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Transforming Organizational Culture using UX Strategies

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Transforming Organizational Culture using UX Strategies



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December 11, 2019

KG

Thanks for joining us today. Our topic is actually quite a large one, so today you'll be getting a bit of a high level view of transforming organizational culture using ux strategies. We'll start by providing you with some context, discussing why it's important to understand your organization and its culture before you try to transform it, provide an overview of ux, and then move into how you might be able to successfully transform your library and its culture, keeping ux principles and strategies in mind. To do this, we'll examine ways to transform your spaces, your services, and decision making processes in ways that will impact your library's culture.

Also, we have 3 polls in the first half of our presentation. If you are watching this with a group, it would be great if you could go ahead and designate someone to respond to the questions when they come up.

But first, who are we?

Hello!



That's Krista
Godfrey



That's Rachel
Vacek



RV

That's Krista Godfrey. She's the Head of Digital Initiatives at the University of Waterloo.

KG

And that's Rachel is the Head of Design & Discovery at the University of Michigan.

Understanding your organization

KG

UX concepts & strategies are all about understanding our users, how they work, what their needs and requirements are, in order to provide the best experience while accomplishing their goals.

Transforming an organization requires this same level of understanding. We need to know what drives our organizations, what their goals are, what they value. In this session, we'll discuss understanding your organization and offer some strategies to help guide the organization in new directions.

Organizational Cultures

There are many different types of organizational cultures

- Communal
- Fragmented
- Networked
- Mercenary



KG

In order to change anything, we must first understand it. Understanding our organizational culture is an important first step to transforming it. If you look in a dictionary, you can easily find a definition of culture: the attitudes and behaviour of a group. Defining your own culture is far trickier.

There are also many things that can impact a culture (location, education, communication flow, and more). To make things more complicated, there can be subcultures within your organization, for example, many departments have their own cultures and a department may even have subcultures within it. The bigger your organization, the more branches and departments you have, the more subcultures you may have. We don't have enough time in our session today to fully explore all of the types of cultures or impacts culture can have, but I will highlight one example that defines some different types of cultures you might encounter. The following were definitions used by Goffee and James authors of the book *The Character of a Corporation*.

The four types of cultures they identified include: communal, fragmented, networked, and mercenary.

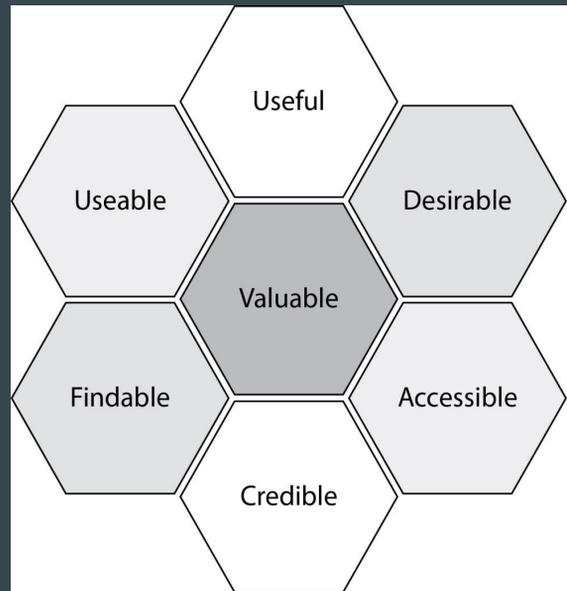
- **Communal cultures** - these tend to have a focus on results and concern with people and process. Often these groups form around an individual or group of individuals and their vision.
- **Fragmented cultures** are focused on the individual and autonomy. Often see negative results of this culture, including cynicism, silos, and critiquing.
- **Networked cultures** are groups that know and like each other. They are highly social and are loyal to the organization and its goals. They value communication. Decisions may take longer but they are supported more than in other cultures. These cultures tend to be fluid and adaptable.
- **Mercenary cultures** have high solidarity and a sense of shared purpose. They emphasize results and success and are goal driven and as such, there is constant analysis and evaluation and often performance based. They may be the result of change or innovation. Often seen in the tech industry.

One thing should be noted - there is no such thing as a right or wrong culture. As I mentioned, there are many different factors that can influence a culture. The location can influence your own organizational culture - a library in Newfoundland is influenced by different things than one in Ontario - not only in location, but history, education, and more. The key here is that with an understanding of your organization's culture and subcultures, you can identify the values and norms that drive the organization. If you understand the culture, you can use techniques that resonate best within those cultures.

