

So you've got a seat at the table.
Now what?



Dalia El-Shimy
Senior Staff UX Researcher // Shopify





**We're talking to leadership the same
way we talk to our teammates.**



For a few reasons

- We're explaining details the way we do to convince our teammates... and they don't care.
- They're looking for strong opinions... and we're uncomfortable.
- We invest in understanding people outside our walls... and forget those within.

How did we get here?



Approval



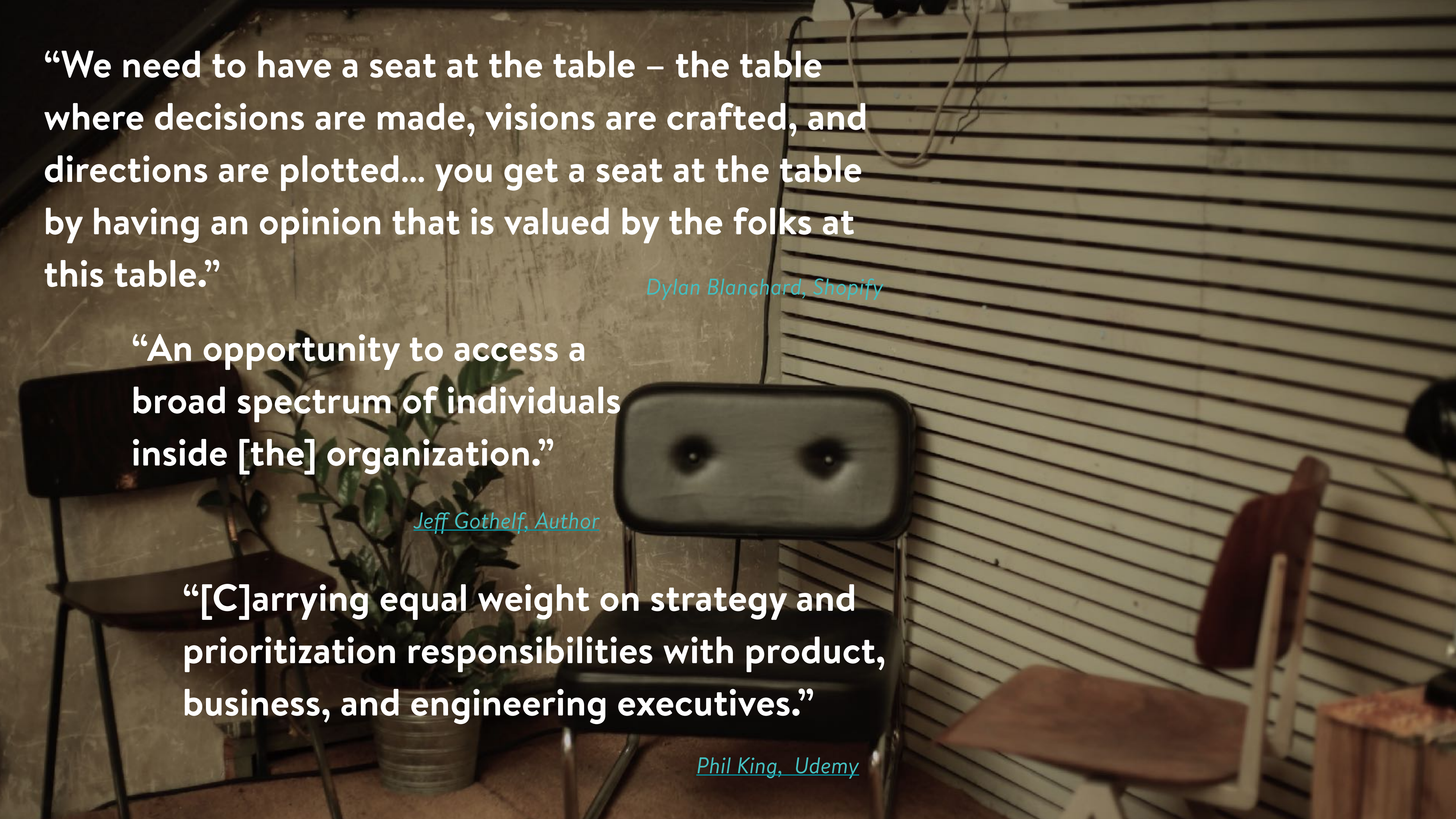
Knowledge



Time



Inclusion
The seat.

The background image shows a room with a light-colored wooden wall. On the left, there is a potted plant with green leaves. In the center, a black chair with a metal frame has a sad face drawn on its backrest. To the right, there is a wooden table and another chair. The overall lighting is warm and somewhat dim.

“We need to have a seat at the table – the table where decisions are made, visions are crafted, and directions are plotted... you get a seat at the table by having an opinion that is valued by the folks at this table.”

[Dylan Blanchard, Shopify](#)

“An opportunity to access a broad spectrum of individuals inside [the] organization.”

[Jeff Gothelf, Author](#)

“[C]arrying equal weight on strategy and prioritization responsibilities with product, business, and engineering executives.”

[Phil King, Udemy](#)



Plot twist:

The fight for a seat is a red herring.

“As research becomes more valued, research leaders are taking on increasingly strategic roles in their organizations—and often aren’t prepared to lead.”

*How we research and designed the
Advancing Research Conference*

“I’m concerned that if we don’t step it up on the actual leadership part, we’re in danger of losing the seat at the table.”

Kate Aronowitz, GV

If you're looking for proof...

