

CASE STUDY

Building Success on the User Agenda



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We know we have a good solution. We have done the research; we have analysed our audience; and we have identified user tasks. We know that the solution meets the needs and goals of users. But, why are our users still dissatisfied with the offering? Is it the curse of the lurking user agenda?

As communicators, we want users to use our product. We want product manuals to be “dog-eared” from constant use; we want users to use the online help rather than call the support desk; and we want our Internet/intranet site’s hits to increase.

By understanding and leveraging the user agenda, we can achieve the user and business outcomes that we are seeking. The user agenda is the missing link between the analysis and design that we do and the outcome we desire.

What is missing from our traditional methods is an understanding of where users are coming from at the point of engagement in the Web site or information. We need to delve deeper and understand beyond the needs and goals of our users; we need to understand and address our users’ agenda at each point where they interact with our solution.

WHAT IS THE USER AGENDA?

The user agenda is complex and much more than just goals and objectives. It encompasses deeper subconscious needs such as priorities, expectations, issues, assumptions, and reservations.

For most one-off information or transaction interactions, users are unable to describe their agenda. Only where they have frequently performed a task and experienced the same frustration will you hear them exclaiming, “why can’t I...” or “why don’t they provide....”

The agenda is only revealed at the point of engagement—when users read our document or interact with our Web site. And even then, it is revealed progressively; often users do not know their agenda until they are performing activities with our solution.

Let us examine an example of where the user agenda is at play: ordering flowers over the Internet for a niece with a new baby.

As you enter recipient details, you suddenly worry that the flowers might not arrive before the new mother leaves the hospital. You look around for an indication about delivery times. Nothing! The information may be on the delivery details page. It may be on the purchase confirmation page, but you need reassurance now. You abort the Web transaction, and if you still have time, you order the flowers over the phone where you can ask about delivery times at the point in the purchase process where *you* have the question.

“The user agenda is the missing link between the analysis and design that we do and the outcome we desire.”

SATISFYING THE USER AGENDA IS CRITICAL

The agenda cannot be ignored and must be satisfied. It determines whether the engagement occurs or not and whether information is used successfully or not.

In the *Best Practices* article, “Beware the User Agenda,” Susan Harkus¹ reminds us that the user agenda is “...that determination to decide myself what is of value to me and to choose myself the way I

want to access services...” The agenda is a driving force that triggers and motivates users, that determines whether users will engage and choose our solution over another.

For several years now, businesses have realized that they need to become more customer (user) focused. One Australian consultancy organization reported that “From the very start, e-commerce has empowered the customer to an unprecedented degree... If the customer is in the driving seat, the logical next step is to rethink everything from that perspective.”² Businesses, designers, and information developers are still struggling with the challenge of responding to the customer in the driver seat.

¹ Harkus, S. “Beware the User Agenda,” *Best Practices*, October 2001.

² Germini, Cap. *Electronic Commerce 2000; Special Report on the Financial Industry*. Ernst and Young.

In today's online environment, we rarely have more than one chance to satisfy our users and their agenda. We have all heard of computer users who reject Help because "it never helps." Unfortunately for the army of committed technical communicators, one or two unsuccessful experiences have convinced some users that Help is not a "helpful" option.

THE TASK IS THE KEY

The solution must address the agenda at the task level, the point where users engage with information or the transaction.

Addressing the agenda only at the user segmentation or demographics level will not be sufficient. Segmentation and user profiling are very useful for establishing the core values, constraints, and aspirations of a user group, but high-level analysis fails to provide the detail needed to design the particular user experience. Agenda detail needs to be gathered at task level.

So do you need to analyze a task from the perspective of a representative of every user segment? Surprisingly, not at all. Users, regardless of the market segments that they belong to, share a common set of assumptions and expectations and have the same subconscious priorities.

Consider the task of buying tickets to a sporting event. The majority of purchasers will have two priorities: "where should we sit?" and "can I buy tickets in that section or an adjacent section?"

