Everybody Wants to Rule Their Guides (and why they probably shouldn't)

The Collective
Knoxville, TN
March 7, 2019, 3:00 pm

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It's an Outline! Follow Along.

Team Roles
- Megan Heuer – Supervised most subject librarians, organized trainings, project management
- Sarah Jenkins – Created style guides, best practices, conducted writing for web trainings, met with librarians one-on-one for coaching, edited guides for librarians
- Hollie Gardner – Conducted UX testing, provided UX + Guides training sessions, developed mockups, provided some website support for guides
- Margaret Terrill, Research & UX Intern – Created templates, duplicated, and edited guides for the subject librarians
- 12 Subject Librarians – Developed their subject guide content
- 2 Library Directors – Supported initiative and provided accountability

About SMU & the SMU Libraries
1. SMU is a private institution located in the Dallas, Texas
2. Enrollment: 11,789
   a. 6542 undergraduates
   b. 5337 graduates
3. Programs & Colleges include arts, business, education, engineering, game design, humanities & social sciences, law, & theology.
4. Six campus libraries
5. This project included Fondren Library & Hamon Arts Library
   a. 12 subject librarians
   b. 41 subject guides

About the Project
1. Scope of Project
   a. Steering group
   b. User testing
   c. Standardized subject and topic guides
   d. Guides homepage
   e. Ongoing working group
2. Catalysts for the Guides Project
   a. 2015 – Migrated to LibGuides 2.0
   b. Shortly after – Evolving into Chaos
   c. Fall 2016 – New intern program at the reference desk - needed easy to use resource
   d. Fall 2018 – Libraries website redesign project scheduled to conclude.
3. Timeline for Subject Guides Redesign Project
   a. May–June 2017 – Subject Guides UX Testing
   b. June 2017 – Template development & copying
   c. July 2017 – Initial training sessions with subject librarians
   d. September 2017 – New subject guide template deadline
   e. October – December 2017 – One-on-one conversations, corrections
December 2017 – Marketing Copy & Writing for Web for Guides

Ongoing – Editing & maintenance of subject guides

Change Management

1. Guiding Change Management
   a. Time Investment
   b. Organizational Culture
   c. Good Communication
   d. Urgency and Accountability
   e. Celebrate Wins
   f. “Fail Yay” Environment

2. Examples of models and resources – See Further Reading section

User-Centered Design for Guides

1. Principles of User Experience Design – (Schmidt & Etches, 2014)
   a. You are not your user
   b. The user is not broken
   c. A good user experience requires research
   d. Building a good user experience requires empathy
   e. A good user experience must be easy before it can be interesting
   f. Good UX design is universal
   g. Good UX design is intentional
   h. Good UX design is holistic

2. Guides are websites, too!
   a. Foundation of how we approach guides.
   b. You don’t have to reinvent the wheel. Existing literature on website design.

3. User-testing and UX activities we performed for this project and other parallel projects
   a. Existing literature
   b. Website analytics
   c. Personas & journey mapping - Example #1 & Example #3
   d. First-click testing & interviews – Example #2
      i. 10 participants; including 1 visiting high school student; 4 undergraduates; 3 graduates; 1 staff member; 1 faculty member
   e. Survey – Undergraduate and graduate marketing classes performed on our behalf

Librarian Attitudes and Assumptions

1. Activity #2 – page 6

2. Librarians valued:
   a. Independence
   b. Demonstrating expertise – Impacted by the culture of academia
   c. Student success
3. Librarians felt:
   a. Pressure to have successful outcomes
   b. Pressure to meet certain metrics (i.e. number of classes, consultations)
   c. Too much to do and too little time
4. Shared goal: Dedication to the students was the foundation for consensus
5. What we learned:
   a. Find out librarians’ assumptions & expectations of guides at the beginning
   b. Determine primary goal & communicate it many times
   c. Have evidence or reasons to back up your decisions
   d. Ask for feedback early & often
   e. Individual conversations