What is User Experience?

“User experience encompasses all aspects of the end-user's interaction with the company, its services, and its products.”

- Don Norman and Jakob Nielsen, founders of NN/G



User Experience “Honeycomb” by Peter Morville

RV

With a very basic understanding of cultures, and before we dive into the UX strategies and principles you can use to help transform your organization, let's do a quick overview of UX.

There was wide use of the term in the 1930s, but Donald Norman brought it into wider usage in the mid-1990s. User experience generally refers to the holistic perspective of how a person feels about using a system. Additionally, Peter Morville, Peter Morville, an influential figure and "founding father" of information architecture, also created this image of a honeycomb, which is really just a visualization that lists the 7 facets of user experience design. It was typically applied to websites, but we can apply these concepts to our library organizations, too, not just our websites.

In order for there to be a meaningful and valuable user experience, information must be:

- Useful: Your content should be original and fulfill a need
- Usable: Site must be easy to use
- Desirable: Image, identity, brand, and other design elements are used to evoke emotion and appreciation
- Findable: Content needs to be navigable and locatable onsite and offsite
- Accessible: Content needs to be accessible to people with disabilities
- Credible: Users must trust and believe what you tell them

We want our organizations and the services and spaces we provide to be useful, easy to use, and available for everyone. We want our resources to be credible and discoverable. But the main point I want to make is that what we are really trying to do with UX is improve experiences for PEOPLE.

One thing that's not in this honeycomb, however, is empathy. As UX professionals, it is our job to advocate on behalf of our users. To do so, we must understand them, and that means building empathy for all the human beings who experience the applications, sites, and services we create and the spaces they visit.

UX in Libraries

- Physical vs. virtual
- Individual vs. team vs. department
- Centralized vs. distributed
- Administrative vs. non-administrative



KG

User experience work can be accomplished in a number of ways. Let's look at where user experience work can be applied to start. Most people are probably familiar with the user experience we work that we do with our library websites, as we try to improve how our users interact with our virtual spaces. This is often accomplished through user research or through usability testing. Some libraries are also applying user experience techniques to their physical spaces. While this may be more frequent during a renovation for example, it can be used to improve our physical spaces when a renovation is not in the budget.

There are also a number of ways to accomplish UX work. In some libraries, UX work is relegated to one individual, either someone who is passionate about UX work and has taken it on or it could be someone hired into a role with UX in their position (as title or duties). Either way, the onus is often on one individual.

Other libraries may have a committee or team devoted to UX work. This could be

spearheaded by the solo individual, as a way to disperse the work and accomplish more over time. It could also be a team with a rotating chair. The team membership may vary. Some institutions will recruit from across the library system, including staff and all levels.

RV

Some larger institutions might also have multiple people dedicated to doing user experience work, with different individuals focused on the research, design, or usability aspects, for example. These people could be centralized all in one UX department, or, they could be spread out in multiple areas of the organization.

At my institution, for example, there are 3 people doing UX research and design embedded in the design and development workflows of our IT projects. But there are other UX researchers in several other departments in our library focused on needs assessment by gathering, analyzing, and synthesizing data about our collections, building spaces, and public facing services.

In some libraries, people doing UX are located in library administration to provide guidance and leadership with the library's overarching strategic directions. They might be dedicated to improving library touchpoints, both physical and virtual, doing assessment, and providing data on how the library continues to support the success of students and faculty, or how the data is successfully reaching the diverse users of its local community.

But no matter where UXers are located within the library, they often generate reports, give presentations, and in general make recommendations needed to facilitate decision-making and help transform our organizations.

Poll: How is UX work performed in your organization?

- A. Solo
- B. Team
- C. Department
- D. Library wide
- E. No work is being done

RV

Here's our first poll. We would like you to share with us some information on how UX work is performed in your organization?

- A. Solo
- B. Team
- C. Department
- D. Library wide
- E. No work is being done

You have 20 seconds! Also, we encourage that you add comments in the chat about your organization, especially if the options here don't quite represent how UX work is performed in your organization.

UX Maturity Levels

“When an organization is well and truly steeped in UX, with total awareness of and buy-in on user-centered thinking, its staff enact those principles, whether they’re facing patrons or not. In short, UX thinking makes a person considerate.”