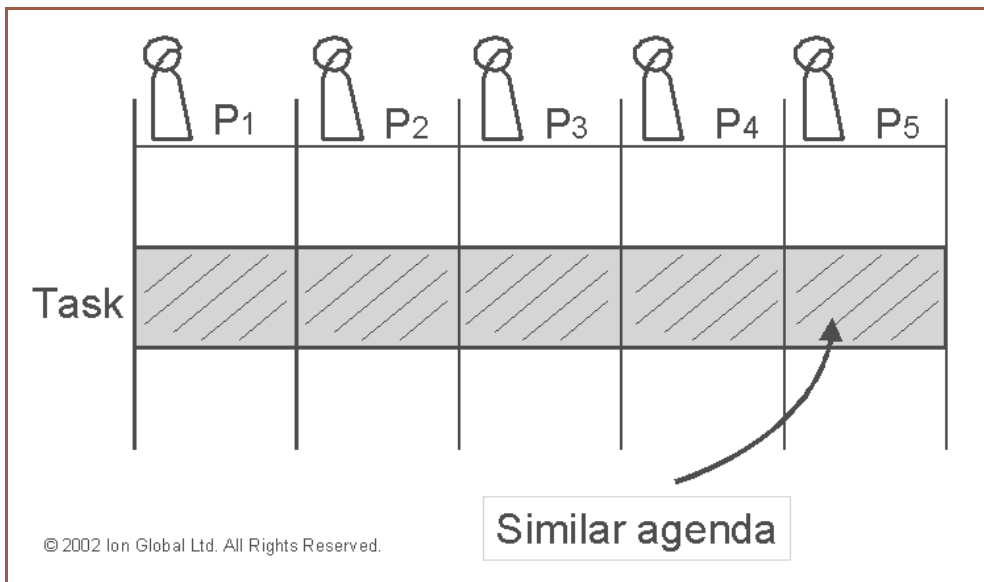
The nature of the task "colors" the user response and "creates" the set of agenda items.

USERS IN THE DRIVING SEAT


Does the user always have the power? Yes. But, if we create successful user experiences the first time, our solutions do not always have to be at the users' mercy.

The users' power comes from our absence. When users access information online, we, as experience designers, are *absent* from the point of engagement. We cannot adjust the support we provide to our users as we observe changes in their responses or are challenged by their questions.


The ticket seller who faces the purchaser in an agency can see when an aspect of the sales transaction does not meet the customer's expectations. The seller interacts personally with the customer and can change the transaction experience to meet the customer's requirements or mitigate the customer's response. Even the social context of the interaction moderates the customer's response.



THE AGENDA IS THE USER "BAGGAGE" ASSOCIATED WITH A TASK. REGARDLESS OF WHICH SEGMENT USERS BELONG TO, THEY WILL HAVE A SIMILAR SET OF AGENDAS FOR THE SAME TASK.

How many chances do we get to create the successful user experience? 

One? Maybe two? Rarely three!



*"They had one chance, they **blew it**. Too much competition out there."*

"I tried help. It was useless!"

"Sorry, I'm out of here!"

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NOTE USERS' AGGRESSIVE REACTION WHEN A WEB SITE OR DOCUMENTATION DOES NOT MEET THEIR EXPECTATIONS. USERS NEVER COME WITHOUT EXPECTATIONS, AND THE LETDOWN IS PROBABLY RESPONSIBLE FOR THE STRENGTH OF THEIR REACTIONS. THEY ARE ALSO IN THEIR OWN DOMAIN, IN CONTROL; BEING LET DOWN CHALLENGES THEIR CONTROL AND THEIR REACTIONS REASSERTS THEIR CONTROL OF THE SITUATION.

For Web sites and documentation, however, users have complete power, and our absence means we have no opportunity to respond to the users' expectations if they have not been satisfied; we can't read users' body language and compensate for something wanting in our solution.

So, we have to accept the users' power; we have to accept that we probably have only one chance to meet their expectations. We need to seize the opportunity to understand and leverage the user's agenda so that we can trigger the desired response when users engage with our Web site and documentation.

YOU CAN UNCOVER THE AGENDA

We must first uncover the user agenda if we are to satisfy our users. As technical communicators, we are well skilled and equipped to do this. Having direct involvement with users is not always necessary; you can still uncover agendas accurately by drawing on the rich source of customer knowledge in your organization.

The user agenda information is knowledge that is within ourselves and within our colleagues in the customer service, product, support, and marketing areas. User agenda information is also often in the media. Uncovering the agenda early in the design process is crucial to the success of our solution.

THE USER AGENDA AND RESPONSIVE TECHNICAL COMMUNICATION

Anecdotal evidence tells us of users who fail to find information and users who find the required information location but fail to *see* the information they are seeking.

