



Joe Sokohl

Portfolio

- o Some thought-leadership examples
- o Some case studies

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Leading

This poster I presented at the 2009 IA Summit encapsulates my approach to leading teams.

PRINCIPLES OF UX LEADERSHIP

—JOE SOKOHL
Regular Joe Consulting, LLC

What's the difference between being a manager of a user experience team and its leader? Leadership goes above management. Managers handle resources; leaders inspire people.

Sadly, UX professionals move from individual practitioner to team leader to manager without having a grounding in leadership. It is leadership that elevates one above resource management and into inspirational guidance.

We need to look beyond practicing the craft and into leading the profession. Being a leader means incorporating strong values into your life and work, as well as following clear principles that help others understand what they need to do.

It's more than just completing a wireframe or writing a Twitter post; instead, leadership is the art of inspiring people to accomplish goals.

Poster Design: Lyndsay Mazzola, Senior IxD, Keane Inc.

Value to Business

Personal/Professional Growth

VALUE TO COMMUNITY

PRACTITIONER

MANAGER

LEADER

- **Know yourself and seek self-improvement, both in the field and personally**
Make sure that you understand what you want to do in this field, why you want to do it, and how to ground yourself.
- **Set the example**
Not only should you be a good UX designer, you need to set the example for your peers, your staff, and your superiors. Consider your demeanor, your work ethic, and your devotion to both client and user success.
- **Ensure that tasks are understood, both before and after completion**
When you create tasks for your team members, make sure that they know what they need to do and understand what success or failure they have achieved.
- **Build the team**
This principle applies to both the UX team you lead, the development teams you work with, or the project team, or all. Building the team means imparting sound guidelines and principles of UX design & development.
- **Assign your staff wisely**
As a practitioner, you make sure that what you design meets users needs, goals, and task expectations. At the same time, pay attention to the people on your team. Are they working on projects they have the ability to work on? Do you have someone who's interested in Little IA doing Big IA deliverables?
- **Be technically and tactically proficient in design**
Know a wide range of UX techniques. Know when to apply specific UX techniques, and ensure you have strong skills as a practitioner.
- **Know your users as well as your staff, and look out for their welfare**
It's critical for you as a leader to make sure that users' needs are addressed in their experience with products you work on. At the same time, take care of your people, ensuring that their needs are met.
- **Keep your staff informed**
You need to ensure users know what they need to do in their tasks, but you also need to keep both project team members as well as your staff are knowledgeable about what is going on, what is expected, and what effect actions might have.
- **Develop a sense of responsibility in your team members**
Not only should you feel responsible for users' success, but you should encourage your team members to accept this type of responsibility.
- **Seek responsibility and take responsibility for your actions**
Your designs and those of your team matter. They have real impact on people. Make sure that you take a sense of ownership and feel responsible for users' successes—and failures. Strive to take on more responsibility for larger areas of product development.
- **Make sound and timely decisions**
As Steve Jobs famously scrawled on the whiteboard of the original Mac development team's area, "Real artists ship." Be decisive in your analysis as well as your critique of subordinates' designs.

Leadership goes above management. Managers handle resources; leaders inspire people.

caption

Writing

Focusing on the critical need for IA, I wrote this chapter for the O'Reilly book, *97 Things Every UX Practitioner Should Know*.



97 Things Every UX Practitioner Should Know



Don't Forget About Information Architecture

Joe Sokohl



A few years back, my wife and I wanted to clean up our utterly disarrayed basement. Our neighbor, a professional organizer, helped us organize 30 years of accumulation. Her succinct process of physical organization reminded me what information architecture truly is.

"Put like with like. Decide what to retain versus what to trash or donate. Then label and store items based on how you live," she said.

That's what information architecture (IA) does: *it organizes and classifies digital stuff so people can find and use it*. Though IA has existed as a field for well over 20 years, lately it has taken a back seat to other aspects of UX such as UI, content strategy, and interaction design. However, IA continues to be an important piece of the UX puzzle.

Like all other aspects of UX, IA starts with understanding the user and their context. User research resides at the core of IA. As we look at how people use information, we observe their behavior, both in seeking information and in storing it. How people engage with information is similar to how humans have engaged with their environment for eons. "Information berry picking" illustrates how a person goes from one information repository to another, finding information that helps them form a sense of meaning or place. "Information foraging" extends the metaphor, indicating that people look for those areas of information that pose potential value. People wander digital aisles as well, looking for meaning in the informational hallways they walk.

To organize information, you first have to *know what information you want to organize*. Is it existing information that needs better arrangement? Is there information that needs creating? Is there duplicate information that needs reconciling? To help us put like with like while we determine what needs to be retained, bundled together, or discarded, we use:

- *Content inventory*: Identifying every piece of content in the information space
- *Content audit*: Analyzing the content by type, purpose, redundancy, and viability to the user

To understand how people name the stuff they use, we conduct:

- *Search log file analysis*: Reviewing terms that users entered when searching for things
- *Card sorting*: Letting users sort terms into categories that make sense to them
- *Tree testing*: Asking people where they go to find or do something

With a solid terminology in place, we label information spaces, finding ways to store them for users to access and use. Once they are labeled, we then provide guideposts and markers to help users wander through information spaces to find what they're looking for.