- Coral Sheldon-Hess

<http://www.sheldon-hess.org/coral/2013/07/ux-consideration-cmmi/>

- 5 User experience is so ingrained that staff consider the usability of all of their work products, including internal communications. Staff are actively considerate, not only toward users but toward their coworkers.
- 4 User experience is a primary motivator; most staff are comfortable with UX principles. Users are consulted regularly, not just for major decisions, but in an ongoing attempt at improvement.
- 3 The organization cares about user experience; one or two UX champions bring up users' needs regularly. Decisions are made based on established usability principles and studies from other organizations, with occasional usability testing.
- 2 Some effort is made toward improving the user experience. Decisions are based on staff's gut feelings about patrons' needs, perhaps combined with anecdotes from service points.
- 1 Decisions are made based on staff's preferences, management's pet projects. User experience [of patrons] is rarely discussed.

RV

Coral Sheldon-Hoss, an amazing librarian in Pittsburgh at the Community College of Allegheny County, created a great visualization in 2013 of user experience maturity levels in libraries. In her blog post, she says that UX thinking is “an attitude that follows you into daily life. An organization that’s doing a great job of UX thinking is visibly better than one that isn’t, and you see the differences not just in the seamless ease of its patron touchpoints or the usability of its website or its well-designed physical wayfinders, but in the way its staff treat one another.”

And she goes on to say, “When an organization is well and truly steeped in UX, with total awareness of and buy-in on user-centered thinking, its staff enact those principles, whether they’re facing patrons or not. In short, UX thinking makes a person considerate.”

<Read each of the levels, starting with 1 at the bottom>

The more your library has embraced UX, the better your organizational culture can become. Recognizing where your library currently is now can be helpful in understanding and taking action on what you can do to help transform your culture to get it to the next level.

Some questions to consider:

- What does your library do to provide the resources, processes, and direction needed for executing UX strategy?
- What can you do as an individual, or do with your team, to help proliferate UX concepts, tools, and strategies throughout your library?
- Are your UXers included in the strategic planning and goal setting processes for your library?
- Are **users** considered in all major decisions?
- Are UXers engaged in assessment activities across your library, or only in certain departments or types of activities?
- Are UXers involved in communicating value and cultivating positive attitudes towards users?
- Are UXers able to create allies across the library, in your community, or across campus?
- Are staff steeped in thinking about user needs and therefore more considerate towards them and one another? Is consideration towards one another part of your library culture?

Poll: What's your library's UX maturity level?

- A. Level 5
- B. Level 4
- C. Level 3
- D. Level 2
- E. Level 1

5 User experience is so ingrained that staff consider the usability of all of their work products, including internal communications. Staff are actively considerate, not only toward users but toward their coworkers.

4 User experience is a primary motivator; most staff are comfortable with UX principles. Users are consulted regularly, not just for major decisions, but in an ongoing attempt at improvement.

3 The organization cares about user experience; one or two UX champions bring up users' needs regularly. Decisions are made based on established usability principles and studies from other organizations, with occasional usability testing.

2 Some effort is made toward improving the user experience. Decisions are based on staff's gut feelings about patrons' needs, perhaps combined with anecdotes from service points.

1 Decisions are made based on staff's preferences, management's pet projects. User experience [of patrons] is rarely discussed.

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Here's our second poll. Please respond with which maturity level you see your library being in.

UX in your organization

Mission, Vision, Values

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So, you have a broad understanding of organizational culture and an overview of UX, so let's talk about how these intersect. One way that organizations publically pronounce their culture is through their vision, mission, values statements, and strategic plans. While many cultures and subcultures are difficult to define, vision, mission, values as they are public statements of what we value and are often easy to identify. They state to our community, whether an university community or a geographical community, what's important to us. So, let's look at what each of these are.

Visions identify what a library is striving to achieve, who we would like to be. They often use future tenses, the library will... It gives an organization something to strive for and can help lead an organization in that direction, for example, Cornell's vision statement is:

Empowering Cornell's research and learning community with deep expertise, innovative services, and outstanding collections strengthened by strategic

partnerships.

A mission statement states what the library does, what currently drives them. Here's an example from Scarborough Public Library:

The mission of the Scarborough Public Library is to provide access to a broad and deep collection and high quality services that promote lifelong learning in a welcoming, community-centered facility.

Values statements are as they sound, the values of the organization and these can help drive their vision and mission. For libraries, these often include intellectual freedom or academic freedom, privacy, and diversity and inclusion.

Strategic plans are often used to highlight priorities for a short duration, usually 3-5 years. Major projects are outlined and should be aligned with the vision and values of the library, and possibly larger organization such as a university or college. Projects in a strategic plan are often given priority and proper resourcing, which are key in ensuring success. These projects are often a good start to move an organization towards a new vision or value.

