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A Career On The Web: Assuming Leadership

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About This Book

Taking the step from being a member of a digital team to becoming a leader can be quite overwhelming. Having proven that you excel in the technical aspects of your job is most probably beyond question, but a leadership position will naturally confront you with entirely new challenges which also call for new skills; you'll have to manage (perhaps even build) a team first, however, it's equally essential to foster a culture that gives your team members room to thrive. After all, a team is as good as its leader, right?

To help you overcome the initial insecurities that such a big responsibility brings along, we have compiled only the most valuable advice from fellow industry leaders in this eBook. It is a trusty companion, no matter if you are about to build a team from scratch or have been promoted to leading an existing team of web designers and developers. Whether you're struggling with hiring good employees, leading new web professionals, making side projects work as intended, or organizing internal training sessions, this eBook is sure to share with you all the practical knowledge and fresh ideas you need in order to improve your leadership skills and foster a passionate and agile team.

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Assuming Leadership In Your Design Agency

BY JEREMY GIRARD 🍷

There comes a point in the career of many web designers where the logical progression in that career is to take on a leadership position. A logical step or not, when a designer “assumes” this type of a position, there is often another “assumption” happening at the same — that wizard-like proficiency with HTML and CSS, coupled with a number of years in the industry, equips someone to take on a leadership role. This is, of course, not always the case.

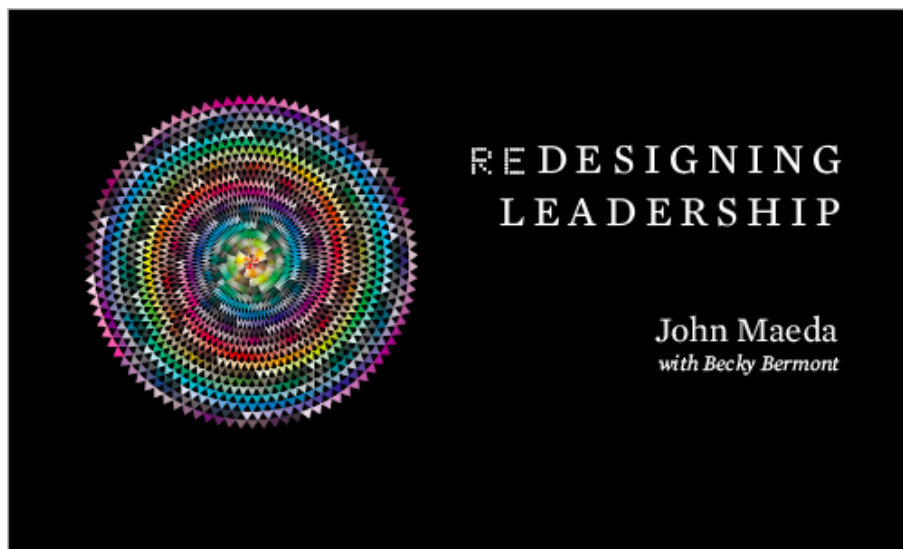
Over the past few years, I have gone through this transition myself, moving from a web designer to a *Creative Director* to my current role as the *Director of Web Development*. During this transition, I turned to the blogs and other resources that I had found helpful in my career to that point, looking for tips and lessons that would help me in my new role. I quickly realized that while there are countless articles to help you become that aforementioned HTML and CSS wizard, there are precious few that deal with the move from designer to director.

In this article, I will share some of the lessons I have learned over these past few years. These are not earth shattering truths and many of these lessons are common sense, but these are the lessons that helped me along the way, and that I found myself needing to be reminded of most often, as I moved from team member to team leader.

LEADING BY LEADING

Typically, someone who has risen from a web designer to a director has done so because they excel in the technical aspects of the job (design, HTML, CSS, etc.) and also at solving problems. Because they are skilled problem solvers, it is easy for a director to want to solve the problems for those they are supervising, rather than leading them to solve the issues for themselves. The concept of “leading by doing” isn’t always the best solution, however. I think John Maeda, the President of the *Rhode Island School of Design*, says it best in his book, *Redesigning Leadership*¹:

Leading by doing ceases to be leading when there is more doing than leading.



To learn more about leadership, I highly recommend reading John Maeda’s book and visiting his [blog](#)².

1. <http://mitpress.mit.edu/catalog/item/default.asp?ttype=2&tid=12436>

2. <http://lawsofsimplicity.com/>

For someone who is used to rolling up their sleeves and getting their hands dirty to solve a problem (or as dirty as HTML and CSS can really get your hands), this lesson of leading others to solve problems for themselves is one you will likely need to be reminded of often (I know I was).

How do you start letting go and allowing others to solve problems for themselves? Simple — you trust them and give them a shot. The solution they find may not be the one you would have come up with, and you may need to direct them through a few extra rounds to get to the solution you would like, but the result is that you will help them get to that solution eventually!

This learning will pay off the next time they have to solve a similar issue, because by leading others to find solutions for themselves whenever possible, and really trusting them along the way, you will make your whole team stronger and free yourself up to do the other important work that is part of your new role as a director.

NO ROOM FOR NEGATIVITY

If you have risen to a leadership position in an organization, it's very likely you have commiserated and complained with the rest of the team on a number of occasions about everything from client feedback to project deadlines or budgets to general workplace frustrations. That has to stop.

Your team will take their cues from you. If you are frustrated and complaining, they will be frustrated and complaining. If, however, you take a bad situation and

make the best of it and keep a positive attitude, that will go a long way to keeping the overall morale of your team positive as well. When the complaints do come, don't ignore them, address them head on and diffuse the situation.

Now, this isn't to say that you won't get frustrated at times. Uncle Ben may have told Peter that "with great power comes great responsibility", but he failed to add that with great responsibility also comes great headaches. You will get frustrated and need to blow off some steam from time to time, but you will find that by being the voice of reason and keeping calm, your own frustrations will often be diffused in the process. If you do need to vent, remember to never do it in front of your team. Their mood will mirror your own, so stay positive.

BUY SOMEONE A SANDWICH

Positive reinforcement is important to any team. This reinforcement can come in many forms, from financial rewards to additional benefits or time off, etc. One of the most effective ways that I have found to show someone their hard work is appreciated is also one of the simplest, however. Buy them some lunch.

Besides being affordable in even the most challenging economy, taking team members to lunch gets them out of the office for a bit and it allows you to interact with them on a real level. It's easy to get caught up in the amazing advances in *CSS3* or *Responsive Web Design* and forget that your team members are more than web professionals —

they are people with lives outside of the office and interests that have nothing to do with HTML.

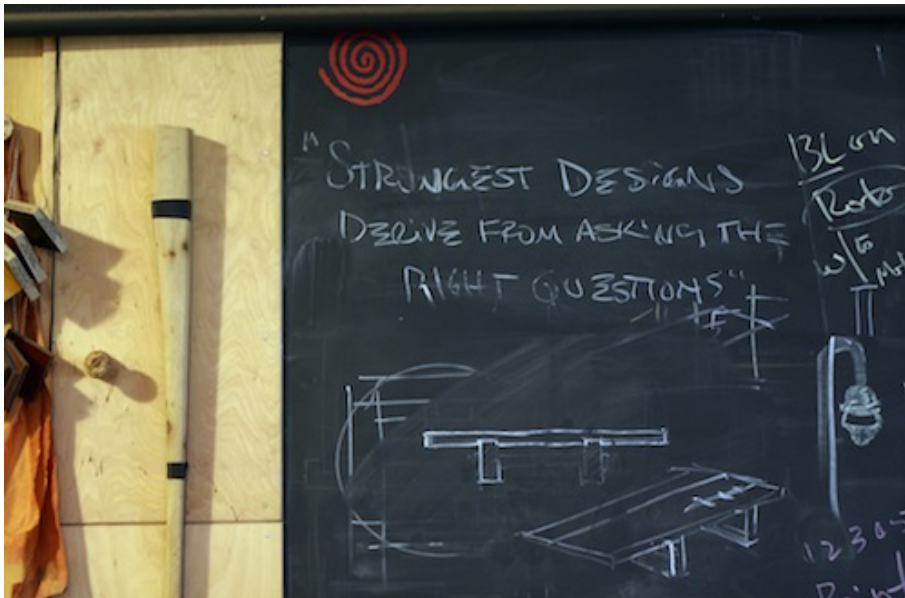
Take someone out to lunch and leave the office behind. Don't schedule the lunch like you would any other meeting, make it a surprise and delight someone who wasn't expecting to go out that day. While you are out, be sure to say "thank you" for your team's hard work. You'll be amazed at what some good food, a real conversation outside of the office, and a genuine "thank you" will do for your team's morale. Give it a shot for yourself — take your team out for lunch today and see what happens.

IF THERE'S GOING TO BE A MEETING, EVERYONE PARTICIPATES

Regularly scheduled meetings can help keep a team in sync, but meetings for the sake of meeting can be wearisome. When I first took over the responsibility of running meetings for our department, I tried a number of configurations. I tried different days of the week and different times of the day. I tried to do a number of short meetings throughout the week versus only one longer one at week's end. I mixed it up as I tried to find the right formula, but my meetings still seemed to be lacking something. Then I figured out what was wrong. It was me.

By "leading" the meeting, I realized I can come to dominate the conversation, turning it into more of a lecture than an actual exchange of ideas. That was what needed to change.

It doesn't matter if you do short meetings each day or a single longer meeting at the end of the week, what matters is that everyone gets engaged in the conversation. If your meetings are suffering the same way mine were, try mixing it up and ask someone to present a project they are currently working on, or a site they recently saw that blew them away, or ask them to summarize a great article they recently read. Get everyone to participate and you will clearly see the energy level of your meetings instantly start to rise.



Sometimes even a creative side project is enough to spark the interest of your team. Try inviting everybody to a chalk board to engage creative thinking and make it clear that everybody's opinion matters.

(Image credit: [Jenny Spadafora](http://www.flickr.com/photos/jspad/5823094082/)³)

³. <http://www.flickr.com/photos/jspad/5823094082/>

BE SELECTIVE WITH PROJECTS

As a team leader, you will often be one of the first ones in front of a new client and a new project. You will be part of all that initial excitement and exchange of ideas. This is a very exciting time in a project and it is not unusual to get out of a kickoff meeting and want to do all the work yourself. Unfortunately, that is no longer your role.

One of the biggest challenges in the transition from designer to director is the reality that your job is to often assign work to others that you really wish you could assign to yourself. As a director, you will have less time to design and develop websites, because more of your time is required to help others more effectively design and develop websites.