Jorge Arango captured IA so well when he talked about IA's concern "with the structural integrity of meaning across contexts." IA helps people engage with that meaning across all experience touchpoints.

Site maps, taxonomies, and search results pages don't provide enough framework for emerging interactions. Voice and virtual and augmented experiences all need structure and classification, just as visual ones do. For example, voice interfaces require IA. Providing information clues reduces the memory people must retain. A clear aural framework helps people know where they are when asking for an album to play, a forecast to be delivered, or a recipe to cook.

Our main human concern in IA remains not just the structure but what people do within it. As Frank Lloyd Wright quotes Lao-Tzu at Taliesin West, "The reality of the building does not consist in roof and walls but in the space within to be lived in." In the same way, IA consists of the space in which people live their information lives. It provides the structure, the bones, and the framework for other activities to operate in.

For information about identifying IA problems, see [Part V, Know These Warning Signs of Information Architecture Problems, page 148](#).

Thinking

I presented this poster at the 2021 IA Conference, expanding on how we need to understand people to craft information organization.

Information Architecture Still Crazy Important...After All These Years

Basic DTD—IA organizes and classifies digital stuff so people can find and use it.

While IA has existed as a field for well over 20 years, lately it's taken a back seat to other UX aspects



Good IA reduces frustration, increases efficiency, and enhances satisfaction...all still crazy important today.

The importance of meaning inculcates IA with relevance

Finding our way around a website is no different than finding our way around a building.

Paul Kahn and Krzysztof Lenk

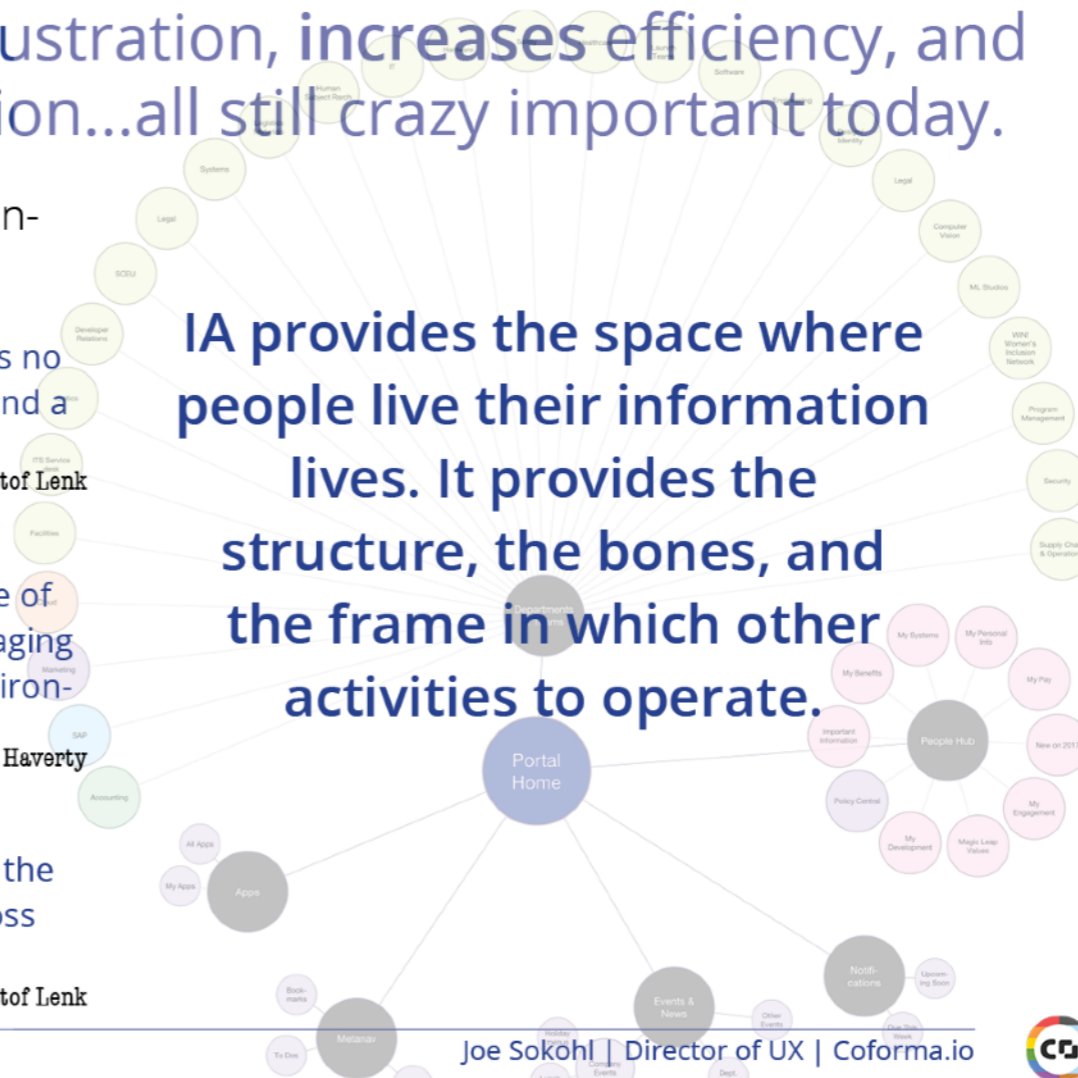
Meaning emerges at the confluence of a goal-directed actor-observer engaging with information directly in the environment.