Practical Implementation
1. Activity #3 – pages 7-8
2. Leadership
   a. Support from directors of both libraries
   b. Megan manages most subject librarians
3. Working Teams
   a. Steering group to initiate the project
   b. Several stakeholders, included subject librarians, UX people, intern, Sarah
   c. Include those with strong opinions from the beginning
   d. Guides team
4. Accountability
   a. Guide review process, follow through
   b. Follow through from all managers of subject librarians
   c. Help people understand why
   d. Have clearly communicated best practices or standards
   e. Still working through this, finding the balance for cost/benefit
   f. High traffic guides have the most scrutiny
5. Website Support
   a. [404 - not found]
6. Communication
   a. Ask for feedback multiple times throughout the project
   b. Prepare for iterative communication
   c. One-on-one communication is essential, almost like research consultation
   d. Need to have double-level of communication – a manager & non-manager
7. Training
   a. UX principles
   b. Writing for the web
   c. Guides as marketing
   d. SpringShare training and working sessions
   e. Prepare for iterative training as needed
   f. One-on-one help
Activity #1: Stinky Fish

About

The Stinky Fish is that thing that you carry around but don’t like to talk about. The longer you ignore it, the stinkier it gets. It’s a metaphor for something that will only get worse if you don’t acknowledge and deal with it. For our libraries, it’s the factors that pose potential problems for your guides project.

Instructions

1. Each person at the table will grab a few sticky notes.

2. Write down the stinky fish at your library. One stinky fish per sticky note. Consider things like your colleagues, technology limitations, org structure, etc.

3. Introduce yourself and share your sticky notes aloud at your table.

4. Add sticky notes to the board. Group in themes as they begin to emerge.

Notes
### Activity #2: Librarian Attitudes & Assumptions

<table>
<thead>
<tr>
<th>Stage</th>
<th>Attitude</th>
<th>Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Hostile</td>
<td>Rejects the notion of designing an experience for any user.</td>
</tr>
<tr>
<td>2</td>
<td>Awareness that Users Exist</td>
<td>Understands that experiences should be designed, but librarians and staff design websites, services, or spaces as if they are the user. “It looks good to me”</td>
</tr>
<tr>
<td>3</td>
<td>Quick &amp; Dirty</td>
<td>A few staff members have taken on the role of improving UX and conduct testing occasionally. But, there is no dedicated budget or staff. If UX testing takes place, it’s usually at the end of projects.</td>
</tr>
<tr>
<td>4</td>
<td>Organized</td>
<td>Organization is generally receptive of creating a good user experience. There are UX staff with a dedicated budget AND time for user experience design. But there still isn’t a mass adoption throughout the organization.</td>
</tr>
<tr>
<td>5</td>
<td>UX Nirvana</td>
<td>Full support from organization. Everything from websites to services to spaces must undergo user-testing at the beginning of the project and throughout the project implementation.</td>
</tr>
</tbody>
</table>

Adapted from the Nielsen Norman Group – UX Maturity Models: Stages 1-8

1. Using the above chart, how would you characterize your organization’s attitude towards user-centered design?

2. If you answered stage 5, why are you even here? If you answered stage 3-4, how can you leverage existing structures for supporting your project? If you answered stage 1-2, how can you work towards shifting your organizational culture?

3. What other attitudes within your organizational culture might be helpful or challenging for your project?

4. Select the tasks that you feel are the functions or roles of guides:
   - Directory of relevant resources or databases
   - Communicate friendliness and/or librarian personality
   - Facilitate or encourage in-person meetings
   - Help subject librarian keep track of resources for the subject
   - Space to collaborate with faculty to list resources for specific classes
   - Standalone object to teach students how to research
   - Online worksheet or reference list for instruction sessions
   - Other ____________________________
Activity #3: Practical Implementation

The following are questions to consider about your own library when embarking upon a guides project. Identify the people in your organization who can be supportive of your project.

1. **Leadership** Who will lead the initiative? How can you get support from upper administration and from managers of guide creators?

2. **Accountability** How can you ensure guide creators follow through with good design?