That being said, you need to strike a balance. From time to time, you should assign a project to yourself, but be selective. Knowing you can't personally design every new project or develop every new site gives you the chance to pick and choose which projects go to which team member, yourself included. Just remember not to keep all the great jobs for yourself — the team will definitely notice that!

GROW YOUR BOOKSHELF

Web professionals are lifelong learners. The always changing nature of our industry forces us to constantly be learning if we want to keep our skills current. The change to a leadership role does not eliminate this need, it simply adds to the type of learning you must do.

In addition to books on HTML, CSS or design principles, your bookshelf should grow to contain titles on managing others or running a business. Recently, I've added the excellent titles from *A Book Apart* to my bookshelf. These titles are written by the likes of Ethan Marcotte, Dan Cederholm and Jeremy Keith — authors whom I've read for years via their blogs as well as books. I have also recently added some titles that are not related to web design to my shelf, including *Rework* by Jason Fried and David Heinemeier Hasson, *Delivering Happiness* by Tony Hsieh, and *Redesigning Leadership* by John Maeda, from which a quote appears earlier in this article.



Perhaps going to a local library and taking a closer look at the leader management section there will also help you stumble on that book — the one your colleagues recommended to you in the good old days.

(Image credit: [heipei⁴](http://www.flickr.com/photos/heipei/3570609850/))

4. <http://www.flickr.com/photos/heipei/3570609850/>

Your role as a director is a dual role. You need to manage and lead, but you also need to be current and relevant in your web design skillset. This should be reflected in the learning you are doing. Next time you look for web design books, also add a few titles to your cart that have little or nothing to do with manipulating pixels and more to do with managing people.

LISTEN AND DECIDE

A big part of being a team leader is making decisions. A big part of making decisions is realizing that, no matter how hard you may try, you will never please everyone.

As the team leader, you will need to listen to different points of view, but you will also have to be the one to decide which ones point in the right direction and which ones do not. In the end, you need to be the one that makes the right choice for the project, the team, or the company as a whole.

You should encourage others to share their opinions with you, from the CEO to the intern that started last week. Listen to what they have to say with an open mind and be willing to have your own opinions changed, but once you have considered everyone's opinion, including your own, you need to decide the path to take. In the end, others may not agree with your opinion, but they will be more likely to support you in the decision you made if you truly took the time to consider all options before you made your choice.

THE I IN TEAM

Throughout this article, I have referenced the move from team member to team leader, but the reality is that even though you may be leading the team, you are still a *part* of it, not *apart* from it. Remember to use the word “us” often and show those under your supervision that you are with them.

I think a quote from E.M. Kelly says it well and gives me an appropriate way to end this article:

*The difference between a boss and a leader: a boss says
“Go!” — a leader says “Let’s go!”*

Are you ready to assume leadership? Excellent — let’s go!

☺

Lessons Learned From Leading New Web Professionals

BY JEREMY GIRARD 🍷

Over the course of my career, I have had the opportunity to lead various web design and development teams, including a number of professionals fresh out of school. Along the way, I've made my share of mistakes and learned some valuable lessons.

Some new team members have jumped right in and begun contributing in a meaningful way almost immediately, and others have struggled to adjust to their new role because I failed as a leader and didn't give them the tools they needed to succeed. One thing I've definitely learned is that the success of a new team member is determined not only by their own abilities and drive, but by the leadership on the team they are joining.

Recently, I was preparing to welcome a young new designer to our company. This position would be his first real experience working in our industry; so, prior to his start date, I decided to make a list of some of those lessons I've learned over the years as a way to remind myself of what I needed to do to make sure he had the resources needed to succeed here. As I wrote my list, I realized that many of these lessons were actually common sense — and yet, if my past experiences are any indication, these common-sense lessons are exactly the ones

that are easy to neglect and that we often need to be reminded of.

MAKE THEM FEEL WELCOME.

Joining a company can be an intimidating experience, especially if the company has a close-knit culture or the team has been together for some time — two factors that contribute to new employees feeling like outsiders. As a leader, you can make your new team member feel welcome by showing them, both in actions and in words, that they are absolutely now a member of the team.

If your website lists biographies and pictures of employees, make it a point to add the new team member's information quickly. Even in organizations that have a “probationary period” to evaluate new hires, those employees should still be added to the website sooner than later. Having a presence on the website, alongside their colleagues, demonstrates to those new team members that they are a part of the group.

You can also use social media to welcome new employees to the organization. Welcoming them on Twitter (or in whatever social media you use) shows the new member that you are excited to have them on board. Your Twitter followers will sometimes chime in as well, echoing your welcome and adding to the warmth and positivity.



Adding a biography, as [FreshTilledSoil](http://www.freshtilledsoil.com/about/) does⁵, shows a new employee that they are part of the group.

Finally, you can make new employees feel welcome by involving them in events and activities with other members of the company. This doesn't have to be elaborate — a simple lunch is a great way to get out of the office for a bit and to interact as more than coworkers. By including new hires in the lunch party, you give them a chance to socialize with others and to feel like more than the “new person.”

MAKE TIME FOR REGULAR MEETINGS.

This lesson is certainly “common sense,” but also one that I, admittedly, find myself failing to follow most frequently.

⁵. <http://www.freshtilledsoil.com/about/>

It is easy to get caught up in projects and other responsibilities and overlook that new employees, especially those new to the industry, need a lot of guidance early on. I try to meet daily with new team members for at least their first few weeks at the company. These meetings do not need to be lengthy — in fact, most are 10 minutes or less — but they provide an outlet for the employee to ask questions without feeling like they are interrupting an activity. Because these meetings are scheduled in advance, the person knows that time has been allotted to their questions; this is important because, even if you have an open-door policy and encourage new team members to come to you with questions, they will be reluctant to “bother” you. You can alleviate this concern with regular meetings.

Without fail, whenever my schedule gets crazy and I start skipping these regular meetings, I notice that the stress level of my team rises accordingly. These meetings not only give new employees an outlet to ask questions, but give me an opportunity to let them know what is expected of them and how they are doing. This open dialogue is essential as the person adjusts to their role in the company.

Of all the lessons on this list, this one is undoubtedly the easiest to let slip — but also the one with the worst consequences if allowed to go too far.



Meetings are essential for new employees, who will need a lot of guidance early on. (Image credit: [Dennis Crowley](#)⁶)

ASSURE THEM THAT FAILURE IS AN OPTION.

No one wants to fail at a task, least of all a new employee who is trying to make a good impression. But, as Seth Godin so perfectly stated⁷ in a recent interview with Kara Miller on NPR's Innovation Hub:

If failure is not an option, then neither is success.

New employees need to know that making mistakes is OK. If failure is not an option, then you will become crippled from trying to get everything right the first time. Anyone who has worked on the web knows that trial and error is essential to the job. New employees need to be assured that failure will not be held against them.

⁶. <http://www.flickr.com/photos/dpstyles/4835354126/in/photostream/>

⁷. <http://wgbhnews.org/post/seth-godin-indicts-education>

Of course, a balance must be struck here. While failure is acceptable, it must yield a better understanding of the problem and an eventual solution. Failure is a means to finding a solution. So, while new team members should know that failure is an option, they should also know to use each failure to propel themselves to an eventual success.



*Mistakes are a part of the job – as long as you learn from those mistakes.
(Image credit: [ktpupp](http://www.flickr.com/photos/ktpupp/508647245/sizes/z/in/photostream/)⁸)*

ENCOURAGE THEM TO CONTRIBUTE.

I once had a manager who felt that if you attended a meeting, you had to contribute to the meeting. He would often call randomly on attendees who had yet to contribute to a meeting and ask, “What do you think of this?” as a way to involve them in the conversation.

8. <http://www.flickr.com/photos/ktpupp/508647245/sizes/z/in/photostream/>

While I understood his reasoning, his execution left a lot to be desired. Too often, individuals would be called upon and would struggle to come up with an answer to a question that they really weren't prepared to speak about. It put people on edge as they waited their turn. Sometimes, attendees would even rush to contribute early in a meeting so that they wouldn't be called out later. This rush to participate usually added a lot of extra words but very little value to the conversation.

Instead of putting new employees in the hot seat, I try to find other ways to make them comfortable with speaking in front of our group. One way, when conducting design reviews, is to ask a new designer to present their work to the team, alerting them well before the meeting so that they can prepare a short presentation. Furthermore, because everyone is commenting on each other's designs and offering constructive feedback, new employees feel comfortable speaking up and offering their own comments. This is an excellent way to help them speak more frequently in front of other team members and clients and to engage in other types of meetings.

KEEP THEM BUSY.

You've probably hired the new person because your company is busy and there is work to be done. That's great, because keeping new team members busy is critical.

Long-time employees will undoubtedly have built relationships with certain clients over time. Many of those clients will prefer to communicate with these employees than with a manager or salesperson. This is perfectly fine,

as long as your company has a system in place to properly estimate, carry out and invoice this work. These client relationships can keep employees busy with new work.

Additionally, some long-time employees work on internal projects, as time permits. When they hit a lull between projects or wait for feedback from clients, they fall back on these projects to keep busy.

New employees have neither of these sources of work. Instead, they look to you to assign them tasks and keep them busy — and they will likely complete those tasks as quickly as possible to make a good impression. This is great, but also a challenge for you as the team's leader. If you do not have a bank of work to keep the new team member busy, they will drift and grow bored, unsure of what to do with their time. Aside from your short daily meetings with them, digging up meaningful work for them will require a time commitment from you.

Before bringing a designer on board, review what projects you would expect them to work on for their first 30 to 60 days — both client projects and internal initiatives. Identify accounts into which you can integrate them so that they can begin building their own relationships, and let them know what the process is if they run short on work and you are not around to assign something else. This could be assisting other team members, furthering their training and education, or experimenting with new technologies or techniques for evaluation.

PREPARE TO EDUCATE.

Part of your job as a manager is to continue a new employee's education and fill in gaps in their knowledge. While this certainly involves mentoring and directing them to relevant resources, one of my favorite ways is to take them to a web conference.

Many students graduate from school not having had the chance to attend a professional conference. Industry events such as the Smashing Conference⁹ and An Event Apart¹⁰ offer new web designers and developers a chance to meet and learn from their peers in an energizing environment. Taking a new team member to a good conference opens their eyes to just how awesome and welcoming this industry can be. It also shows them that the company has invested in their success and is willing to spend money to help them grow in their knowledge and their career.

Every time I have taken a new employee to a web conference, the experience has been fantastic. Such events show the team member that they are a part of something much bigger than our company — they now belong to the web community as a whole.

⁹. <http://smashingconf.com/>

¹⁰. <http://aneventapart.com/>



*Inspire new employees by taking them to a quality conference.
(Image credit: [Kris Krug](#)¹¹)*

GREAT EMPLOYEES NEED GREAT LEADERS.