So why are these important? When user experience is included in these types of statements or plans, it indicates ux is a shared value, something that the library, as a system strives for and works towards together. It's a public statement of what we strive to be and do. When UX is noted as part of these statements, it's easier to move UX strategies into all we do. When transforming an organization, one might ultimately aim to see UX values added to these statements.

For example, in Cornell's mission statement, If one wanted to move the library towards user experience, instead of Empowering Cornell's research and learning community with deep expertise, innovative services, and outstanding collections strengthened by strategic partnerships, perhaps they might add innovative and user

friendly services...

In Scarborough's vision, they may have changed it to provide access to a broad and deep collection and high quality and user focused services and space that promote lifelong learning in a welcoming, community-centered facility.

When it comes to values, we might include a good user experience as a value.

Poll: How is UX work reflected in your organization?

- A. Stated in your library mission, vision, or values statement
- B. Stated in your library strategic plan
- C. Some of the above
- D. All of the above
- E. None of the above

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Here's our third poll. How is UX work reflected in your organization?

Any questions so far?



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We're about halfway through our presentation, and we wanted to take a moment to see what questions you have.

Why do we care about organizational culture?

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So, why is culture important? Culture is important because it's really about what drives an organization. It's the attitudes, behaviours, values of an organization. It underlies how we do things, where we place our priorities, how we accept and implement change.

It not only influences what we do, but it can influence how we work and treat each other. Rachel highlighted the idea of empathy. With a culture that's focused on user experience, that's focused on the user, we can help ensure that we're building empathy for both our staff and our patrons. Ideally, it can lead to a culture that values treating each other with kindness.

By focusing on the user, which I will stress again includes our patrons and our staff, we can also move towards a culture that values both diversity and inclusivity. If we understand the real, rather than the perceived, needs of our users, we will ideally move towards services, spaces, practices, and values that are more diverse and

inclusive and reflective of our community and organization.

Culture drives what we do in the library

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Culture is a driver for the decisions about what we value in libraries, where we want to put our priorities and resources and so it influences what we do as a library. Changing something that plays such a large part in what we do and how we act within our libraries, is not an easy task. Many textbooks suggest that our aim should not be to change the culture but to make smaller, transformational changes over time.

Transforming an organization is not something that can happen overnight, it takes a lot of time and management to accomplish successfully.

We'll now look at a few ways you might be able to transform an organization using ux strategies or philosophies. These are often smaller and more manageable than attempting to turn an organization's culture around, but can have a large impact on the values within your culture

Transforming your spaces



RV

How many of us have complained about the signage in our libraries, or taken complaints about it? How many have walked by signs or monitors that are problematic or watched others do the same? What about observing that there are spaces in our libraries that don't seem to be used in the ways that were intended? People moving furniture around, or sitting on the floor in an exhibit area because they can't find a quiet space. How many times have you had to help someone find a book in the stacks, or even some? Or how about our virtual spaces - how many have left our websites because they are just too confusing, too overloaded with information our users don't need?

We can use UX principles to help with wayfinding and signage in our libraries and in our virtual spaces. This could include A/B testing on location, and taking into consideration font sizes, colours, and more. We could use personas to talk about user needs in our different physical spaces that are used for research, study, meetings, or community programming. Also, our spaces and signage universally designed and

accessible for everyone? Are we, in essence, creating spaces that our USERS want and need, and do we regularly assess our spaces to make sure they are meeting our users' evolving expectations of how they like to work and play?

Here, we want to rely on that UX tenant - the user's needs come first. It's not about where we think a sign should go, but where it's needed. It's not about what we think the users need on the library website, but what's actually needed. By starting with placing user needs first in these areas, we can start to apply these same user-centered concepts to other areas in the library.

At my institution, there are several people in a department called Library Environments that regularly apply UX strategies to transform the physical spaces throughout the library. This department collaborates with library staff and our academic community to design and strategically develop adaptive spaces within the library -- for both library staff and the public --, including renovations to existing spaces. They collaborate with people and facilitate the design of thoughtful and effective workspaces and work processes..They monitor traffic flows and space usage. And they conduct a lot of user research focused on understanding user expectations and needs.

Transforming your services



RV

Service design is the activity of planning and organizing people, infrastructure, communication and material components of a service in order to improve its quality and the interaction between the service provider and its customers. Service design uses methods and tools derived from different disciplines, from ethnography to user experience and interaction design.