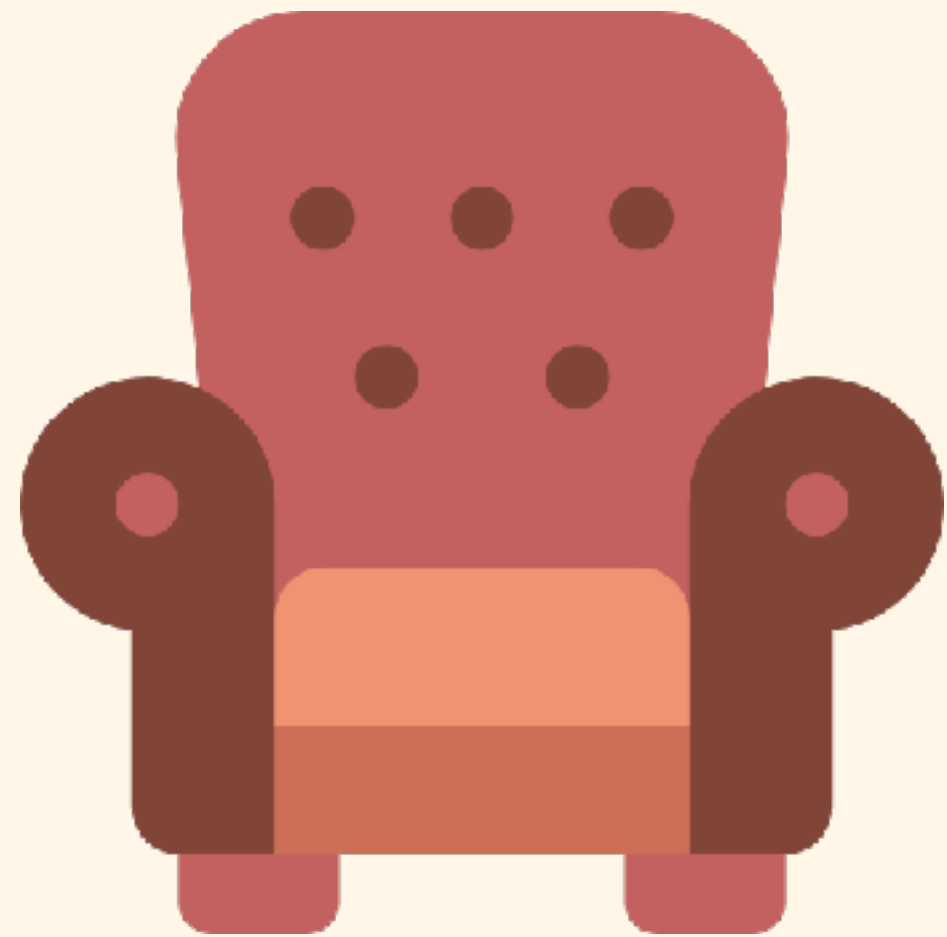
- 72% of researchers are doing research “before beginning any design or development” ¹
- 53% of researchers “educate upper management or other stakeholders” ²
- Literally all of Research Ops

^{1, 2} [UserTesting Industry Survey](#)



So if you've got the seat...
now what?

Leveraging your seat



Look for patterns

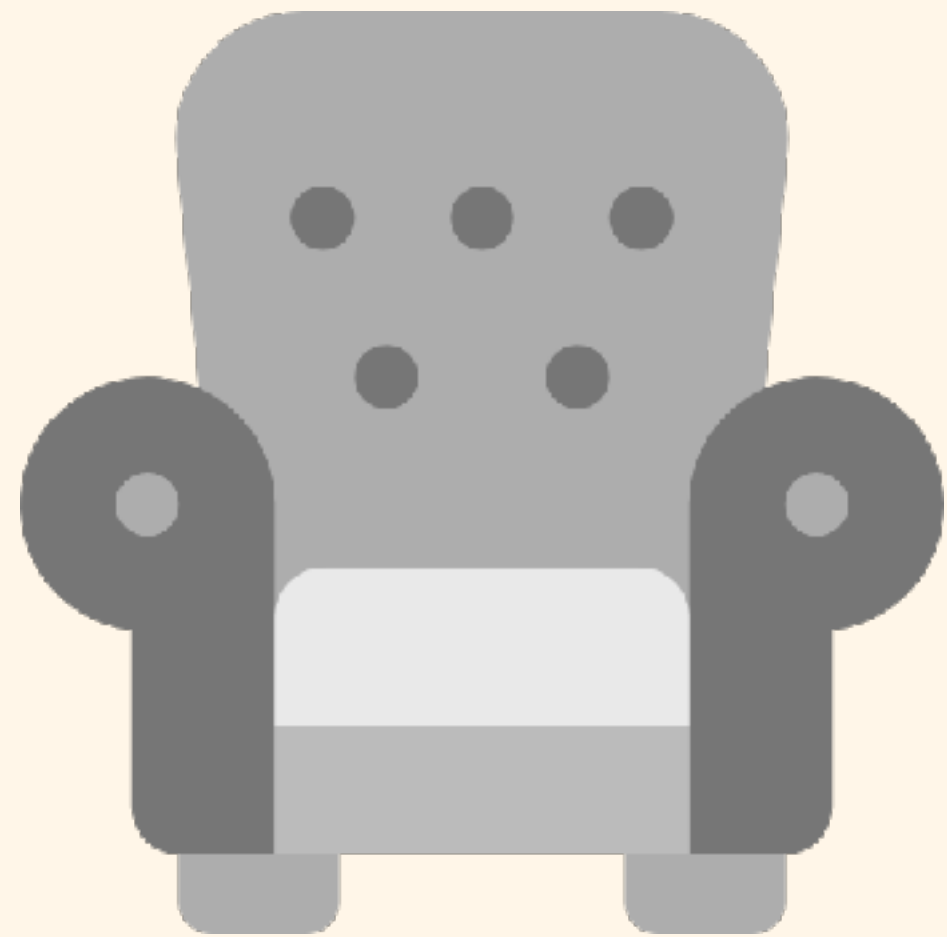


Tell the *right* story



Close the loop

Leveraging your seat



Look for patterns



Tell the *right* story



Close the loop



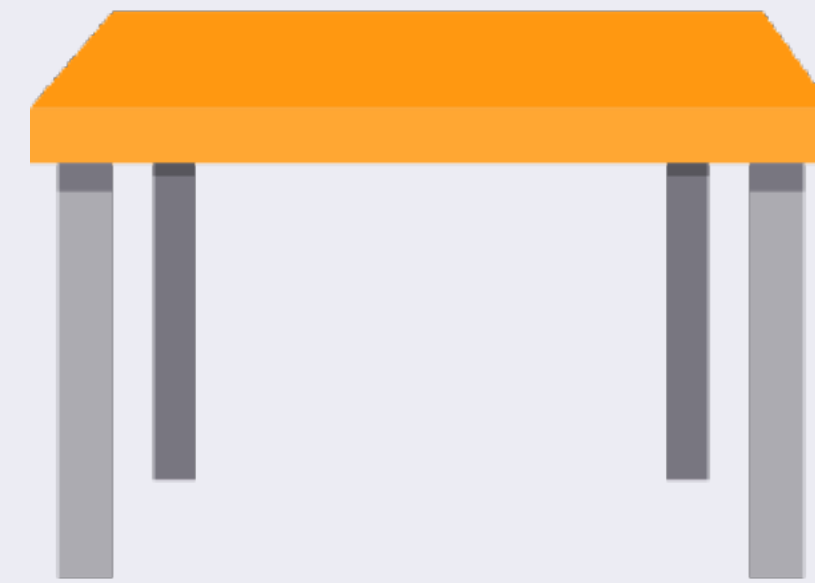
The 'where'