3. **Working Teams** Who could potentially be on your steering group to initiate the project? Who might be able to help with the following?

   - Create templates: ____________________________________________________________
   - Best practices/Style Guides: _________________________________________________
   - Workflows: __________________________________________________________________
   - Who will be in the team to carry out the project afterwards? The following groups could be one and the same, or there may be some overlap.
     - SpringShare Skills: _______________________________________________________
     - UX Testing & Website Design: _____________________________________________
     - Management of People: ___________________________________________________
     - Diplomacy: __________________________________________________________________
     - E-Resource Management: ___________________________________________________
     - Project Management: _______________________________________________________
     - Training/Coaching: _______________________________________________________
4. **Website Support** How can you get support with HTML/CSS? With connecting seamlessly to your library’s website? With user testing?

5. **Communication** What are the best ways of communicating to guide creators? Of having guide creators give feedback?

6. **Training** Guide creators will need training in UX design and in implementing the new standards. Who can take on this responsibility?

**Reflection:** What other factors or stakeholders will make or break your project?
Example #1: Mapping the User Experience

<table>
<thead>
<tr>
<th>Step</th>
<th>Task</th>
<th>Feedback</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Find the library</td>
<td>Location is clear and visible</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>2. Access the library</td>
<td>Door is open and accessible</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>3. Navigate to the reference desk</td>
<td>Signage is clear and informative</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>4. Approach the reference desk</td>
<td>Staff is friendly and helpful</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>5. Place the request</td>
<td>Forms are easy to understand and fill out</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>6. Wait for the request to be processed</td>
<td>Time is estimated and communicated</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>7. Retrieve the requested item</td>
<td>Item is readily available and accessible</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>8. Check out the item</td>
<td>Procedures are clear and concise</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>9. Return the item</td>
<td>Instructions are clear and easy to follow</td>
<td>-</td>
<td></td>
</tr>
</tbody>
</table>

This chart adapted from "User Experience Handbook."
Example #2: First-Click Test & Interview Questions

1. What do each of the sections mean to you?

<table>
<thead>
<tr>
<th>Header Text</th>
<th>What do you expect this means?</th>
<th>Rename?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Megan’s Recommended Resources</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Find Out More About...</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Background Information</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Research Help by Course</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. What do you like about this layout? What do you dislike about this layout?

3. How easy/difficult do you think this page is to use?

   Easy 1 2 3 4 5 Difficult

4. How likely will you be to use this page for your subject area in the future?

   Will Definitely Use 1 2 3 4 5 Will Never Use

5. Consumer Research: Do you find this overview page useful? Did you notice it is a description for the tabs?
Example #3: Using Subject Guides to Market Databases
Presentation by Hollie Gardner & Tyeson Seale, Slides Excerpt

Audience Persona
Who are they?
- 2000 or 3000-level undergraduate student
- Majoring/minoring in your subject
- Assume they have foundational knowledge of library databases
- Busy and will probably skim
- Struggling with other aspects of research, performs cost-benefit analysis on websites

Audience Persona
What do they need? Why are they here?
- Want good grades in their class
- Need something which saves time
- Need descriptions in an easy language to help bridge gap between their background knowledge and complex topics
- Quick guide to the top five databases in their field

Audience Persona
How do they get here?
- Main Desk referral
- Library tab in Canvas
- Professor refers them to this page
- You send this page to them in consultations, orientations, etc

Things to Keep in Mind
- It is NOT your subject guide’s job to teach students everything about libraries
- Descriptions need to be brief and engaging
- Treat this like an email reference consultation where you tell a sophomore/junior how to do research in their field and why they should go to those resources
- Marketing Team will reuse your content to market databases

But, what about my faculty and graduate students?
- These resources could still be new info to this audience
- They will likely agree with your top five databases - Shows you’re on the same page
- This page will be a great teaching resource for their classes
- Still need more? Create an “Advanced Research in [Subject]” topic guide or carefully curate your A-Z List recommendations

