean, professional aesthetic. The landing page photos show off design-magazine-style, homey, contemporary interiors as examples of the caliber of long-term residential and care facilities that are made possible through partnership with Goods Plus. A grid of photos features the smiling faces of five senior citizens along with a younger woman wearing scrubs and a stethoscope, presumably representing the medical staff who care for the smiling residents she is pictured with. These images signal that a variety of stylish, vibrant, and cheerful older people are living well, thanks to products and services Goods Plus provides.

The theme of advocacy for seniors is also strongly integrated throughout the "our story" section of the site. A chronology page lists milestones and the additions of a range of new services, capabilities, and product offerings since the founding 30 years ago, including a profit-sharing program for employees, an interior design and remodeling business unit, the e-commerce platform, the own-branded equipment, and various facilities management capabilities and services. Among these milestones is recognition for ethical corporate leadership given by a small, religiously-affiliated university with a campus located in the same metro area. Community volunteer projects such as health, education, and wellness initiatives are also summarized, along with the organization's advocacy for seniors and industry-focused policy initiatives.

Website Depiction of Quality at Goods Plus: Values-Driven and External

While quality is not explicitly described on the Goods Plus website, the idea is strongly associated with the organization's description of its activities as fulfilment of its mission:

building better communities and facilities for seniors. This theme resonates through the descriptions of actions and initiatives, including employee ownership, commitment to the interests of the senior health-care industry, health and wellness outreach activities, employee job satisfaction, and personal stories. All of these reflect the company's shared values and commitment to making contributions that affect the well-being of others.

Goods Plus extends that idea of helping seniors to live well to include supporting and helping those who run and maintain the facilities where these seniors live. The images in the rotating collection on the landing page also allude to the needs of this constituency of managers and administrators with two images that feature smartphones with chalk-board-style line-drawings signaling planning and management, such as dollar signs, light bulbs, piggy-banks, buildings, and flow-charts floating above the phone screen. These images suggest that the procurement sites are mobile-friendly and focused on time-saving, cost-saving approaches to doing business. These value propositions apply to the organization at large, but these attributes are especially connected to the Goods Plus facilities management business unit.

The rotating-image feature also functions to separate web traffic to specific business units of the company. The feature includes a left sidebar next to the rotating photos with tabs for the "about," "what we do" as well as the individual business units that help customers with planning and development, building management, and cost-management, in addition to the online purchasing. The tabs for two of the business units (building management, and cost management) open separate internet browser tabs when clicked, and funnel users through a secure log-in, whereas the other business units' tabs allow browsing without logging in. This separation creates further distinction between business units that offer simple online purchasing, and the units that handle full-service operation and maintenance.

The website's main menu bar across the top of the home page includes "solutions" and "resources" as well as a blog. These learning materials include an "own vs. rent" section along with articles that serve to frame the goods and services of the organization not as excess technological complications, but as problem-solvers. For example, an article about the benefits of using an industrial floor-cleaning machine addressed the potential objections customers may have because staff can certainly use a bucket and mop to wash the floors. However, the article framed the machine as a simple means of safety compliance and a time-saver, because the machine helped staff finish washing the floor more quickly and reduced drying time (during which, residents and staff would have to avoid the wet floor), constituting an improvement. Similar approaches to other categories of labor-saving equipment were also available to educate customers. The site also included product guides and product demonstration videos for Goods Plus' own-branded products including such specialized categories as healthcare equipment, mobility aids and equipment, beds and mattresses, and training materials and equipment for facility staff. The range of information categories in this educational section serves to present Goods Plus as a helpful and supportive business partner.

Through all the content on the site, "customer service" maintains a strong presence. A blue conversation-bubble "chat" window pop-up is ever-present. The webpage footer has a prominent photo of a smiling, professionally-dressed young man as the face of the customer service team. This rhetorical emphasis on the customer service staff aligns with the position that Goods Plus customer service representatives hold within the organization, as the role is an important component of the business model.

Similarly, the careers section of the website reinforces the importance and prominence of the customer service personnel and, by extension, the importance the organization places on

staff, generally. The text states “help wanted” in large white letters. Red proofreaders’ marks cross out “help” and the word “partners” appears to be written on a torn off piece of yellow legal pad and taped to the screen. Behind the screen candid video footage of employees plays, including quick shots of people in a large auditorium, meeting rooms, at individuals’ desks, a workout class, presentation easels, product prototyping and testing scenes, as well as fun footage such as high-fives, and pointing at the camera. The group of employees featured appears as “real people” and the video montage features men and women of varied ages and ethnicities, less polished and professionally posed than the images of seniors featured on the Goods Plus landing page. This video footage appears carefully edited to retain, rather than eliminate, the jumpy cuts of a hand-held video camera, delivering the effect of authenticity, perhaps intended to indicate to the prospective employee that you, too, could find yourself fitting in here with these regular people.

Matt: User-experience Strategist for Goods Plus

Matt does UX research at Goods Plus. He holds a bachelor’s degree in advertising from a mid-sized private, religiously-affiliated, urban university in the same Midwestern city. His personal interest in web design since his teen years led him to an entry-level position in web design after college. Matt describes his strong interest in UX as alignment of “the human, technology, and creative” elements. After several years in a web-design role for an educational institution, Matt served as a project manager for an industry organization, then took a job with his current employer, the supply-chain firm, Goods Plus, where he has been for five years. Though his job titles do not explicitly describe UX roles, Matt considers himself to have gained eight years of UX experience so far in his career.

At Goods Plus, UX is a cross-functional team, operating like an internal service provider for other business units, and Matt describes this facet as one of the team's "struggle points" because the team is physically not in the same location as the other strategic business units, which are distributed across two locations in the metro area of a Midwestern urban center. "They don't see my cubicle when they're planning projects," Matt points out while describing the effect of his physical distance from some of his colleagues. He attributes his Goods Plus colleagues' infrequent interaction with him, the UX component of the organization, as one reason UX can be overlooked in project planning.

Goods Plus is comprised of several strategic business units and Matt describes the structure as a traditional corporate organization with each business unit having significant autonomy. Each unit has a high-level director and separate, dedicated departments such as marketing under each director. However, the organization's own description of the structure differs from this functional reality, and Matt notes that the leaders of the individual business units refer to their structure as "inverted pyramids," suggesting a different hierarchy of decision-makers.

Inverted pyramid organizational structures elevate different roles than in traditional business, giving significant decision-making responsibility to client-services roles (or in other industries, to production process roles), with higher-level colleagues endeavoring to support and empower those client-service-focused employees. At least nominally, in this organization, that inverted pyramid structure emphasizes the contributions of customer-facing roles and prioritizes them in decision-making processes. Conversely, in a traditional structure, increasing levels of decision-making power would rest with progressively smaller groups of employees, each holding progressively higher rankings at the organization. (i.e., a large group of entry level employees

with little decision-making power reports to a smaller group of lower-level managers, who report to a smaller handful of mid-level managers, who report to the organization's senior leaders).

The other "exception" to the independent-business unit structure is the engineering team. This group is responsible for building technology tools such as the customer-facing e-commerce platform, the firm's website, and similar digital infrastructure. The engineering department also runs one of the business units and is responsible for building the technology that the other business units use to deploy their services, such as the e-commerce website, the design software, and procurement automation systems. Matt discloses that this unit is a favorite of the CEO (who holds an engineering degree); internally, other areas of the business experience a degree of what he terms "favorite child syndrome" in knowing that the projects and opinions from this group will be prioritized or at least viewed more favorably than alternatives. Matt struggles against this disposition toward favoritism and he associates these biases with rhetorical challenges.

Projects at Goods Plus originate at the manager level with a "road map" from the business unit directors. Each director maintains a roadmap, essentially a Google Doc with a prioritized list of things to do. Matt likens the projects to home repair and equates the scale and scope of projects on the road maps to "squeaky-drawer-level projects, not remodel-the-entire-kitchen-level." Roadmaps have begun to employ "weighted scale⁵" project prioritization and story-pointing⁶ elements of Scrum project management, also, criteria such as time-sensitivity,

⁵ Weighted scale prioritization is intended to help organizations allocate time and resources to projects that will deliver the greatest strategic advantage to the organization. Proposed projects are assessed based on factors such as delivering a competitive advantage, cost reduction, efficiency improvements, quality improvements, and growth potential.

⁶ In Scrum and Agile project management, parts of a project are assigned a number or other label to signify the amount of work, risk involved, estimated level of difficulty, complexity, and time needed. Scales are ideally based on a universally-agreed upon set of references for clarity and consistency among all contributors to the project.

value to the business, and similar are now quantified in an effort to help understand the specific reasons for the project prioritization.

In each project at Goods Plus, Matt works with either a business analyst or systems analyst and one stakeholder from the relevant department. Large projects will also assign a project manager, usually a business-unit director. The projects are usually subdivided into “features” for the system, such as the e-commerce site’s search function, and the features are addressed one at a time.

UX functions as a “business intelligence” unit within Goods Plus and this group’s contributions are understood as helping contribute to other projects. Engineering works in design sprints, similar to Agile organizations, and larger projects are subdivided into individual “features” (e.g. the e-commerce site’s search function) and addressed one at a time. Projects typically have a business analyst or system analyst leading the project in cooperation with a stakeholder from the relevant business unit. A typical production cycle works in two-week sprints, including phases dedicated to design, iteration, and voice-of-the-customer check-in and follow-up.

Quality, as Matt understands it, means usable, useful, desirable, credible, accessible, findable, and valuable⁷. Goods Plus doesn’t currently have a standardized check list for quality and the team does not conduct testing post-development. Matt attributes this practice to the perception among his colleagues that building the technology is the end-goal, not necessarily knowing whether the technology solved the problem. Matt learns about project outcomes through word of mouth when sales managers pass on feedback such as, “I talked to Company A, and they love this thing.”

⁷ The list references usability researcher Peter Morville’s infographic, which is included in Chapter 1 as Figure 1.2

SUMMARY

This chapter described the sites of research for this study. Four sites of research are divided into two UX-receptive organizations where UX practices are incorporated in each project's development cycle and two UX-reluctant organizations where UX practices are still used, but not thoroughly and consistently on every project. I provide a rhetorical analysis of each workplace's website presence, focused on the way the organization characterizes quality. I describe the four study participants' academic backgrounds to understand these experiences as preparation for their current job roles and I provide summaries of the participants' job roles within their organizations, along with the way these professionals understand quality in relation to their own work, and the work of their respective organizations.

Chapter 4 addresses the findings of the four cases, connections between the cases in this study, and challenges facing UX professionals and organizations that include UX work in projects.

CHAPTER 4: FINDINGS

In the previous chapter, I described the four sites of research, and the distinctions between the UX-receptive organizations (where UX research is highly valued and integrated into most if not all project workflows) and UX-reluctant organizations, where UX practices are used infrequently or applied inconsistently. I provided a rhetorical analysis of each organization's corporate website focusing on characterizations of quality. I describe each of the four participants' job roles, and provide relevant details of their educational and professional backgrounds, and I summarize the way each of the participants understands quality in relation to their own work, and the work of their respective organizations.

In this chapter, I present the key findings of the study. Namely, that all the study participants struggled at times to secure access to the necessary resources for UX, were challenged with project ownership, and experienced conflict between the UX findings and the organization's goals and identities.

In much of the technical communication literature on user experience (UX), scholars focus on a narrow case of use for UX methods and practices (e.g., Dicks, 2002; Dilger, 2006; Schneider, 2005; Kim, et. al., 2008; Elling, Lentz, & deJong, 2012;) or on expanding the range of contexts in which to teach and apply UX methods and practices (e.g., Breuch, Zachary, & Spinuzzi, 2001; Jameson, 2013; Campbell, 2000). The actual workplace contexts in which UX activities are conducted have been largely unexamined. Participants in this study described several rhetorical challenges as central to their efforts to contribute to advancing positive, high-quality outcomes through using UX methods and practices. These issues range from wider problems related to access to the appropriate resources to conduct testing, to knowledge or understanding of UX within organizations and collaborating teams.

The experiences of the study participants indicate that significant issues complicating or hindering their UX work are connected to three major issues: 1) limited access to necessary resources for UX, 2) complications resulting from project ownership, and 3) conflict between the UX findings and their alignment with organizational goals or identities.

First, in this study, **lack of access to key decision-makers meant the UX professionals were sometimes overlooked during project planning or relegated to roles where their influence over the design and development process was limited.** Study participants also struggled to gain access to the right groups of users for research, and enough time to conduct research deemed necessary for a given project. While the issue of limited resources is so common that workplace clichés abound (i.e., ‘Every project starts over budget and behind schedule,’ and similar), the connections between misunderstanding UX and limiting the UX professionals’ access to resources warrant further examination and discussion.

Project ownership also contributes to the challenge UX professionals in this study faced in advocating for UX methods, practices, and data acceptance in their workplaces. My study participants worked as members of cross-functional teams, which did not afford them full autonomy to design the research they conducted. Project owners (both within the organization and outside it) exerted a degree of influence over the meaning of data from UX research and the broad goals for the research activities that the study participants conducted.

Third, **study participants found that their UX research recommendations were more readily accepted and successfully implemented when those recommendations aligned with facets of the company’s self-image.** This apparent confirmation bias suggests that in organizations, UX research may be perceived as a risky approach to research because of the possibility that it could uncover negative or otherwise unfavorable data.

This chapter will address each participant's experiences, beginning with the two study participants in UX-reluctant workplaces, followed by the participants in UX-receptive organizations. Each participant's experiences will be organized according to the three key issues just summarized: limited access to resources, project-ownership complications, and conflict between the UX findings and the organization's identity and self-image.

UX-RELUCTANT WORKPLACES

In UX-reluctant workplaces, UX practices are sometimes included in development cycles and data from users is considered valuable, but obtaining that data may not be a priority on every project. The project team may choose other options for data collection, quality-assurance, and verification that they believe deliver equally beneficial results.

Matt, UX Professional at Healthcare Procurement Firm, Goods Plus

This section will provide anecdotes from Matt's experience as a UX professional at Goods Plus, where he contributes to technology projects as a member of a cross-functional team. The business units at Goods Plus operate with a high degree of autonomy, and each unit controls its own marketing and customer service, and works with the engineering department and UX department to build and maintain the technology systems (such as the e-commerce platform) that provide goods and services to customers.

Finding 1: Limited Access to Necessary Resources

At Goods Plus, Matt and his UX colleagues struggle to gain adequate access to the appropriate audiences, especially the lower-level employees who are the actual end-users of the

software. Instead, the team typically interacts with a public-facing employee such as a manager or a public relations person. These interactions take place during “voice of the customer⁸” check-ins, which are conducted through phone calls during the development cycle of the project. These customer calls have transitioned away from groups of five customers in a focus-group style conference, to one-on-one calls between Goods Plus and the customer. Matt has successfully made the case to his colleagues to be involved in the calls, rather than accepting second-hand information from his customer-facing colleagues.

At Goods Plus, employees in customer-facing roles such as customer-service representatives or manager-level employees are typically the contact people for customers. Limiting the possible points of contact for customers simplifies and streamlines the customers’ interactions with Goods Plus. However, this arrangement is problematic if the UX team wishes to collect unfiltered user feedback, which is the most helpful for diagnosing problems with the technologies the UX team is trying to build and maintain. To preserve the existing division of job duties at Goods Plus, the UX team would need to request that the customer-facing contact person at Goods Plus collect customer feedback and pass it along, or otherwise work through the customer-facing employee to solicit feedback. The customers’ ongoing relationships with their service reps or other Goods Plus contact people are likely to influence the feedback those customers provide. For example, a customer may downplay difficulties with the technology because she doesn’t want this issue to reflect badly on her customer service rep. Similarly, the Goods Plus customer-facing employees perform in a public-relations capacity in these customer interactions, managing the relationship between their employer and the customers who spend

⁸ Voice of Customer (also abbreviated VOC) is a term for the activities involved in collecting customer comments including opinions, expectations, and preferences about a product or service. Typically, both quantitative and qualitative methods are used to collect data.

money with their employer. The ongoing relationship dynamic between the Goods Plus employees and customers may influence data collection or transmission to the UX team.

The UX team joining these customer calls signals a shift in procedure for Goods Plus. The team initially met with resistance at the suggestion the UX team participate in the calls because it would appear to customers that adding more Goods Plus names and faces would needlessly complicate the interaction. Instead, other colleagues who already have a need to talk to customers such as Goods Plus business unit directors or customer service representatives could simply relay information to the UX team. However, the perspective of the UX team is that employees without UX experience were unable to pass on adequate, relevant information, essentially resulting in a workplace game of “telephone.” Like the nonsense message passed between players in the parlor game, the data was similarly distorted by the time it reached Matt. At Goods Plus, directors have significant customer contact, but many of their conversations are executive-to-executive, and though these individuals know their businesses well, they are unlikely to be sources for authentic voice-of -customer data because the executives don’t interact with the software in their day-to-day work as their subordinates do.

Limited access to the right people who actually used the software meant that the team needed to parse the feedback they received through the “customer-adjacent” colleagues (e.g., customer service representatives, training staff) to try to interpret what the customer had actually experienced and what that meant for making changes to the technology.