Marsha Haverty

IA is the only field...concerned with the structural integrity of meaning across contexts.

Paul Kahn and Krzysztof Lenk

IA provides the space where people live their information lives. It provides the structure, the bones, and the frame in which other activities to operate.



Expel Data Visualization Improvements

Focused on redesigning approaches to information and data visualization for Expel's cybersecurity dashboards.

The brief

At Expel, different people need at-a-glance information to help their decision-making. From security operations center (SOC) analyst to chief information security officer (CISO), users need to understand how well their security operations perform with respect to MITRE and other security frameworks. The current situation was fraught with data science tool visualizations and disparate approaches to information. Confusion among users led to different understandings.

What I did

As the first cross-team principal UX designer, I brought my extensive knowledge of information dashboard design to bear. I reviewed existing user research and collaborated with cross-functional teams, including developers and account managers.

Creating sketches first, I worked with the team to help them understand accessibility, focus, and the ability for users to recognize issues quickly.

My redesign created a new, extensible approach that enables a single view with data-rich visualizations supporting core knowledge needs.

Results

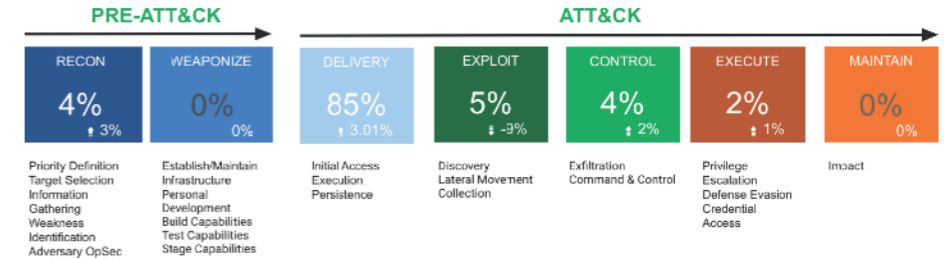
Design system improvements meant that future approaches to information visualization created consistent at-a-glance components.

The development lead supported the new approaches fully and recommended my assumption of design system lead.

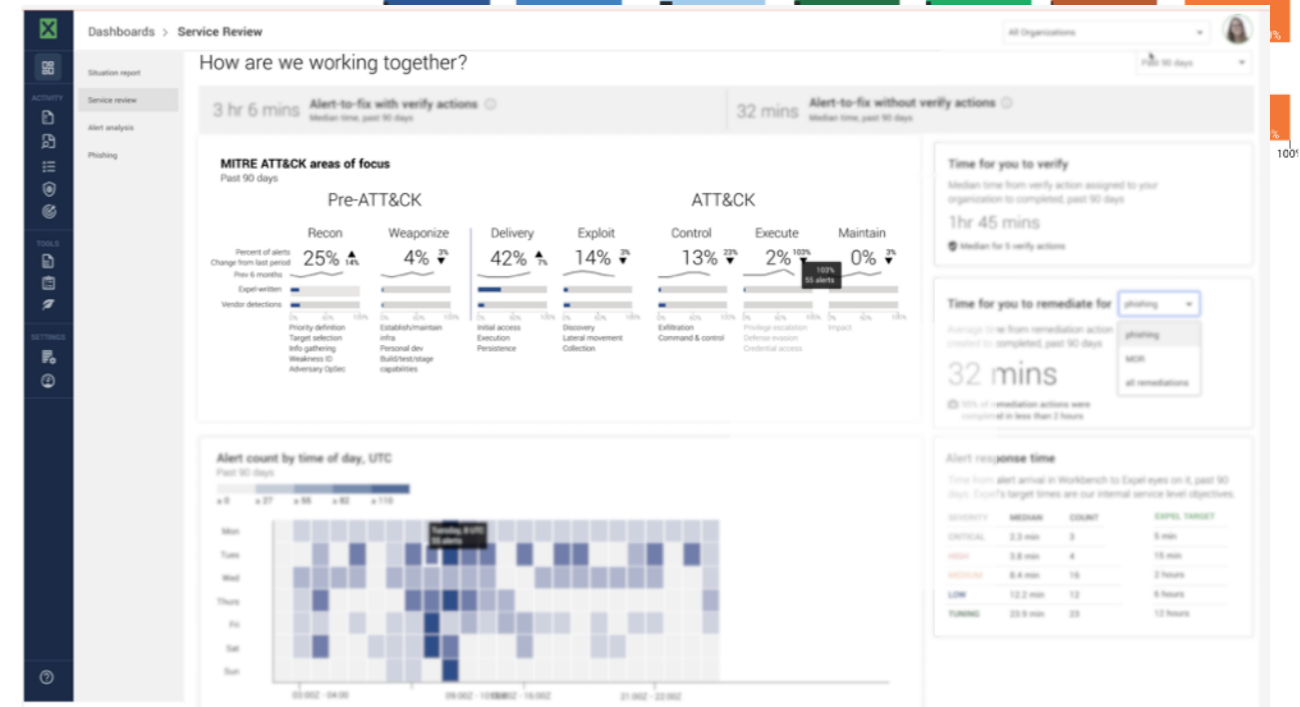
MITRE Enterprise ATT&CK Tactics

Where do your alerts fall?

