Ask not what your organisation can do for UX; ask what UX can do for your organisation

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Ned: UX is perhaps the most exciting thing that has happened to librarianship in the UK in the last 15 years. To understand users, make things better for them and see those changes working: it's fabulous. Who knew it could be viscerally thrilling to make informed decisions…

For something so positive, UX is curiously polarising. Those who do it, absolutely love it; those who don't, absolutely don't. We all know a version of this story: the library has a problem, UX can find the solution but the powers that be don't buy in to it. 'There's not enough evidence,' they say. 'Have you tried a survey?' Yes, we have. We've tried surveys for approximately 20 years and made consistently poor choices. Choices which don't work for the user, and which – often at great expense – we have to undo, or redo, usually about 4 years later. UX is sometimes seen as expensive and time consuming, but ultimately NOT doing UX is so much more expensive in every way.

Paul and I work at the University of York Library, in an environment where this over-reliance on demonstrably ineffective data-gathering *doesn't* happen. We work in an environment where UX is at a level of maturity which means it's in the fabric of our decision-making. It's important to acknowledge that part of that is pure good fortune. But it's no accident. Part of it is down to the approach we've undertaken over the last 5 or 6 years.

This is an article about what libraries can do to get UX done.

A little less conversation, a little more action

Our first tip is to stop talking about UX. We need to stop talking about the concept of User Experience all the time and instead highlight the results – or even better, let the results speak for themselves.

UX scares people. They see it as impenetrable or intimidating at one end of the spectrum, and superficial or 'buzz wordy' at the other. And I sympathise with that perspective: humans are inherently threatened by things we don't already understand.

Many years ago I felt the exact same away about Twitter – everyone was on at me about how useful it was, but my understanding of it was superficial and it seemed intimidating, so I resisted it for a long time. Then when I actually got there, I got it right away. It was a community of people sharing ideas and resources.

No one had told me about the benefits, they just focused on the features. If someone had told me, 'I took part in an incredibly useful conversation about librarianship today, with people from several countries, and it's changed my practice,' I'd have asked, 'Where did you have that conversation?' And when they'd said 'Twitter,' I think I would have listened. But instead people just told me I *must* join this new social network, and that made me defensive… They said, 'It's really fun, you only get 140 characters.' I didn't *need* that in my life. I didn't move towards that.

It's hard to get people to move towards something they don't know they need. For this reason, we actually don't spend too much time trying to win people over at York. We just do the work and make the services better, and then make sure UX gets the credit afterwards. It's like getting your kids to eat healthy food. If you make a big fuss about it the whole exchange becomes about the concept of vegetables, whereas the ideal scenario is that they eat some pasta and say, 'That was nice,' and then you turn around afterwards and say, 'Ha! We hid courgette in the sauce!'

The only way to support a revolution is to make your own

Tip 2: Sell by doing. It's easy to be paralysed by trying to do too many things at once. I think this happens in lots of areas with librarianship – the scale is so vast. It's happening now with diversification and decolonisation – there are a thousand things to address and improve and it can be overwhelming. The key is to pick the things that *can* be done, and do them.

UX is just as useful to improving the layout of the building as it is to improving the catalogue as it is to improving the signage as it is to improving the comms – so where do you start? Be Machiavellian about it. Choose one thing and do it, but make it something that people can *see*. None of this subtle, behind-the-scenes stuff. Sell by doing. The first thing you see when you walk into the Library at York is the Morrell Lounge – this used to be a problematic area with a lot of noise and mess, but is now a lovely space with lots of comfortable, adaptable furniture and a sound-dampening wall made of fabric. It looks nice, but that's not as important as the fact that it *works*. The space works better than it did before we changed it, and we changed it based on what we learned doing UX.

The culture of an organisation changes not when people have conversations about the culture, but when people see the results of actions.

A woman needs a fish like a man needs a bicycle

Tip 3: A great way to embed UX in the culture of an organisation is to use UX to save that organisation money.