Finding 2: Project Ownership Defines Goals, Outcomes

Matt and his UX colleagues work as an internal service agency at Goods Plus. The team members are assigned to projects as part of a team comprised of a business analyst or system

analyst and a stakeholder from the relevant department, and projects are typically led by a project manager or business unit director. Projects are broken down into “features” for the system (typically something small such as the search function for the e-commerce website or similar) and addressed one at a time. The typical project workflow sometimes generates internal conflict because of staffing when multiple projects need a team’s or individual’s attention simultaneously.

Matt finds that it is challenging to be included in projects if the project planners involved don’t regard UX as a necessary component for project development. Physical distance deepens the problem of access, as Goods Plus operates a main campus and a smaller satellite office, several miles away from each other. The UX team works out of the smaller downtown office while many of the other departments work in the main campus building. Matt attributes the physical distance from his colleagues to the degree of marginalization for the UX team. “They don’t see my cube when they’re planning projects,” is the way he explains the “out of sight, out of mind” predicament.

In such cases, the UX team may be asked to contribute later in the project, essentially to check that a feature functions according to the technical specifications of the project, but not necessarily to conduct user testing to see if the project resolved a problem for the users. Matt and his UX colleagues are not consistently included during the stages where project requirements are being developed, so these quality-assurance measures late in the process are limited to confirming that the project-planners’ goals have been met. By eliminating the development steps involving users during the needs-assessment phase, and later in the verification phase, the project relies on the developers’ assumptions about user needs only, rather than on actual data from the users.

Finding 3: UX Findings and Practices Conflict with Perceptions of Organizational Identity

The standpoint behind UX principles, as UX practitioners understand them, sometimes conflicts with organizational norms at Goods Plus, particularly in how the company sees the organization's relationship with its customers and the relative values of different groups of stakeholders. For example, engineers have significant power in the Goods Plus organization (which Matt attributes to the company founder's educational background in engineering) and many of the engineers have been with the organization for nearly all of its 30 years in business. At Goods Plus, engineering builds and maintains the technological infrastructure such as the websites and e-commerce platforms on which the other business units operate. That responsibility is significant, and its value to the organization can also be understood in the engineering department's status as an independent business unit.

Power drives decision making at Goods Plus, and the engineers' long tenure and status within the organization permit a degree of superiority. They "just know" and that's enough of an answer to justify a course of action. Matt recalled a meeting when he was asking careful questions, trying to understand the logic supporting a decision about a project; at that meeting, input from engineering was treated with "because" and no explanation or justification was given. It was simply accepted as the appropriate response because it came from engineering.

Similarly, some long-time customers also drive decisions, and engineering and other departments are often asked to create special features for the software or otherwise comply with the wishes of these customers. While the organization would certainly not succeed without meeting customer needs, Matt sees this accommodating approach as problematic because Goods Plus is "not creating one great experience, but a lot of mediocre-to-bad experiences" based off

these customer requests for specific design features. Matt finds there is some need to interpret what customers say to understand what they mean and how that translates to the individual's experience. As Matt puts it, "there is a difference between understanding what the customer needs and doing what the customer says." Matt believes that sometimes Goods Plus misses this understanding in its rush to fulfill requests. Speed takes priority over proving to customers that Goods Plus is responsive to customer needs and requests.

The Goods Plus UX team faces a problem in terms of understanding the distinctions between customer expertise and UX and design expertise, as well as between responding to requests and addressing UX problems. Matt learned that voice-of-customer activities require more strategy and rhetorical negotiation than he initially anticipated. The team approaches the interaction with customers as "we heard about an issue with X and we wanted to ask you some questions about that." This approach helps frame the customer as an active participant in helping build the positive technology experience. Correspondingly, that collaborative approach places the customer in a more active position than in its typically passive position at the end of the line of a traditional top-down production process where corporate developers design and create a product, and consumers use it (or not).

Elevating data from users within the development process and involving users in the development process do not necessarily mean that the users thoroughly understand the process. Matt and his UX colleagues find group teleconferences difficult to manage because the participants sometimes stray from the goal of the conversation into discussion about extreme hypothetical situations instead of day-to-day use. The users are not intentionally trying to derail conversation, but presume that "what-if" scenarios are an equally timely priority as the routine-use cases that they are supposed to be discussing. UX doesn't dismiss the need to address

extreme cases of use, but the typical tasks that most users need to accomplish take precedence because the UX team's goal is to deliver a positive experience for the vast majority of the regular users.

Providing an artifact such as a mock-up or sketch helps move discussions along during voice of the customer calls, but Matt finds that the artifacts also have rhetorical consequences. Goods Plus colleagues participating in the calls expect high-fidelity, polished designs that demonstrate professionalism. However, Matt and his UX colleagues discover through their work that customers can be reluctant to provide much feedback on those designs, perhaps because they want to avoid invalidating the work that had clearly gone into producing the design or they do not want to give negative feedback to the designers.

Matt and his UX colleagues recognize a conflict between the UX team's goals for obtaining useful feedback during voice of customer calls and meeting the expectations of their Goods Plus colleagues for communicating professionalism when interacting with customers. For example, in one project, the team got more and better data using low-fidelity, unpolished mockups to talk to customers, but their colleagues objected to the low-fidelity mockups, believing these rough drawings to be unprofessional and therefore detrimental to customers' perceptions of Goods Plus. The UX team negotiated a compromise between their own department's goals for gathering data and their colleagues' goals for meeting specific standards for communicating with audiences outside the organization. The UX team compromised, aiming for a design that delivers just enough structure and reference points to guide the discussion, but with room for customers to feel that they contributed some expertise.

Goods Plus characterizes itself as an organization with a customer-focused approach to business. The organization (including business unit leaders who have regular contact with

customers) believes that acting in a customer-focused manner means complying quickly with specific customer requests to modify the websites and user interfaces in those precise ways and the Goods Plus leaders expect that the UX team will also prioritize quick compliance with customer requests.

However, the Goods Plus UX team sees the expectation to comply with customer requests as a potential conflict. The modifications and specific design changes that individual customers request may not result in a universally positive experience for the range of Goods Plus customers. For example, if one customer requests that Goods Plus reorganize website content to prioritize a product category from which she frequently purchases, other customers may struggle to navigate the content and locate items they need because the information organization was disrupted by the redesign. The isolated design modification from one customer may not reflect best practices or sound research, and it may not benefit a majority of the website users. Customers offer valuable insight about their use of the technology but they may have limited UX-design experience and expertise, and thus, it is essential that UX teams investigate these customer requests to understand the nature of the customers' problems with the technology and what may be causing it, rather than simply proceed in making changes without understanding what deeper problems are connected with that part of the interaction.

Goods Plus believes that building the technology is the organization's end goal, and accordingly, the organization prioritizes swift action to deliver the precise changes that specific customers request. While these customer requests may help identify interaction problems, fulfilling the request as specified may only scratch the surface of the issue and never actually address the underlying problem. In contrast, if delivering a high-quality experience is the organization's goal, the organization would take a different approach to making changes. It

would be necessary to define, for example, what a high-quality experience means, what criteria should be used to define it, and which groups of stakeholders would be prioritized. This holistic approach aligns with the goals for UX research and meeting the needs for diverse stakeholder groups, rather than prioritizing the requests of a few important customer voices. This approach also values the expertise of the UX team and their contributions to facilitating positive customer experiences with Goods Plus technologies, products, and services.

The following model provides a visual representation of the influence stakeholders exert on the workflow at Goods Plus. The stakeholder's suggestion or request drives Goods Plus to quickly address the specific request. In order to quickly respond to the request, Goods Plus may immediately begin development without much preliminary research or examination of the context for the stakeholder's request. In such a scenario, the UX team at Goods Plus may not become involved in the development process until late in the process, when they are asked to conduct verification, or similar late-stage quality assurance. The UX team has limited influence over the development process when organizational stakeholders (e.g., project managers) overlook the UX team when planning and the UX team is only granted late-stage access to projects for verification. Figure 4.1 shows the UX project and the impact of stakeholders in this workplace.

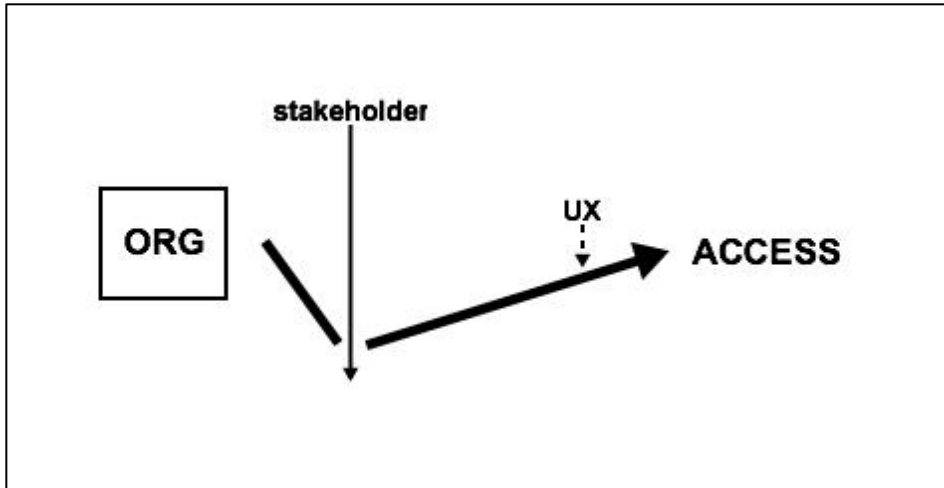


Figure 4.1: Goods Plus UX-Stakeholder Influence Model

In this model, the way the organization (“ORG” in the box) identifies itself determines the organizational norms and overarching goals. This standpoint influences the approach to research. At Goods Plus, prioritizing a fast reaction to customer requests means subordinating activities that might delay that response, or an alternate resolution to the problem, just not the specific solution the customer suggested. The project follows the progress of the arrow from left to right, ending at access to the necessary elements for UX research. The influence of the customer stakeholders is so extreme that UX work (which might slow the development process, or which might uncover an alternate solution to the problem, but not the one the customer suggested) is interrupted, represented here with the broken arrow. UX access to the project is granted late in the process, and the stakeholder influence pushes the arrow down, indicating a strong impact on the research activities.

Kyle, IT Professional at Midcity University

This section provides anecdotes from Kyle's experience as an IT and UX professional at Midcity University, where he contributes to technology projects as a member of a cross-functional team. During his tenure with the university, Kyle has served in a project-management role, overseeing cross-departmental work teams for both a college within the university, and he has served in an IT capacity for an administrative group.

Finding 1: Limited Access to Necessary Resources

Kyle has struggled to garner adequate resources to complete his UX research. When working on a project to redesign a database system, Kyle and his colleagues wanted to better understand who would be using the database. This needs assessment would help settle some information architecture matters such as appropriate categories, search terminology, and other parameters that would streamline the process for obtaining a range of data that had formerly been stored across several different systems. The team planned to conduct surveys targeting the primary users, many of whom served in administrative roles in academic departments, or in program leadership roles. The team debated the criteria for what attaining successful survey outcomes would entail.

Kyle found that a benevolent sense of caution overshadowed the process of planning the survey and the user-experience research. His colleagues and others at the university pushed the team to scale back their efforts to survey these university employees. The original plan called for an in-depth survey that would provide insight into how these employees accessed data from the university's databases, what projects and initiatives they were using the data for, and what

purposes this data would serve for those projects. In the end, however, the team settled for a drastically-reduced email survey of only two questions.

Correspondingly, Kyle believes that the project's mission strayed from the original goals of helping streamline the information-access process. As the project progressed, it drew the attention of people with higher organizational status at the university, and as the project progressed, it also shifted away from its origins as an internal matter among the project team which was concerned with the needs of the intended database users.

With increased visibility came additional, internal, political concerns that affected the way the team managed the project work. For example, the project team became concerned that they not inconvenience anyone who would be invited to take the survey. The university's external public relations team also became interested in the survey content, despite the fact that the survey would be distributed only among current employees of the university. The additional scrutiny shaped how the project team believed they needed to consider their work; the team prioritized approval of the project (which meant settling for a brief user survey that would deliver limited detail) over the original user-centered goals which emphasized understanding user needs so those needs could be addressed in the restructured database system.

Kyle finds that time becomes a significant concern in cross-departmental project teams. Such projects are staffed by people who are "volun-told" to contribute to collaborative projects outside their main job responsibilities. Kyle uses this tongue-in-cheek description to indicate that participation is not truly voluntary, but expected. The shared experience of feeling compelled to join this work team translates into empathy for the other project team members and Kyle believes that the team also felt a tension between respecting peoples' time and producing quality work. When asking people to supply data as participants in the research activities, this concern

for the participants' time meant that the team reduced their data collection efforts to the very minimum possible to gain useful information. Kyle's team abridged the lengthy questionnaire to only two questions in the hope of getting higher quantity of responses from the target audience group rather than greater depth of information from more questions. The work group imposed restrictions on themselves, limiting their access to the key audience of database users by narrowing the scope of investigation. The team believed these limitations were necessary to maintain internal, organizational norms of demonstrating respect for colleagues' time, despite the potential benefit of improving the database.

Ultimately, the work group's initial goal of producing a database system that could streamline the data-gathering process for users was subordinated to demonstrating respect for the time those users might spend providing data for the UX research initiative. The team was simultaneously balancing the goal of maintaining organizational norms of respecting colleagues' time with the need to gain the approval and goodwill of the high-status stakeholder groups at the university. The team compromised depth of information for a larger potential number of participants responding to the survey, and the blessing of high-level stakeholders.

Finding 2: Project Ownership Defines Goals, Outcomes

As Kyle's project progressed, it acquired more groups of stakeholders, and ownership became distributed across those stakeholder groups, diluting the authority of Kyle and his project team members. Those additional stakeholder groups held high levels of status at the university, so their opinions became important, perhaps to the point of overshadowing the needs of the database users who were originally the project team's main concern. Maintaining the goodwill of

these peripheral, but high-status stakeholder groups meant that the team's priorities shifted to reflect the values of these groups and gain their approval.

Reflecting the values of these groups does not necessarily mean that Kyle's team no longer prioritized the needs of the database users, but that the project acquired more constituencies. This addition of other priorities naturally led to compromises. For example, to maintain the goodwill of the powerful stakeholder groups who questioned the need to survey the database users, the team scaled back their survey. By making the survey smaller in scope, it became more innocuous, and more likely to receive approval from the high-status stakeholders, even though a very short survey would naturally generate less applicable data.

Finding 3: UX Findings and Practices Conflict with Perceptions of Organizational Identity

Kyle describes his work at Midcity University as somewhat self-directed, but the workplace constraints of time and bureaucracy mean Kyle and colleagues sometimes struggle to gain approval for projects, including UX research. In the case of the database-user survey, the team justified to themselves that a higher response rate would be preferable to greater depth of responses, and abridged their longer survey in hopes of gathering more responses to fewer questions.

Kyle's project colleagues approached planning the survey with the idea that 'we don't want to frustrate people,' and in alignment with that goal, the team scaled back the participant questions to just two. (The project then stalled for several months for reasons unrelated to the project itself, then was reinstated.) Before the survey could be distributed, a higher-level administrator cautioned the project team and stipulated that the university's public relations office needed to approve their survey.

Kyle and colleagues became frustrated at the administrator's misunderstanding of the survey and the project team's intent. Given that the intended survey recipients were internal employees, and the public relations office typically deals with external communication from the university to audiences outside the institution, request for approval of this extremely brief survey seemed incongruous.

Further, the team was also frustrated about the unfortunate irony of this situation: The goal of the survey was to learn about the data needs of their fellow colleagues across the institution to better design the new system to accommodate their needs. The people who would receive the survey were primarily administrative staff members typically overlooked as key project stakeholders because they do not hold high-status job roles within their departments. These are busy people with lots of responsibility, but who may not be acknowledged as a source of important knowledge on an institutional level, nor perceived as having a stake in database system functionality. The goal of the survey was to gather data to inform construction of a database system that would work efficiently, and make the administrative staff's jobs easier, but those staff members were believed to be so busy and overburdened that Kyle's project team colleagues felt that even the brief survey would unjustifiably add to their work.

In his current role, Kyle is a member of ad-hoc project teams that serve the needs of diverse groups of stakeholders within a complex bureaucracy. His team members change project to project, and so do the stakeholder groups. The internal relationships and norms of behavior and precedent are important and influential. Organizational leaders seem to view UX practices as disruptive and in these cases, the leaders prioritize traditionally accepted workflows and processes over the potential risk of an untested approach.

The following model provides a visual representation of the influence stakeholders exert on the workflow at Midcity University. The addition of more groups of stakeholders influence the direction and constrain the project. These additional stakeholders are represented in the model as “stakeholder 1, 2, and 3” and these downward arrows push the direction of the project arrow downward, altering the project’s course and priorities. The project team at Midcity University is limited in their autonomy and access to resources due to increasing numbers of stakeholders exerting influence during project planning and development, and the influence of these groups push the project’s direction away from its original goals, scale, and scope. Figure 4.2 shows the UX project and the impact of stakeholders in this workplace.