All Customer Alerts



Expel Written



Key tools and deliverables

- Stakeholder workshops
- DataViz principles
- Design system specifications

Major Government Agency App Redesign

While working as lead user researcher and interaction design, I led major design decisions to modernize

The brief

Within a major government agency, a modernization compelled a redesign as well as a technical rewrite of a data entry application. Though only about 100 users interact with the tool, it affects millions of government employees past and present. The existing tool requires six months of training to become proficient. Many errors occur, often due either to the archaic nature of the UI or due to the amount of manual processing needed.

What I did

After consuming reams of previous research, I developed an agile plan for user research. I led lean UX-based design sprints: Every two weeks, I would refine what we wanted to learn, create a guide for research while also helping create a prototype, conduct 1:1 research with four users, and synthesize findings.

Close collaboration with the client's product owner and our technical team ensured a seamless working relationship.

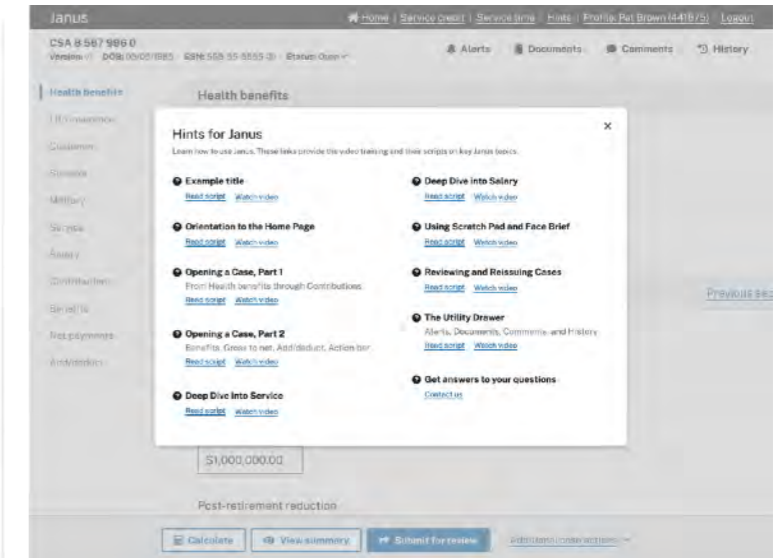
Also, the client had asked for training as a deliverable. Knowing how poorly existing standup training had been received, I created an on-demand approach to accessible video-based topic-led training. I also create a core content strategy to help them govern the information that would be created.

Key tools and deliverables

- Stakeholder workshops
- Contextual observation & interviews
- Content strategy guidelines
- Instructional videos and innovative online help
- Interaction design documentation
- Design system specifications

1.6.4 Validation feedback-interactive table

The screenshot shows a table with columns: Period, Start date, End date, and LWOP. Row 1 has Start date '04/09/1995' and LWOP '10,678'. Row 2 has LWOP '10,678'. Row 3 has LWOP 'hours'. Annotations include: 'Message area (showing multiple messages)' pointing to error messages; 'Row indicators' pointing to red circles; 'Highlighted fields (red and bold text, outline and fill color for field)' pointing to the LWOP cells; 'Text and cell outline color: USWDS "error-dark" Cell background color: USWDS "error-lighter"'; and 'If error on Save, focus is moved to error message above.' pointing to the Save button.



Results

Though the program continues to deploy the application, the approach I took has achieved reams of praise from users and from agency management.

In addition, innovative approaches to delivering documentation make the design extremely extensible.

Vanguard Advisor Platform 1/3



Phone



Tablet



Responsive web

Research and identify a new approach to content and information architecture for an advisor-facing platform