Team emails



Presentations



Check-ins

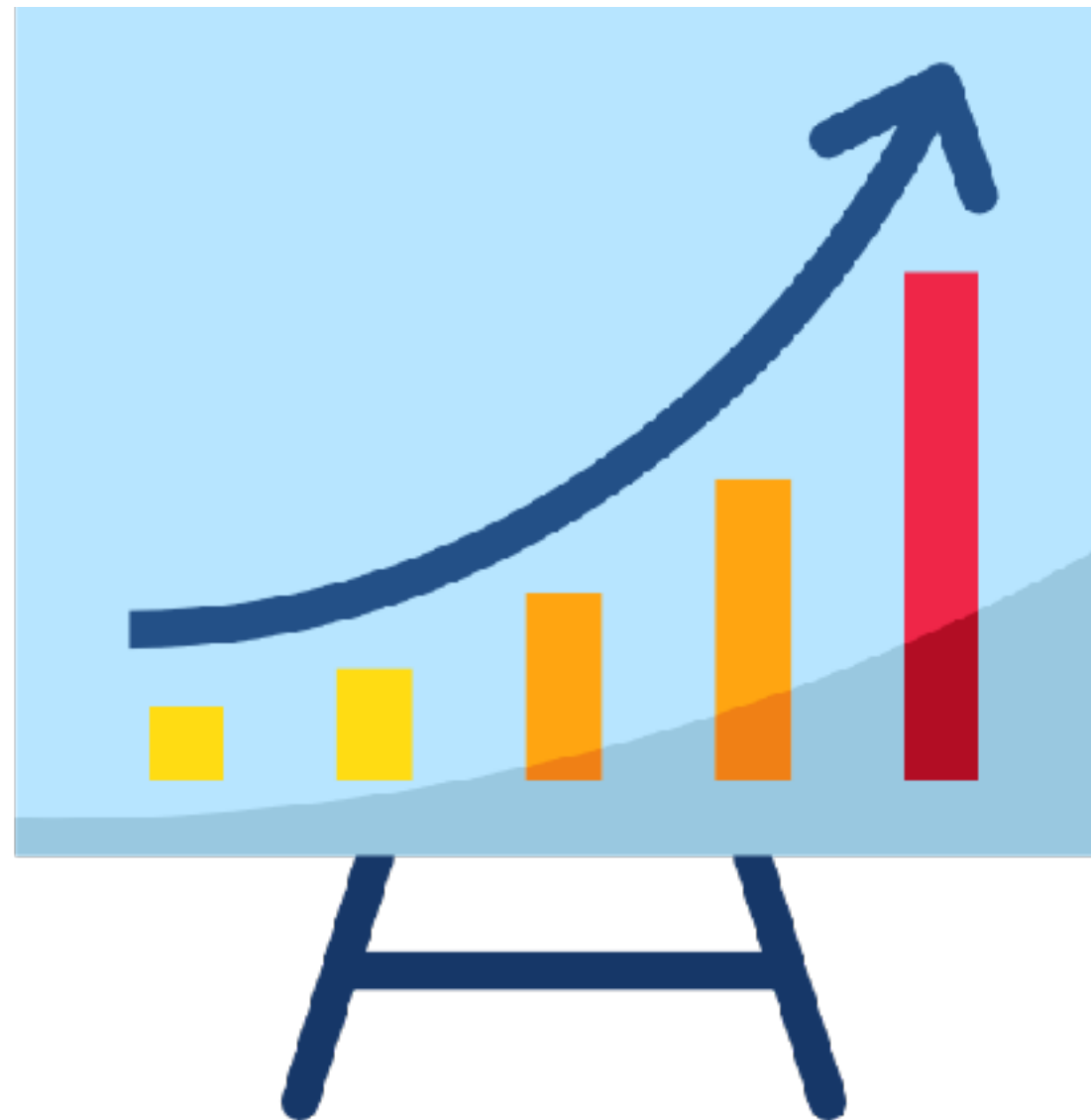


Reports

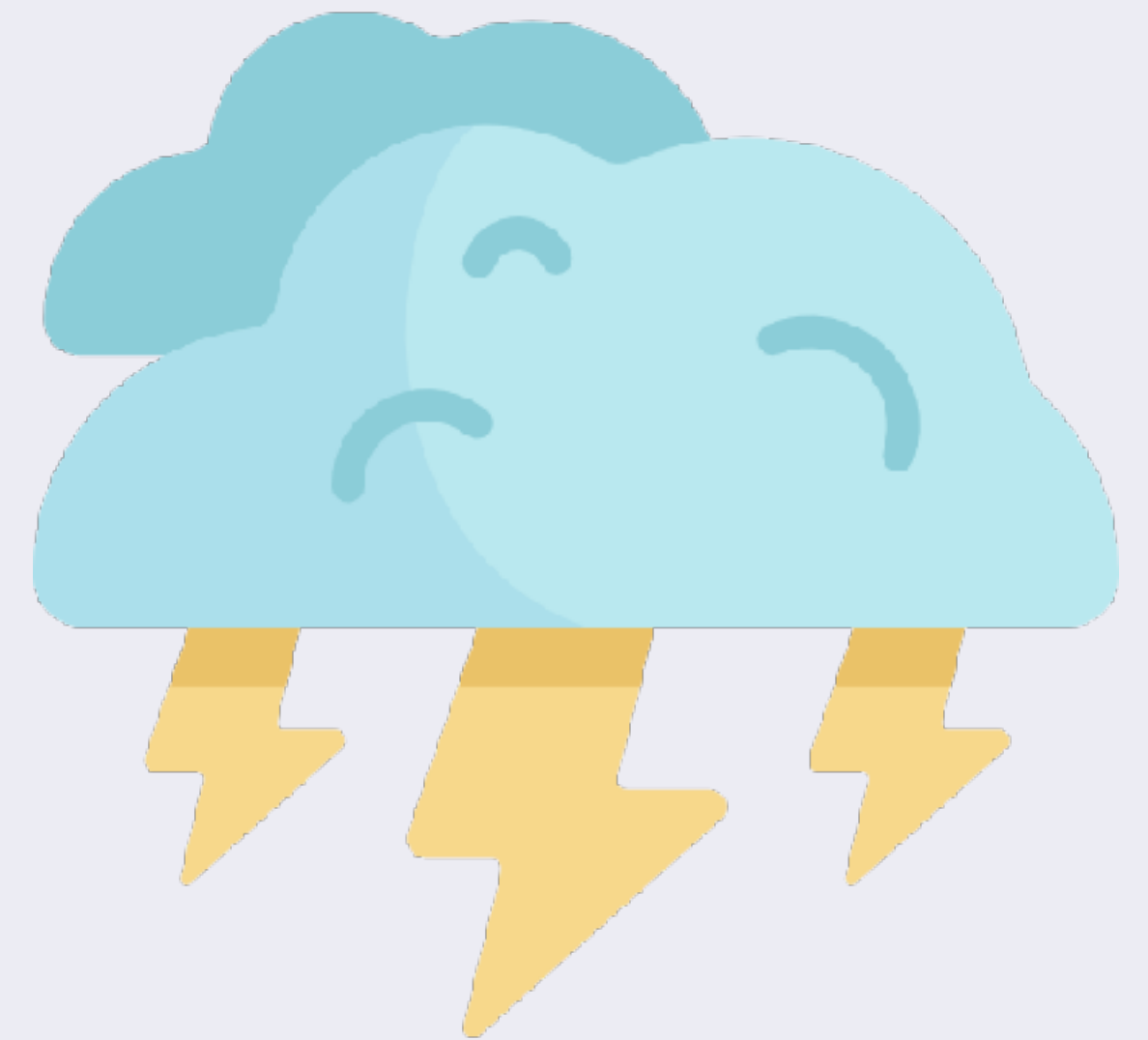
The 'how'