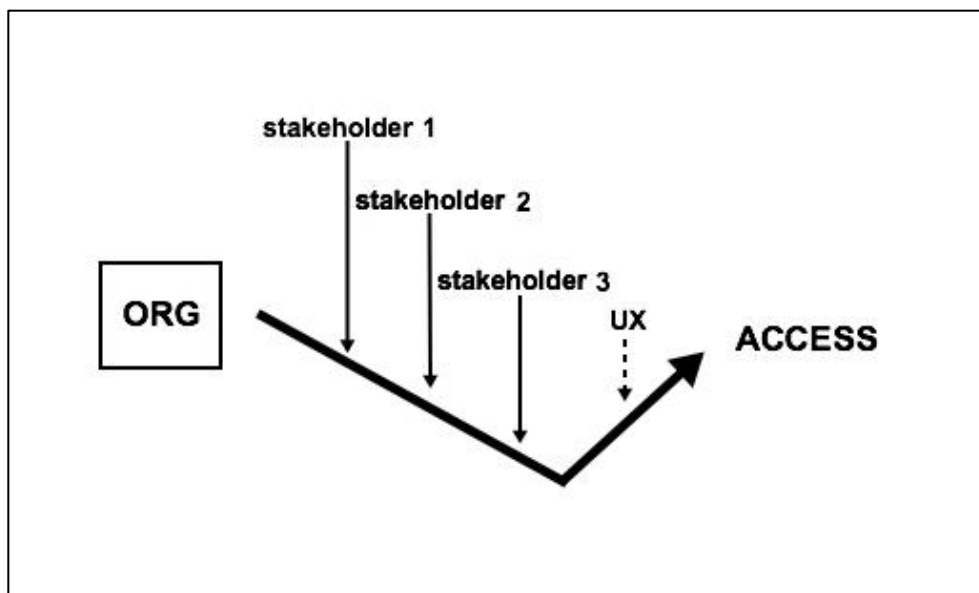


Figure 4.2: Midcity University UX-Stakeholder Influence Model

As in the previous model, the way the organization (“ORG” in the box) identifies itself determines the organizational norms and overarching goals that influence the approach to research. This standpoint influences the approach to research. At Midcity University, deference to the concerns of increasing numbers of stakeholders alters the goals, scale and scope of

research. This altered course of research limits the authority of the project team over the project and prioritizes the concerns of stakeholder groups other than the end-users of the database who should be prioritized. UX research which prioritizes those end-users, is represented by an arrow with a dotted line near the end-point, access to the necessary elements for UX research. The dotted line for UX signals diminished influence, compared to the solid lines that represent stakeholder influence.

UX-RECEPTIVE WORKPLACES

This section presents the experience of the study participants in UX-receptive workplaces, where UX practices are consistently included in development cycles and data from users is considered valuable and necessary for accomplishing project goals and meeting quality standards.

Travis, CX Professional at Style Store

As a UX professional at Style Store, Travis works with the retail organization's customer experience (CX) team. The team is geographically divided between its Midwestern headquarters and a west coast technology center. Projects are staffed with pairs of CX researchers, one researcher from each location, and the colleagues communicate with each other using digital chat platforms and video conferencing. Collectively, the CX researchers serve as an internal service bureau or UX consulting agency for other departments at Style Store.

Finding 1: Limited Access to Necessary Resources

Travis and the CX team sometimes struggle to access appropriate users for testing with specific segments of Style Store's audience. The organization uses a recruiting agency to obtain participants for UX initiatives, which often means that "professional testers" are recruited for remote testing⁹ scenarios. These individuals make money participating in online surveys and Travis and his colleagues have found that these candidates are sometimes not appropriate matches for the recruitment criteria. While this is clearly a matter of quality control for the

⁹ Remote usability testing is conducted with participants and moderators who are not in the same physical location. Often, remote tests are conducted online, using screen-sharing software.

recruiting agency, access to authentic members of the target audience group is important for data accuracy and the team was frustrated during a recent test cycle when 87 percent of the respondents the agency supplied did not meet the criteria.

The Style Store CX team is unsatisfied with the recruiting agency, but sees few better alternatives. Despite requests to their workplace superiors, the group has thus far been prohibited from conducting tests in their local stores. The CX team believes the benefit of observing real customers in an authentic experience would benefit their research, but the leadership at Style Store has been reluctant to grant permission because they believe such interaction would appear disruptive and could potentially inconvenience customers.

Finding 1: Project Ownership Defines Goals, Outcomes

Interpreting what data means often depends on who owns the project. Travis discovered that the same data can mean different things to different groups within the organization. His CX team's findings about online coupon codes and gamification¹⁰ illustrates this point about divergence.

Style Store's marketing team believes that gamification elements are popular with the retail store's customers. Marketing believes that "stacking" coupons to apply multiple discount offers to the same purchase is something customers truly value because they enjoy the challenge of seeking out the codes. The marketing team is very dedicated to this perspective that engagement with the brand is always positive, so the Style Store online marketing strategy prioritizes creating a game-type, points-earning interaction. Marketing believes that people enjoy

¹⁰ Gamification applies aspects of game play such as earning points, rule-based activities, and other elements of competition to interaction with a brand to increase customer engagement. Gamification is especially prevalent in online marketing applications.

the coupon game because they see significant online activity surrounding coupon codes including websites and pages on internet forums dedicated to this issue, along with noteworthy quantities of shoppers who share their coupon codes online and tell others which sale codes can be combined. Marketing, Travis explains, regards this activity as “evidence that customers love the coupon game so much they are making websites dedicated to it.” However, during user-experience tests Travis and his CX colleagues discovered that the customers don’t actually enjoy the gamification aspects of coupons, but they are financially motivated to seek out the coupons for discounts. The CX team believes that customers share coupon codes online because they see such behavior as that of “consumer advocates” and “white knights.” By showing others the work-around they figured out, these individuals can share this expertise and feel like their efforts help others.

Use and enjoyment are conflated in this situation, and the marketing team is attributing use of coupon codes to something customers find to be positive and enjoyable. CX test findings about attitudes toward those coupon codes indicates that customers search for and use the codes because they find the discounts to be valuable, not the process of searching for the codes. For the customers, an easy, straightforward transaction is valuable because they were able to locate the items they wanted and purchase them without difficulty. Conversely, lengthy engagement with Style Store’s website means that customers experience a more complicated transaction, they struggled to find items they want, or they must do extra work to obtain the available discounts. Long visit times on the e-commerce site do not necessarily indicate that customers are enjoying themselves and are deliberately seeking out additional ways to spend more time on the site.

The marketing team values longer engagement times because deeper engagement is correlated with higher levels of spending¹¹ and marketing's success within the organization can be measured by increased revenue. Longer interaction with the site is classified as "engagement" which has positive outcomes including converting website visitors who may have navigated to the website intending only to browse or seek preliminary information into making a purchase. Those revenue data points don't tell the full story, however, and customers staying on the site for lengthier visits may not reflect customer perceptions of the value of that experience, or their opinions of the interaction. In short, spending longer amounts of time to complete a transaction doesn't indicate that the user considers that time to be well spent.

The CX professionals understand their team's organizational role at Style Store as one of customer advocacy, and want to deliver an interaction experience that the customers would find valuable and worthwhile. The CX team's approach to evaluating and measuring the customer-retailer relationship is more holistic and complex than using such data points as spending and coupon code use frequencies. The CX team's goal is to create experiences that build longer-term, positive relationships with customers, and these relationships are built on factors such as perceptions of value, quality, and ease of use, that are less easily quantified than revenue, and take longer to measure. If the decision was up to Travis and the CX team, they would create the easiest checkout process possible and eliminate coupons. Coupons were a successful tactic in the past, so the Style Store leadership considers them to remain valuable.

¹¹ Conversion rates refer to the percentage of website visitors who make a purchase (or fulfill another end-goal such as filling out a form).

Finding 3: UX Findings and Practices Conflict with Perceptions of Organizational Identity

Travis found that his higher-ranking colleagues resisted the team's findings when the research indicated a misalignment between Style Store's corporate identity goals and customer preferences. Style Store's corporate mission includes a statement about industry leadership and the organization strongly identifies as a technology-forward enterprise. Travis and his CX colleagues find that the organization privileges technology in the approaches to work. They also realize that their superiors are receptive to proposals to acquire new technologies and tools for the team's work and that the organization is among the early adopters of emerging technologies. When the data points in an opposite direction, the findings are met with much less enthusiasm.

The Style Store CX team found their superiors resistant to UX research that indicated customers prefer to receive printed materials from the organization instead of digital communication. Travis believes that this customer preference for printed advertisements and sales fliers indicated that the customer base is more traditional than initially presumed, and also perhaps represents an older demographic. The CX team attributes this preference to the Style Store brand retaining its original customers who shopped at the store in its earlier days, before its rebranding, acquisition of proprietary fashion brands, and expansion to online retail. Travis and the CX team believe that retaining these long-time customers is a positive indicator that the company has maintained long-term relationships and diverse appeal across a variety of demographic groups. Colleagues outside the UX team were less pleased to hear that any groups of customers prefer print, which signals an older demographic less likely to be interested in digital media and emerging technologies. According to Travis, the use of cutting-edge technologies is important to Style Store because it sets the company apart as an industry leader and trend-setter.

The following model provides a visual representation of the situation facing the CX team at Style Store in balancing their standpoint as advocates for customers with the standpoint of their colleagues, the internal client stakeholders for whom the team is conducting research. The stakeholder’s influence and the CX team’s UX perspective simultaneously exert pressure on the research activities, pushing the direction of the project arrow off its direct course toward access to the necessary elements for UX research. Figure 4.3 shows the UX project and the impact of the internal client stakeholders in Style Store.

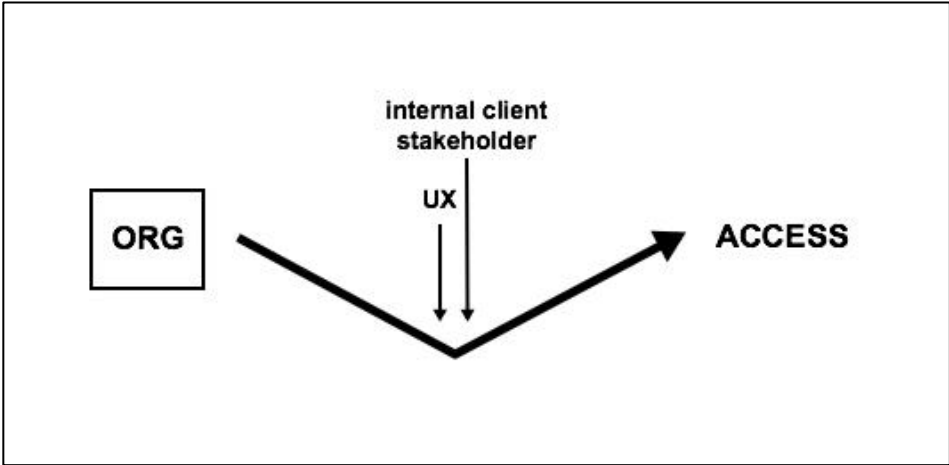


Figure 4.3: Style Store UX-Stakeholder Influence Model

As demonstrated in the previous models, the way the organization (“ORG” in the box) identifies itself determines the organizational norms and overarching goals. This standpoint influences the approach to research. Both the UX professionals (CX at Style Store) and their colleagues (the stakeholders who are also clients for the UX research at Style Store) are shown with arrows at the same point in the project to indicate that both groups exert influence and the UX team attempts to balance the needs of customers with those of their colleagues and clients.

Beth, UX Professional at Technology Consulting Firm, Consulttech

Beth typically works as part of a cross-functional team at the consulting firm, assisting with projects that focus on developing custom technology applications for clients in the manufacturing and financial sectors. ConsultTech values UX work and plans projects to include it as part of the development cycle, both research for needs-assessment, and testing later in the process.

Finding 1: Limited Access to Necessary Resources

Beth has cut short her work on a project at the client's request. ConsultTech integrates UX research consistently into project workflows. This way of working is part of the firm's business proposition to clients as a worthwhile approach to project planning because research informs project planning, which improves the quality of outcomes. ConsultTech even explains to clients that UX will be part of the work. In spite of these explanations, and midway through the research phase of a project, a client requested that ConsultTech "stop doing research" and apply the remaining funds allocated to UX research to the software design phase instead. As Beth understood the situation, the client didn't really understand the integrated nature of the activities and processes that were involved in UX research, but just saw hours allocated to activities. The client presumed that a very limited amount of research would suffice and that more research would essentially duplicate efforts. Rather than waste funds on unnecessary research, those project hours would be better spent on software development, something that the client recognized as having immediate value, and believed to be a more significant and important part of the project. Beth stopped her research as requested, and as a result, the incomplete research wasn't useful to the project.

The presumption that research is unnecessary and only tenuously connected to the direction of the project and design decisions led the client to question ConsultTech’s project management choices. Because the client did not acknowledge the integrated nature of the UX research in the workflow at ConsultTech, the client believed that eliminating “extra” research dollars was actually a benefit because it would presumably save money and reallocate personnel hours to activities believed to be more valuable. In reality, the abrupt end to UX research meant that the expected workflow process would need to be amended to comply with the client’s wishes. Beth and the rest of the project team weren’t able to use much of the partial research effectively, which altered some of the ways the team intended to work.

Finding 2: Project Ownership Defines Goals, Outcomes

In comparison, a client of Beth’s organization initially objected to two common UX practices – iterative¹² UX research and testing with actual end-users. The client, an agriculture-industry commodities website, was confident that the background information provided to ConsultTech would be more than sufficient for the project – to develop a mobile application for the website which displays commodities prices like a stock ticker.

The first group of UX research participants were power users¹³ and customers whom the client knew well. According to Beth, relying on these voices would skew the site toward a segment of the user population and provide an inaccurate picture of the total user population. Based on knowledge of these specific customers, the client believed that users accessed the

¹² Iterative testing is a cyclical testing and refinement process: creating a prototype, testing the prototype, refining, then re-testing the adjustments to ensure they solve the problem

¹³ Power users are experienced users of a technology who regularly use the advanced features and capabilities that average users may not use such as customization options or shortcuts. Thus, a power-user’s interaction with a technology might be quite different from that of a more typical user.

commodities website from computer desktops, and that the users treated visiting the commodities website like managing personal finances – using the site at regular intervals, checking for specific things, paying attention, and reading carefully. Research revealed that some users did interact with the site that way, but that other users behaved differently. Other groups of users visited the site randomly, not on a set schedule, they used smartphones not desktops to view the site, and they usually consumed information from the site while engaged in another task, or while waiting to do something else.

Observations and discussions with users helped to dispel the incorrect perception of users as a homogenous group, revealing that the ways they interacted with the site and consumed data from it required changes to better accommodate the real needs of users. (The client responded by adding voice recordings of commodities prices and trend reports so users can safely listen while driving or operating farm machinery.)

Finding 3: UX Findings and Practices Conflict with Perceptions of Organizational Identity

In another project, for her own organization, Beth used her rhetorical awareness of alignment with the organization's ideals and image to advocate for improvements to ConsultTech's corporate website. She presented her idea to revise the website by pointing out that the consulting firm's value proposition frames quality research and design as an investment. However, those statements about investing in quality rang hollow if the website delivering that message had outdated design and poor navigation. Beth felt that website visitors would conclude that the consulting firm didn't invest in itself. The argument worked and Beth's project proposal was approved.

The following model provides a visual representation of the influence stakeholders exert on the workflow at ConsultTech. Here, UX professionals approach research on behalf of their clients, so the clients' requests are prioritized. If UX research is supposed to be conducted in the spirit of advocacy for the users, this work is conducted at the behest of the client. The UX team must persuade the client to attend to those matters. Figure 4.4 shows the UX project and the impact of stakeholders in this workplace.

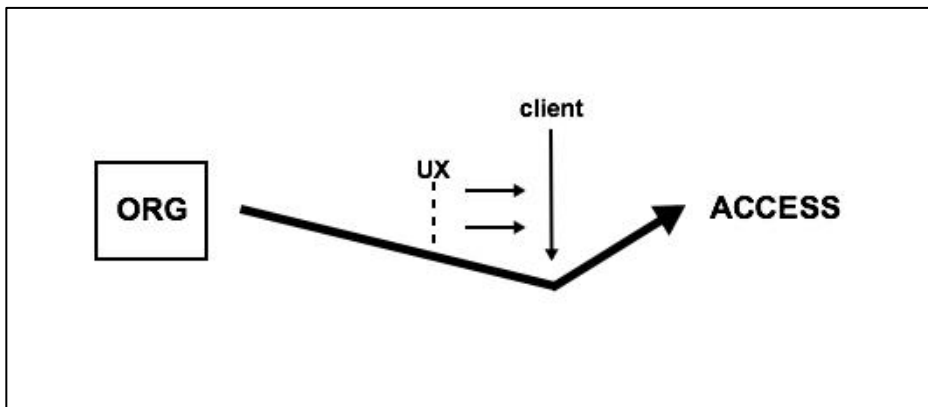


Figure 4.4: ConsultTech UX-Stakeholder Influence Model

As in the previous models, the way the organization (“ORG” in the box) identifies itself determines the organizational norms and overarching goals. This constitutes a standpoint that influences the approach to research. Here, the standpoint is that ConsultTech employees work on behalf of clients, proceeding through the steps of the workflow process according to the client’s instruction and authorization. In the model, the project follows the progress of the arrow from left to right, ending at access to the necessary elements for UX research. In a ConsultTech client project, any influence UX professionals have over the process must be facilitated through the client, so the UX impact is shown here as a dotted line without an arrow, but with arrows pointing at the client’s influence, indicating the way UX practitioners must persuade clients to approve UX activities that will benefit the end users.