Being a leader is an awesome responsibility, especially if you are leading people who are just entering our industry. Whether you follow the lessons covered here or have more profound ways of leading new team members, the challenge you face is that, to have a great team, you must be a great leader. You must take a consistent approach to welcoming new employees to your organization, helping them to build on their strengths and acquire new ones and supporting them in their career growth.

If you do your job right, then one day, the new hire you are leading will pick up the torch and lead the next generation of designers and developers.

11. <http://www.flickr.com/photos/kk/4167212375/sizes/z/in/photostream/>

Summary: Do's And Don'ts

- *Do* make new team members feel welcome and part of the team by including them in company activities — both in and outside the office.
- *Do* schedule regular meetings to allow new team members to ask questions and get feedback on their performance.
- *Do not* allow your busy schedule to constantly override those regularly scheduled meetings, leaving the new employee with no way to get the guidance they need early on.
- *Do* assure new employees that failure is a part of the job — so long as it propels them to the solution.
- *Do not* put new team members on the spot by calling on them unannounced in meetings.
- *Do* encourage participation by giving employees time to prepare before presenting to the group.
- *Do* keep new employees busy with meaningful work.
- *Do not* assume that new employees will know how to fill their time if they run out of assigned work.
- *Do* educate and inspire new team members by introducing them to the web community as a whole, including at conferences and other industry events.
- *Do* recognize that the team members you lead today will become our industry's leaders tomorrow. 🐣

How And Why To Make Side Projects Work At A Digital Agency

BY DANNY BLUESTONE 🍷

It's no secret that the digital industry is booming. From exciting startups to global brands, companies are reaching out to digital agencies, responding to the new possibilities available. However, the industry is fast becoming overcrowded, heaving with agencies offering similar services — on the surface, at least.

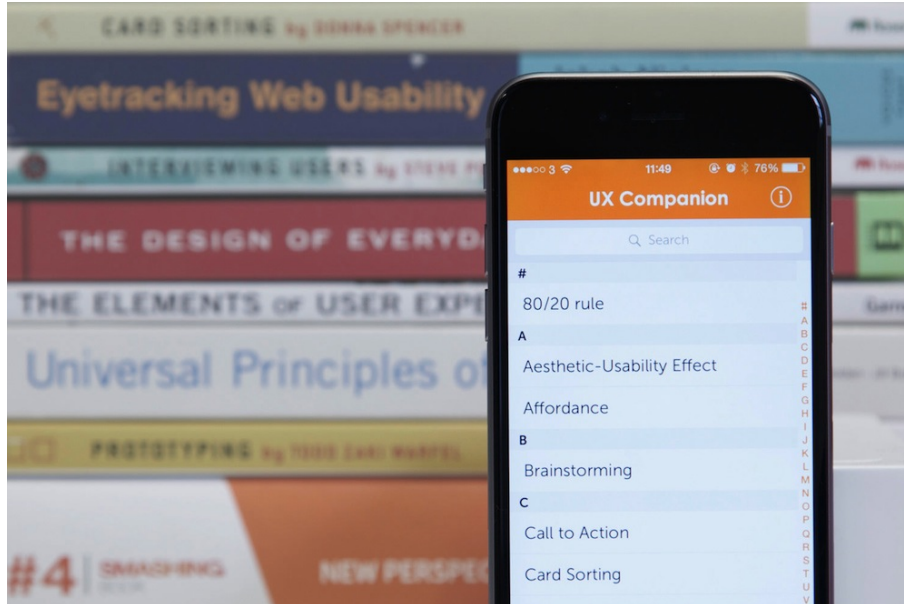
Producing creative, fresh projects is the key to standing out. Unique side projects are the best place to innovate, but balancing commercially and creatively lucrative work is tricky. So, this article looks at how to make side projects work and why they're worthwhile, drawing on lessons learned from our development of the UX Companion¹² app.

Why Integrate Side Projects?

Being creative within the constraints of client briefs, budgets and timelines is the norm for most agencies. However, investing in research and development (R&D) as a true, creative outlet is a powerful addition. In these side projects alone, your team members can pool their expertise to create and shape their own vision — a powerful

¹². <http://www.uxcompanion.com/>

way to develop motivation, interdisciplinary skills and close relationships.



We've gained fresh inspiration on how to make side projects work from having learning lessons from developing UX Companion.

Building R&D into the identity and culture of an agency can also lead to new client work. These projects act as a road map, showing clients exciting new technologies and ideas that will differentiate you from competitors. One of our earliest projects turned our website into a brochure, optimized for the first iPad's touch interactions. By demonstrating the final product, we went on to win a project to create a similar product for a new client.

How To Make Side Projects Work

At Cyber-Duck¹³, we're still working on achieving that perfect balance between commerce and creativity. But we have fresh inspiration on how it's done from having

worked on UX Companion. The app gained a popular following in early October, as one of the first native apps to offer a full glossary of user experience (UX) terms and theory — but the development process was definitely a learning process.

Ensure The Project Is Worth It

Commercializing side projects alongside client work isn't easy. Even if such projects are intended to generate additional revenue streams, they are not directly related to your core business. Those with a more qualitative aim, such as promoting expertise or technological experimentation, are even harder to justify.

A significant shift in mindset is required to support either type of side project — weighing the longer-term, incremental benefits against committing what would otherwise be immediately billable time. Many agencies do this with a time-bound model of 80% client time versus 20% R&D time, inspired by Google's successes with Gmail and Google Reader — which they have since (tellingly) phased out. I'd instead recommend the following guidelines.

TAKE ON PROJECTS, INSTEAD OF ALLOCATING ILL-DEFINED INDEPENDENT R&D TIME

Encourage your team to research, monitor and share interesting, emerging technologies and trends. We collabo-

¹³. <http://www.cyber-duck.co.uk/>

rate and circulate an internal newsletter, which feeds into ideas for side projects. These are debated in quarterly R&D meetings, with a select few being allocated further resources in the same way as new client projects.

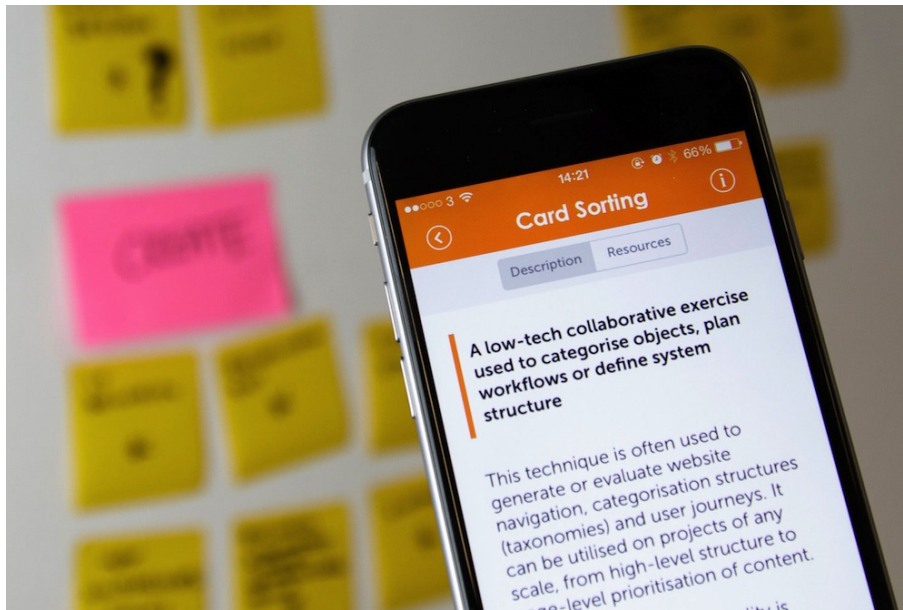
THE BEST SIDE PROJECTS SOLVE GENUINE CHALLENGES

Solving real problems also inspires us. UX Companion stopped clients from being overwhelmed by UX jargon, or from using terms differently from us, and we're now working on a new CRM to resolve some of our operational frustrations. Carefully managed side projects that tackle common problems can become an additional source of revenue and can even, in very special cases, tempt the agency away from client work completely, as happened with 37signals¹⁴ and its Basecamp.

HOWEVER, THE VALUE DOESN'T HAVE TO BE COMMERCIAL

Supporting R&D will increase the engagement and motivation of employees, giving them a true creative outlet to beat the "churn" of the billable hour, and helping you to recruit and retain the best talent. Indeed, post-launch, UX Companion achieved far more than we'd anticipated, with over 7,000 downloads in one week and thousands of social media mentions in the UX community. The buzz in our office was great and a real boost to the team.

¹⁴. <http://37signals.com/>



We were encouraged to develop UX Companion to solve a genuine challenge: helping clients and new members of staff to understand key UX terminology.

Define The Audience And Meet Their Needs

Defining one's audience is a basic tenet of all user-centred design, and it's worth repeating for side projects. The very nature of a side project as a "passion" project, free from the limits of a client's vision, makes it all too easy to become convinced by your own idea — without validating general interest.

When scoping out UX Companion, we aimed to create a reference tool, packed with definitions to demystify jargon. Already convinced it would be of use to our clients and us, we quickly tested with our audience, which revealed that the project could be taken further. We asked the UX community about their go-to dictionary resources, and we heard accounts of a variety of frustra-

tions with online glossaries, which encouraged us to explore how to also meet their needs.

CREATE PERSONAS AND USE CASES

Expand upon initial research through a user-centred approach, drawing full personas for all audience types. A broad target audience is still possible. For instance, UX Companion was aimed at both UX-savvy designers and marketers who have far less knowledge of the terminology. In this instance, we were our own audience, which meant we could quickly solve key problems, with less effort spent on familiarization.

Then, move on to envisage the key use cases for your product. These use cases helped us to realize that our app needed to be accessible offline, with all content downloaded to the device so that users could refer to it in meetings or while travelling.

CONSIDER THE BEST FORMAT FOR LIMITED RESOURCES

Because side projects typically have limited resources, designing for all devices is not possible. Recent research¹⁵ shows that almost a third of smartphone users no longer download new apps in a typical month, despite spending a significant amount of “digital time” on apps¹⁶. So, new ideas must be especially strong.

15. <http://www.ft.com/cms/s/0/4c3e5708-2628-11e4-9bca-00144feabdco.html?siteedition=uk#axzz3JhSRJ7Bz>

16. <http://venturebeat.com/2014/08/25/people-now-spend-most-of-their-digital-time-on-mobile-apps/>

We thought long and hard about whether a native app would be the best format for UX Companion, and the use cases convinced us to go ahead. But we had to make the difficult decision to test the waters by developing for iOS first, with Android and a desktop app planned as a possibility for later. This enabled us to get the idea out there and receive feedback before committing more resources to develop across platforms, but it also meant losing a part of the potential audience.