I love UX for giving you solid information you can act on. Trends, norms, fashions, what other people are doing – they only matter if they coincide with what your specific community wants.

We were considering spending several thousand pounds on an addition to the

catalogue to help people find information in a different way. We, the librarians, thought it was great. We did some fieldwork with users and they did NOT think it was great. In fact they were more or less baffled by it. We have no wish to shame the product or its makers so we won't say what it was; it's a useful product that some libraries get real value from. But ethnography told us that our particular community would not find it valuable, so we cancelled the trial and didn't buy the product.

All of a sudden, UX goes from 'messy and expensive' to 'saving both money and mess.' Again, it's not us trying to win people over by talking about UX; it's results speaking for themselves.

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We'd now like to discuss a particular case study: a project to improve our library catalogue, YorSearch. We'd been doing UX for around 3 years up to this point but the project was a bit of a game changer for us – several of the approaches we took here we are still using in projects right now. Paul Harding will tell you about this in more detail; he was technical lead on the project. But before he does, it's worth noting: this wasn't a 'UX project.' This was the Yorsearch Improvement Project. UX was just the thing which made it good.

You finally really did it. You maniacs! You blew it up!

Paul: This part of the article will describe the specifics of the Yorsearch Improvement Project (YIP) and some of the changes we made as a result, then go on to share project outcomes that have had an impact far beyond the scope of the original work.

Some background: we'd been using the Primo Classic interface for many years. It was highly customised, worked reasonably well and – perhaps most importantly – we'd been stung by early adoption of Ex Libris products and features in the past, so were unwilling to make the switch to a new interface until we were convinced it would work for us. Also, an important factor was that the perception of the catalogue at York was that it was almost sacrosanct – we couldn't make any meaningful changes, and even minor ones required endless meetings involving library staff, but – tellingly – not users.

One specific example (among many) was when we were looking into creating a resource type to handle miscellaneous items in our collections such as engravings, etc.

Now, in library-land these items are commonly labelled as 'ephemera', but some of us felt that we should consult our users about the most appropriate label. However, sadly we were in a minority and the use of such esoteric terminology was deemed absolutely appropriate – it is a library after all – and if our users didn't understand it, well, they were our initiates and it was our job to impart ancient library wisdom to them.

We were fortunate that a number of library staff had already carried out UX projects, so using UX techniques to inform development of a digital rather than physical space didn't seem like such a huge leap. We set ourselves relatively modest targets in terms of the number of students we wanted to speak to given we all had day jobs to be getting on with.

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I want to pause for a moment here and offer up a confession. I hope you can find it in your hearts to forgive me. I've been involved in a lot of user testing in former lives, and we would always include as many users as possible and generate loads of

feedback, so I was very dubious that the number of interviews we were proposing would be useful. I know, right?

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The methodology we used involved semi-structured interviews and cognitive maps. We took the decision not to focus on the catalogue for these and instead asked more general questions about conducting research for a piece of coursework – we wanted to understand what role the catalogue played in student work, even if that was 'none'! We felt that this would provide us with a greater understanding of integrations with other systems that we might want to consider, and, for those who didn't use the catalogue, what – if anything – we could do to entice them back.

Very quickly, I had my Damascene moment – clear themes began to emerge from the sessions, and sitting in a room with students and listening … LISTENING! … was an incredibly positive and valuable experience.

Everybody loves the Sixties. Especially those who weren't there.

These emerging themes included many which we'd been wrestling with as a library for some time, and about which there were extremely entrenched views that we'd previously been unable to overcome.

A specific example of an area where we – the Library – thought we knew best and needed to help our poor users was the always thorny issue of the two-tab search, where we separated local library holdings from content harvested from elsewhere like the Borthwick Archive.