Positive



Fact-based

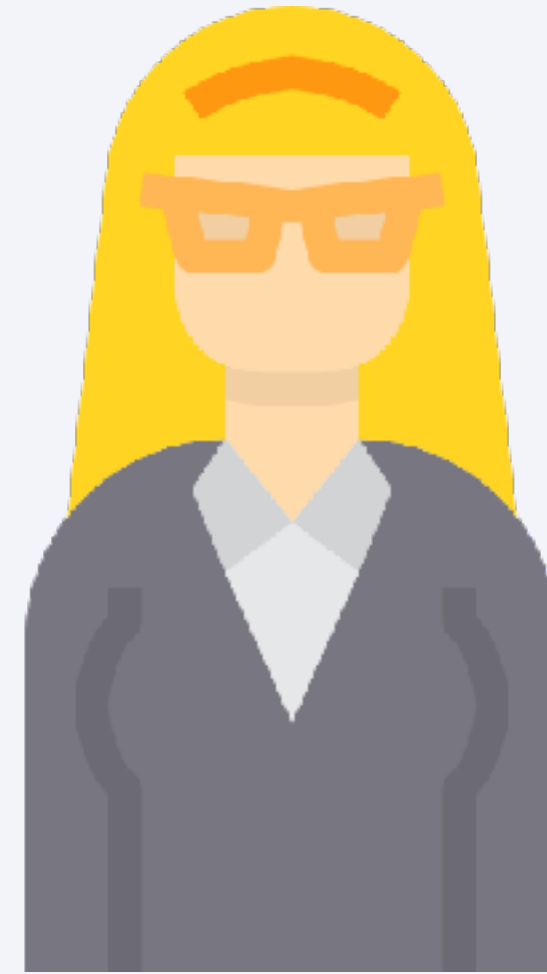


Intensity-based

The 'what'



Money



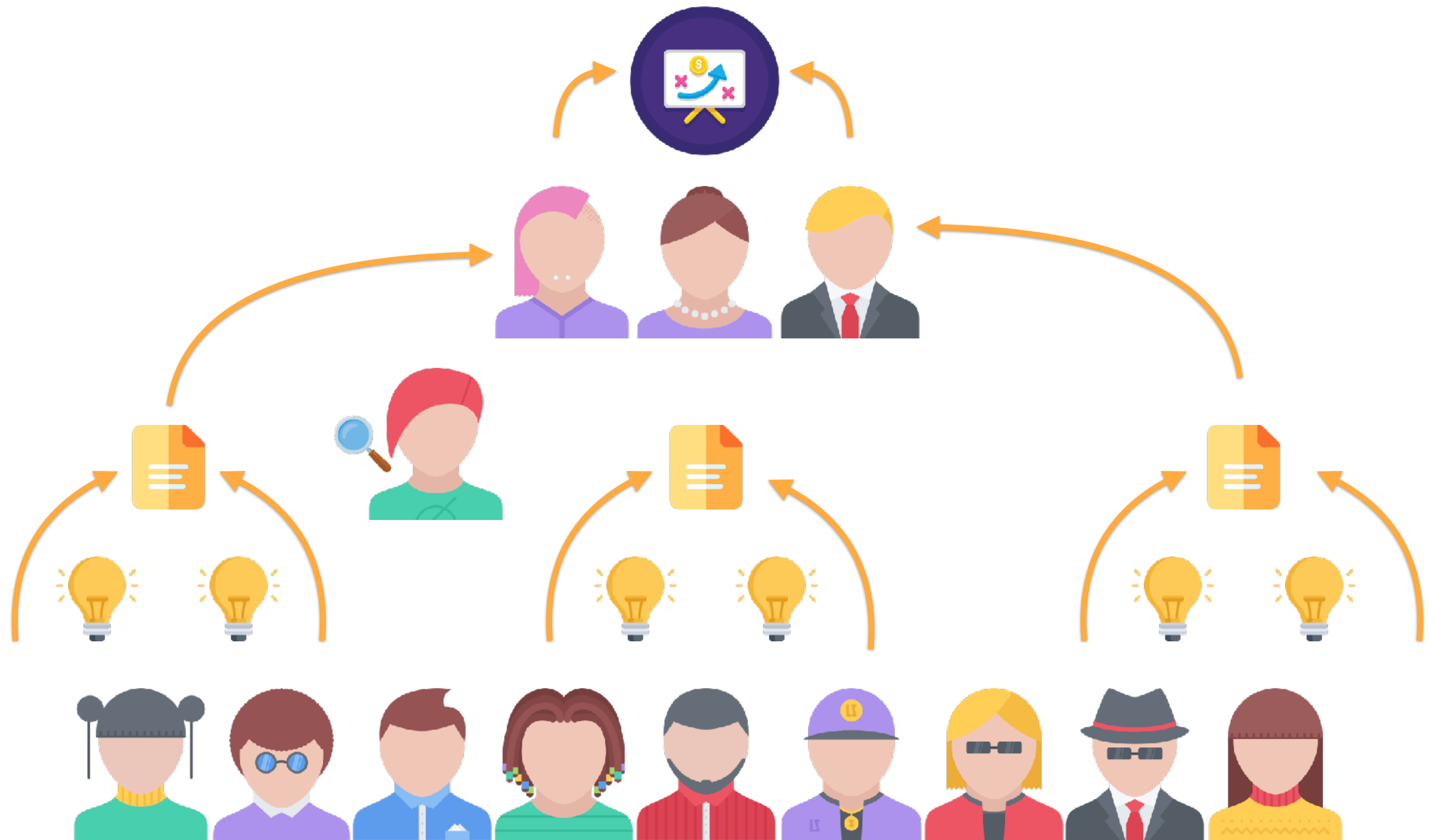
Users



Funnels

Case study:

Investment planning at Shopify



We inserted ourselves

- Studied past investment plans and the goals they set
- Sought input on research questions from other disciplines
- Kicked off our process months in advance



alia (UXR)
detailed
more
ncise
quickly
talk.

Dalia
Problem → Impact
→ Solution → Method
Perfecto!