Proactively Manage Resources

For agencies with a core commercial model of billable hours, resources are the main challenge in side projects. We found it difficult to balance R&D dreams with client visions: Delayed by client launches with hard deadlines, our initial aim to release UX Companion in January soon became August.

We realized that top-level project management had been neglected, with team members from different departments involved as joint stakeholders. Unlike the way we manage client projects, there was no clear lead person to drive the project forward and make definitive decisions. With a far less formal sign-off process for milestones, big decisions about copy and design were frustratingly revisited and due dates forgotten in email trails.

KEEP YOUR TEAM MOTIVATED, AND DON'T DELAY PROJECTS

Clashing against deliverables and pushing back timelines can really waste momentum and enthusiasm, and

nowhere is this more noticeable than in a project originally pursued as a passion “on the side.” Treating UX Companion as “behind schedule” left the team feeling downhearted and without a sense of urgency, as if all future tasks were just attempts to catch up, and the app’s launch was too elusive to get excited about.

If delays are unavoidable, then set a new achievable timeline and recognize the need to rebuild momentum and excitement for launch.

NEGOTIATE TIME FOR R&D AT THE OUTSET

Better still would be to avoid delays from the start. Just as agencies draw careful timelines with specific deliverable deadlines for clients, they should commit to a schedule for their side project as far as possible, even if that means planning for a far-off launch date using small increments of time on an ongoing basis.

We now schedule R&D projects using Harvest Forecast¹⁷. It is a great tool to block time into each department’s production schedule, to mark milestones (for low-fidelity side projects) and to gain a quick overview of a project as a whole.

COMMIT DEPARTMENTS RATHER THAN INDIVIDUALS

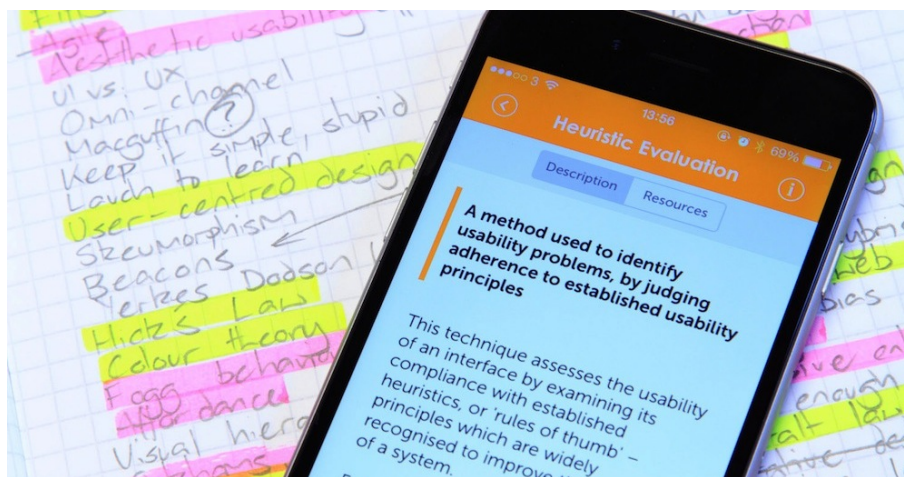
In the past, different team members were assigned to a variety of specific side projects, with deliverables dependent on their personal availability. This further com-

¹⁷. <https://www.getharvest.com/forecast>

pounded resource challenges. Now, we work more intensively on fewer projects, each of which has a defined lead and defined stakeholders. As with client work, individual tasks are the responsibility of each department, so that team members are able to collaborate and complete on time.

BE PREPARED FOR SURPRISES

As a creative experiment, a side project can throw up surprises, so retaining some flexibility is important. We didn't realize that UX Companion's content would be trickier and cause far more delays than the technical development. Our UX team was asked to write initial drafts, which we believed would capture nuanced definitions. We hadn't accounted for the team being less accustomed to writing educational content. Next time, we'll set a more careful and realistic strategy for any content-heavy project requiring the expertise of our busy team.



Our UX team carefully selected key terms to cover, from common terminology they come across in daily tasks – but they found it tricky to work in writing time.

Challenge Yourself, And Explore New Technologies

A side project is a great chance to experiment with emerging technologies, ensuring the agency stays ahead of the game and feeds insight back into client processes. It improves employee engagement by encouraging them to expand skills and try out new things without affecting a client's brief or deadline.

We assembled a mixed team to build our product, using Objective-C, the native language of iOS apps, in Xcode¹⁸. By chance, development began just before iOS 8 was due for release. To avoid compatibility updates soon after launch, the team had to quickly adapt and build within a beta version that could simulate the upcoming operating system. This experiment made the code messier, and development took slightly longer than expected. But it was a great opportunity for the team to learn something new.

Similarly, after launch, when Google announced support for in-app tracking via Google Analytics, we thought that testing its implementation in UX Companion would be better than testing in our next client's app.

¹⁸. <https://developer.apple.com/xcode/>



Challenge your team by experimenting with new technology. For us, this meant building in a beta version of Xcode.

Quality Is Key

No agency would launch a client project without comprehensive testing, and the same goes for all side projects. Alongside meticulous quality assurance (QA) testing of UX Companion, each definition was checked manually across an array of iPhones, using TestFlight¹⁹ to host and release new iterations of the app.

Furthermore, the app was tested by a small number of target users on different devices. These testers were tasked with finding key terms, reading through definitions and giving feedback on the content and usability.

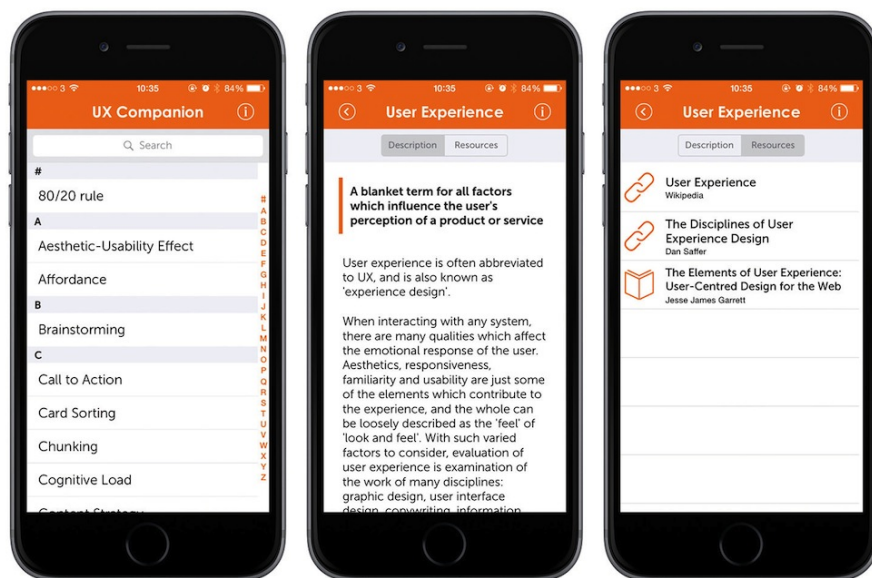
This rigorous QA enables an agency to showcase its capabilities through side projects. After all, you'd only

¹⁹. <https://www.testflightapp.com/>

want to showcase a bug-free, intuitive product. Having demonstrated UX Companion to one of our partners, they are now considering working with us to create a similar reference tool for their industry.

Commit To Releasing Features

Keep the initial product simple, taking a “lean” approach to development and launching with only the most critical features. Otherwise, you court the danger of spending a vast amount of time on a product that you’re never happy enough to launch. Despite its status as a “side” project, commit to maintaining and releasing future features and building an active community around your product. Otherwise, you risk losing users and all of the team positivity that came from developing the product.



The final pages of UX Companion, including the dictionary-style list of terms, a full article and external resources.

Starting small and adding features over time has helped us continue to find resources to support UX Companion. We're happy with our initial launch, and the app's popularity has validated our plans to build a version for Android. We've also gotten feedback that users would like us to add in-text links between the articles, to improve usability.

Conclusion

Given the crowded, competitive nature of the digital space, investing in creative side projects is a powerful way to stand out, experiment and feed innovation back into client work.

Many of the tips covered in this article share some common ground — if you manage your side projects with as much professionalism as you manage client projects, then you're likely to succeed. Achieving the perfect balance with client work isn't easy, but we're confident that following these lessons will be great for our next project, and hopefully they'll help you on your way. 🍷

Internal Developer Training: Doing It Right

BY JAMES MILLER 🍷

Successful developers all have something in common: the desire to create. To fully realize that creativity, they need to continually improve their skills. The web industry has grown from this desire to learn. You only need to look at the unwavering demand for conferences, workshops and training days for evidence of this.

For many companies, however, these sources of training require time and money that simply might not be available — especially when you consider that technologies evolve all the time. The cost of continually sending your team to workshops and training days can quickly become unsustainable.

People in the web industry in particular believe in sharing what they've learned and helping others to improve their skills. This is the perfect premise on which to develop an internal training program. Within your team lies a wealth of skills, knowledge and experience that can be shared and developed further. With a little effort and using resources freely available on the web, you can increase the technical competence of the team organically, with much lighter demands on time and cost.

Why Bother?

Good developers will teach themselves anyway, right? Well, yes. But significant benefits are to be gained from

formalizing and actively championing training within the company.

Developers who excel in a particular technology can teach it to others, gaining morale-boosting recognition and a reputation for being the go-to person for that skill. Junior members of the team will learn what the team is capable of and who they should query with specific questions. This is much more valuable than you might realize — knowing exactly where to go when a problem arises can quickly prevent bottlenecks in a project and make the team much more responsive.

As developers spend structured time together, they will learn the strengths and weaknesses of the team and form a more cohesive unit. They will be more able and willing to innovate and push boundaries if they know the full capabilities of their colleagues.

Most importantly, regular well-executed training will make developers better at their job and probably much happier. They will understand more, be challenged more and be significantly more productive.

Developers will always be more committed when value is put on their current skills and when their potential is invested in. In an industry that has so many attractive and flexible places to work, training can be a significant perk that helps to retain and attract talent.

Let's Get Started Already!

The first challenge you will likely face in implementing regular training sessions is getting the company to buy into what you are trying to achieve. Explain the afore-

mentioned benefits to aid your cause. However, you might have to get creative if your work environment is less flexible. For example, consider reducing the investment of time by proposing a “brown bag” approach. Get team members to bring their own food and make the training session an informal lunch meeting.