Staff loved two tabs, even though we needed an infographic to explain what each was searching. This obviously quickly became out of date as we added more data sources to the catalogue and was a nightmare to update. There was a fear that our local holdings would be swamped in the wild west that is the 'everything', and that our innocent, vulnerable users would be confused. Any previous changes to the UI had refused to consider the possibility that we could have a single, blended search. We even had Analytics data which suggested that the second tab ('search everything' … what does that even mean?) was used far less, and our interviews with students also showed that few used or were even aware of the second tab.

From our research, it turns out that – surprise, surprise – our users are pretty savvy at finding what they're looking for, and don't care where it comes from. So, within a few sessions of speaking to students, we had enough evidence to finally

ditch the two-tab approach. I still vividly remember the meeting where its last remaining supporter admitted that, if they were alone in wanting separate tabs, we should probably get rid of them.

Another tricky issue in the past had been that of what should appear on the catalogue homepage. Previously, it had been a cluttered affair as we tried (and all-too-often failed) to educate our users about how the catalogue worked. We agonised over homepage content during the redesign process; I created prototypes with embedded Twitter timelines, LibAnswers FAQs, more infographics, etc., etc. The feeling among us librarians was that the homepage needed to be more dynamic; that it needed to include all sorts of information.

Our UX testing showed that users simply didn't care what was on the homepage. It sounds obvious now, but what they were interested in when visiting the catalogue was … you guessed it … finding what they were looking for! Again, a small number of interviews disabused us of many of our prior misconceptions and we were able to strip back our homepage design to a prominent search box and a few key links to other resources. Win!

One final example of a theme which emerged from our user sessions was that of feedback. Students didn't know what to do if they came across a broken link or other problem with the catalogue, with many saying that they'd either go elsewhere to try to find the resource, give up, or go to the library desk to report it. Despite some resistance among staff about monitoring and usefulness of this feature ('ONE DOES NOT INTERACT WITH THE CATALOGUE. ONE CONSUMES. THE CATALOGUE JUST "IS"') we added a 'report a problem' button which automatically gathered metadata from the record and prepopulated a form which would be submitted into our LibAnswers queue. We also made our chat widget more prominent so that users could get in touch more easily that way, and made the generic 'Help' link more obvious, all of which solidified the link between our users and the library via the catalogue.

People believe what they want to believe. Even if it isn't true.

There were some unexpected consequences to the UX-led changes that we made to the catalogue.

Shortly after launch, we started to receive feedback from users that the new interface was faster , that the results returned were more accurate, that more content was now available. You can look at this in one of two ways – either this was purely

a perceptual thing as we hadn't changed the underlying platform and the content was the same. Or, as a fully-fledged UX evangelist, I prefer to interpret it along the following lines: our user-led changes meant that the users *were* finding things quicker, and *were* finding more relevant content. Either way, we have happier users which is a win for us and for them.

One final tale I'd like to share is around a specific piece of feedback we received post-launch. Now, I'm sure we all have our list of 'Those Users' – the people who we dread hearing from. It just so happens that one of these users got in touch with us the day after we'd launched the new interface. I gathered myself … I moved the cursor over the email … my heart rate was soaring as I clicked the mouse button, only to discover that the individual in question wanted to congratulate the team on the great work they'd done to modernise the catalogue!

(They did subsequently get in touch to say that the new catalogue was unusable and that they were switching back to the old interface, but one step at a time and all that …)

I'm going to conclude my part of the article by talking about the lasting impact that the YorSearch Improvement Project has had, as it really felt like a tipping point in demonstrating the value of the approach, and finally solidified UX as something that we just do.

The project really broke the shackles on the catalogue and allowed us to continue experimentation, rapid changes and continuous iteration. Previously we had adopted a 'big bang' approach to any large-scale changes, where we would gather user requirements, retreat to our development bunker, then return months later with an end product that more often than not didn't meet the original brief. By that point, we'd have spent the allotted time on the project and would be moving onto something new. The YorSearch project changed all of that as we were constantly in touch with students about our plans and prototypes, and continuous iteration was built in from the outset.