CONCLUSION

The UX professionals in this study found their work constrained by the wishes and expectations of others with claims on projects. For UX professionals who worked on cross-functional teams, and who conducted UX research on behalf of other departments, those influential others included colleagues in their own organizations. These colleagues and clients may or may not fully understand or appreciate the ways that UX research is intended to work (i.e., as an iterative process, prioritizing user needs and goals over business goals) and thus, may continue to advocate for approaches that impede UX processes. The participants in this study found their client relationships (both internal clients in other departments and external clients) problematic for conducting thorough UX work. For example, in pursuit of managing costs or managing the organization's reputation with outsiders, these clients made demands of the UX professionals that effectively limited access to the resources necessary to conduct thorough research, or marginalized less-favorable findings.

Issues of Access Reflect Misunderstanding of UX

The experiences of the study participants indicate that limited access to resources such as time, users, and personnel to conduct UX research stems from misunderstanding UX as a research methodology. The compounded effect of misunderstanding the methods of UX research activities, the goals for conducting UX research in a specific way (as an integrated project management process, rather than as a post-development quality-assurance measure), and the resources and contacts necessary to produce useful and relevant data can lead to decisions that dilute the research. Limited time means that the team is less likely to understand the problem,

and will perhaps even be encouraged to skip steps in the process or otherwise further economize. If the UX team must rely on others' translations of user needs, and if those needs are also filtered through a communication professional who is cognizant of the benefit of maintaining the organization's positive image, it can be difficult if not impossible to understand the nature of the technology problem. Misunderstanding the UX process does not necessarily result from prioritizing a quick response to customer needs. Rather, the misunderstanding can be seen as connected to the organizational structure, and specifically to which work group "owns" the project to which the UX work contributes.

Project Ownership Influences Research Goals, Criteria, and Interpretation of Data

All of the participants in this study operated, at least at times, as an internal service bureau, doing UX work for other departments in the organization. When contributing to projects they didn't "own," the UX professionals had limited autonomy over their research. In these scenarios where the UX professional or UX department acted as a service bureau, another department would enlist the UX team to conduct research that the department identified as necessary to essentially become clients of their UX-team colleagues. The other department, as internal clients, maintained control over the design decisions of the UX project and determined what should be researched, which influenced which data would be collected, and what broad goals would shape the research. Such projects do not necessarily function to discover the needs and goals of the end-users, but do balance user needs with those of the internal clients.

Non-ownership of a UX project set up a rhetorical imbalance between the UX researchers and project stakeholders. This arrangement constrains UX research by elevating the project

owners' perspectives instead of prioritizing the interaction between the user and the technology based on meeting the users' goals and needs.

UX is not fully employed as an integrated workflow process in projects where UX professionals are marginalized (or altogether absent) during the planning and development processes and throughout the development cycle. During such projects, the UX team is limited to conducting an evaluation late in the development process, and thus, the team is also restricted in what data can be delivered. Instead of being a means of workflow management that integrates quality control into the development and refinement process, UX is reduced to a minimum of surface-level, after-the-fact check boxes. While not every project reduces UX activities significantly in all aspects, it begs the question what relevant data can be drawn from an evaluation that does not prioritize the actual users of the technology and acknowledge their goals for using the technology, relevant contexts for use, or confirmation that adjustments truly did resolve the problems for users.

Findings in Alignment with Organizational Identity Suggest Connections to Risk Tolerance

This study indicated that UX findings that aligned with the organization's self-image were more readily accepted than findings that challenged organizational identity. The degree of autonomy afforded to UX professionals to control the direction of their research suggests a connection to the tolerance for taking risks at the organization.

Participants in this study characterized their organizations as somewhat risk averse, and this perspective can partially explain the late addition of UX to product development cycles, and to limiting access to actual technology users who should be involved in the development processes. The degree to which a project owner or champion is willing to invest resources, to

expend internal goodwill, or call in favors, and essentially gamble on results that might bring valuable knowledge, but not necessarily the specific results that the project owner hoped for may be connected with the tolerance for risk in the organization.

Notably, the standpoint of caution can conflict directly with UX research practices that cede some control over elements of the project. These research practices that involve valuing the authentic experiences of actual users are necessary for the in-depth, holistic approach that lets UX research produce the most effective results that serve the needs of users, rather than the needs of internal stakeholders. UX professionals face challenges in securing the internal goodwill necessary for their colleagues to accept UX research findings that may not align with the project champion's goals and hypothesis. The participants in this study experienced rhetorical challenges when research findings challenged the established perceptions of organizational identity.

Chapter 5 will address the theoretical implications of the findings addressed in this chapter, including the outcomes of inconsistent UX practices in industry, and the impact of context on the UX research, participants in research, and stakeholder influences on workplace activities, values, and norms.

CHAPTER 5: THEORETICAL FINDINGS AND IMPLICATIONS

In Chapter 4, I outlined the ways in which the four UX professionals in this study face challenges in their workplaces that impede their ability to conduct UX research that will improve the quality of outcomes with respect to users' needs and goals. Regardless of whether the participants in this study were employed at a UX-receptive or UX-reluctant site, they all struggled with UX research in their respective organizations based on specific cultural or contextual priorities and tolerances, or on perspectives and orientations of those organizations that limit access, determine project ownership and strengthen organizational identity. As the previous chapter illustrated, all the participants faced challenges with 1) limited access to the necessary resources to conduct research, 2) project ownership and its influence over the goals and direction of the UX research, and 3) acceptance of UX findings that challenged or conflicted with aspects of the organization's identity. In this chapter, I discuss and further analyze the findings outlined in Chapter 4 concerning each case, focusing on theoretical implications. This chapter will also draw connections between individual cases.

Before addressing the theoretical implications of this study's findings, I provide a brief overview of key standpoints on which my hypothesis about challenges facing UX professionals and organizations that include UX in their development processes are based. Broadly, UX research is widely valued, but UX work is inconsistently practiced and UX roles are inconsistently defined; that inconsistency and variety in approach is problematic.

FOUNDATIONAL PREMISES

UX research is widely understood to be a workplace approach to improving the quality of texts and technologies that an organization creates in pursuit of its business goals (e.g., Barnum, 2002, Barnum 2010; Johnson, 1998; Cooper, 2004;). The UX professionals in my study understand their respective organizational roles as advocates for users. They strive to employ the UX methods and practices to deliver outcomes that improve the experience for people who use the resulting texts and technologies.

Organizations, too, recognize the importance of a user's experience with goods and services, and there is evidence of increasing interest in UX. Prominent UX leader and researcher Jakob Nielsen estimates that the industry will continue to grow, globally, from a current estimate of one million practitioners to 100 million by 2050 (Nielsen, 2017). However, in his 100-year-overview of UX, Nielsen also underscores an important point: there is no consensus across this growing industry about what a UX job is (ibid.) Nielsen states that in the Nielsen-Norman Group's 2014 survey of UX professionals, 1,045 people responding to the survey held 210 different job titles (Nielsen and Farrell, 2014), highlighting the significant variety that exists across the field. Organizations demonstrate strong interest in UX, as evidenced by the growth in the industry and the diversity of job titles.

Notably, if strong interest isn't a guarantee of consistency across industries, it isn't a guarantee of quality in outcomes, either. Simply adding a UX professional to a work team, or labeling some activities in the development process as "UX" is not a guarantee of high-quality outcomes, nor of delivering effective, usable research. In fact, even in organizations that profess to value UX research and include UX methods and practices in project workflows, my study participants have experienced workplace constraints that impede their work as UX practitioners.

Workplace conditions such as client relationships, project ownership, norms of organizational cultures, and misunderstanding of how UX methods and practices work may actually prevent UX work from being effectively conducted or implemented, despite the best efforts and intentions.

To focus on uncovering how an organization's culture and context influence UX work, my study examines the experiences of four UX professionals who do UX research as part of their jobs. The participants work in a variety of industries, organizational settings, and sizes of organizations, and in their respective roles, UX research is intended to contribute to the quality of each organization's end product. (In other words, none of the organizations in this study sell UX research expertise as the end product. Rather, UX work contributes to the quality of goods or services the organization produces.)

In addition to telling the stories of these UX professionals at work and analyzing these experiences, I provide a rhetorical analysis of each organization's website with a focus on how the organization characterizes quality. This approach provides a window into how the organization wishes to be understood by key audience groups, and this public-facing communication offers insight into the organization's self-identity. (Since extensive rhetorical analyses are found in Chapter 3, I use brief summaries of the participants' rhetorical situations here.)

Organizational identity can influence the corporate culture and overarching organizational norms (i.e., Balmer, 2014; Cornelissen, Christensen, and Kinuthia, 2012; Cornelissen, Haslam, and Balmer, 2007;). Academic research in management and marketing makes distinctions between organizational identity and corporate identity. For example, Joep P. Cornelissen, S. Alexander Haslam, and John M. T. Balmer (2007) find that organizational identity tends to address patterns of shared meaning, while corporate identity research is product-

and image-focused. Among their observations, these scholars note that corporate identity is positive and fluid, forms the basis for shared perceptions and actions, strategically created and managed, and connected with material outcomes and products.

If organizations strategically create and manage their identity online, then we may analyze a corporate website to better understand what that identity is, and how audiences are meant to regard the organization. It follows that the way the organization describes itself and the way that quality is described and characterized on the organization's website aligns with preferences or predispositions toward ways of working and approaches to quality.

It is my hypothesis, however, that some of these preferences and organizational norms do not align well with UX methods and practices. In fact, some organizational norms and shared perceptions actually impede UX methods and practices and prevent UX professionals from fully executing their research, applying findings, and delivering quality for end-users. If UX research is constrained or marginalized, conducted without adequate resources, or ineffectively applied, its potential to improve experiences for users cannot be realized. Despite labels, an organization practicing UX with these unhelpful constraints fails to make improvements to benefit users. That constrained UX research becomes performative and serves only to make audiences inside the organization believe that quality benchmarks are being met.

How Findings Address the Research Question

I believed when I began this research that UX professionals were facing constraints imposed on them by their own workplaces and the rhetorical situations inside their organizations. I intended to find out what those constraints might be and where they might arise in the UX

process. I believed that if we could understand what conditions caused UX work to be sidelined, marginalized, or otherwise constrained, the TC field might be better able to help UX professionals understand what to look for to identify these constraints and how to remove or work around them.

I originally designed this study to address a different research question. As I disclosed in earlier discussions about how I planned and conducted the study, I initially presumed that knowledge of UX research and experience with conducting UX work were the catalysts for the employees' understanding of how projects are planned, workflows are negotiated, and how quality is perceived and achieved. As I continued to analyze the feedback from the participants, and investigate organizational culture, I came to understand the situation differently.

Organizational culture wielded a much stronger influence over employees than I anticipated. The mere inclusion of usability research activities as part of the workflow was not as influential in shaping the way people worked as I had presumed it would be. Rather, people adapted to the rhetorical situations imposed on them by their workplaces and the organization's cultural norms and they worked UX methods and practices into those organizational constraints.

My (revised) central research question is: **How does an organization's definition of quality and its approach to achieving quality shape the organization's approach to using usability testing as a quality-assurance workplace practice?**

I understand the context for my investigation as connected to overlapping and interconnected issues: Briefly, effective UX research is dependent on specific, essential components that are necessary for the UX research process to work as advertised. Those components must be enacted in an environment where people understand how the process works, and what conditions are vital to successfully conduct that work. Without ample resources, time,

or with too many constraints and modifications to the process, UX research is limited to a performative process unable to deliver effective, usable results.

Theoretical Standpoints Central to this Study

First, I see usability testing framed as a means to achieve quality outcomes in the workplace. This presumes that usability testing is being conducted in ways that enable the tests to evaluate the appropriate criteria. Several key ingredients are necessary. These components include 1) access to the right group of representative users for the text or technology in question, 2) the time and personnel resources to fully enact a testing process where needs assessment, prototyping, testing, adjustment of the prototype and verification that the adjustment actually fixed the problem can take place, and the 3) support of other colleagues who understand that the goal of the UX process is the same end-goal as the organization – a high-quality end-product. If those ingredients are missing or substituted, the process isn't really UX anymore, it's something else. Perhaps it's user-acceptance testing (evaluating whether the product is merely acceptable, not truly effective) or internal verification (no representative users were consulted about the adjustments to the product; product developers asked UX professionals to ensure that features performed as the developers specified they would).

Second, investigating my research question emphasizes the importance of an organization's shared understanding of quality. Specifically, that processes should prioritize the standpoint of the text's or technology's end users, and that user-centered quality is not in competition with business-focused goals; such competing definitions of quality set internal and external stakeholder groups against each other, to the detriment of users. In an organization with commercial goals, initiatives and employees connected to financial gain are likely to receive

priority and gain organizational approval. Conversely, if UX is presumed to interfere with financial gain because it is perceived to add cost or delay, other approaches are likely to gain approval instead. Thus, user needs will be marginalized while business goals will be prioritized. Significantly, if the only needs that matter when an organization develops a product or service are financial and business goals, and if the real people who use these products and services are never more than an abstraction, UX work is no longer a means of user advocacy; it becomes dishonest and truly a waste of time and resources.

Third, if the quality in question is holistic quality, then outcomes are context-based, rather than process-dependent. Creating a process intended to generate quality, and then defining quality as ‘an item created through this quality-producing process’ amounts to circular logic. A corrupted, incomplete, or poorly-executed process cannot produce quality outcomes, so the ingredients necessary for meeting user-centered priorities must be present and included to achieve holistic, user-centered quality.

Responding to my research question also meant understanding the setting in which UX research is conducted. The situation in which quality is meant to be produced matters, and myriad factors can interfere with the ingredients for holistic, user-centered, high-quality outcomes. Some of these are a matter of the workplace context itself.

User Needs as Multi-Faceted, Responses as Rhetorical

Quality is complex, and depends on deep understanding of user needs – both their needs to use the text or technology and their needs to build and sustain workable, positive relationships with key communicators within the organization. When UX is perceived as an isolated production process, disconnected from other systems and relationships, the organization can

easily overlook necessary elements of the process, and the conditions that exert pressures on key stakeholder groups. For example, if participating in UX research appears to the organization's customer as a potential hazard to maintaining a strong, positive relationship with a customer service representative, the customer is unlikely to do anything that might damage a currently-positive relationship. To appear "helpful" and yet maintain that working relationship, the customer may reply to the UX inquiry, but provide only surface-level or cautious responses, avoiding too much detail, or downplaying anything potentially negative. Such feedback might not appear helpful to the UX team, but this approach may seem like the best course of action to the customer who must continue to work with the service rep.

Infinite variables can affect the UX research process. The dynamics of a wide variety of professional relationships have the capacity to influence UX research. These relationships are not limited to the relationships between UX professionals and their colleagues and the audience groups associated with the UX research initiative. In fact, the influence of professional relationships extends beyond the context for testing. Business and organizational goals, relationships between individual employees within a given organization or a work team, between an organization and its clients or customers, and conditions throughout the industry or business sector are just a few of the circumstances that may affect goals, strategies, and tactics. All of these factors influence how individuals communicate, organize their priorities and goals, and approach their work. All of that comes to bear on a UX research initiative. To make UX researchers more effective, we must understand the wider workplace and industry contexts within which UX research is planned, produced, and consumed.

These previously unacknowledged factors associated with the workplace and professional organizational relationships affect the work that can be conducted, and limitations on the

research and its applications. The rhetorical situation facing participants in UX research and the communication and relationship-maintenance goals of these people influence their responses to UX research.

IMPLICATIONS FOR TECHNICAL COMMUNICATION THEORY

The rhetorical situation significantly influences the agency of UX professionals within their workplace and this finding constitutes new knowledge that the TC academic field should pursue further. UX professionals experienced limited agency to advocate for users or involve users. Workplace behavioral norms demanded some degree of deference to important groups of workplace superiors, clients, customers, and other colleagues. This cultural expectation elevated those important groups and prioritized their needs ahead of users, and the UX professionals (who view their role as “user advocate”) had to negotiate between accommodating the preferred groups and meeting user needs. These findings suggest that we must better understand workplace conditions under which rhetorical agency and user advocacy are constrained.

UNDERSTANDING THE INTERSECTION OF QUALITY AND UX AT THE SITES OF RESEARCH

To deepen and broaden the TC field’s understanding of how UX works within and against organizational constraints, I use a higher level of rhetorical analysis in this chapter to explain and discuss the primary findings of the research sites (outlined in Chapter 3). I explain the criteria I find most promising for understanding holistic quality – the framework Smart, Seawright, and DeTienne introduce to describe quality offers helpful vocabulary for identifying where quality is located, rhetorically. I apply their vocabulary to my analysis of the study

participants' workplace situations when I discuss quality in the two UX-reluctant organizations, Goods Plus, and Midcity University, first, and the UX-receptive organizations, Style Store, and ConsultTech, second. In these discussions, I identify the type of quality demonstrated on each organization's website, along with the audiences each website appears to be addressing. This application and explanation contributes additional depth and breadth to the TC field's understanding of how context influences workplace practices. I also explain the way each research participant understands quality and how each participant's UX work is constrained or enabled within the workplace setting, including the influence of the organization and project stakeholders on the UX research. In doing so I provide a model for each organization that illustrates how stakeholder concerns (other than the end-users) shape UX practice.