Management is much more likely to offer its full support if it can see evidence of the benefits. Clearly explain that not only are you looking for their approval, but you want to keep them in the loop as the training progresses. Showing a comprehensive plan and clear metrics for how the team will improve will go a long way to convincing management that the investment of time will benefit the company.

THE TRAINING PLAN

To formulate the plan, look through the most recent projects that your team has worked on. Analyze the skill sets that were used. Talk to project managers about any issues that may have arisen. Keep an eye on developments in the wider industry and how they might bear on future projects.

Most importantly, look at the developers’ personal development plans and see how training could facilitate their goals. This will also help you to identify senior members of the team and those with specific expertise who would benefit from leading the training sessions themselves. Senior members in particular will have a wealth of development and commercial experience.

Of course, make sure that the senior members of the team are on board and would be comfortable leading training sessions. Give them enough time to prepare, and provide guidance on what is expected, while still allowing them sufficient freedom to make the session their own.

Keep the training plan simple. List the specific sessions you wish to include, briefly describe them, and assign them to developers who have the skills to lead them.

Order the training sessions by importance, but don't feel you have to attach dates. Depending on the size of the team, you might find that key members will be absent for some of them and that you will need to reschedule.

At the end of each session, date it and mark it as completed in the training plan. Write any relevant notes next to the entry, such as problems, areas not covered and new avenues to explore in future sessions. Make the document a collaborative spreadsheet to make it easier to share internally.

MEASURING SKILL LEVEL

Exactly measuring a developer's skill level is difficult, but a generalized indication will help.

One way is to use a skills matrix, listing each team member down the left column, languages and skills along the top, and a scale of 0 to 10 as measurements:

- **0**
no experience
- **1–3**
understands the basics

- **4–7**
competent with practical experience
- **8–10**
expert

	A	B	C	D	E	F	G
1		HTML	CSS	JavaScript	Angular JS	Ember JS	Backbone
2	Emma Dale	10	8	6	8	7	2
3	Brook Side	10	9	8	2	7	8
4	Holly Oaks	8	6	9	6	3	0
5							
6	Average Skill Level	9.33	7.67	7.67	5.33	5.67	3.33

A sample skills matrix ([View large version](#)²⁰)

Adapt the scale to your needs. You could make it more general, with terms such as beginner, intermediate and expert. Or make it more complex, depending on the skills required by your team. Review it when training sessions are completed and after significant projects.

A matrix that is up to date makes for a useful tool to allocate resources, schedule work and inform the wider company of the development team's capabilities.

Stick To Your Principles

Before planning the content of the training sessions, consider some underlying principles.

²⁰. <http://media.mediatemple.netdna-cdn.com/wp-content/uploads/2014/08/01-skills-assessment-opt.png>

TIMING

Due to the nature of development, finding a regular time when all members of the development team can step away from their work is tricky. Avoid standard release dates and the preceding and succeeding days.

Aim for once a week. Greater frequency could threaten deadlines and meet with resistance from management. Keep the sessions consistent; too much rescheduling or skipping of sessions will devalue the importance of the training in the eyes of the developers.

Friday is often a good time, especially in the afternoon. Most of the company will be winding down at this time, and disruption will probably be minimal. If homework is assigned, this also gives developers the opportunity to dabble with it on the weekend.

Plan the sessions in advance. Keep them short and sweet, no longer than an hour to keep everyone engaged.

ENVIRONMENT

A meeting room with a large screen and wireless Internet would be ideal. Ensure that there is enough comfortable seating so that everyone can participate easily.

Such rooms are usually designed for client presentations, which can make them difficult to book. Again, scheduling the training sessions for a slow period of the week and booking in advance should help with that. Send out calendar invitations so that the team blocks out that time, too.

Let any potentially disruptive colleagues know that training sessions should not be interrupted. Once every-

one has arrived, close the door. Shut out everything (and everyone) that could be a distraction.

Don't forget about off-site members of the team. Being included will give them the benefit of the training and also remind them that they are considered part of the team. Use Skype or Google Hangouts to include them. Ensure that their supervisor knows about the training session so that they can allocate the time and, ideally, a quiet, comfortable environment.

DISCIPLINE

To protect the time, both the company and the team need to agree that attendance at training sessions is mandatory. Exceptions and rescheduling should happen only in extreme circumstances.

Phones and laptops are distractions and should be discouraged. Attention should be focused on the presenter and their material.

GOALS

When planning the sessions, try to align the individual developers' targets with the company's goals for growth. Focus on technologies and techniques that will not only benefit the team, but increase the company's expertise.

The skill-level matrix mentioned above can be distributed to other departments to help them understand the development team's capabilities.

HOMework

Without practical application, training will be quickly forgotten. To achieve real progress, assign a task for the participants to practice the skills they've learned in the session.

The assignment should be small enough to achieve in the downtime between projects or outside of normal working hours if necessary. More importantly, it should be interesting enough that a developer would want to do it, especially if it needs to be completed in their spare time.

Reviewing an assignment could be the focus of the subsequent session, in which you would explore different approaches and techniques, as well as identify and reward those who have excelled.

Homework is, of course, optional. Not everyone will want to do it, and, despite their best intentions, developers won't always have the time to tackle it.

But if the training sessions are aligned with both the company's goals and their personal development plans, you might be surprised by how willing the developers are to complete homework. They'll be inspired by the chance to show off their skill, gain recognition from colleagues and maybe even win a prize.

RECORD

Not everyone will make it to every training session. Developers take vacations, and urgent bugs and tight deadlines will sometimes intrude. Recording sessions is a

good way to give those who miss one a chance to catch up.

Also, share the slides and links from each session with attendees. The best way to do this is to set up a [Github Pages website using Jekyll²¹](#), and get everyone to contribute. The website could also be used as an internal knowledge base.

FUN

Keep it fun! If the training sessions become a chore, then they probably won't be successful. A friendly, open and honest environment will create the right culture for growth, fostering connections between team members, and improving communication and cohesiveness.

Let's Break It Down

So, how do you go about structuring a training session? As mentioned, this is highly subjective and depends on both the facilitator and the team. However, if you're struggling to know where to begin, let's make a meal out of it!

THE APPETIZER

Everyone likes to have a taste of what is going on, so start with a quick business update, detailing the company's latest wins and the progress of work underway. If you have

²¹. <http://24ways.org/2013/get-started-with-github-pages/>

any other news about the company, including potential opportunities within, consider sharing it, too.

An update on the wider industry could also be beneficial. If any key developments have happened, discuss these and share links to relevant articles. The beginning of the session is also a good opportunity to review homework and single out the best solution with recognition (and a trophy if you're feeling generous!).

Don't dwell on any of these things for long. This section shouldn't last longer than 20 minutes.

THE MAIN COURSE

The meat of the session should focus on the designated topic.

The most common type of session will probably be a tutorial on a particular language or technique. Don't assume anything. Introduce the technology, explaining its purpose and situations when it is best used, not forgetting its limitations. Ask for opinions and experiences from any team members who have experience with the technology.

Showing examples is the easiest way to demonstrate a technology. Prepare these carefully, especially if you plan to follow a similar approach in your development projects. Keep them succinct. Either use multiple small examples, or break down a single big example into digestible modules. Avoid live coding unless it is simple and prepared in advance.

Deposit all of the coding examples in your knowledge base or Github repository so that the team can examine them after the session.

With more complex, substantial areas, consider splitting the training into multiple sessions. Start with the basics, and increase the learning curve each week. Don't rely on tutorials alone — mix things up. Plenty of different formats will give developers valuable knowledge and insight.

Deconstruct a project completed by the team. Identify successful approaches, and analyze any issues that arose. Review the techniques used, and get feedback from developers who worked on the project. This will help to account for contingencies if any changes need to be made and will demonstrate good ways to tackle future projects.

If your company is more creative and pioneering, consider devoting sessions to new hardware that has been acquired. Play around with it and inspire your developers.

Collaboration within the team and with other departments could also be incorporated into training sessions. Consider two speakers from different areas presenting the same technology — programmers and designers will often have very different views. Or venture even further and invite a project manager to lead a session, which could improve processes, communication and understanding between departments.

THE DESSERT

Finally, finish the session by mulling over what you've covered. Invite questions and encourage discussion.

Before everyone leaves, assign the homework. Choose it ahead of time, and clearly explain it. The assignment should relate to the material covered in the session – and perhaps extend it.

Start	Introduction New hires, new business wins, industry trends and general company update.
10 mins	Review of last week's CSS3 Animation homework. Highlight best practice and present prize.
20 mins	d3.js Basics d3.js is a powerful interactive data visualiser written in JavaScript. Today is the first session of three and we will cover the basics: <ul style="list-style-type: none"> - Setup and walkthrough of basic template. - Talk through chaining elements with example code. - Demonstration of how to import different data sources. - Examples of drawing divs and use of spacing.
30 mins	
40 mins	
50 mins	Q & A Questions, comments and feedback. Homework: Draw a bar chart. Best visualisation wins!

A sample training session schedule

Continual Improvement

Continually review the effectiveness of the training sessions. Once they have become a regular fixture, solicit feedback.

Keep the training collaborative. Invite the development team to tell you what works for them and what doesn't, and be prepared to alter the training plan. Also,

look to the wider company to see what impact the training is having and whether particular areas might need more focus.

Every team and every company continually evolves. Training will help to keep both aligned and at the forefront of the industry, enabling them to shine. 🌟

How To Build An Agile UX Team: The Culture

BY JEFF GOTHELF 🐼

This is the first in a three-part series on how to build and grow successful user experience teams in agile environments²². It covers challenges related to organization, hiring and integration that plague UX teams in these situations. The perspective is that of a team leader, but the tactics described can be applied to multiple levels in an organization.

Building any kind of agile team is a lengthy and challenging process. Building a user experience team within an agile organization challenges not only traditional design practices but typical design team dynamics. In this first part, we'll look at the type of culture that would support a strong UX component in the agile process and how to structure the organization so that designers are most effective and are able to thrive.

Organizations Become Supportive Through Dialogue

Critical to the success of any user experience team is an organization that values its contribution. This is not unique to agile shops, but it becomes even more critical given agile's rapid cycle and participatory rituals. In a typ-

²². http://en.wikipedia.org/wiki/Agile_software_development

ical resource-allocation scenario, no more than one UX designer is assigned to a cross-functional (i.e. scrum²³) team. In fact, this scenario is usually optimistic. In some cases, a UX designer will be straddling more than one team. “Team” is the core concept of the agile philosophy, and as such it must include the designer as a core member.



Teams work together to celebrate their wins at weekly team-wide demos²⁴.