Dalia
Liked the difference
on the speech
depending on
the audience

Context (strong
telling)
Value (explicit)
Action
Liked that
2nd was FAST
+ value was
implicit
Context (n
te)
Action
+ Next
Steps.
(value
implicit)

ed proces. lots of
context outside
Shr. f. y
each segment
was digestible
+ understandable
DE

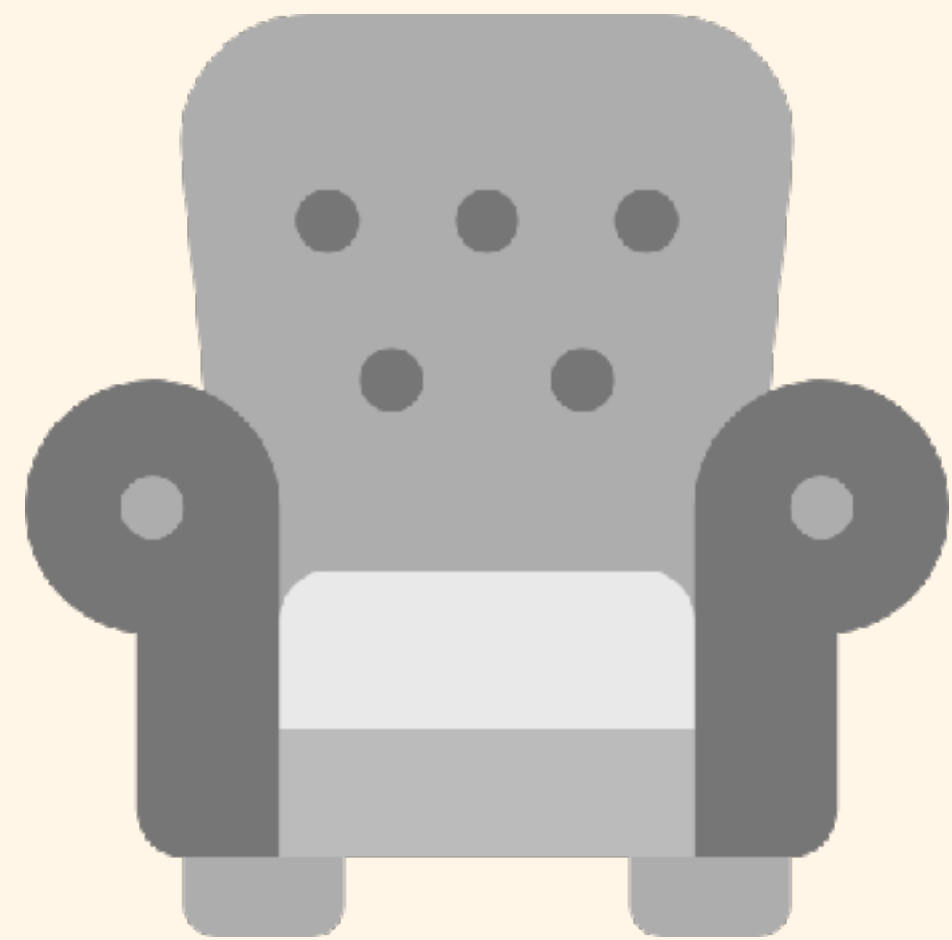
tra
the problem framed
differently in the 2
stages → super cool!

UXR

more granular

end on the
overall benefit
for the company
(minimize legal risks)

Leveraging your seat



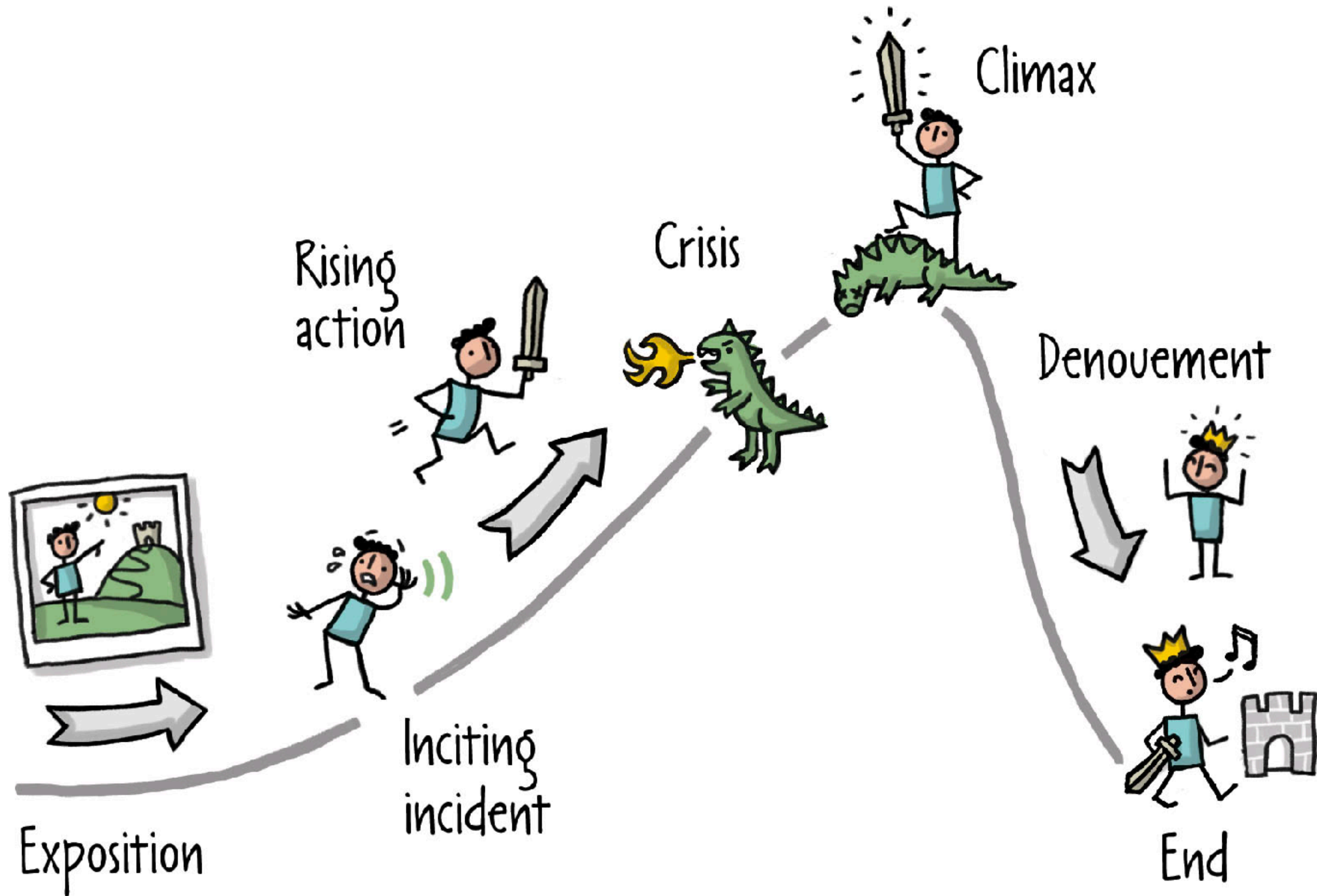
Look for patterns



Tell the *right* story



Close the loop



6 Rules for Persuasive Storytelling

Summary: Stories build empathy and make the user needs and pain points memorable to your team. Effective stories speak the language of the audience, are rooted in data, and take advantage of compelling artifacts.