Smart, Seawright and DeTienne's (1995) model for defining quality in the workplace (Figure 1.1) presents the most relevant vocabulary for identifying and describing the connections between contextual quality and the value propositions of UX.

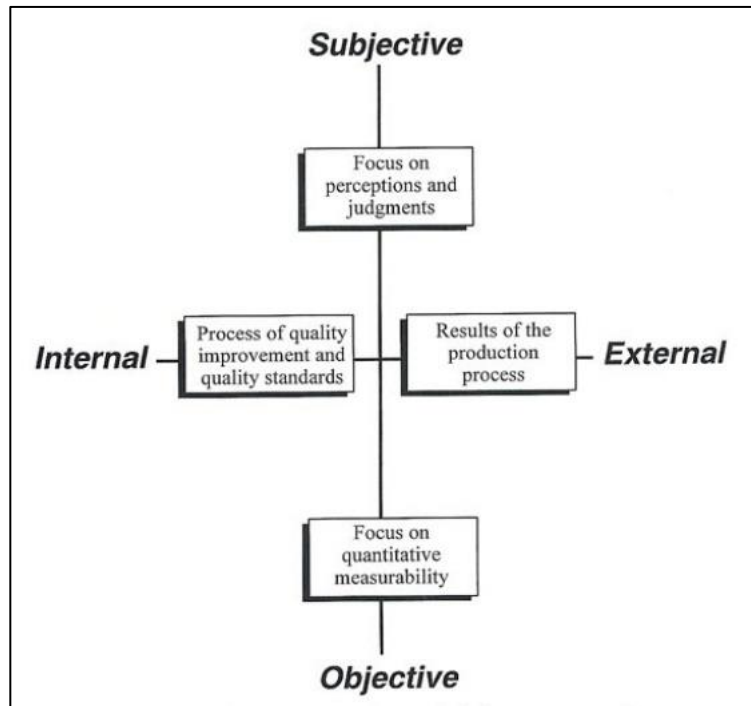


Figure 1.1: Smart, Seawright and DeTienne’s two-dimensional quality model

As Chapter 1 details, the authors propose that TCs use a holistic approach that identifies four points at which quality is assessed: internal, external, subjective, and objective factors. In their model, *Internal* factors are connected to the process of quality improvement and quality standards within the organization. *External* factors focus on the results of the production process and the end product, after it leaves the organization. *Subjective* factors focus on peoples’ perceptions and judgments of the product in question, while *objective* factors focus on aspects of the product which can be quantitatively measured using tools and a repeatable process (475). In my study, the organizations demonstrated some of these factors, but not all four.

Workplace norms and organizational identities favor certain approaches, practices, and predispositions over other ways of working. UX methods and practices sometimes align well

with these approaches, but other times, UX practitioners may find themselves working with a narrowly-focused approach to quality that prioritizes evaluating isolated attributes of quality, but not holistic, overall outcomes. As a result of this misalignment, the UX professionals in this study find themselves struggling against workplace practices that constrain UX research, marginalize the findings, and fall short of delivering high-quality outcomes that meet user needs.

To understand the approaches to quality at the sites of research, I apply Smart, Seawright, and DeTienne's model to a rhetorical analysis of each organization's website and I identify the primary audience groups to whom the website appears to speak. I will begin with the UX-reluctant workplaces (Goods Plus and Midcity University) and conclude with the UX-receptive workplaces (Style Store and ConsultTech).

Approaches to Quality at UX-Reluctant Workplaces

Both of the UX-reluctant workplaces (organizations at which UX research is considered valuable, but not necessarily included in all project workflows) in this study demonstrate external and subjective quality on their respective websites. Testimonials are a key feature of both websites and these opinions deliver important messages about the organization to its audiences. This section will begin with a discussion of Goods Plus and UX specialist, Matt, and it will conclude with a discussion of Midcity University and IT professional, Kyle.

Quality for Goods Plus: External, Subjective

The healthcare procurement and facilities-management firm Goods Plus uses external and subjective quality on its website. External quality is characterized by outcomes, or results-focused attributes that are located outside the organization, and subjective qualities are those

drawn from peoples' perceptions and judgments about the organization. The Goods Plus website addresses two primary audiences: potential customers and potential employees. The website focuses on quality in the form of a positive experience with Goods Plus and its products and services, emphasizing the way current employees feel about their jobs at the organization, and the way the primary business of the organization serves a more socially significant purpose than simple commerce.

Text on the Goods Plus website emphasizes the organization's advocacy for seniors, both formal advocacy through lobbying for legislation and policies that serve the needs of older Americans, and informal, small, daily actions that benefit the lives of the residents of care facilities. The testimonials from current Goods Plus employees speak positively about working at Goods Plus because of the sense of shared values across the organization. The statements also comment on the organizational commitment to work that serves to benefit the well-being of others in society.

In this website text, the external and subjective factors of quality are closely connected. The opinions featured on the website are those of employees who are speaking about the societal impact of the work they do at Goods Plus. The employees' perceptions are subjective because their statements express belief that their work is providing benefit. Those benefits are not quantified or measured, but rather, express a strong sense that Goods Plus delivers positive outcomes. The website appeals to potential customers (who wish to provide positive benefits to the residents of the care facilities they manage) and potential employees (who presumably share the values of the current Goods Plus employees and wish to work in a similar organization where the work serves to benefit others.)

To Matt, UX strategist at Goods Plus, quality means usable, useful, desirable, credible, accessible, findable, and valuable, echoing the user-experience honeycomb infographic by Peter Morville (2014). In a typical Goods Plus workflow, the team uses direct requests from clients or other project stakeholders to set up guidelines for the project. UX needs-assessment practices are not consistently used on all projects to gather data. Goods Plus doesn't currently have a standardized check list for quality and the team does not conduct testing post-development, but instead conducts verification checks. As an example, sales managers pass on feedback about projects to Matt after project completion such as, "I talked to Company A, and they love this thing."

The external and subjective quality at Goods Plus aligns with the organization's prioritization of customer perceptions and judgments. The organizational norm to favor activities that clearly communicate responsive action to fulfill customer requests leads the organization to simply comply with requests, and to rely on the customer's subjective understanding that quality has been delivered because their request was met. This approach to quality benefits individual customers who have the ear of decision-makers such as project managers and business unit directors who have the ability to control projects. However, customers who have less political capital are marginalized in this process, and because these voices are less likely to be heard, requests from some customers are less likely to be met with the same attentiveness as larger, more important customers.

In the stakeholder influence model for Goods Plus (discussed in detail in Chapter 4), the project leaders wield significant influence (on customers' behalf) and this influence shapes the way that projects are managed and which priorities will be addressed in the project. In this model, the most significant challenge Matt faces as a UX professional at Goods Plus is reflected

in a scenario in which the project is planned without his team's involvement. The broken progress arrow in Figure 4.1 shows the significant influence of an internal stakeholder (here, the project manager) severing the progress line. The UX involvement comes late in the process.

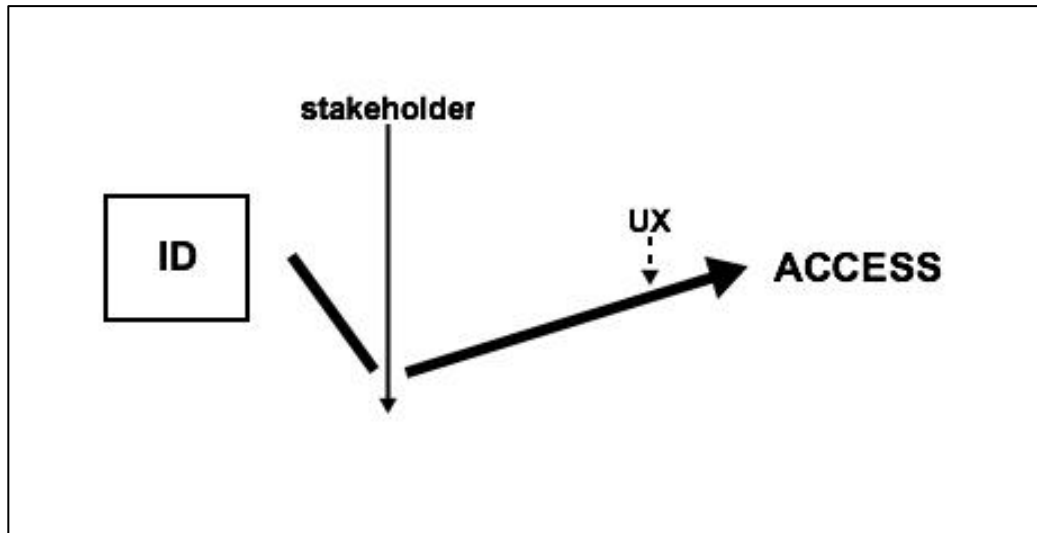


Figure 4.1: Goods Plus UX-Stakeholder Influence Model

The organization's standpoint and identity emphasize externally-focused quality, which aligns with prioritizing customer requests for specific features and improvements. This approach to quality may become problematic for individual employees, however. Goods Plus prioritizes a sense of shared values among employees, and this characterization of Goods Plus as a positive and desirable work environment may appear at odds if employees feel that they have limited agency to enact positive changes and have their work valued. A workflow process that includes limited UX research as brief needs assessments, or verifications only after development processes are completed may communicate that UX holds little value in the organization, and that other perspectives are favored.

Quality for Midcity University: External, Subjective

Midcity University's website exhibits externally-defined, but primarily subjective quality. Outcome-based external quality is evident in the ways the website characterizes the educational experience at Midcity University. The website text focuses on the outcomes of individual students and graduates of the institution. These opinions are located outside the organization and are based on the value each individual perceives to have gained through this education. Quantitative elements, including numbers of students, academic programs, athletic teams, and research opportunities, serve to support the subjective qualities expressed in the featured students' and graduates' perceptions and judgments. The Midcity University website addresses primarily prospective students, and secondarily, the wider community. The website text focuses on quality in the form of characterizing the university education as a positive experience, evidenced by the impact that students and graduates of the institution have made in their respective fields.

Text on the Midcity University website points to the university's Carnegie Classification of Institutions of Higher Education R1, but it is significant that the emphasis on this designation is of secondary importance when discussing research at the institution according to the website. The R1 designation is based on quantifiable and external factors that would qualify as objective, according to Smart, Seawright, and DeTienne, but the opinions of individual students who have had positive experiences conducting research at the institution are emphasized instead. The testimonials from these students and graduates speak positively about the access to research opportunities and other educational benefits, rather than to the R1 label.

In this website text, the numbers quantifying statistical data, for example, of student organizations, sports teams, and academic programs speak to the process-oriented aspects of the

university. These statistics provide support for how the university might create that positive experience described in the student testimonial statements. Thus, the internal (organizational processes and structures to deliver the educational experience) and external (results of that education) factors support each other, though the external factors are emphasized. Similarly, the objective (statistical data) elements are subordinated to the subjective factors (student testimonials), but are still present, creating an interconnected picture of quality.

The opinions featured on the website are those of students and graduates who point out particular elements of the university experience as support for why Midcity University was a good choice for them. These individuals' statements are subjective because they express personal opinions rather than discuss factors that could be quantified or measured. The website appeals to prospective students (who are presumably seeking a similar experience with individual, internally-meaningful benefits.)

For Kyle, quality would be determined by a set of consistent attributes and metrics that a project team could use to measure the outcomes of their work. Consistent processes for planning and completing projects would also feature into his sense of quality. The absence of process consistency and established metrics have been a source of frustration for Kyle, compounded by the ad hoc nature of the project teams. The same individuals may not work together consistently, so even establishing consistent standards across the team members is challenging.

The subjective quality that is present across the Midcity University website aligns with the emphasis on stakeholder perspectives that Kyle described in this study. He recalls a project in which the needs assessment phase of a database redesign project was made increasingly complicated by the addition of stakeholders with increasing levels of influence at the university. The project got increasingly more difficult to negotiate, because stakeholders with increasing

degrees of organizational clout became involved, and each time, the project team felt compelled to react with deference to their position and extreme caution toward any questions these new stakeholders raised. The external factors of quality at Midcity University expressed in the website text aimed at prospective students aligns with the reverence the project team demonstrated in accommodating the individual concerns voiced by high-ranking stakeholder groups, but Kyle's characterization of the UX project's original mission aligns more closely with internal quality.

In Smart, Seawright and DeTienne's model, internal quality is focused on processes within the organization that are intended to result in quality if those processes are followed. This definition aligns with Kyle's preferences for a consistent set of metrics for projects, and a repeatable process to follow. The stakeholders' concerns about Kyle's project and the database-user survey his team wanted to conduct during the needs assessment phase suggest that the stakeholders understood quality in terms of what external audiences might think. Perhaps their concern was tied to the possibility that asking about university employees' use of data could reflect poorly or raise concern about privacy and data security if outside audiences were to learn about the original, lengthier survey effort.

In the stakeholder influence model for Midcity University, (detailed in Chapter 4), the project team has limited autonomy and access to resources due to increasing numbers of stakeholders exerting influence during project planning and development. Figure 4.2 shows the UX project and the impact of multiple internal stakeholders on the project workflow, ("stakeholder 1," "stakeholder 2," and "stakeholder 3" in the model).

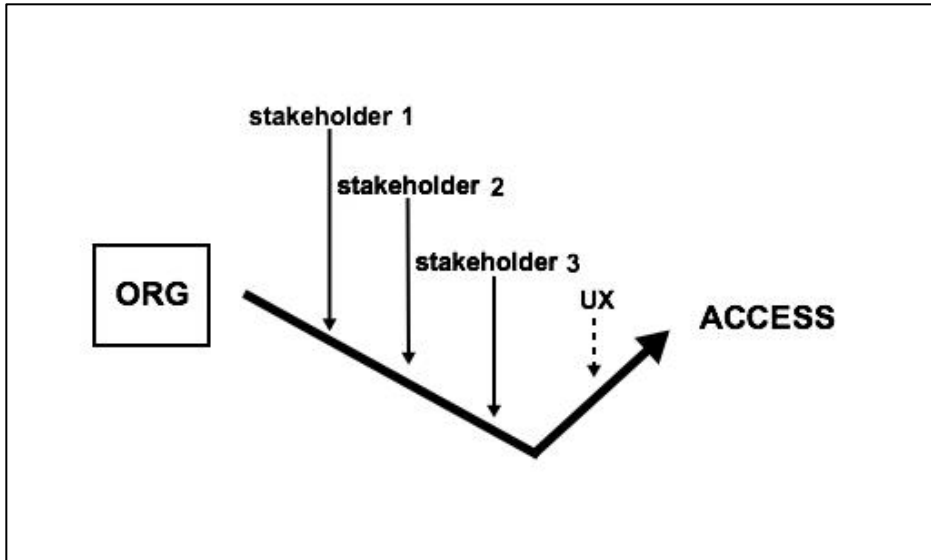


Figure 4.2: Midcity University UX-Stakeholder Influence Model

The multiple project stakeholders are represented by longer impact arrows pushing the project away from its initial goals. UX involvement is diminished, shown by the short, dotted line, after the distortion by the three stakeholders.

Midcity University's characterization of itself focuses on the individual, subjective understanding of quality as interpreted by the opinions of students and alumni. The quantitative support provided by the statistics about numbers of students, clubs, research opportunities and the like provide a counterpoint to the subjective testimonials. The influence of stakeholders pushed the project away from its original mission, limiting influence and access for UX, and limiting the agency of the project team. A limited UX workflow process without necessary metrics for assessment contributes to a sense that the team is dependent on the good opinion of others to validate their work, similar to the emphasis on student opinions demonstrated in the website text. The absence of the consistent metrics and processes diminish the agency for the project team members to effectively work toward quality and to advocate for their own work

without first seeking approval from higher-ranking others who may or may not understand the workplace processes and practices of UX research.

Approaches to Quality at UX-Receptive Workplaces

Both of the UX-receptive workplaces (organizations at which UX research is highly valued and consistently included in project workflows) in this study demonstrate less in common than the UX-reluctant organizations. Consulting firm, ConsultTech, employs internal and subjective quality while clothing and home-goods retailer, Style Store, features external and objective quality. Testimonials play a key role for Style Store's message to audiences. ConsultTech's website focuses on the organization's workflow process and other ways of working and interacting with industry audiences and clients. This section will begin with a discussion of Style Store and CX researcher Travis, and it will conclude with a discussion of ConsultTech and UX professional, Beth.

Quality for Style Store: External, Objective

The retail organization, Style Store, uses external and objective quality on its website. (While the website serves an important e-commerce function in support of the brick-and-mortar retail stores, analysis in this study focuses on the website's other rhetorical work communicating information about the organization itself.) External quality is characterized by outcomes, or results-focused attributes that are located outside the organization, and the objective qualities are those drawn from factors about the organization that can be quantitatively measured. In its corporate section, the Style Store website addresses two primary audiences: investors and potential employees. The website emphasizes its potential value to investors in terms of the

organization's strategic plan, expressing the corporation's aspirations to be the best in delivering product, value, customer experience, personalization and employee teams.

Text in the corporate responsibility section of the website emphasizes corporate giving and establishes rhetorical connections between customer service and community service. Employee volunteer hours, service events and corporate grants to nonprofit organizations are quantified. The website text shifts the responsibility for verifying the recipients of corporate donations to an outside organization that facilitates corporate giving called Benevity. Nonprofits must register with Benevity, and this relationship functions as an external approval process.