Development managers need to set the expectation with their staff that design is critical to the team’s success. As you begin to build your UX practice in this environment, ensure that you have frequent conversations with these managers to review how their staffs are reacting to the

²³. [http://en.wikipedia.org/wiki/Scrum_\(development\)](http://en.wikipedia.org/wiki/Scrum_(development))

²⁴. <http://www.jeffgothelf.com/blog/>

addition of designers to their teams. These conversations will help anticipate issues that may hinder the cohesion of the scrum team. In addition, lessons from fixing one of these issues can be applied pre-emptively on other teams.

By the same token, it is incumbent on the UX designer, their corporate champion and team leader or builder to promote the values of the craft in the organization. Again, this is not unique to agile environments, but it is critical to keeping the team focused on core UX and design issues. Key to this promotion is transparency. Let the team into the designer's world. Let them see what they do and how they do it, and let them experience the benefits that come from doing UX and design work. When all members of a cross-functional team can articulate the benefits of design activities such as,

- speaking with customers,
- understanding the business and competitive landscapes,
- constructing the information hierarchy,
- assessing visual communication,

then they will be far more inclined to carve out time for those activities in each iteration. Include the team in the actual design exercises. By practicing participatory design, the designer's contribution will become evident, building their credibility and crystallizing team cohesion.

How To Structure The UX Team

Organizationally, there are essentially two ways to structure the UX team: as an internal agency of shared resources or by using a hub and spoke²⁵ approach, with designers dedicated to specific teams.

INTERNAL AGENCY APPROACH

Using the internal agency approach, incoming work is routed through a central point of contact (typically the UX manager) and then assigned to the designer who is best suited to the work *and* who has the bandwidth to take it on. The challenge with this approach is two-fold.

First, it promotes a culture of specialization in which designers limit their contribution to particular segments of the craft (for example, mobile, e-commerce, social experience design, etc.). Secondly, with no loyalty to the scrum team, priorities become driven by which product owner can yell the loudest, typically leaving the designer in the middle, awaiting the outcome to know where to focus. Additionally, this approach taxes the UX manager heavily by forcing them to constantly assess bandwidth, availability and applicability of skills to the required tasks, all while helping the product owners manage competing needs among the design staff.

²⁵. <http://www.web-strategist.com/blog/2010/11/09/research-most-companies-organize-in-hub-and-spoke-formation/>

HUB AND SPOKE MODEL

The hub and spoke model, on the other hand, is the better practice. Dedicate each designer exclusively to one particular scrum team. They should feel like they are a part of their scrum team and feel connected to that team's focus. In doing so, the designer's priorities become clear. Their priorities are synonymous with the team's, thus enabling them to clearly understand where to expend their energy.

Asking for a designer's input or effort on a "quick" project or "internal need" is a fairly common occurrence in many companies. It is incumbent on your organization's leadership to protect the one designer or team structure, so that each team's designer isn't peppered with these ad hoc requests. Such requests distract the designer from their team's mission and inevitably consume already limited capacity. In the eyes of the designer's teammates, these efforts erode any progress that has been made in confirming the designer's permanence on the team.

Working With The New Teams

New ways of working for designers will, at first, be uncomfortable. For many design managers, assigning their staff to particular teams brings a new challenge. No longer does the design manager dole out specific work to each person on the team. Instead, the designer's daily agenda is driven by the prioritized backlog of the scrum team. This is a duty that managers were likely used to doing in the past, and its removal may feel like a reduction in responsibility and authority. To fill this potential void, design managers should work with their staff to under-

stand their team's priorities and suggest methods of structuring the work in a way that allows the best user experience to get built.

Weekly one-on-one meetings with each designer should reveal any challenges unique to their situation. In addition, regular touch points with each team's product owner will provide insight into any design challenges on the horizon. And monthly high-level retrospective meetings become a forum for managers to share successful and failed tactics across the organization. With all of these tactics in place, the driving goal should be to solidify the designer's place on each team.

Dedicating your staff to other teams does not portend the doom of the centralized user experience team. The centralized team is still very much needed for mentorship, professional development and general design support (such as critiques). In addition, a centralized UX practice can bring learning from the individual scrum teams back to the broader group, disseminating lessons that improve the process elsewhere.

The centralized UX team also serves as a "safe haven" for designers to vent their frustrations with the agile process, commiserate a bit with their colleagues and reassure themselves that they're not alone in their agile UX challenges. Weekly UX team meetings are the building blocks of this community. Outings to design events, talks and recreational events help solidify the bond between distributed designers. A UX-only email distribution list or other forum could also provide this safe haven on an as-needed basis and supplement discussion outside of the regular meetings.

Conclusion

Company culture and staff organization are the two fundamental building blocks of agile and UX integration. By creating an environment that values design, promotes its benefits and spreads this gospel through the allocation of UX resources across individual teams, companies will lay the foundation for successful team-building and adoption of the agile process down the road.

In part 2 of the series, we'll discuss why hiring is such a critical part of the agile UX team's success and how to maximize your chances of hiring the most appropriate staff. 🍷

How To Build An Agile UX Team: Hiring

BY JEFF GOTHELF 🐼

This is the second in a three-part series on how to build and grow successful user experience teams in agile environments²⁶. It covers challenges related to organization, hiring and integration that plague UX teams in these situations. The perspective is that of a team leader, but the tactics described can be applied to multiple levels in an organization.

In part 1 of this series, we discussed what kind of organizational structures and attitudes are needed for agile and UX integration to take root. The third and final section will deal specifically with how to integrate the team. In this section, we'll discuss hiring. As you build and grow an agile UX team, hiring becomes a central point of impact for the team. Understanding what to look for in designers and how to assess their potential success (or failure) in your agile environment can be tricky. In addition, not all (and potentially none) of your legacy designers will integrate with the agile methodology. Here are a few ways to go about it.

²⁶. http://en.wikipedia.org/wiki/Agile_software_development

Agile Designers Are Hard To Find



Anyone you add to your agile UX team must be willing to work collaboratively.

Simply advertising “agile” in your job description will not drive enough interest from designers who actually have experience with the process, mainly because many designers with at least five years of experience have never worked this way. Also, the proliferation of interactive agencies has produced a huge swathe of designers who have partnered with developers but have minimal experience. When you first meet a prospective member of your UX team, it’s critical to get an understanding of how they approach two things: the concept of “team” and problem-solving.

The Devil Is In The Transitions

To assess how they feel about working on a cross-functional team, go through each employer on their resume to see where they fit in that organization, what their impact was and, most importantly, what triggered their departure from the company. The transitions will often tell you exactly what drove the separation between those companies and your candidate.

HANDLING CRITICISM

One warning sign to watch for as you probe their resume is difficulty with taking criticism from beyond the design team. This could foretell of potential challenges with integrating with a scrum team down the road. Feedback will inevitably come from non-designers. If there are already signals that the candidate does not take this type of feedback well, then consider someone else.

HERO DESIGNERS

Next, keep an ear out for rock-star syndrome. If the transitions in your candidate's career were driven by "too much criticism" of their work, or an inability to build the designs they came up with, or a propensity to simply leave a job if the chemistry wasn't immediately there, then you may be dealing with someone who believes they are a hero designer. Hero designers are problematic in agile environments because agile is distinctly anti-hero. It promotes the concept of the team (not the individual designer or developer) as the smallest unit of labor, and it focuses on that team winning and losing together. A hero

designer will undoubtedly be upset that dynamic by wasting energy and time on unproductive conversations. Hero designers struggle to collaborate and share their work productively.

JOB TRANSITIONS

Finally, when discussing job transitions, be wary of frequent changes of employer. The risk here is that your candidate is unable to gel well with their teams. If it has happened once or twice, it could simply have been a coincidental matching with bad teams. If it has happened more than that, though, the issue will typically be with the designer. Maintain a line of questioning around those transitions to see if you can notice any anti-team patterns.

Problem-Solving Over Portfolios

Understanding how your candidate solves problems is the next big hurdle. A portfolio can provide evidence that the designer can create an aesthetically pleasing experience, but it doesn't speak to the problems that those designs actually solved. Portfolios should be treated as conversation starters. The ubiquity of design tools makes it relatively easy for any designer to "draw a straight line." Ask your candidate to pick the project on which they feel they had the most impact and to walk you through the problem statement, their approach to solving it, their contribution to the project and the result.

Going through the project's entire lifecycle will show you where the candidate is strong. Do they engage right

away at the problem-statement level? This is critical in agile because you're constantly working to validate your hypotheses for the solution. Can they articulate an understanding of the target audience when promoting a solution? Again, knowing the customer will help to drive more value to that customer faster: a core agile tenet.

Finally, how interested are they in the success of the implementation? If they are comfortable launching a product without wanting insight into how well it's performing, then they're likely not a good fit for your agile UX team. Having an interest in the efficacy of their solutions is imperative. In your agile shop, they will be iterating on their work based on this performance data. An innate curiosity here signals a potentially worthy candidate.

Spend Some Time Together Outside Of The Interview

In assessing how well the candidate will integrate with your team, a critical interview tactic is to plant them with their prospective teammates. This could be as short as an hour-long exercise or even as long as a full day. Have the designer join in on the team's activities, and ensure that those activities include whiteboarding, brainstorming and general team-wide problem-solving exercises. This tactic will reveal as much about the candidate's skills as it will about team chemistry and likability. Ultimately, as the hiring manager, you won't be working as closely with this person as the team will, so let their opinions shape

some of the process of deciding on the candidate's viability.

As a final assessment, have a developer interview the candidate. Like the others, this tactic will reveal several things, including the designer's ability to communicate with developers. Can they communicate effectively with team members from other disciplines and create a meaningful conversation around the problems that the team is working to solve? Can they inspire the developer through a previous team's win (or loss — as long as the candidate focuses on the lessons learned)? This final interview should shed more light on the candidate's chances of success in your agile environment.

Conclusion

Agile UX team hiring is similar in many ways to any other UX hiring activity, with some key differentiators. Besides assessing the designer's skills, it's imperative to understand how well they work with a cross-functional team. The tactics mentioned in this article will provide insight into the designer's mindset and can serve as predictors of their success in integrating in your team.

You've set up the right infrastructure and hired the right team. In the third and final part of this series, we'll discuss how to integrate these elements into a productive team. 🐼

How To Build An Agile UX Team: Integration

BY JEFF GOTHELF 🐼

This is the final part in a three-part series on how to build and grow successful user experience teams in agile environments²⁷. It covers challenges related to organization, hiring and integration that plague UX teams in these situations. The perspective is that of a team leader, but the tactics described can be applied to multiple levels in an organization.