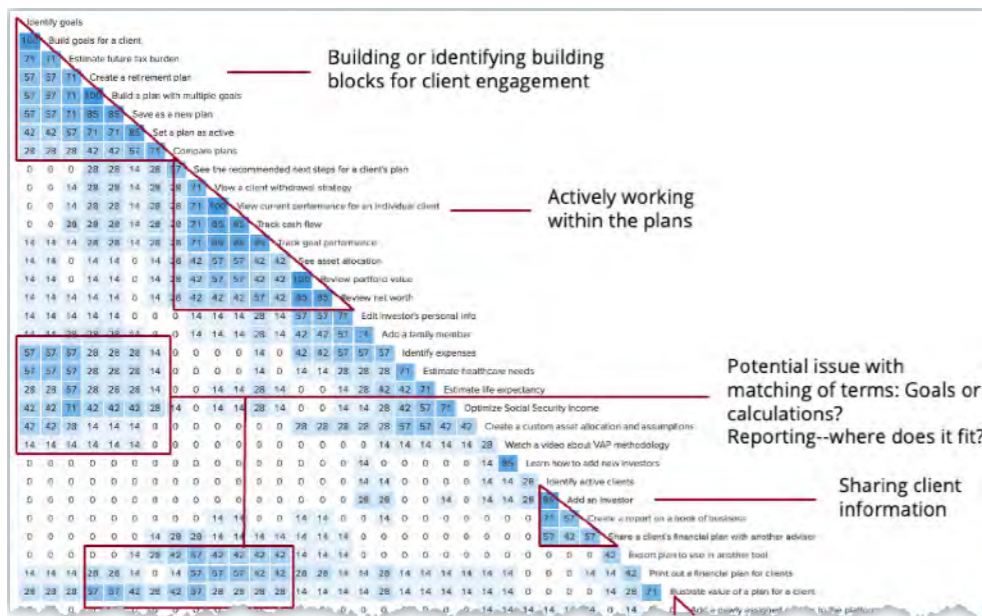
The brief

As this major investment firm created a new SaaS platform for its advisors, it realized they had not intentionally thought about the information architecture, way finding, and how users would know what tools and products were available. They wanted to ensure the platform could grow as new products and offerings came on line.

What I did

Using a rapid mixture of primary and secondary research, I created a global information architecture strategy and navigation framework for VAP that helps the VAP product team deploy an advisor-centered approach to task and information findability, retrieval, and usage.

The IA and navigation work again involved user research through rounds of card sorting, tree testing, and questionnaires.



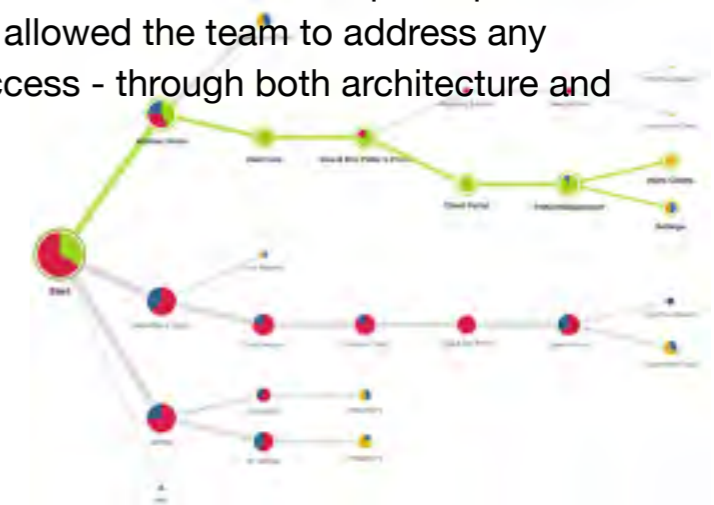
User research

The team recruited 29 diverse advisors. Each advisor participated in all three tests, so we captured progressive improvement in feedback from a baseline. With few exceptions, advisors participated in all the studies.

I conducted three separate tests. Each test progressively developed complexity and certainty in our concept. This approach allowed advisors to provide a more comprehensive set of feedback on both structure and design.

Tree testing

I wanted to determine paths people take in a new VAP structure in order to accomplish tasks, find information, and meet their goals. First I developed a candidate site structure, then I asked participants to select the correct location. Results allowed the team to address any challenges and reinforce success - through both architecture and design.



First-click testing

Determining whether people can find something within a presented design helps refine navigation design. The first test focused on how well a rudimentary new navigation design worked. Similarly to the Tree Test, I gave advisors specific tasks (for example asking them to compare a plan), and analyzed how well they found that target.



In the second Chalkmark test, we refined our designs, using the existing MVP as a guide. I then ran another first-click test, using many of the same tasks as in Chalkmark 1 to compare like-for-like results. I focused more on details (for example, language choice) rather than visual design, given the overall success of our redesign in tests.

Key learnings

Based on the user research, I learned several key aspects of behavior and structure:

- Unify age titles and menu functions
- Centralize in-page calls to action
- Give more meaning to “Activate a Plan”
- Keep a limited approach to iconography
- Multiple entry points are fine...but not in the same nav
- Prioritize in-page help

Navigation approaches

A stronger, more intentional approach can help wayfinding, placemaking, and sense-making. After reviewing several approaches to IA, I settled on the hub and spoke approach as the best way to realize how to improve advisors' experience with findability - with additional structures within functions as needed.