Without this cultural shift, it's fair to say that we would have been unable to respond as positively as we did during the pandemic, when regulations required multiple system changes and we were creating new services (e.g. book takeaway) on the fly and with extremely hard deadlines. Without a UX-led, iterative approach we would never have got these services off the ground – it was taken as read that there would be issues post-launch, but we'd initially handle these via our customer services staff, while fixing the underlying problem in the system.

In a similar vein, we'd always shied away from enabling new features in Primo

without exhaustive testing and debate among library staff. The undeniable success of the YIP meant that at last we had the power to say to staff who objected to this approach, 'IT'S NOT FOR YOU!' and simply try these features out. For a while we talked about sandpit and staff interfaces, but eventually these fell by the wayside as the relentlessly successful UX juggernaut gathered momentum and the realisation spread that everything we did should be driven by our users.

Overall, involvement in the project was an incredibly empowering process, with my own cultural shift reflecting the wider shift taking place across the library. By listening to our users, we could overcome staff resistance to change, make things work better for our users and, above all, sell by doing.

You were only supposed to blow the bloody doors off!

Ned: Everyone is familiar with the phrase 'it's better to ask for forgiveness than permission' – we'd go so far as to say, ask for neither! We have had four Library Directors since we started doing UX, all very supportive, and UX was presented to them as an inherently positive aspect of how we work at York.

For us, getting out and talking about UX is an important part of embedding it in the culture. We talk about it at events like UXLibs, and we also talk about it internally at the University. We write about it in journals. Obviously this is mostly because we love it and want to be part of a wider conversation – but also, external validation is often a useful tool for getting internal validation…

One of the Directors actually mentioned our UX work as a strength of our library in their interview presentations – by being known for our UX work we're securing its future as personnel changes over time.

Knowledge speaks, but wisdom listens

Ultimately, it would be easy to slip back into old habits as an organisation. To buy an expensive new product without first researching it with our users. To change the space without some fieldwork. Paul and I aren't in every meeting.

So we proactively try to involve an ever-widening pool of people in UX. We run training sessions across the University for anyone interested. We encourage cross-departmental collaborative projects.

We also have a UX Toolkit. This is internal but everyone is welcome to see it and use it if they wish. You'll find it at bit.ly/yorkUXtoolkit (case sensitive). It contains

an intro to UX, guides to ethnographic techniques, consent forms, links to projects and presentations. We say on the pages of the toolkit, 'Here's a list of people who would be happy to talk about UX with you if you're interested,' so people can find out.

Something very specific we've taken from the YorSearch project is how useful it was to do three rounds of ethnography. We call it 'three rounds of five'. We speak to five people at the start of the project for generative research, to get a wider understanding of what's going on. Then we speak to them again once we're in a position to make changes – the prototyping stage. And we do a final round of evaluative research towards the end to assess whether the changes worked. I tell everyone about this, because I love it and because it's helpful for people new to UX to have a specific plan of what to do. It's not just: here's this whole new discipline – good luck. It's: here's a tried-and-tested way you could structure your project.

The result of this is that, all the time, more and more people become equipped to participate in, and advocate for, UX as part of the culture. Listening to users is just what we do now. There's always someone in the room who says, 'We should probably do some UX work here.'

Ultimately, our UX journey at York has been shaped by some factors beyond our control, and some factors we're entirely responsible for. The things we *can* change and impact, we have.

Our final tips are these:

1. Make it really easy to find out more about UX and actively recruit staff to become practitioners
2. Don't badge things as 'UX projects'
3. Use UX not just to make good changes, but prevent bad ones
4. Talk less about UX and more about your success

And in the end, it all comes down to this: we get out there and make informed choices, and it works. Our spaces are better. Our accessibility is better. Our provision for people with English as a second language is better. Our catalogue is better. Our website is about to get better. We sell by doing.

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All the quotes we've used as Headers in this article have been from the 1960s, but we'll end with one from Anton Chekhov, dating from the 1890s:

Don't tell me the moon is shining;
show me the glint of light on broken glass.