Part 1 in this series discussed how an agile UX team should fit in your organization in order for it to succeed, and part 2 went over how to hire designers who will propel their scrum teams to success. In this third part, we'll discuss how to integrate the UX designer into the agile process and team structure.

For many designers, coming into an agile environment feels like settling in a new country. There are different dialects and new rituals. Furthermore, design is treated very differently than they are used to. It is, in fact, through ritual that a UX designer is able to integrate in their agile team. In addition, it is incumbent on the designer to open up the design process for collaboration and critique from other members of the team. Together, these tactics have the potential to yield a successful agile team.

²⁷. http://en.wikipedia.org/wiki/Agile_software_development

Rituals Are Critical To Integration



Developers, designers, product managers: all need to work together.

First and foremost, participation in agile's rituals is imperative for the designer on your scrum team. It doesn't matter so much what those rituals are or how well (or not) you stick to the agile playbook. Whatever the team's regular practices such as the "stand-up" (a daily 15-minute meeting in which the team meets, standing up, to discuss yesterday's work, today's efforts and anything that is blocking progress) the designer must attend them.

At first, this will feel awkward and potentially a waste of time. Most of the conversation will undoubtedly skew tech-heavy, yet the designer should still attend. These are the bonding moments when it becomes evident to both the developers and the designer that they are on the same team. Just spending those 15 minutes together every day

will begin to break down the walls of mistrust that were created through years of departmental silos and will instill the level of camaraderie necessary for the team to excel.

Any other rituals that the team has including iteration planning (a once-an-iteration meeting in which the team plans its work for the next cycle) and retrospectives (a post-cycle meeting in which the team discusses what went well, what went poorly and what to try next time) must include the designer. It is imperative that they *participate* in those meetings as well, not just attend them, because it is at these meetings that the designer gets a sense of where they fit on the team and how best to influence not only the work, but the process.

Fewer Secrets, Bigger Impacts

Secondly, the designer needs to meet their new team halfway by demystifying the design process and opening it up to their new teammates. Instead of showing finished work, the designer should bring in sketches and ideas for review. Get the team's input and buy-in at a much earlier stage of the design. Having some input a bit further upstream than they're accustomed to will empower the rest of the team. It will also reveal to them the amount of effort and the consideration that go into each design and will show the work's evolution from idea to sketch to pixels.

Another team-building tactic is cross-functional paired design. Accelerate the integration process by sitting a developer and the designer down on the same machine to

create the experience in real time, using code, pseudo-code, design tools and sketches. Whatever it takes to get the end result during that session is fair game. By just spending time together, the teammates will begin to understand each other's strengths and weaknesses. The transparency now afforded to them will reveal to each the challenges and value of the other's discipline. As a bonus, some technical skill will naturally get cross-pollinated, enhancing the knowledge of both parties.

Bring The Pain To Everyone (In A Good Way)

Part of successfully integrating UX into an agile team is to make the team acutely aware of the usability challenges that its product currently faces. Nothing is more effective at this than having the entire team view users with the product. This could be done in various ways, but the point is to make it easy. Conduct the testing internally, and broadcast it over the office network; or use a screen-sharing tool. Bring the user's frustration to the team. Let the team discuss what it saw, and plot together how to overcome these challenges in the coming iterations. These discussions are golden opportunities for the UX designer to showcase their expertise and their value to the team.

Ultimately, integration is driven by inclusion. The developers need to include the designer in their world, while the designer needs to open up their practices, processes and, most importantly, thinking to the developers. The more time the team spends together, the greater

the transparency will be between the members. This transparency is what builds the trust that enables inclusion to take place. This transparency is what creates a safe place for conversations to happen and, most critically, for mistakes to be made. Knowing that their team is behind them and that mistakes will be forgiven and learned from allows the designer to let down their guard and integrate effectively in the agile team.

Conclusion

Agile was not conceived with user experience or design in mind. But the changing nature of software development has forced these disciplines together. In many cases, forcing traditional design practices to fit with these newer philosophies and methodologies has led to disaster. This three-part series has focused on how to set up an infrastructure that enables the user experience and design teams to integrate into the agile process. In addition, we've covered what to look for when hiring designers to work in agile environments.

Finally, we laid out a very practical approach to actually integrating UX into the world of agile software development. These elements should provide a solid foundation for getting your team working more effectively in this world. 🐼

How To Recruit A UX Designer

BY MATTHEW OGSTON 🍷

The web has entered an era of user-centricity. If businesses are to attract new customers and retain existing ones, they must create websites and apps that deliver intuitive and tailored experiences. Whether you run an online retailer or a not-for-profit community website, the user experience is mission critical.

As a consequence, we have seen a real surge in the need for talented user experience (UX) designers who can help turn vision into reality. How do you attract, recruit and retain UX talent in your business?



(Image credit: [opensourceway](http://www.flickr.com/photos/opensourceway/4371000486/sizes/o/in/set-72157628736893483/)²⁸)

If you are anything like us, you'll be keen to learn from leaders and innovators in our industry, which is why

²⁸. <http://www.flickr.com/photos/opensourceway/4371000486/sizes/o/in/set-72157628736893483/>

we've assembled some luminaries from the UX community to share their insight and experience especially with the Smashing Magazine community.

We'd like to say a big thank you to the experts who made this guide possible. They all have a unique perspective on UX, and their work intersects with it in very different ways.

- Kara Pernice, [Nielsen Norman Group](http://www.nngroup.com/)²⁹
- Peter Merholz, [Adaptive Path](http://adaptivepath.com)³⁰
- Martin Belam, [The Guardian](http://www.guardian.co.uk/)³¹
- Stu Collett and Odette Colyer, [Super User Studio](http://superuserstudio.com/)³² and [UX Jobs Board](http://uxjobsboard.com/)³³
- Tom Wood, [Foolproof](http://www.foolproof.co.uk/)³⁴
- Justin Cooke ([@justincooke](http://twitter.com/justincooke)³⁵), [Fortune Cookie](http://www.fortunecookie.co.uk/)³⁶ and chair of [BIMA](http://www.bima.co.uk/)³⁷

We asked each of our experts 10 questions. Their perspectives give you a 360° view of how they tackle UX recruitment in their organizations. Jump to the section that

²⁹. <http://www.nngroup.com/>

³⁰. <http://adaptivepath.com>

³¹. <http://www.guardian.co.uk/>

³². <http://superuserstudio.com/>

³³. <http://uxjobsboard.com/>

³⁴. <http://www.foolproof.co.uk/>

³⁵. <http://twitter.com/justincooke>

³⁶. <http://www.fortunecookie.co.uk/>

³⁷. <http://www.bima.co.uk/>

grabs your attention, or read through the complete guide for all of their insights.

THE QUESTIONS

1. How did you learn to hire?
2. Do you hire with your head or your heart?
3. In a sentence, what makes for a great UX designer?
4. How do you advertise UX positions in your company?
5. What one question do you ask every candidate?
6. Do you have a particular method of assessing candidates?
7. Do you hire based on years of experience or achievements and portfolio?
8. How do you retain talent?
9. What kind of culture do you try to create?
10. What skills would you like to see in more UX designers?

1. How Did You Learn To Hire?

Very few people would say they've "learned" how to hire, because this would imply that they've stopped learning, and of course we all continue to learn every day.

Many of the experts I spoke with continually develop and hone their hiring skills, but their advice hinges on three principles.

FIND A ROLE MODEL

Tom Wood of Foolproof: “My role model is David Ogilvy. He had a really clear and public view about the qualities he looked for in the people he hired. His quote, ‘If we each hire people smaller than us, we will become a company of dwarfs, but if we each hire those larger than ourselves, we will become a company of giants,’ is a call for everyone in a position to make a point to step up and challenge themselves through the quality of people they hire.”

Martin Belam of The Guardian: “I’ve been on a lot of interview panels through the years and picked up techniques from people such as Mags Hanley, Lorna Leddon and Karen Loasby.”

LEARN FROM THE EXPERIENCES AND MISTAKES OF OTHERS

Justin Cooke of Fortune Cookie: “Like everything we do at Fortune Cookie, we have never stopped trying to improve our recruitment process. This was achieved by learning from mistakes, through experience and from others particularly asking recruitment agencies and candidates for feedback on how we could be better.”

FIND YOUR FEET

Ultimately, you need to blaze your own hiring trail and go with your instinct. As **Kara Pernice** of the Nielsen Norman Group emphasizes, “Asking advice from other people who have successfully hired behooves you, but there is nothing like experience.”

Peter Merholz of Adaptive Path says, “I rely a lot on intuition, which has proven mostly successful.”

2. Do You Hire With Your Head Or Your Heart?

Logic and instinct both have their place in the hiring process, and the decision will nearly always be made partly with your head and partly with your heart.

You will likely use your head to determine whether the candidate has the requisite skills, experience and attributes. And then to a certain extent you need to follow your heart and your instinct in deciding whether a candidate is a good fit for your culture.

The experts I spoke with validated this idea, explaining that they initially look at hiring from a rational point of view.

Justin Cooke: “At the first stage we look for the rational, but the ultimate decision has to be based on an emotional connection.”

Peter Merholz sums this up perfectly: “I would say the head is the initial barrier — if I can’t rationalize the hiring decision, then it won’t go anywhere. But after the head makes a decision, the heart plays a part, particularly in thinking about ‘softer’ matters, like personality and cultural fit.”

Stu and Odette: “It’s a balance of finding a person with the right attitude and personality, twinned with skills needed to do the actual job.”

Kara Pernice: “Both, but you have to know you can deal well with each other. And I usually get that feeling from my gut rather than my brain.”

Ultimately, the final decision comes from your head because, as **Tom Wood** explains, “If you make a mistake with hiring in a small or medium-sized business, you can cause real problems for yourself.”

3. In A Sentence, What Makes For A Great UX Designer?

If you don’t know what you are looking for, you will never know when you’ve found it. Nowhere is this philosophy truer than with hiring.

A real appreciation not only of what makes a superb UX designer but of what kind of person you are looking for is essential if you are to recruit successfully.

What makes a great UX designer is, of course, a matter of opinion, but there is a consensus that a UX designer must, in the words of **Martin Belam**, “make good stuff and make stuff good.” They must have an ability to interpret and empathize with the user, to simplify the process and to execute a design solution.

Peter Merholz: “An ability to take an empathetic view of the user, and to interpret that into a systematic design solution.”

Justin Cooke: “Someone who can make the complex simple, beautiful and ever so slightly fun.”

Stu and Odette: “Someone with the passion and curiosity to constantly learn more about how people interact with digital products.”

Kara Pernice: “Great UX designers have a desire to innovate and gather knowledge about potential users and customers, and the humility to know that their first design iterations will rarely be great.”