Vanguard Advisor Platform 3/3

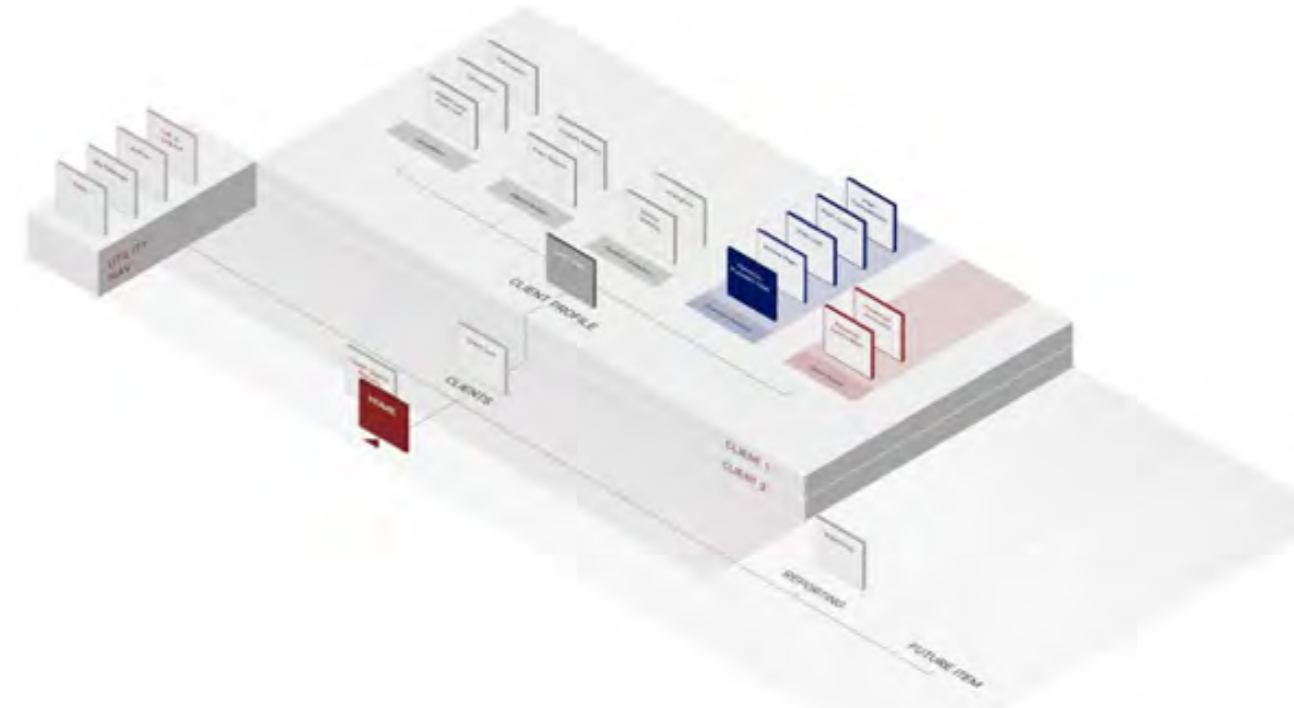
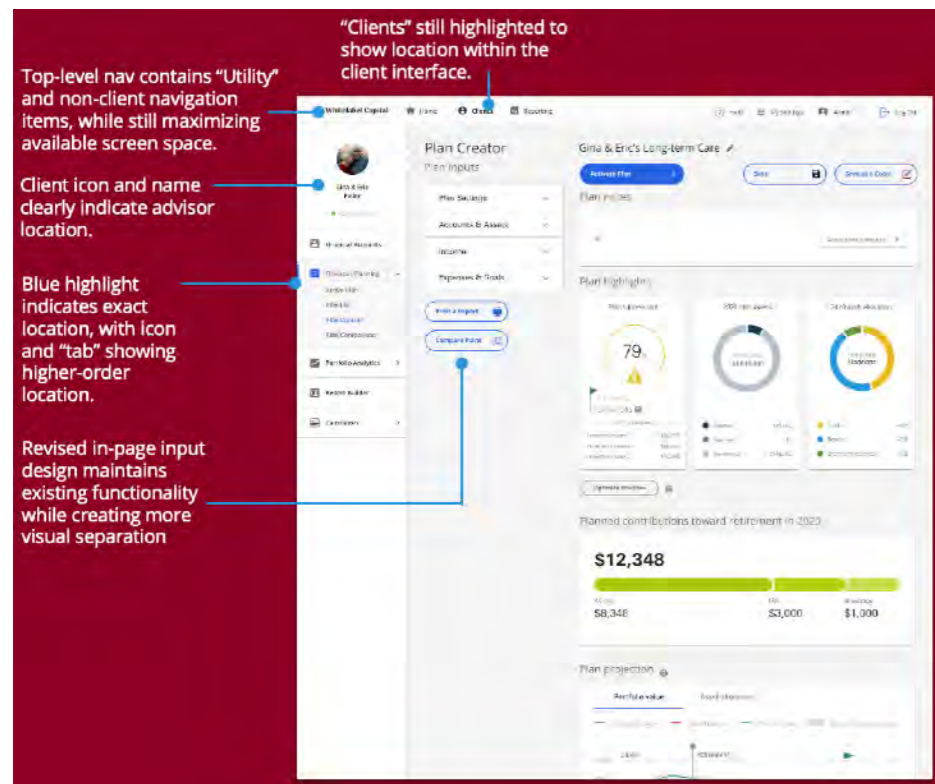


Mapping for users

Creating new approaches for the navigation and the structure provided a standard approach for the greater platform design.

To maximize the ability of advisors to use the platform, I streamlined their ability to navigate while also ensuring that advisors are always aware of their location. I also needed to minimize confusion between navigation and tool-specific functionality.