Marc Stickdorn and Jakob Schneider, authors of *This is Service Design Thinking*, provide five basic principles that underlie service design:

1. User-centered, through understanding the user by doing qualitative research -- meeting with users, contextual inquiries, interviews
2. Co-creative, by involving all relevant stakeholders in the design process -- go through research and exercises together as a team
3. Sequencing, by partitioning a complex service into separate processes -- agile, iterative

1. Evidencing, by visualizing service experiences and making them tangible -- visualizations, user journeys, service blueprints
2. Holistic, by considering touchpoints in a network of interactions and users -- making connections to see how all these things overlap.

So why is this important? Every library has services. More libraries are hiring UX professionals, or forming teams or departments to focus on enhancing the user's experiences with the library. Service design is an extension of this.

When you embark in doing service design activities, you explore issues by doing a deep dive in research to better understand user needs, and to analyze the issue and audience. As a results, you'll probably generate multiple potential solutions. And then you can do pilots and prototypes with those ideas, and synthesize results and determine next steps. Service design is an opportunity to bring together a diverse group of library staff, and empowering them to co-create new services, or refine existing ones, and have shared experiences. It can help bring alignment between your spaces, services, values, and goals, all to meet user needs. A service blueprint is also sometimes a deliverable at the end of synthesis to help you move to the piloting and prototyping stage.

A service blueprint is a diagram that visualizes the relationships between different service components — people, spaces/technology, (physical or digital evidence), and processes — that are directly tied to touchpoints in a specific customer journey. This deliverable, along with the analysis that comes after your pilots and prototypes, helps you and your library to make more informed decisions.

Joe J. Marquez, currently the Web Services Librarian at Reed College in Portland, OR, is doing some great work on service design in libraries. He co-wrote the book, *Library Service Design: A LITA Guide to Holistic Assessment, Insight, and Improvement*, and teaches a course with Library Juice Academy.

And a great place to start is at <http://designthinkingforlibraries.com/>. It's from the Chicago Public Library and the Aarhus Public Library (in Denmark). Together with funding from the Gates Foundation, they created the **Design Thinking for Libraries** toolkit to introduce a way of working that will help you understand the needs of your patrons and engage your communities.

Transforming your decision making



KG

UX strategies can be an excellent tool in helping transform our culture to one that is driven by data or support a culture of assessment. Many libraries have been striving for a culture of assessment, and user researcher, such as usability testing and ethnographic techniques such as observation, can be an excellent tool in this toolkit.

User research can help ensure that the decisions we make, on the website, in our signage and wayfinding, in our renovations of spaces, or in the technology we choose to add to our library. Usability helps us move away from I think. For example, when it comes to the library website, everyone feels very personally about how they use it or how they may teach to it. We all use the website everyday, therefore we must be experts. But what we feel needs to be on the website is not always the same as what our users need on the website. User research can help ensure that the changes we make are made with our users needs in mind, not what we think our users needs are.

Performing user research allows us to move to data-driven decisions rather than what

we think is best. Data-driven decisions are what a culture of assessment strives to achieve. By moving towards a culture that embraces user research, we move to a culture of data-driven decisions.

Transforming your culture



KG

So, how do you transform your culture? The answer is not quickly. It takes time. We've noted some techniques already that can impact your broader culture by focusing on the user.

Another method you might consider employing that can influence your culture is to develop the skills in an area that can in turn lead to a change in values. Many of the projects we've noted can help do this as well.

For example, UX work via a committee or team can be a great means to grow UX skills throughout an organization. A committee or team can build UX skills amongst themselves first, learning how to do usability testing, for example. Once the team is comfortable, they can start offering workshops or brown bags to their colleagues, to help further develop skills within an organization. Rotating membership will allow those with a keen interest to develop their skills even further, and when a term is done, they can take the skills back to their unit and other projects and act as a

champion for UX principles and methods. Slowly, the skill moves out through the organization and is transformed into something that is valued.

As I noted earlier, if we focus on real needs, needs that have been identified by working with and observing our users, we begin to embrace important values such as empathy, diversity, and inclusivity. Moving the focus from ourselves to others can lead to a kinder, more inclusive culture.



Change management is **key**

RV

With all these areas to consider, it's important to understand that transforming your organization culture is really about change management. Change management is a collective term for all approaches to prepare, support, and help individuals, teams, and organizations in making organizational change. Again, it's about the PEOPLE. You can transform your virtual and physical spaces, your services, and your culture, but in order to be successful, you need to work with your library staff and your users -- all the people that are involved or impacted by the change.