Turn Descriptions in Effective Marketing
Four Tips for Identifying Benefits
- Know your customer
- Put yourself in the customer’s shoes
- Think of results. What results will the product or service get?
- Ask “So what?”
Example #4: Subject Guide Peer-Review Checklist Training Activity

Subject Guide: __________________________________________________________
Reviewer: ______________________________________________________________

<table>
<thead>
<tr>
<th>Selected Databases</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do the 5 or 6 databases listed represent the top databases in the field that we</td>
</tr>
<tr>
<td>have access to?</td>
</tr>
<tr>
<td>If a multidisciplinary database is selected, is there a defined reason for its</td>
</tr>
<tr>
<td>inclusion?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Product – Features - Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are the features clearly communicated for this audience?</td>
</tr>
<tr>
<td>Do the benefits match the student needs or experiences?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>“Writing for Web” Checklist</th>
</tr>
</thead>
<tbody>
<tr>
<td>Will readers be able to quickly scan?</td>
</tr>
<tr>
<td>Is there a minimal amount of technical jargon? Is it written in a language for the</td>
</tr>
<tr>
<td>user?</td>
</tr>
<tr>
<td>Are all of the sentences 20 words or less? Are the descriptions brief?</td>
</tr>
<tr>
<td>Is there any unnecessary repetition?</td>
</tr>
<tr>
<td>Is the content front-loaded? Does it get to the point quickly?</td>
</tr>
</tbody>
</table>
# Example #5: LibGuides Review by Sarah Jenkins

**Guide Name/Subject Librarian:**

<table>
<thead>
<tr>
<th>Visual Standards</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>No subpages (drop down tabs)</td>
<td></td>
</tr>
<tr>
<td>Page titles use title case</td>
<td></td>
</tr>
<tr>
<td>Font size &amp; color</td>
<td></td>
</tr>
<tr>
<td>Uses Floating Boxes</td>
<td></td>
</tr>
<tr>
<td>Minimal tabbed boxes</td>
<td></td>
</tr>
<tr>
<td>Images &amp; screenshots have alt text</td>
<td></td>
</tr>
<tr>
<td>All links working</td>
<td></td>
</tr>
<tr>
<td>Important info in left column</td>
<td></td>
</tr>
<tr>
<td>2 columns or less</td>
<td></td>
</tr>
<tr>
<td>Column size (no columns smaller than 33%)</td>
<td></td>
</tr>
<tr>
<td>Profile box</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Terminology Standards</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Interlibrary Loan</td>
<td></td>
</tr>
<tr>
<td>Libraries referred to by full name</td>
<td></td>
</tr>
<tr>
<td>Library Search links &amp; wording</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Content Standards</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>All databases have custom descriptions</td>
<td></td>
</tr>
<tr>
<td>No library jargon (OPAC, ILL, etc.)</td>
<td></td>
</tr>
<tr>
<td>No large blocks of text</td>
<td></td>
</tr>
<tr>
<td>Does it make sense?</td>
<td></td>
</tr>
<tr>
<td>Is it user-friendly?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Subject Guides</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Matches template</td>
<td></td>
</tr>
<tr>
<td>Approx. 7 topic guide links</td>
<td></td>
</tr>
<tr>
<td>Approx. 5 Best Bet databases</td>
<td></td>
</tr>
<tr>
<td>Side Tab widget</td>
<td></td>
</tr>
<tr>
<td>Course Guide widget display hidden if empty</td>
<td></td>
</tr>
<tr>
<td>Heading metadata (type/group, subjects, tags)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Topic Guide</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Title works as standalone guide</td>
<td></td>
</tr>
<tr>
<td>Title uses title case</td>
<td></td>
</tr>
<tr>
<td>Overview page</td>
<td></td>
</tr>
<tr>
<td>Overview page has explanation of guide contents</td>
<td></td>
</tr>
<tr>
<td>Heading metadata (type/group, subjects, tags)</td>
<td></td>
</tr>
</tbody>
</table>
Further Reading

Change Management


User-Centered Design


Usability – Writing for the Web