I designed a system that places all tool-specific functions within their respective pages, rather than attaching a scrollable menu to the left side. This design also maximizes screen space, through minimizing the vertical height of our top nav bar, and allowing users to compress/close the left side “client nav” as desired.



Key tools and deliverables

- Stakeholder workshops
- Contextual observation & interviews
- Navigation design details
- Style guide
- Card sorting
- Tree testing
- Taxonomies

Results

Information architecture showcased ease of findability, enhancing the scent of information. Initial observations with users showed they could access the right information and content at the right time.

Allianz Global Assistance 1/2

Redesign a customer-facing travel insurance transactional and informational site

The brief

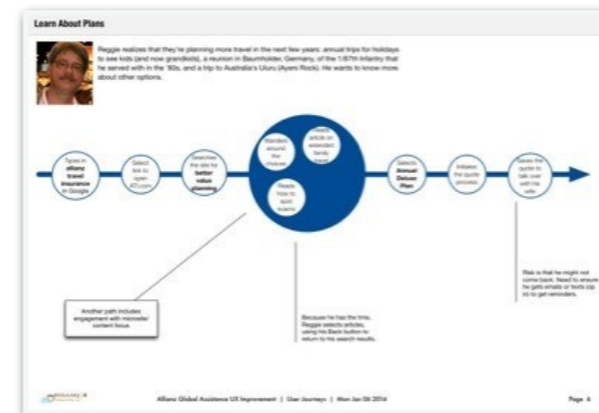
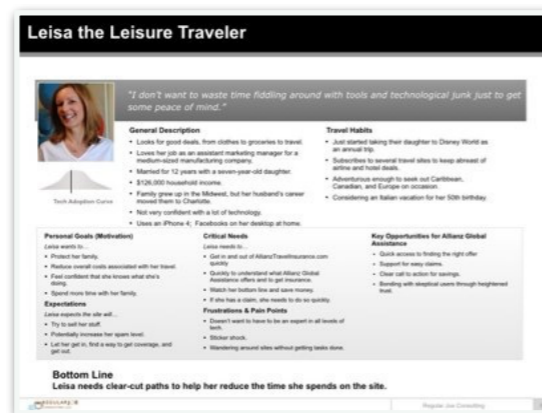
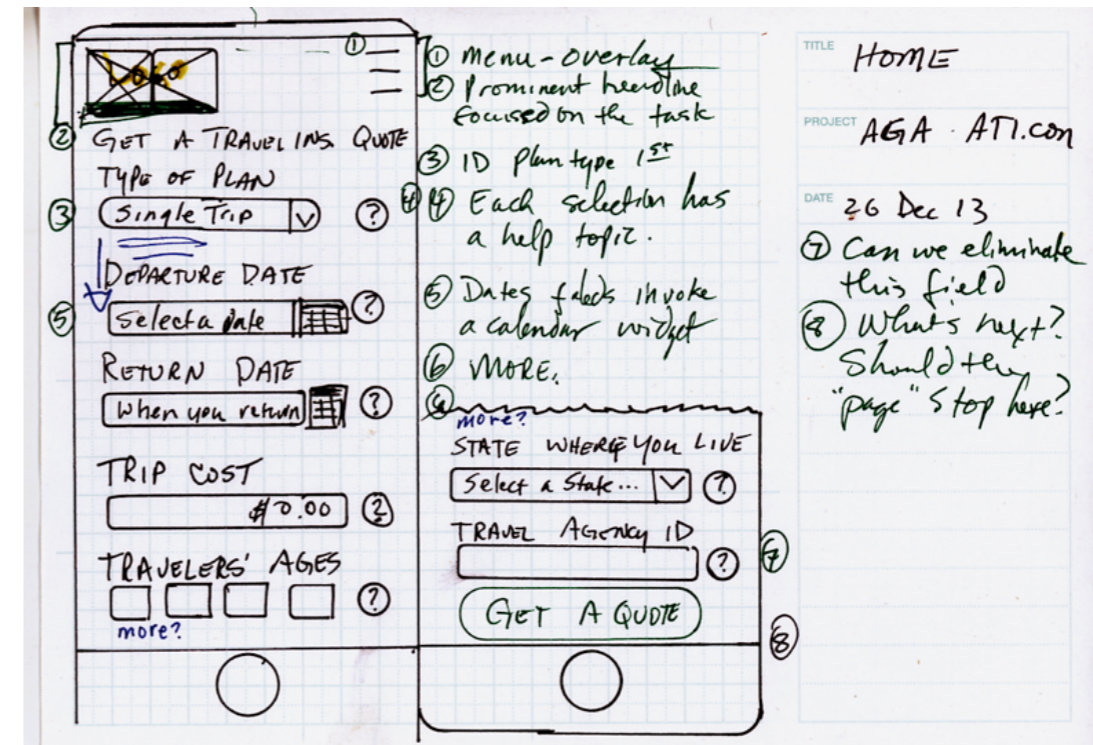
Allianz Global Assistance wanted to move its outdated experience design into a modern, flexible, and mobile-friendly approach.

What I did

After conducting several internal knowledge transfer meetings, I established a baseline of business goals as well as the client's perception of their users. I performed a qualitative & quantitative heuristic review. I engaged a subcontractor, who performed moodboarding and helped establish a visual design direction.