Employee testimonials from current and former Style Store employees are featured in excerpts from company reviews they provided to the employment website Glassdoor. Both positive and negative reviews demonstrate trustworthiness and the authenticity of the reviews. The reviews are a clear example of subjective opinion, but the use of scores and ratings calculated by Glassdoor align with Smart, Seawright, and DeTienne's classification of objective quality and the external and subjective factors of quality are closely connected.

The employee testimonials featured on the website speak to aspects of the organizational culture at Style Store and the relationships individual employees have with the organization as a whole. (These testimonials are discussed in Chapter 4. Briefly, the testimonials feature employees who have experienced positive, affirming relationships with an aspect of the Style Store organization. One received disaster assistance after a storm, one experienced a health scare and took steps toward better wellness using the Style Store fitness program and inspired colleagues to follow suit. Another group of employees helped a customer acquire a special piece of no-longer-in-stock jewelry to which she had an emotional connection.) The featured employees emphasized emotional and personal connections to the larger Style Store organization

and to the familial type of care the organization demonstrated toward them. The employees' subjective perceptions describe interactions that made them feel that their work provided value to others, or that the Style Store organization demonstrated a degree of care for the individual through specific actions such as disaster relief assistance after a hurricane. Those benefits are not precisely quantified or measured across all the statements, but they provide evidence of positive interaction between the individual and the organization.

Travis and his colleagues in the Style Store customer experience (CX) department consider themselves customer advocates, a significant distinction because they understand this role to be in contrast with those that other work groups play in projects. Quality is based on establishing a long-term relationship with clients, and delivering an interaction that meets customer needs and can be assessed according to a set of metrics that account for the complexities of the customer relationship, such as perception and value. The organization currently lacks such a measurement system and CX team members struggle to interpret their work through a purely numeric or financial lens in line with the straightforward way that sales figures can be quantified. Travis and his CX colleagues are focused on longer-term goals such as customer retention, while other departments such as marketing are more deeply invested in short term goals, such as monthly gross margins. To focus on quantitative data, the CX team is gathering long-term data they can use to assess the spending of long-term customers and make a business case for investing in technology experiences that influence customer loyalty. The team believes they can prove that long-term, loyal customers are more financially valuable to Style Store than one-off purchases tied to specific, individual promotions. The team is also working to develop a measurement scale for determining success across projects. Travis describes the experience-based categories as 'how satisfied,' 'how likely are you to do something,' as difficult

to measure quickly, unlike tabulating sales that applied a particular online coupon code. Even defining loyalty is contentious, and Travis explains that his team remains undecided if “loyalty” is best measured by spending alone, or frequency of purchases, or both.

The external and objective quality reflected in the Style Store website emphasizes the opinions of groups outside the organization, and is determined by quantitative measurement. The listing of memberships in industry groups, the emphasis on the score for the job-market website Glassdoor, and the quantities of hours volunteered and funds donated to charities, all align with those attributes of quality. The UX methods and practices that the CX team struggles to communicate to their colleagues do not easily fit into the same categories, so this friction is likely to cause frustration at best. The CX team fears that others in the organization may dismiss UX methods and findings because they don’t adhere to the metrics used elsewhere in the organization to assess projects.

In the stakeholder influence model for Style Store (detailed in Chapter 4) the CX team’s primary challenge is in negotiating between the CX team’s standpoint (including how to assess and measure their work) as advocates for customers, and the standpoint of their colleagues, the stakeholders for whom the team is conducting research. Figure 4.3 shows the UX project and the impact of stakeholders in this workplace.

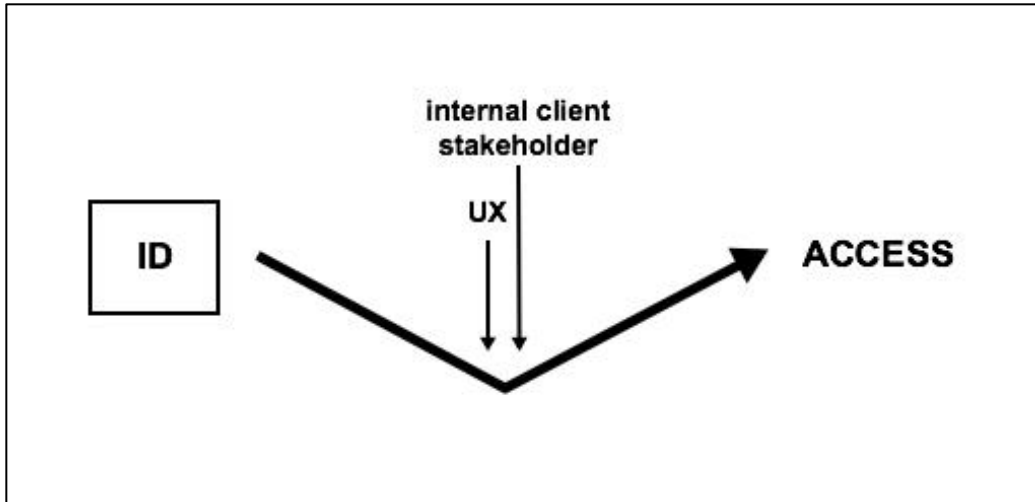


Figure 4.3: Style Store UX-Stakeholder Influence Model

Style Store’s internal workflow processes place the CX team in the position of serving internal clients, other departments who need UX research for projects. This relationship prioritizes the metrics and standpoints of the team who has requested the research, while UX methods and practices necessarily prioritize the needs of the users. This conflict is expressed in the model where both the UX team and their internal clients influence the project at the same point, determining the organizational norms and overarching goals, which influence the approach to research. The CX team attempts to balance the needs of Style Store’s customers with those of their colleagues who are internal clients for their UX research.

The reality of external and objective quality at Style Store is at odds with the way the CX team understands their own research and benchmarks for quality of users’ experiences. Their research may be readily accepted when it conforms to the way the organization wants to be perceived, or when the research otherwise aligns with hypothesis about what the research will say. However, it is likely that when UX research challenges these perceptions, the use of

different metrics in the CX team's work than in other groups at Style Store may help diminish internal credibility for UX research that delivers negative news.

Quality for ConsultTech: Internal, Subjective

The website of technology consulting firm, ConsultTech, focuses on external and subjective quality. Internal quality is characterized by process-oriented actions within the organization, and subjective qualities are those drawn from peoples' perceptions and judgments about the organization. The ConsultTech website addresses two primary audiences: potential customers and potential employees. The website focuses on quality in the form of outlining the formal process the firm follows in conducting their working relationships with clients. Text describes the steps taken, and the benefits and outcomes of particular capabilities including custom cloud-based technology applications and assisting clients with emerging technologies. In addressing prospective employees, the text again emphasizes the existing norms at ConsultTech, including the organization's approach to specific benefits such as industry-education opportunities, organizational culture, and career mentoring.

Text on the ConsultTech website emphasizes subjective quality through the use of casual business expressions and metaphors which function to express an intuitive and shared understanding of the outcomes of the business activities. The expressions call to mind military combat and wilderness survival, in the abstract. The use of these statements doesn't presume that the reader actually has experienced warfare or extreme outdoor activities, but that these reference points suggest a certain approach to work that the reader would recognize as valuable.

In this website text, the process-oriented emphasis and the implication of subjective aspects of quality that the reader should interpret from reading about the processes and goals of

ConsultTech's work are strongly connected and interdependent. The perceptions of employees and testimonials of clients are hinted at, but are not explicitly present in the text. Quantified outcomes are also absent, but several statistics are provided for such data as number of projects, years in business, volunteer hours, and sponsored events. The website appeals to potential customers (who wish to gain the benefits of solving unspecified technology problems) and potential employees (who presumably wish to work in an organization that provides opportunities for professional development, mentorship and the type of work environment described by the metaphors and casual expressions.)

To Beth, quality is client-based, and she emphasizes that 'no complaints' is a standard goal across ConsultTech indicating good-quality products and services. (A formal process for determining whether clients are satisfied or merely remaining silent is absent from the explanations of the workflow, however.) On the ConsultTech website, quality is characterized as process-driven and little emphasis is given to the precise outcomes of these projects, but instead, on the perspectives of the clients who choose to work with ConsultTech. The acronym-heavy text, combined with the use of metaphors and expressions alluding to conflict and challenges, suggest a select audience is the group really being addressed. Knowledge of the abbreviations and interpretation of the abstract language suggest that a reader belongs, and therefore his or her opinion carries weight.

The emphasis on the subjective quality prioritizes the opinions of others (here, clients). In such a workplace, prioritizing the client's perspective has the potential to subordinate the agency of individual employees if a client wishes to override what is established practice. However, the emphasis on internal dimensions of quality also appears to challenge this characterization. If producing quality work at ConsultTech means following an established set of processes and

steps designed to achieve a good-quality outcome, deferring to client wishes would interfere with the process and potentially, the outcome.

The UX professionals at ConsultTech approach their research on behalf of their clients, and this prioritization is described in the stakeholder influence model for ConsultTech (detailed in Chapter 4). Whereas UX research is intended to prioritize the needs of users, work in this organization is conducted at the behest of the client. The UX team must persuade the client to accept a process of working and the outcomes of that research that address user needs. Figure 4.4 shows the UX project and the impact of stakeholders in this workplace.

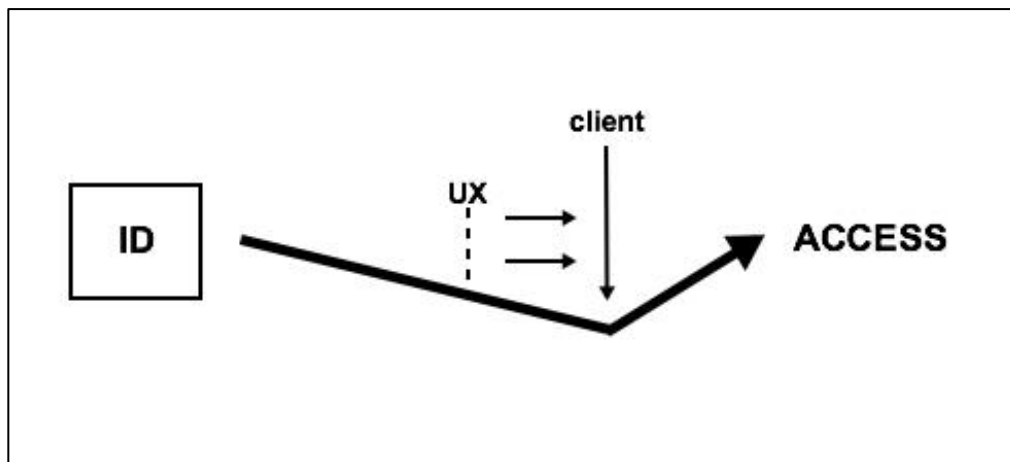


Figure 4.4: ConsultTech UX-Stakeholder Influence Model

Here, the influence of UX must be conducted through the client, so the UX impact is shown here as a dotted line without an arrow influencing the path of the project, but with arrows pointing at the client's influence, indicating the way UX practitioners must persuade clients to approve UX activities that will benefit the end users. The internal attributes of quality that are emphasized in the website text can be potentially disrupted by prioritizing subjective elements, client perspectives and opinions of quality.

CONCLUSIONS AND SUMMARY

UX research is approached in systematic ways that align with high-quality, objective research methodology. While the practices and standpoints involved in designing and facilitating research may be straightforward and objective, the context in which participants engage with UX research may be more complex. Interconnected workplace relationships and strategic communication practices overshadow exchanges between individuals who juggle multiple rhetorical goals, maintain face in professional settings and otherwise negotiate among priorities. Despite hearing “we’re testing the product, not you” from the UX professional facilitating a test, participating in UX research may appear to have consequences. The rhetorical situation of participating in research is largely unacknowledged. Failure to acknowledge the influence of organizational culture and workplace norms, and the delicate negotiation of priorities that may be taking place when participants respond to UX research, means that we overlook another way that UX research may be distorted and thus, less effective.

The UX professionals in this study experienced limited agency over their UX research and they needed to adapt to these constraints in order to accomplish some of their goals for research. The participants all struggled at times to make their UX research valuable to important groups within and outside of their organizations. UX professionals were not consistently included in planning projects and in making contributions to the needs assessment, project development, testing, and follow-up, rather, they may only be included to facilitate verification activities at the end of the development cycle, too late to exert influence over the course of action. In these situations where UX is limited and constrained, the workflow process demonstrates a standpoint that values other perspectives over UX and positions UX as bringing comparatively little value to the organization and its work.

The UX professionals in this study did not function as fully independent researchers and they conducted research on behalf of internal and external clients. At times, these project owners determined what should be tested, which audience groups could be included in testing, and how data from testing should be interpreted. This scenario shifts the emphasis of UX research to maintaining the goodwill of specific important people to grant approval for the work, and to validate it, rather than emphasizing the data from the research and its impact on users. Further, the deference to internal project owners and important colleagues shifts the research to focus on achieving business goals rather than on attending to user needs and goals.

Influential external relationships, such as those with financially-important clients also shaped the direction of projects. This approach to customer-focused quality benefits customers with more financial clout, but it marginalizes those with smaller budgets who represent lower levels of revenue for the organization. The needs of these less important clients are unlikely to receive much attention.

The emphasis on the rhetorical situation as described by Lloyd Bitzer (1968) is apt here to also describe UX research. Bitzer states that many scholars ignore the rhetorical situation (2) in favor of other preoccupations, addressing instead matters of process, the nature of the discourse, the interaction between the parties among other matters. These other questions give way to discussions of methods, application, and move away from an important constituent part of the communicative exchange – the situation from which that exchange arises. Analysis of UX that focuses similarly on only the methods and application takes the participant's responses out of context and presumes a fictional set of circumstances as the context for the research. This abstraction removes specific kinds of agency from the participant.

Bitzer establishes criteria for situational rhetoric, and several points are helpful for understanding what ought to be acknowledged when discussing and analyzing UX research. Among those characteristics for what Bitzer means by the rhetorical situation are: A) Rhetorical discourse is discourse that responds to the situation, B) that response is significant because it responds to this situation and exigency, C) rhetorical discourse alters reality with its participation – it effects change, D) the discourse is rhetorical because someone said it in order to provide an appropriate response to a communicative situation (6).

Participants in UX research should be acknowledged as responding rhetorically when they provide data in UX research contexts. Their responses to inquiries arise from a specific situation or exigency for testing a document or device to which they have some sort of relevant connection. The participant's response is significant because it is solicited by the UX professional for the purpose of evaluating a document or device. The response will be considered valuable and likely a source of actionable data, and the UX professional conducting the test will react to the participant's statements both during testing activities, and afterward. In taking part in the testing, the participant responds to prompts, knowing that responses are intended to be collected, recorded, and analyzed. This knowledge and situational awareness suggests that the participant is likely to craft the responses for the situation, at least to a degree.

By omitting the rhetorical situation from considerations and examinations of UX research contexts, the TC field presumes that testing takes place in a more sterile communicative environment than perhaps is accurate. The focus on objectivity in testing concentrates on the standpoint of the UX researcher, but does not fully address the possibility that the participants may also bring a particular standpoint or concerns with them into the testing environment and those factors may influence responses to the testing activities, even unintentionally. Bitzer's

classifications highlight several unacknowledged contextual factors influencing the exchange of information between participant and researcher during a UX test, and this serves as a reminder that the TC field can deepen our understanding of how to better interpret and analyze these complex interactions, and that more research toward greater depth and breadth is needed.

In Chapter 6, I address implications of these findings for professional practice, TC pedagogy, and potential for future research.

CHAPTER 6: IMPLICATIONS FOR PRACTICE, PEDAGOGY AND FUTURE RESEARCH

In Chapter 5, I discussed theoretical implications of my study's findings. The UX professionals in my study each experienced limited agency over their UX methods and practices despite the disposition of their respective organizations toward UX research. All the participants in this study struggle at times to make their UX research valuable to key groups within and outside their organizations. UX professionals struggle to become included in projects and to make contributions to the needs assessment, project development, product testing, and follow-up activities in order to ensure that these activities address the needs and goals of users. Rather, UX professionals may be constrained or marginalized, and their involvement may be limited to verification activities at the end of the development cycle, which is too late in the process to influence the course of action. In these workflows with limited UX, other standpoints, values, and perspectives are clearly favored over UX methods and practices, and UX is framed as bringing little value to the organization and its work. Users, therefore, are also diminished in value.

The UX professionals in this study did not work as independent researchers. Rather, they conducted research on behalf of other internal and external groups who maintained some form of ownership of the research initiative. When these project owners were colleagues from other departments at the organization, they acted as internal clients for the UX professionals in this study, contracting with the UX team to conduct research. This project ownership shifted the relationship from one of relative equality between colleagues to that of superior and subordinate, with the UX professionals in a role of reduced agency, dependent on the authority of the project

owners for permission to conduct research. The project owners' authority also shifts the emphasis of the UX work away from striving to meet the needs and goals of users, to that of maintaining the goodwill of specific, important people to grant approval for the UX work and validate it. Thus, emphasis shifts away from the UX research data and its impact on users and toward internal project owners and their business goals.

External relationships with clients and customers also shaped the UX research and the direction of projects. Customer-focused quality emphasizes an organization's relationships with financially-significant clients over their relationships with clients who purchase smaller quantities of the organization's products and services. Customers who spend more are likely to receive more attention from the organization while the needs of clients with smaller budgets may be overlooked.