What causes the information blindness phenomenon? Our experience is that users bring subconscious questions and issues to the information search task. We find that users' priorities, expectations, assumptions, and reservations may cause them to

- ◆ set different browse cue words from the words we use in our information structures
- ◆ expect information to be presented in a different sequence
- ◆ overlook valuable content because opening paragraphs seem unrelated to priorities

Given the recurring incidence of information blindness and information that disappoints rather than fulfills, can technical communicators leverage agenda dynamics to make their documentation more usable?

We believe they can. We have worked with our clients to "activate" the information space.

- ◆ We've created e-newsletter copy and link text that engage the subscriber, and we've seen click rates for the agenda-focused writing rise by 30 to 40 percent.
- ◆ We've audited Web sites against task agendas and helped clients turn ineffective navigation and failing content into user-enablers.
- ◆ We've developed agenda-based content specifications for Web site pages, and we've seen a radical change in the way product and marketing people perceive their information responsibilities.

MINING THE SUPPORT CHAIN

At the 2001 Australian Society for Technical Communication Conference in Sydney, JoAnn Hackos³ introduced supply chain/support chain concepts to an enthusiastic Sydney conference of technical communicators.

What is interesting about supply chain/support chain discussions is that support chain documentation anticipates bringing writers close to the issues around the user performance space.

As technical communicators, we have or can make opportunities to leverage the experience and knowledge of our support chain network. Associates in the chain become the writer's links into an agenda mix that determines what the user will see, how the user will assess, and why the user will engage or give up.

At Ion Global, we use agenda analysis techniques to enable our clients to mine the knowledge of their customer, marketing, support, and product people.

Often the analysis is beyond research: we cobble together anecdotal evidence; we analyze and find trends in similar customer responses. We work hard to "inform"⁴ our intuitive definitions of issues that users bring to their tentative engagement with Web sites and information.

Together, we evolve task definitions that identify navigation cues and the agenda that determines engagement. We explore behavioral drivers that are subconscious, that are only revealed progressively as the user interacts with information or transactions.

As a first rule of usability, Jakob Nielsen⁵ advises paying attention "to what users do, not what they say." Certainly when you are exploring user agendas, users cannot tell you what you want to know. You must look beyond actions and words to the triggers that engage or reject.

For example, the anger and frustration that is so often implied in customer correspondence is a clear indicator of the priority that a customer feels about an issue being reported. When that same anger appears across customer contacts about the same or similar issues, you can make an informed assumption that issues of that type are high on the agenda priority list of your users.

NOTHING IS NEW UNDER THE SUN

For technical communicators, an agenda-driven approach is not new. John Carroll⁶ pro-

motes this approach for online tutorials and help. An agenda-driven approach brings users into your writing and design activities, rather than leaving them at the end of your labors, waiting for your output.

User agendas provide concrete guidelines for developing information.

Examples

- ◆ Prioritize your information in accordance with the agenda priorities. Layer information so that issues of lower agenda priority are explained in linked topics or later sections.
- ◆ Anticipate and address potential user reactions to performance situations where agenda expectations or assumptions are not met. Even when your product cannot meet a user expectation, acknowledge the expectation in some way to mitigate the user reaction.

IN CONCLUSION...

Our experience is that agenda analysis brings a significant return on the time and effort invested in exploring, analyzing, and addressing the subconscious "baggage" that users bring to every task.

Furthermore, task definitions become part of your knowledge repository. They can be tuned and enriched by customer feedback, by internal support chain feedback, by user testing, and by other qualitative research.

By striving for good user experiences, our clients are supporting their customers' (users) agendas. Ultimately, they are also ensuring the fulfillment of their own business agenda. □

³ Hackos, J. *Supply Chain/Support Chain: Where Do We Belong?*, Australian Society for Technical Communicators (ASTC) Conference, Sydney, Australia, November 9-10, 2001.

⁴ Moore, Geoffrey A. *Crossing the Chasm*, 1991, New York, NY. Harper Business. ISBN 0-88730-717-5. Moore argues that when there is not much research or data, then the most reliable decision making tool is the person's informed intuition rather than analytical reason.

⁵ Nielsen, Jakob. *First Rule of Usability? Don't Listen to Users*. Alertbox, August 5, 2001. <http://www.useit.com/alertbox/20010805.html>.

⁶ Carroll, J.M. *The Nurnberg Funnel: Designing Minimalist Instruction for Practical Computer Skill*. 1990.