By [Rachel Krause](#) on April 28, 2019
Topics: [Persuasive Design](#), [Design Process](#), [Customer Journeys](#), [Personas](#)

Share this article:

[Twitter](#) [LinkedIn](#) [Email](#)

[Comments](#) 0

UX and the psychology of storytelling

by Becca Kennedy
August 15, 2018


UX DESIGN

How to combine the art of storytelling with the design of human experiences...



How storytelling can enrich user research

Reflecting on my UX research projects

 Puja Prakash [Follow](#)
Jun 27, 2018 · 4 min read

[Twitter](#) [Facebook](#) [Bookmark](#)

JANUARY 29, 2010 · [61 comments](#)

UX Storytelling For A Better User Experience (Part One)

QUICK SUMMARY ↗ *Stories have defined our world. They have been with us since the dawn of communication, from cave walls to the tall tales recounted around fires. They have continued to evolve with their purpose remaining the same; To entertain, to share common experiences, to teach, and to pass on traditions.*

[Calendar](#) 12 min read

[Pin](#) [Storytelling](#), [Emotional Design](#), [User Experience](#)

[Twitter](#) Share on [Twitter](#) or [LinkedIn](#)

Communicating user research learnings is a storytelling exercise

Don't stress about the format — focus on your narrative.

 Raya Raycheva [Follow](#)
Mar 13, 2019 · 6 min read

[Twitter](#) [Facebook](#) [Bookmark](#)

- Reports or slides?
- Comics or research museums?
- Gifs or infographics?



This story is different

- It's less about a product, and more about the investment
- It's less about a complex narrative, and more about a memorable shorthand
- It's less about going deep, and more about weaving a narrative
- It's less about the “what”, and more about the “so what?”

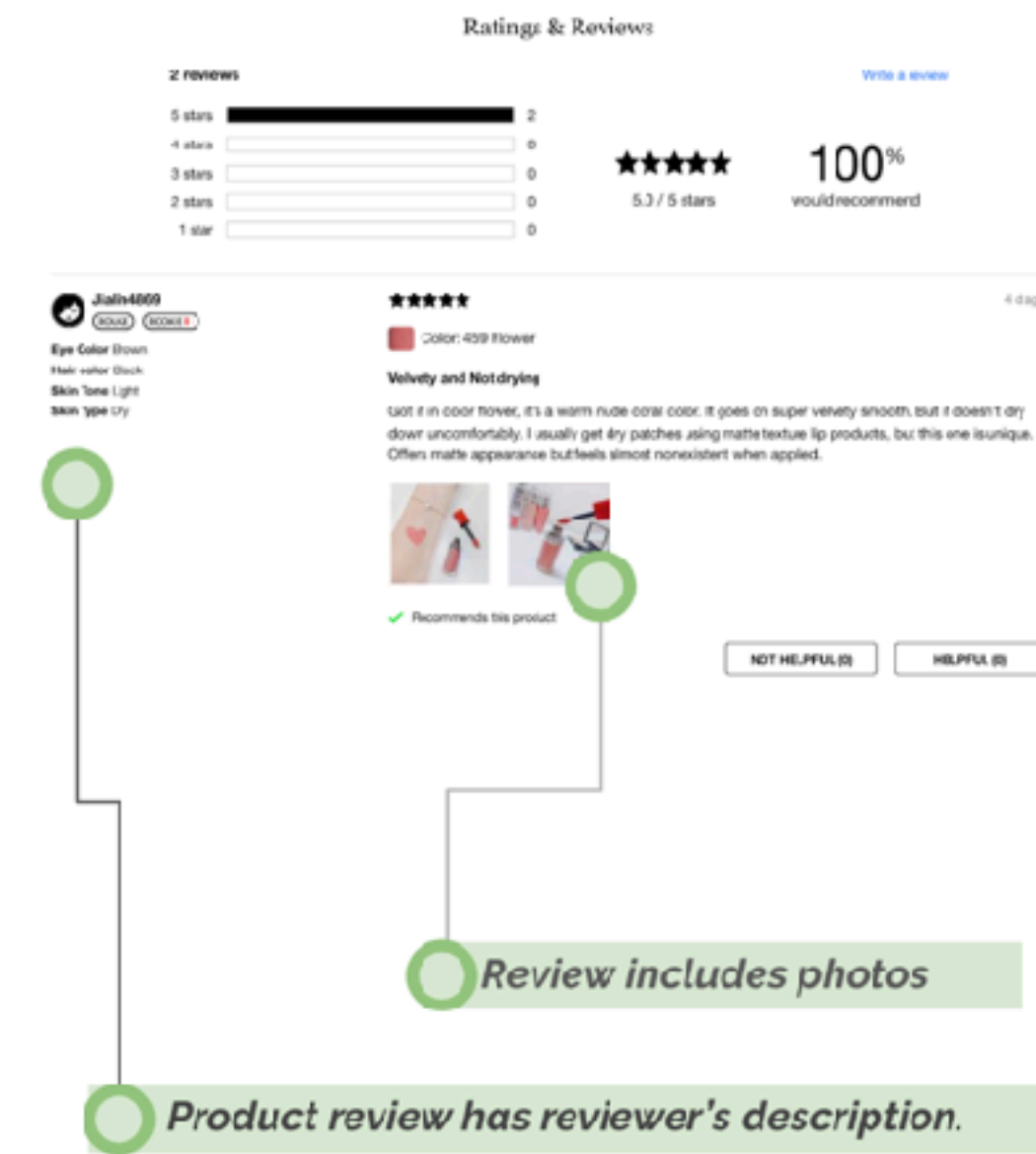
Product Trust Builders and Breakers

How To Build Trust to Product?

- Multiple photos on product page
- Videos on product page
- Product description divided into categories
- Product reviews
- Notify me back in stock feature
- More than 75% positive reviews
- Reviewer description
- Verified reviews
- Photos, videos included in the review
- Total cost clarity (all costs) before checkout
- Shipping estimation tools
- Discounts are easy to apply

How To Break Trust to Product?