The most common change drivers in libraries include:

- Technological changes, like a new library service platform or new library website
- Process and workflow reviews
- Physical changes to spaces
- Expectations of our users for how services or sites should work
- Government or university funding

- Changes to our communities
- Organizational restructuring

Change can be stressful. People are resistant to change in organizations because it can be uncomfortable. The notion of doing things this way, because 'this is the way we have always done them', can be particularly hard to overcome. But fortunately, there are several different models out there that can be super helpful.

One of the most popular models out there is *John Kotter's 8-Step Process for Leading Change*. John Kotter is a professor at Harvard and has written numerous books and articles on the topic of change management.

1. Create a Sense of Urgency
2. Build a Guiding Coalition
3. Form a Strategic Vision and Initiatives
4. Enlist a Volunteer Army
5. Enable Action by Removing Barriers
6. Generate Short-Term Wins
7. Sustain Acceleration
8. Institute Change

No matter what change management methodologies you employ, you need to remember that it took years to create your existing culture, and will take considerably longer to transform it into something different.

Change is a process. It takes time to influence and get **buy-in** from both your users and your library staff. If they aren't on the same page as you in understanding WHY this change is needed, you will face difficulty in implementing that change.

The importance
of buy in, or
even better,
join in



KG

This leads to the idea of join in. Change management often talks about buy in as a key part of a successful change. Buy in means acceptance though. It does not mean one supports it, they just won't actively work against it. They can still be negative.

Join in means that you are actively part of the change. The example of a committee to spread UX skills illustrates actively joining in. If you are actively part of the change, if you feel ownership and responsible for the change, you are more likely to see it succeed.

Do you need a champion to be successful?

...

YES

RV

So now you're in a place where you've expanded your toolkit, and are working on transforming your culture. Library administration as well as your peers have "joined in" to your efforts. You have a team, you've equipped yourself with several UX tools and design-thinking methodologies and you feel ready to go. But wait, there's more!

You need a champion. An ally. A sponsor. A partner. Peter Drucker said "Culture eats strategy for breakfast." It's so true. You can have the strategy, but culture is complicated, and transforming your library's culture in a way that isn't too disruptive and is ultimately successful, can be extremely challenging. You and your UX team need allies.

Are there people in your library who seem engaged when you talk with them about change, culture, or UX? Are there people currently doing assessment? Are there people who are currently champions for diversity, equity, inclusion, or accessibility? Are there people who seem to really get what this is all about? Are there people who

are always giving you feedback on how to improve something that you oversee? Are there people you admire who are already change agents? These people can be your biggest allies.

And even those people who complain about everything -- if you can get them to "join in" -- they can become your biggest allies.

In my library, we're in the middle of a library website redesign. The project team has several sub teams, and membership is primarily based on roles and responsibilities of people doing the work. So it's primarily library IT and communications/marketing people. We wanted to have more diverse voices spread throughout the organization that could help make the transition to a new site easier, and be a resource to answer questions. We created a group of website champions who aren't doing any work on the project but are able to talk positively about it and help others to join in.

But you should also have a project champion somewhere in your library leadership. This might be a sponsor. They take on the burden of ensuring everyone involved is on board and behind the ultimate success of the project or change initiative.

YOU can successfully transform your organizational culture using UX strategies

RV

Transforming your organizational culture can be challenging, but Krista and I hope that we've provided you with some ideas and strategies to help you be successful in your quest.

Success may include the addition of a new value, such as one that is user-focused or committed to providing a good user experience.

For example, a culture that has moved to embrace UX work might have:

- UX embedded in its vision, mission, values, and strategic plans that recognize the importance of the user and work associated with understanding user needs
- UX work is a recognized value and seen as a regular part of everyone's duties -- not just the duties of the solo UX librarian or the UX Team.
 - This may include job descriptions that explicitly include UX responsibilities

- Leadership commits and supports UX work, and considers the user in all of its strategic decisions
- UX is used to create evidence based decisions
- UX is actively supported and encouraged
- UX tools are used to help shape new or improve existing services

Hopefully, all this will result in library staff having a heightened awareness of their users. What do our users need? What do they value?

Thinking about our culture, we can start to be more strategic in having discussions about and planning for what we need and value as an organization. Transforming values and cultures are not easy, but armed with the knowledge and tools, we can move towards establishing values and cultures that are more centred on both our users and our library staff needs.

Contact us!

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RV

Here's our contact information. Also, please follow us on Twitter!

Questions?



Questions?

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