In this final chapter, I address the implications of these findings for UX practice and pedagogy. The knowledge generated in this study can also help emerging UX and TC professionals prepare for their future careers, and I address implications for teaching UX in greater depth and breadth in university TC programs. In this section of the chapter, I call for TC programs to help students develop a sense of organizational literacy. I see organizational literacy as a complex understanding of the rhetorical situations, affordances, and constraints facing a UX professional within the workplace as well as within the industry, and the community. I conclude by addressing implications for UX practice and offer strategic approaches for practicing UX professionals. This study may be considered a starting point for an area of research focused on better understanding the complexities of organizational cultures and the way UX work is conducted, understood, and applied, and so I also address opportunities for future research in this area.

IMPLICATIONS FOR UX PRACTITIONERS

Regardless of where they work, UX practitioners are likely to confront challenges in their workplaces. UX professionals may very well enter into well-meaning organizations that have high hopes for the benefits of UX research and the impact it may have on their outcomes. These organizations believe that because they've hired a talented UX professional and added a UX role to the development team, good things will happen. But in practice, UX research may still be undervalued, misunderstood, and undermined in subtle, but still damaging ways that limit the UX professional's agency, and the capacity for UX research to influence product development processes and outcomes. This study indicated that UX professionals can take steps to regain agency and make their research more successful and impactful within their organizations. Three key takeaways for UX professionals focused on observation, networking, and alignment are outlined below.

Identify the Organizational Values and Power Structures

UX professionals should become students of their own organizations and those of their clients, as well. Deep knowledge about the powerful groups, individuals, and value systems that wield influence is an essential foundation for the following pieces of advice. Essentially, it's crucial that a UX professional understands her organization as a cohesive whole with a set of shared behaviors and common language, rather than understanding an organization as simply a collection of individuals. Being part of an organization influences the way that employees take action and make decisions, and how they make connections and form logics that explain what they have experienced. Those shared behavioral norms and common language are essential to

sense making (how people in the organization explain and justify decisions). For example, Travis describes his employer, Style Store, as a risk-averse organization. Employees at Style Store understand risk aversion as a positive trait because this disposition is believed to have helped the retail firm survive the recession of 2009. Therefore, approaches that Style Store is likely to perceive as risky are less likely to be valued or implemented if more conservative and cautious alternatives are possible.

Make Connections that Get UX in the Room

Networking within one's own organization is also beneficial to raising awareness of UX among colleagues, and a UX professional's observation of the workplace would help her develop strategic connections with project stakeholders and internal leaders. She should get to know these colleagues and their current and upcoming projects. When UX research would benefit these colleagues and their projects, the UX professional could offer to help with research, and explain the specific outcomes UX research could deliver for that project. It's not a time to be humble, but the UX professional should take care in crafting and delivering this message to avoid sounding presumptuous, demanding, or making unrealistic promises.

Align UX Research with Organizational Goals

UX research offers significantly more to organizations than user-acceptance testing and late-stage verification, but unless a UX professional is prepared to tell that story in a way that is meaningful to her organization, UX research won't be fully appreciated for its potential benefits. By understanding how the project leader's work is evaluated, and what priorities influence the decision-making in a particular work group, the UX professional can better craft her message

about how UX can deliver useful, valuable data to inform that work. It is important to note the difference between performing UX work that focuses on business needs and goals only, and carefully framing a pro-UX argument to make the business case for satisfying user needs using UX research methods and practices.

In summary, UX professionals need to develop the rhetorical savvy to help them understand UX research and its implications for a variety of stakeholder groups, and they need to be prepared to advocate not only for users, but also for themselves and their own value. The TC academic community can and should help emerging professionals build these competencies and I address implications for teaching technical communication in the next section.

IMPLICATIONS FOR TEACHING TECHNICAL COMMUNICATION

Based on the findings in this study, UX professionals will face situations in their workplaces that require them to work within and against constraints imposed on them by their own organizations. Producing high-quality UX work and ensuring that the findings are applied effectively will require that emerging UX professionals not only acquire knowledge of effective UX methods and practices, but also knowledge of their organizations' power structures, preferences, norms, and cultural contexts. This awareness of organizational standpoints and how they shape the way others in the organization approach problems and decision-making will be important to helping formulate strategies to advocate for users, and for UX work. Therefore, I recommend that TC programs help students to strengthen their rhetorical awareness and develop a sense of what I am calling *organizational literacy*.

Develop Students' Sense of Organizational Literacy

I see organizational literacy as the awareness of not only one's own role in a work group and how individual skill sets can make positive, productive contributions, but awareness that extends into the organization, the industry, and the wider community. Developing organizational literacy depends on helping students strengthen their understanding of 1) their own rhetorical situations, 2) those of their colleagues, and 3) the organizations and business systems that give rise to those rhetorical situations.

Kelli Cargile Cook's (2002) article, "Layered Literacies" identified six broad areas in which emerging professionals must develop skills and competencies to prepare for the technical communication workplace. Basic, rhetorical, social, technological, ethical, and critical literacies, as Cargile Cook defines them, are focused on the application of these skills throughout the curriculum, rather than isolating each skill and addressing it separately. Cargile Cook's contributions makes a strong case for the complex and integrated nature of several skill sets relevant to the evolving technical communication workplace. I see that UX work may also require specific attention to the way organizations themselves operate, and the way they fit into the larger business sector and community.

The addition of organizational literacy to Cargile Cook's list of competencies builds on this foundation and broad knowledge areas, specifically, rhetorical literacy, and critical literacy. Rhetorical literacy, according to Cargile Cook, encompasses identifying, selecting and applying strategies to specific conditions imposed by the audience, context, and purpose relevant to the communicative situation (10). Critical literacy is "the ability to recognize and consider ideological stances and power structures and the willingness to take action to assist those in

need,” (17). I see this combination of observation and discernment which Cargile Cook defines as separate from organizational literacy, but an important foundation for it.

The technical communication field should define organizational literacy as the ability to understand roles, priorities, and relationships within a team, an organization, and a business sector, as well as across each of those boundaries, and how those relationships influence what may be communicated, what is likely to be valued, and how competing priorities are likely to be ranked across each of those relationships. This specific approach to rhetorical awareness, applied critically to the organization and the relationships of people within the group and outside of it, would help students begin to understand the underlying and perhaps unacknowledged motivations that drive decision making. Knowing what priorities are most important to key decision makers – and why those priorities are important – can help UX professionals advocate for their own work and advocate for users more effectively, by helping them align the goals of UX research with organizational and individual priorities and values. This study indicates that UX professionals must employ a strategic rhetorical approach in talking about their work and its value, and that some organizational roles, such as engineering, production, or development roles, are automatically afforded a degree of organizational preference that other roles do not receive. Roles such as technical communication and UX are believed to be valuable, but because they focus on researching and refining, these jobs are perceived as perhaps less essential than production-focused roles and tasks. To counteract such misperceptions, UX professionals must also learn to advocate for themselves and their contributions, so that they can participate in product development processes and advocate for users.

Students emerge from technical communication programs with strong skills in their areas of professional specialization, but that knowledge alone is unlikely to result in successful, high-

quality outcomes that truly solve problems for end-users. Students of UX and related disciplines are likely to face workplace situations where their work is poorly understood by their colleagues and perhaps also their organizations. When the contributions of UX research are misunderstood, the emerging UX professionals can be marginalized or overlooked. If UX professionals are only minimally involved in project development planning, needs assessment, and testing cycles during development, their contributions are less likely to make the desired impact on projects, and ultimately, have less chance to benefit users. Therefore, UX professionals need to develop strong critical and analytical skills, and the organizational literacy to help them understand their rhetorical situations within their own work groups, within their organizations, and within the wider industries and communities where real people consume products associated with that UX work. To effectively conduct such analysis, students need to be able to develop strong understandings of not just their own professional specialization, but of how that discipline fits into the team, organization, industry, and community, writ large.

Rhetorical analysis skills are central to developing these areas of awareness, and students must also be encouraged to use their skills to understand their own roles and job responsibilities, and those of their colleagues. This understanding can help them learn what each of their team-members and other contributors to cross-departmental projects does, what organizational affordances and constraints influence each person's strategies and the tactics they use to meet goals, and how those goals fit into the organization as a whole will help them to understand how to approach projects and make advancements. Lloyd Bitzer's (1968) framework advocating for wider acknowledgment of the rhetorical situation and its influence on communicative exchanges offers a place to begin for instructors (regardless of their past experience in professional workplaces). I discussed earlier, in Chapter 5, the opportunities to apply Bitzer's framework to

the UX testing situation as a way to acknowledge that other exigencies and concerns may also shape the responses a study participant offers during research. Bitzer's framework can also serve as a means to begin understanding relationships and connections within and across organizational boundaries.

The TC academic field can help emerging professionals approach their work and their interactions in a way that doesn't ignore the complexities of communicating, but highlights them and helps to address the ways that routine responses are, in fact, rhetorical and are chosen with the goal of effecting change, in a specific situation, as a response to a particular utterance or exigency (Bitzer, 6).

To help students address these knowledge areas, TC instructors should also help students augment their knowledge of their own specialization with broader knowledge of the business environment and the industry or field in which their UX work will be applied. This study indicated that UX professionals may not have access to the right representative user groups and the resources necessary for the best quality UX research. Less-than-ideal resources and work conditions place limits on the scale and scope of research, but UX professionals can make the most of what tools and resources are available to them. This may mean explaining UX research in terms of financial outcomes, making a business case to argue for a specific approach, or advocating for their own value to colleagues and workplace superiors. By aligning the outcomes of UX research with the goals and approaches of other project and organizational stakeholders, the UX professional may be better able to "sell" UX and the value it contributes to the organization's products and services.

This study takes preliminary steps toward developing an understanding of organizational culture and how it influences UX work. In the next section, I briefly outline opportunities to continue with further research.

OPPORTUNITIES FOR FUTURE RESEARCH

To gain a preliminary understanding of how organizational culture and workplace conditions influence UX work, this study involved a small number of participants and focused on their own impressions of their workplaces, and the ways in which projects are planned and work is carried out. Further studies should engage in deeper analysis of some of the observations emerging from this study. I focus here on two areas of inquiry, developing a deeper understanding of the workplace cultures in specific types of workplaces, and building knowledge of how organizational identity correlates with risk tolerance and UX work.

Deeper Examination of Workplace Types

Studies that focus exclusively on specific types of workplaces, such as a study that examined several UX-receptive organizations, would help to uncover commonalities across workplaces with similar dispositions toward UX work. This narrowed focus would help to highlight and identify ways in which UX professionals in these workplace cultures rhetorically approach situations in which they must advocate for their work, the value of UX methods practices, or for meeting user needs. The theoretical frameworks and the conceptual models established as part of this study can serve as a starting point for identifying similar types of workplace dispositions toward UX work, and thus, help researchers identify sites of research that would constitute similar workplace cultures.

Organizational Identity, Risk Tolerance, and Perceptions of UX Work

Examining the strength of organizational identity as it relates to risk-taking within the organization can also offer valuable insights to the field. This study indicated that UX work may be perceived as a potentially risky approach to research. An organization may be reluctant to invite end-users' participation in the production process for numerous complex reasons beyond simply the possibility that users may deliver negative feedback or make statements critical of the organization. Other rhetorical and strategic goals may wield influence, and thus, help shape the way individuals communicate and prioritize the rhetorical options available to them. These unacknowledged concerns should be better understood, so that we can gain a fuller picture of perceived rhetorical agency.

If, for example, the organization understands itself to be constrained in some way, such as production processes or systems with limited flexibility, the organization would correspondingly also understand itself as potentially unable to make sufficiently quick, or effective changes to meet market demands or to keep pace with industry competitors. Under such circumstances, it may seem unnecessarily risky to invite anyone to consider shortcomings of the current product, service, or way of working, despite the obvious potential benefits of fixing those shortcomings. Thus, UX research, which invites outsiders to examine the company's product or service and identify problems, appears to have significant immediate drawbacks that overshadow the potential long-term gain. If the organization believes its ability to deliver an outcome that meets these newly identified problems is constrained, it may not wish to start looking for those problems at all.

Personal concerns, internal to the organization's employees may also influence their tolerance for risk-taking, and reluctance to engage with UX. This hesitation may also be connected to concerns about maintaining face. UX research is valuable because it includes and elevates voices not typically included in a traditional top-down production process. The addition of UX to the production process constitutes a disruption or alteration of the established workflow process. Disruptions, however well-intentioned, can foster a sense of uncertainty, and for employees in roles that already do not seem to be as highly valued as others in the organization, the uncertainty may lead them to react in ways that protect their own (potentially precarious) status. Because seeking the input of non-expert users appears to devalue expertise in design, development, or other steps in the production process, employees may be reluctant to seek user feedback for fear that their own value to the organization will be further minimized, or displaced by user opinions. An understanding of the organization's tolerance for risk, dispositions toward innovation, valuing contributions across departments, and similar, but unacknowledged concerns of employees may also help to identify other factors that influence the way that UX work is perceived, received, and carried out in similar organizations.

BIBLIOGRAPHY

- Andersen, R. (2007). The rhetoric of enterprise content management (ECM): Confronting the assumptions driving ECM adoption and transforming technical communication. *Technical Communication Quarterly*, 17(1), 61-87.
- Balmer, J. M. T. (2015). Corporate identity, corporate identity scholarship and Wally Olins (1930-2014). *Corporate Communications: An International Journal*, 20(1), 4-10.
- Balmer, J. M. T. & Burghausen, M. (2015). Explicating corporate heritage, corporate heritage brands and organizational heritage. *Journal of Brand Management*, 22(5), 364-384.
- Barnum, C. (2002). *Usability testing and research*. New York: Longman.
- Barnum, C. (2010). *Usability testing essentials ready, set-- test*. Burlington, MA: Morgan Kaufmann.
- Batova, T. (2014). Component Content Management and Quality of Information Products for Global Audiences: An Integrative Literature Review. *Professional Communication, IEEE Transactions on*, 57(4), 325-339.
- Brady, M., & Schreiber, J. (2013). Static to Dynamic: Professional Identity as Inventory, Invention, and Performance in Classrooms and Workplaces. *Technical Communication Quarterly*, 22(4), 343-362.
- Breuch, L., Zachry, M., & Spinuzzi, C. (2001). Usability Instruction in Technical Communication Programs: New Directions in Curriculum Development. *Journal of Business and Technical Communication*, 15(2), 223-240.
- Bitzer, L. (1968). The Rhetorical Situation. *Philosophy & Rhetoric*, 1(1), 1-14.
- Campbell, K. (2000). Research Methods Course Work for Students Specializing in Business and Technical Communication. *Journal of Business and Technical Communication*, 14(2), 223-241.
- Carliner, S. (1997). Demonstrating Effectiveness and Value: A Process for Evaluating Technical Communication Products and Services. *Technical Communication: Journal of the Society for Technical Communication*, 44(3), 252-65.
- Carliner, S. (2003). Characteristic-Based, Task-Based, and Results-Based: Three Value Systems for Assessing Professionally Produced Technical Communication Products. *Technical Communication Quarterly*, 12(1), 83-100.
- Cohen, D. J., & Crabtree, B. F. (2008). Evaluative criteria for qualitative research in health care: Controversies and recommendations. *Annals of Family Medicine*, 6(4), 331-9.

- Cook, K. C. (2002). Layered Literacies: A Theoretical Frame for Technical Communication Pedagogy. *Technical Communication Quarterly*, 11(1), 5-29.
- Cooper, A. (2004). *The inmates are running the asylum*. Indianapolis, IN: Sams.
- Cornelissen, J., Thøger Christensen, L., & Kinuthia, K. (2012). Corporate brands and identity: Developing stronger theory and a call for shifting the debate. *European Journal of Marketing*, 46(7/8), 1093-1102.
- Cornelissen, J., Haslam, S., & Balmer, J. (2007). Social Identity, Organizational Identity and Corporate Identity: Towards an Integrated Understanding of Processes, Patternings and Products. *British Journal of Management*, 18(S1), S1.
- Cuppan, G., & Bernhardt, S. (2012). Missed Opportunities in the Review and Revision of Clinical Study Reports. *Journal of Business and Technical Communication*, 26(2), 131-170.
- Dicks, R. (2002). Mis-usability: On the uses and misuses of usability testing. *Proceedings of the 20th Annual International Conference on Computer Documentation*, 26-30.
- Dilger, B. (2006) "Extreme usability and technical communication." In J. B. Scott, B. Longo, & K. V. Wills, (Eds.) *Critical power tools: Technical communication and cultural studies*. (47-69). Albany: SUNY Press.
- Domingo, M., (October 9, 2018) How to advocate and evangelize user experience. Retrieved from <https://www.interaction-design.org/literature/article/how-to-advocate-and-evangelize-user-experience?>
- Farrell, S. & Nielsen, J. (2014) User experience careers: How to become a UX pro, and how to hire one. Retrieved from <https://www.nngroup.com/reports/user-experience-careers/>
- Duska, R. (2014). Why Business Ethics Needs Rhetoric: An Aristotelian Perspective. *Business Ethics Quarterly*, 24(1), 119-134.
- Elling, S., Lentz, L., & Jong, M. (2012). Users' Abilities to Review Web Site Pages. *Journal of Business and Technical Communication*, 26(2), 171-201.
- Geertz, C. (1973). *The interpretation of cultures: Selected essays*. New York: Basic Books.
- Gelinas, Jr., U., Rama, D., & Skelton, T. (1997). Selection of Technical Communication Concepts for Integration into an Accounting Information Systems Course: A WAC Case Study. *Technical Communication Quarterly*, 6(4), 381-402.
- Halpern, J. W. (1988). Getting in deep: Using qualitative research in business and technical communication. *Journal of Business and Technical Communication*, 2(2), 22-43.