- Too few photos
- Lack of product description
- Products exported or made in China
- Lack of product reviews
- Only text reviews
- High shipping costs shown too late (checkout)
- Surprise duty/customs fees
- No discounts or discounts don't work as expected



To feel confident when making decisions...

1. Buyers need to feel like a store is designed with care and for ease of use.
2. Buyers need to easily find the right information at the right time.
3. Buyers need to feel like a store tells a strong, cohesive story.
4. Buyers need social proof as a way of establishing legitimacy and reliability.
5. Buyers need to know exactly how much they'll pay as early as possible.

Pitch for Isinsu

Context

For years now, something has been keeping me up at night. I've been watching people present research findings at Town Hall, with their participants' names and faces being projected to the whole company. I've been seeing slides that include the pictures and store names of merchants in Slack channels. And, each time, I would wonder whether the participants shown in those presentations, slides, or clips had consented to their information being shared that way.

Familiarity with informed consent

The idea of informed consent is probably not new to you, if you've conducted research with humans outside Shopify (whether in academia or industry), you've probably had to get explicit consent from your participants. And, you've probably noticed that Shopify doesn't have any formal process for doing this.

Problem

This basically meant that the standard at which we've been

Solution

So, after getting input from the research team for inspiration, I started working on what the process around handling participant information. Then, that, I got input from the legal team and the other teams documenting the whole process in the UX Handbook.

Impact

Since the much a par w be

highlighting impact on merchants/buyers/partners.

is it an update? or ~~get~~ is it a pitch to get buy-in?

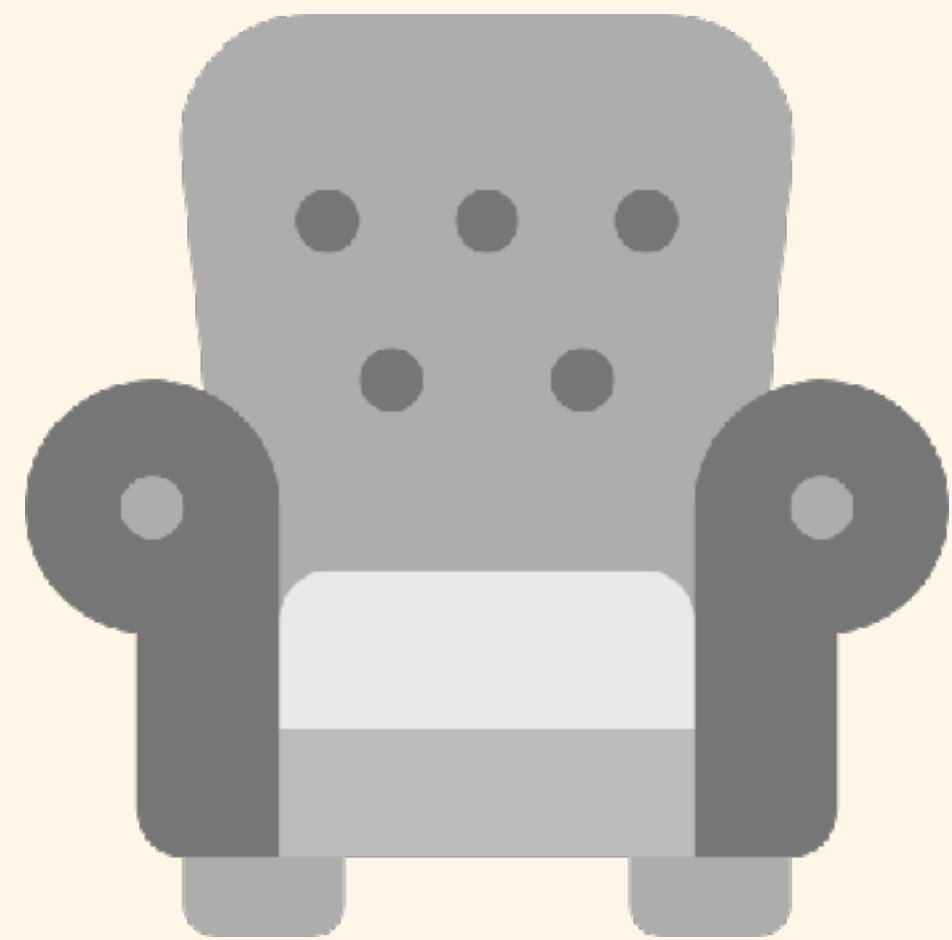
what's the gap in the knowledge



Caveat:

Don't ignore cultural differences

Leveraging your seat



Look for patterns



Tell the *right* story



Close the loop



Approval



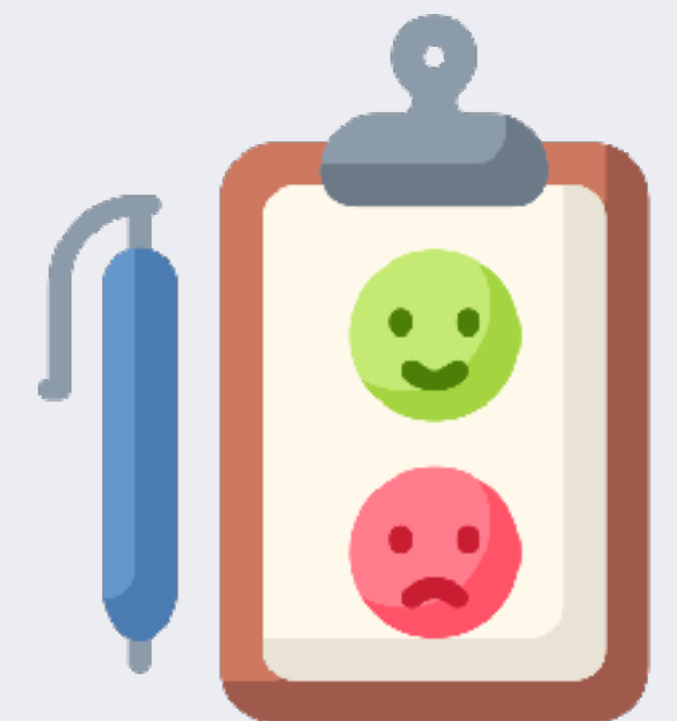
Knowledge



Time



Inclusion



Feedback



Feedback on investment planning research

We'd love to hear your thoughts in order to improve future rounds of investment planning research.

Throughout investment planning, did you at any point consult the research that was conducted to help inform the process?

For reference, the research conducted can be found at <https://bit.ly/2CSesUB> (Online Store Experience) and <https://bit.ly/358hvEj> (Online Store Tools)

☐ Yes

☐ No

UXR Comms workshop - Feedback form

Evaluator: Larry Lumsden

Presenter: _____

I thought this pitch was clear.

Disagree 1 2 3 4 5 Agree

I thought this pitch was concise.