Tom Wood: “The willingness to collaborate with both the end user and the business client during the design process.”

4. How Do You Advertise UX Positions In Your Company?

There is a clear shift in the way UX roles are being advertised, in line with the increasingly social nature of the web. Interestingly, Stu and Odette still succeed in finding candidates through specialist recruitment agencies, despite the perceived decrease in their popularity.

Here’s how our panelists fill their UX vacancies.

Tom Wood: “Our site, amplified by Twitter and LinkedIn activity.”

Kara Pernice: “We have the luxury of having our boss write a newsletter that reaches many UX professionals, so that is our biggest marketing tool when hiring. It works for us because people who read the newsletter have a sense of what we are about.”

Peter Merholz: “We have our ‘Work with us’ page on adaptivepath.com, and then we reach out through various channels to spread the word: Twitter, our blog, LinkedIn, UX industry mailing lists.”

Martin Belam: “We have our own recruitment portal site, and I usually tweet and blog in a personal capacity to help drum up candidates.”

Justin Cooke: “On the Fortune Cookie website, on LinkedIn, on totaljobs.com, on industry websites like Econsultancy and BIMA, at events and conferences, and through our employees, who receive a bounty to anyone they recommend who we hire.”

Stu and Odette: “UX Jobs Board and specialist recruitment consultancies.”

5. What One Question Do You Ask Every Candidate?

One thing that is universally agreed on is that there is no “right” way to interview someone, so I asked this question of our experts to see if we could at least draw out common themes.

Martin Belam asks of candidates, “Can you describe to me a project that went badly wrong. Why did it go wrong, and what did you personally learn from it?”

Failure is a topic that is all too often avoided in interviews, but a question like this helps the interviewer understand how a candidate copes with failure — failure being inevitable in any career. It helps you determine whether they are capable of humility and also to see how they have professionally developed as a result of failure. This seemingly innocent question can tell the interviewer a great deal about the candidate.

Justin Cooke: “What is the most amazing thing you have seen on the Internet this month?”

Justin’s is a great question to ask because it helps you understand if the candidate is as passionate as they say they are. (Do they keep up with the latest trends, or do

they just say they do?) It also helps you to see the kinds of things that they get excited about; the question might just reveal whether the individual is a good cultural fit for your team and the kinds of projects you do.

Peter Merholz: “What is the thing that gets you out of bed every day and wanting to do this kind of work?”

As an interviewer, you undoubtedly want to understand the motivations of the person you are speaking with. After all, motivation is the key to a happy, productive workforce.

That being said, if you flat out ask a person what motivates them, they’ll probably lie to you with the usual interview spiel about their satisfaction in doing a good job.

Asking someone what gets them out of bed every morning is a roundabout way of asking the same thing, but you’ll catch the individual on the hop, and they’ll probably give you a more honest answer than had you asked what motivates them.

Finally, **Tom Wood** always asks people about their ambitions, “to see if they will push themselves — and us.” This is a superb question and allows you to determine whether the person has planned their professional life in the near and long term or are just plodding.

6. Do You Have A Particular Method Of Assessing Candidates?

Assessing a candidate’s suitability for a job is certainly one of the most, if not *the* most, challenging aspects of hiring, so understanding how the best in the business do it is helpful.

Some clearly like to go the practical route and judge a candidate by assigning them a task during or following the interview. **Justin Cooke** says, “Nothing beats setting a task. The output is always fascinating.”

Kara Pernice allows candidates to do most of the talking and gives them simulations to perform, “such as, give a short presentation and send us the video. This can’t truly demonstrate how they would do, but it’s a start. Sometimes we agree with a candidate to first test the waters by hiring them on a contract basis or as an intern. If we are all happy and still interested in the end, we hire them.”

Peter Merholz, Martin Belam and Stu and Odette feel that the process is fairly simple and that a candidate can be assessed based on their credentials and personality.

Peter Merholz says, “It’s pretty straightforward: do they have the practitioner chops (across strategy, research and design), and do they have the right personality and cultural fit?”

Martin Belam adds, “I expect anyone in UX to have a significant online presence, and I’m always surprised if they don’t.”

To anyone reading this who is seeking a career in UX, a strong online presence is definitely a prerequisite.

7. Do You Hire Based On Years Of Experience Or Achievements And Portfolio?

I was surprised by the responses to this question. I assumed the quality of the portfolio would weigh more heavily every time, but that wasn’t the case.

Tom Wood responds, “Of the two, experience is probably the one I favor most, simply because anyone can catch a break on the projects they work on and the results they get (success has a thousand fathers, after all). Because of the emphasis we place on working directly with clients and end users, there’s often no substitute for the life experience that makes you comfortable in the company of these groups.”

However, **Stu and Odette** says, “The latter. You can get people who have been in the industry 10+ years and still haven’t produced good design work.”

Peter Merholz adds that his company generally favors the portfolio, but “if we’re hiring for a more senior role, where things like client-management skills are crucial (and perhaps even more crucial than super-awesome design chops), then experience definitely is a factor.”

Martin Belam supports this by saying, “I think in any team you need a mix of skills and experience. I enjoy mentoring people and bringing younger people into the profession, so I look more at what I think people will be capable of achieving and how they will go about it, rather than years of experience and qualifications.”

Justin Cooke adopts a completely different approach, saying “Years of experience and portfolios are useful inputs and metrics, but we are more interested in a candidate’s answers to our questions and their response to the task that we set.”

8. *How Do You Retain Talent?*

To someone outside of the UX community, talent retention might not seem like a critical issue, given the state of the economy and how many people are looking for work. But UX is a fiercely competitive market, with agencies and consultancies vying for the attention of the right UX folks.

The level of attention given to talent retention by the people I spoke with is fascinating. Here are what seem to be the key factors in retaining the best UX designers.

OPPORTUNITY

Kara Pernice: “We try to give people opportunities they are interested in.”

SELF-ACTUALIZATION

Tom Wood does it “by thinking every day about what motivates our people and making sure we do everything we can to help them realize their personal goals and ambitions. Beer also helps.”

AUTONOMY

Peter Merholz: “There is no UX consulting firm that allows the autonomy and freedom that Adaptive Path provides. Also, our commitment to sharing ideas, through writing, speaking and teaching, is unparalleled and attractive to our team.”

PROFESSIONAL DEVELOPMENT AND WORLD-CLASS TRAINING

Justin Cooke swears by “never saying no to a training request; employing brilliant leaders; listening to everyone’s ideas and auctioning them to make us a better agency; continually communicating how we are doing; starting at 10:00 am; tracking the market to ensure that our salary and benefits packages are among the best in the industry; and ensuring that we understand everyone’s career goal and mapping out a plan to make it a reality.”

BREATHING ROOM

Stu and Odette: “We’re a pleasure to work with, and we only focus on a set number of projects, so as not to stretch people too far. The quality goes down if you do.”

9. *What Kind Of Culture Do You Try To Create?*

This question follows on the last one, because culture is obviously central to talent retention, and there are clear crossovers between the answers to the previous question and how this filters down through the culture that these leaders are trying to promote.

“Constellations are more interesting than individual stars.” This is the eloquent way in which **Tom Wood** describes the team culture he is trying to foster.

Justin Cooke supports the notion of a team culture by adding, “We are aiming to create a passionate team that

cares for each other and is 100% committed to improving the digital world to make the real world a better place.”

Kara Pernice focuses more on the individual, describing the culture that she is trying to foster as being more autonomous, with “professionals producing high-quality, rigorous work that improves design for clients and UX professionals.”

10. What Skills Would You Like To See In More UX Designers?

I was most looking forward to hearing the responses to this question, not only for the insight, but also because they will help job seekers hone their skills in the most sought after areas.

The thing many of the experts seem to be looking for is holistic in nature — a well-roundedness more than particular design skills.

CLIENT-FACING SKILLS

Tom Wood describes the need for more charming UX designers, who are “comfortable thinking in the same room as clients.”

STRATEGIC THINKING

Justin Cooke looks for “a stronger understanding and awareness of the entire customer journey; a desire to improve the entire service rather than just the experience, and brilliant good storytelling.”

Stu and Odette add, “The ability to pragmatically design for digital products, rather than being able to talk solely about UX in general. Our industry is suffering from too many talkers and not enough walkers.”

RESEARCH ABILITY

Martin Belam says, “I wish people would read more widely, and more about some of the traditional design skills.”

FACILITATION

According to **Peter Merholz** (and I tend to agree here), “Facilitation skills are becoming increasingly crucial in our work; being able to coordinate cross-functional teams and get the most and best out of them.”

Summary

UX is a hard skill to teach; no formal credentials are required, and no two career paths or job descriptions are the same. In fact, pinning down exactly what UX is can be difficult. It can mean different things to different people. Some UX design positions require only graphic design skills, others mainly planning and wireframing. Most, however, require a combination of design, planning, negotiation, conflict management, objectivity, leadership and openness. Above all, a good UX professional must have a natural appreciation of the human mind and be open to new attitudes and approaches and to exploring

the impact of real people on the commercial environment around them.

Recruiting and hiring great UX professionals can be both challenging and fun. Quite often, the “right” person will be wildly different from the person you initially expected, and skill, judgement and intuition are required to pick them out.

One thing is for sure, though: UX skills are in high demand and short supply. It’s a candidate’s market, and companies need to try now more than ever to attract *and* retain the best minds in the field if they are to succeed online. 🐼

About The Authors

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Prior to joining Neo, Jeff lead the UX design teams at TheLadders and Web Trends. Earlier he worked with and lead small teams of software designers at AOL. He is the co-author (with Josh Seiden) of “Lean UX: Applying Lean Principles to Improve User Experience.” Twitter: [@jboogie](https://twitter.com/jboogie)⁴⁴.

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About Smashing Magazine

Smashing Magazine⁵¹ is an online magazine dedicated to Web designers and developers worldwide. Its rigorous quality control and thorough editorial work has gathered a devoted community exceeding half a million subscribers, followers and fans. Each and every published article is carefully prepared, edited, reviewed and curated according to the high quality standards set in Smashing Magazine's own publishing policy⁵².

Smashing Magazine publishes articles on a daily basis with topics ranging from business, visual design, typography, front-end as well as back-end development, all the way to usability and user experience design. The magazine is — and always has been — a professional and independent online publication neither controlled nor influenced by any third parties, delivering content in the best interest of its readers. These guidelines are continually revised and updated to assure that the quality of the published content is never compromised. Since its emergence back in 2006 Smashing Magazine has proven to be a trustworthy online source.

⁵¹. <http://www.smashingmagazine.com>

⁵². <http://www.smashingmagazine.com/publishing-policy/>