- Hatch, M. (1993). The dynamics of organizational culture. *Academy of Management. The Academy of Management Review*, 18(4), 657.
- Jameson, D. (2013). New Options for Usability Testing Projects in Business Communication Courses. *Business Communication Quarterly*, 76(4), 397-411.
- Johnson, R. R. (1998) User-centered technology: A rhetorical theory for computers and other mundane artifacts. Albany: SUNY Press.
- Johnson, R. R. (2010) The ubiquity paradox: further thinking on the concept of user centeredness. *Technical Communication Quarterly* 19.4): 335-351.
- Johnson-Eilola, J. (1996). Relocating the Value of Work: Technical Communication in a Post-Industrial Age. *Technical Communication Quarterly*, 5(3), 245-270.
- Kansagra, A. P., Liu, K., & Yu, J. J., (2016). Disruption of Radiologist Workflow. *Current Problems in Diagnostic Radiology*, 45(2), 101-106.
- Kim, L., Young, A., Neimeyer, R., Baker, J., & Barfield, R. (2008). Keeping Users at the Center: Developing a Multimedia Interface for Informed Consent. *Technical Communication Quarterly*, 17(3), 335-357.
- Kwon, B., & Farndale, E. "Employee voice viewed through a cross-cultural lens." *Human Resource Management Review* (2018).
- McBride, Michael. (2012). Create EHR workflows that increase productivity: Technology can disrupt practices, but you can take steps to minimize its impact and prepare for the future. *Medical Economics*, 89(16), 43-4, 49.
- Morville, P. (June 21, 2004) User experience design. Retrieved from http://semanticstudios.com/user_experience_design/
- Nielsen, J. (December 24, 2017) A 100-year view of user experience. Retrieved from <https://www.nngroup.com/articles/100-years-ux->
- Norman, D. A. (2013) The design of everyday things: Revised and expanded edition. New York: Basic Books.
- Pacanowsky, M., Arsht, S., Mackey, A., Baxter, B. K., Banks, L., Henage, R. T., ..., Scott, A., (2017). Employee voice: Foundation to the scaffolding of CHG Healthcare's culture journey: Foundation to the scaffolding of CHG Healthcare's culture journey. *Organizational Dynamics*.
- Rice-Bailey, T. (2016). The Role and Value of Technical Communicators: Technical Communicators and Subject Matter Experts Weigh In. *Technical Communication Quarterly*, 25(4), 230-243.

- Rice-Bailey, T. (2014). *Identity, Value, and Power: A Qualitative Study of the Complexity of the Working Relationship between Technical Communicators and Subject Matter Experts*, (Doctoral dissertation) ProQuest Dissertations and Theses.
- Seawright, K. W., & Young, S. T. (1996) A quality definition continuum. *Interfaces* 26.3 (107-113).
- Schneider, S. (2005). Usable Pedagogies: Usability, Rhetoric, and Sociocultural Pedagogy in the Technical Writing Classroom. *Technical Communication Quarterly*, 14(4), 447-467.
- Schreiber, J. (2013). *Scientific management systems as enframing or empowering: How Lean and Six Sigma define technical communication*, (Doctoral dissertation) ProQuest Dissertations and Theses.
- Smart, K. L., Seawright, K. K., & DeTienne, K. B. (1995). Defining Quality in Technical Communication: A Holistic Approach. *Technical Communication: Journal of the Society for Technical Communication*, 42(3), 474-81.
- Spilka, R., & Sullivan, P., (2011) Qualitative research in technical communication: Issues of value, identity, and use. In Conklin, J., & Hayhoe, G. F. (Eds.) *Qualitative research in technical communication*. Routledge, (15-38). New York: Routledge/Taylor and Francis Group.
- Tomlin, R. (2008). Online FDA Regulations: Implications for Medical Writers. *Technical Communication Quarterly*, 17(3), 289-310.
- Yin, R. (2009). *Case study research: Design and methods* (Fourth ed., Applied social research methods series; v. 5). Los Angeles: Sage Publications.

APPENDIX: INTERVIEW QUESTIONS

FIRST MEETING -- INTERVIEW QUESTIONS: Technical Communicators/UX Professionals

- 1) How long have you worked in this organization and in this role? What kind of background/education/prior, relevant experience do you bring to this job/role?
- 2) How would you describe the workplace culture of this organization? (e.g. flat organizational structure, hierarchical structure, organized into client-service teams, organized by role/job titles, etc.?)
- 3) What is your role at the organization? How are work groups set up? Who do you work with on your projects, in terms of professional/project-based roles?
- 4) How do projects get planned and completed – can you describe the process? How do teams manage a project workflow? (e.g. Agile, scrum, Lean, Six Sigma, UX? How/why are these practices used in this organization?)
- 5) What are the goals/activities/missions of your business unit? How do these activities fit into the larger organizational structure? What factors drive the decision-makers? Who are the primary stakeholders (internal and external) for your team’s projects/contributions to the organization?
- 6) How is quality defined in your team or work group? in the organization, generally? How is quality evaluated? (e.g. what criteria or data helps determine this value?) Who decides what determines quality? How does your group/department (and you individually) contribute to quality? How do you know when you have produced something of quality? What metrics are used to evaluate processes and products?

FOLLOW-UP QUESTIONS: Technical Communicators/UX Professionals

- 1) Since we last met, what general activities related to the project have taken place?
- 2) What important conversations, actions, and decisions related to the project did you record (e.g., in a project log or other notes)

KIMBERLY S. BAKER

CURRICULUM VITA

EDUCATION:

PhD in English, University of Wisconsin-Milwaukee, Milwaukee, Wis. Dec. 2018
Professional Writing specialization; Rhetoric and Composition emphasis

Dissertation: “Usability Testing as Organizational Ethos Focused on Quality: Case Studies of Workplace Cultures”

Committee: Rachel Spilka, PhD., chair; David Clark, PhD., Shevaun Watson, PhD., Sarah Freeman, PhD., Tammy Rice-Bailey, PhD.

MA in English, University of Wisconsin-Milwaukee, Milwaukee, Wis. May 2012
Professional Writing specialization

Thesis: “Client and Classroom: Navigating Among Multiple, Competing Audiences”

BA in Communication, Marquette University, Milwaukee, Wis. May 2001
Major: Advertising, Minor: English

PEER-REVIEWED PUBLICATIONS:

- Rice-Bailey, T. and **Baker, K.** “Introducing a Writing Coach into an MBA Course: Perspectives of Students and Coaches” *Journal of Technical Writing and Communication*, DOI: 10.1177/0047281616667676
 - Baker, K. “Immigrants, Foodways and Assimilation: The Settlement Cookbook’s Dual Audiences and Roles,” in *Women’s Ways of Making*, Rose, S. and Goggin, M. eds., *manuscript accepted*
-

NATIONAL/INTERNATIONAL CONFERENCE PRESENTATIONS:

- “Usability Testing as Organizational Ethos Focused on Quality: Case Studies of Workplace Cultures” Association of Business Communicators International Conference (ABC), Oct. 2016, Albuquerque, N.M.
- “Boxed Cake Mix and a Fully Stocked Kitchen: Usability Research Projects Can Help Ease the Classroom-Workplace Transition” Conference on College Composition and Communication (CCCC), Apr. 2016, Houston, Texas

- “Immigrants, Foodways, and Assimilation: The Settlement Cookbook’s Dual Audiences and Roles”
Feminisms and Rhetorics 2015 Conference – Women’s Ways of Making, Oct. 2015, Tempe, Ariz.
- “Usability Research as Tool to Ease Transition from Classroom to Workplace”
Council of Programs in Technical and Scientific Communication Annual Meeting (CPTSC), Oct. 2015, Logan, Utah

REGIONAL CONFERENCE PRESENTATIONS:

- “Audiences Invoked, Imagined & Ignored: The Readers and Roles of *The Settlement Cookbook*”
Marquette University-UW-Milwaukee Humanities Conference, Apr. 2016, Milwaukee, Wis.
- **Baker, K.**, McCormick, L., Singl, L., Williams, C. “Rethinking Our Strategies for Retention: Multiple Means of Engagement in First-Year Composition”
UW-Milwaukee English Department Composition Forum, Apr. 2013, Milwaukee, Wis.
- “Another Audience in the Classroom: Toward Greater Relevance for English 101”
UW-Milwaukee-Marquette University Composition Instructor Conference, Dec. 2012, Milwaukee, Wis.

INVITED PRESENTATIONS:

- Rice-Bailey, T. & **Baker, K.**, “Facilitating Student Collaboration: Instructors Using Improvisation in the University Classroom,”
Milwaukee School of Engineering Protracted Leave Grant Recipients Forum
Milwaukee, Wis. Sept. 2018
- **Baker, K.**, Dugan, J., Sova, D., Sova, R. “Usability Researchers Panel”
mkeUX (user experience professional organization)
Milwaukee, Wis. Sept., 2015
- Baker, K., “Workplace Communication: Strategies and Best Practices”
Business Practicum course (Greg Smith, instructor)
MS in Management Program, UW-Milwaukee Lubar School of Business Mar., 2015
- **Baker, K.** and Ebert, J. “Usability Testing: Overview and Case Studies”
Project Management course (Rachel Spilka, PhD, instructor)
Professional Writing Graduate Program, UW-Milwaukee Oct., 2014
- Baker, K., “Workplace Communication: Strategies and Best Practices”
Business Practicum course (Greg Smith, instructor)
MS in Management Program, UW-Milwaukee Lubar School of Business Mar., 2014

- Baker, K., “What Support Means to Students” Oct. 2013
Graduate Student Remarks
UW-Milwaukee College of Letters & Science Awards Reception
- **Baker, K.** and Ebert, J. “Usability Testing: Overview and Case Studies” Oct. 2012
Research Methods course (Rachel Spilka, PhD, instructor)
Professional Writing Graduate Program, UW-Milwaukee

GRANT-FUNDED SCHOLARSHIP:

- “Facilitating Student Collaboration: Instructors Using Improvisation in the University Classroom,” with Rice-Bailey, T. Summer 2018
Milwaukee School of Engineering
Faculty Protracted Leave grant
- Usability Testing Lab, College of Letters & Science, with Spilka, R., Hruby, H., Ebert, J., UW-Milwaukee 2012-2017
College of Letters & Science Digital Futures grant

RESEARCH IN PROGRESS:

- “Facilitating Student Collaboration: Instructors Using Improvisation in the University Classroom,” with Rice-Bailey, T.
 - e-learning module for Milwaukee School of Engineering instructors
 - academic journal publication
- “Constrained by Culture: How Well-Meaning Organizations Minimize User-Experience Research”
- “Defining and Interpreting ‘Quality’ in User-Experience Organizations”
- “Kitchens and Classrooms: Girls Technical Education, From Cooking Classes and Domestic Science to Girls Technical and Trade High School in Milwaukee”

TEACHING EXPERIENCE:

- *Business Writing* (UW-Milwaukee English; online, face-to-face; undergraduate)
- *Composition* (Milwaukee School of Engineering; undergraduate)
- *Critical and Analytical Thinking in Business*, (UW-Milwaukee Lubar School of Business; MBA)
- *Foundations of User Experience* (Milwaukee School of Engineering, undergraduate)

- *Introduction to College Composition* (UW-Milwaukee English; undergraduate)
- *Introduction to Usability* (UW-Milwaukee English; undergraduate)
- *Public Speaking* (Milwaukee School of Engineering; undergraduate)
- *Technical Writing* (UW-Milwaukee English; online, face-to-face; undergraduate)
- *Technical Writing* (Milwaukee School of Engineering; undergraduate)
- *Theories of Communication* (Milwaukee School of Engineering; undergraduate)

WRITING COACH

- *Critical and Analytical Thinking in Business*, Sarah Freeman, PhD., instructor. (UW-Milwaukee Lubar School of Business; MBA)
- *Business Practicum*, Greg Smith, instructor. (UW-Milwaukee Lubar School of Business; MS in Management program)

ACADEMIC APPOINTMENTS:

Fall 2017- present	Adjunct Assistant Professor, Milwaukee School of Engineering, Humanities, Social Science & Communication
Fall 2016-Spring 2017	Graduate Teaching Assistant, UW-Milwaukee College of Letters & Science, English
Summer 2015	Lecturer, UW-Milwaukee Lubar School of Business, MBA
Fall 2015-Spring 2016	Graduate Teaching Assistant, UW-Milwaukee College of Letters & Science, English
Summer 2014	Lecturer, UW-Milwaukee Lubar School of Business, MBA
Spring 2014	Graduate Teaching Assistant, UW-Milwaukee Lubar School of Business, MBA
Fall 2013	Graduate Teaching Assistant, UW-Milwaukee College of Letters & Science, English
Summer 2013	Lecturer, UW-Milwaukee College of Letters & Science, English
Fall 2012-Spring 2013	Graduate Teaching Assistant, UW-Milwaukee College of Letters & Science, English
Fall 2011	Lecturer, UW-Milwaukee College of Letters & Science, English

PROFESSIONAL INDUSTRY EXPERIENCE:

Publishing Assistant, *Families in Society*

Alliance for Children and Families, Milwaukee, Wis. Feb. 2011 – Mar. 2012
Supported day-to-day operation of peer-reviewed academic social-work journal; copy-edited manuscripts; assisted with strategic planning activities.

Project Manager

Advanced Marketing Insights, Oak Creek, Wis. Mar. 2010 – Dec. 2010
Oversaw development and production of training materials for pharmaceutical sales representatives and compliance for international versions of medical equipment advertisements; managed document-cycling and approval processes.

Managing Editor

Northbrook Publishing, New Berlin, Wis. Apr. 2007 – May 2009
Developed content including technical, instructional, and company-profile articles for custom trade-magazines of Caterpillar Inc., British Petroleum/Castrol, Bombardier Recreational Products/Evinrude; managed document-cycling and approval processes; managed responses to requests for proposal, development of new-business presentations.

Associate Editor

Northbrook Publishing, New Berlin, Wis. Aug. 2005 – Apr. 2007
Managed design, production, client-service, and editorial staffs for special client projects including commemorative books, reports, digital publications, and marketing initiatives; supported day-to-day operation of custom trade-magazine programs; contributed technical and instructional content for publications.

Public Relations Specialist

Northbrook Publishing, New Berlin, Wis. Jul. 2001 – Aug. 2005
Brokered interviews, article placements; developed feature articles, product profiles, press releases, and other content for new product line; facilitated client's entry into new market.

SERVICE, CONSULTING & ADVISORY GROUPS:

- Co-Manager Mar. 2012-May 2017
UW-Milwaukee College of Letters & Science Usability Testing Lab
Developing, administering usability evaluation programs for campus stakeholders and research partners; instructional classroom visits and lab-use overview presentations.
- *Advisory Group*: UW-Milwaukee Digital Arts & Culture Jan. 2015-May 2017
Developing guidelines for undergraduate capstone projects; strategic programmatic development.
- Internship Supervisor Jan. 2015- May 2017

UW-Milwaukee College of Letters & Science Usability Testing Lab
Mentoring interns; planning, coordinating, and evaluating usability testing initiatives and document-design projects.

- *Panel Judge* Apr. 2015
UW-Milwaukee Lubar School of Business MS in Management Program (Greg Smith, instructor)
Evaluating client presentations for Business Practicum course capstone project teams
 - Graduate Plan Representative Jan. 2014-May 2015
UW-Milwaukee Department of English Plan G/Professional Writing
Event-planning; student-faculty liaison.
 - *Consultant* Jun. 2014-present
Major Robot, LLC., Ferndale, Michigan (Jonathan Bourland, principal)
Professional writing, usability-testing strategy for web-design projects
-

AWARDS, GRANTS & SCHOLARSHIPS:

- Association for Business Communicators Graduate Student Travel Award, 2016
 - University of Wisconsin-Milwaukee Graduate Student Travel Award, 2016
 - Feminisms and Rhetorics Graduate Travel Award, 2015
 - UW-Milwaukee Department of Professional Writing Travel Award, 2015
 - UW-Milwaukee Chancellor's Graduate Student Award, 2014-2015
 - James A Sappenfield Fellowship, 2013-2014
 - UW-Milwaukee Chancellor's Graduate Student Award, 2012-2013
-

PROFESSIONAL AND CIVIC ORGANIZATIONS & SCHOLARLY SOCIETIES:

- Association for Business Communication (ABC)
- Association of Teachers of Technical Writing (ATTW)
- Coalition of Feminist Scholars in the History of Rhetoric and Composition (CFSHRC)
- Council for Programs in Technical and Scientific Communication (CPTSC)
- National Council of Teachers of English (NCTE)
- Milwaukee Turners (civic organization)
- mkeUX (Milwaukee user-experience practitioner group)
- UTEST (online community of academic and industry usability researchers and practitioners)