Disagree 1 2 3 4 5 Agree

I thought this pitch was well-structured.

Disagree 1 2 3 4 5 Agree

Overall, I understood what the presenter was talking about.

Disagree 1 2 3 4 5 Agree

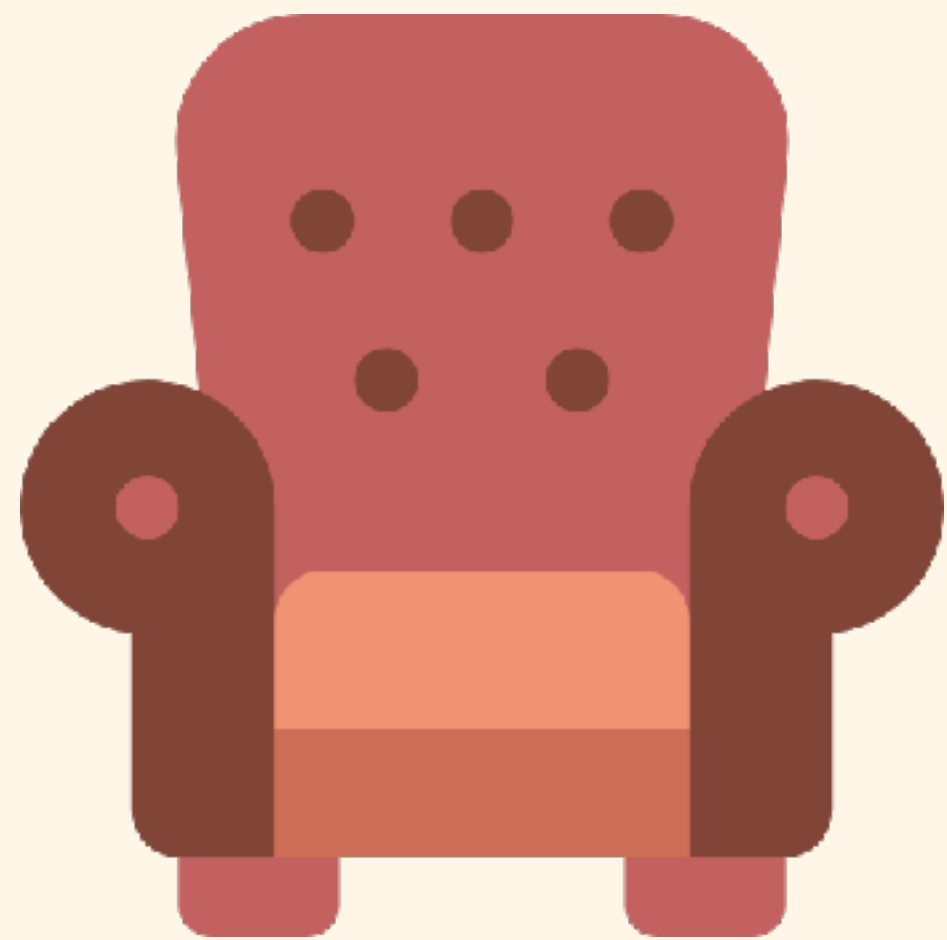
I think the work the presenter talked about is something worth working on.

Disagree 1 2 3 4 5 Agree

Any additional thoughts, questions, or feedback?

This is a continuous, iterative process

Leveraging your chair



Look for patterns



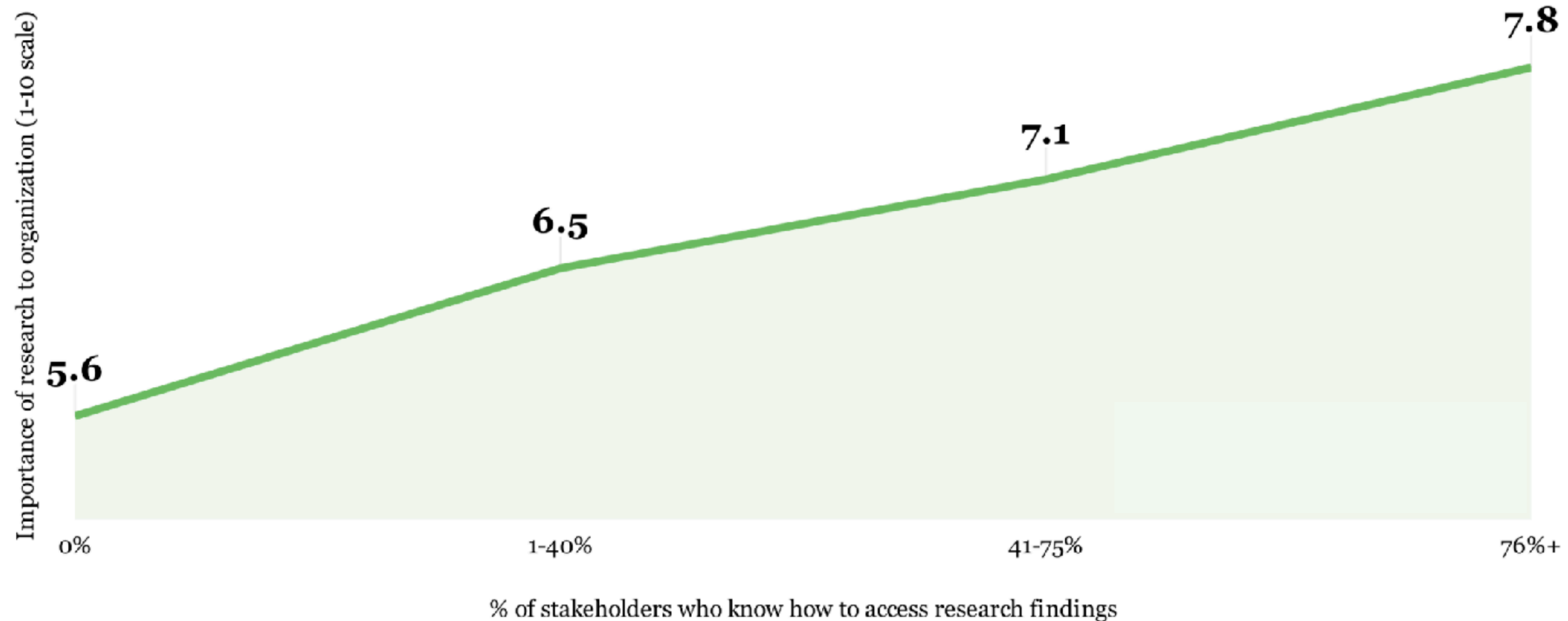
Tell the *right* story



Close the loop



% of stakeholders who can access research findings vs. Importance of research to organization



Bounded rationality:

**Humans will make perfectly reasonable decisions
with the imperfect information they have.**

Our role is to expand those boundaries.

Thank you!

dalia@shopify.com