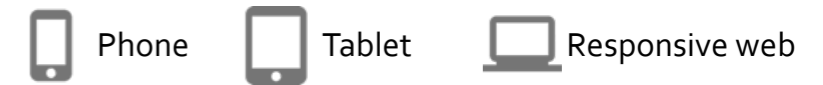
Once we had a solid understanding of initial personas, I quickly moved into scenario-based journey mapping. Using a set of provisional personas and these scenarios, I quickly created mobile-first sketches of primary states. I moved these into digital sketches to prove concepts. Secondly I worked out larger viewport-based ideas, and I established a set of patterns for building the design.

Sketching The activity of putting pen to paper helps me think through design ideas and problems quickly, without getting too precious about them.



User Research From moodboards to personas to journey maps, I established an internally based understanding of the user. In later activities, I used an Axure-based prototype to conduct in-person usability tests.

Allianz Global Assistance 2/2



Redesign a customer-facing travel insurance transactional and informational site

After working out design concepts internally, I conducted 14 in-person usability tests. Using this data, we were able rapidly to adjust both visual design and interaction design issues. We also proved the viability of some of our concepts.

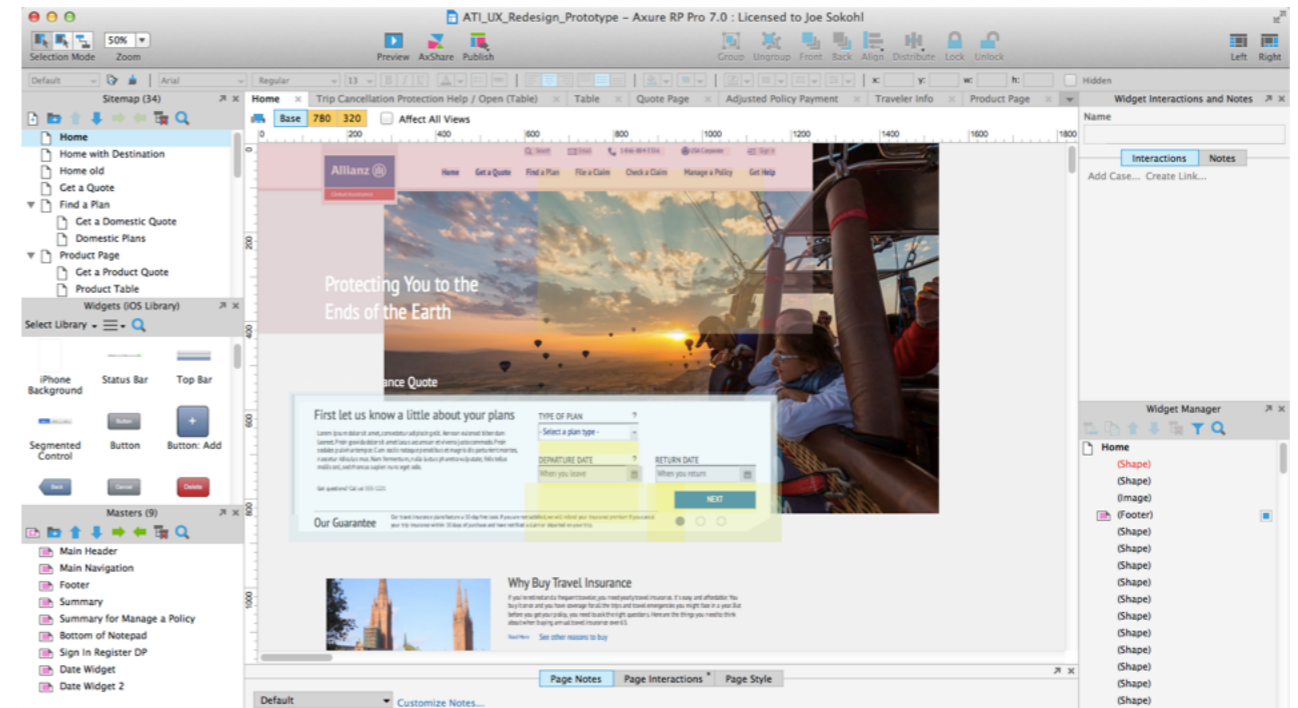
Once I delivered the project successfully, AGA engaged with me for several more projects:

- European site redesign
- White-label redesign

Using a get-to-prototypes-fast approach reduced time as well as confusion on the part of the stakeholders.

Key tools and deliverables

- Sketches
- Balsamiq (wireframes)
- OmniGraffle (wireframes & journey maps)
- Axure (prototype)
- Silverback (usability testing)
- Keynote & Excel (heuristic review)
- InDesign (styleguide)



Prototyping Moving to Axure helped not only illustrating interaction design to the team, but it also helped me work out details in the concept. It also formed the basis for both usability testing and documentation, wherein I embedded specs for developers.

Results

The usability tests provided deep insight, helping us adjust some elements of the design. They also validated hypotheses as well. The developers said this set of information was “the best detail and most useful documentation we’ve ever seen.”

NBC Operations 1/2

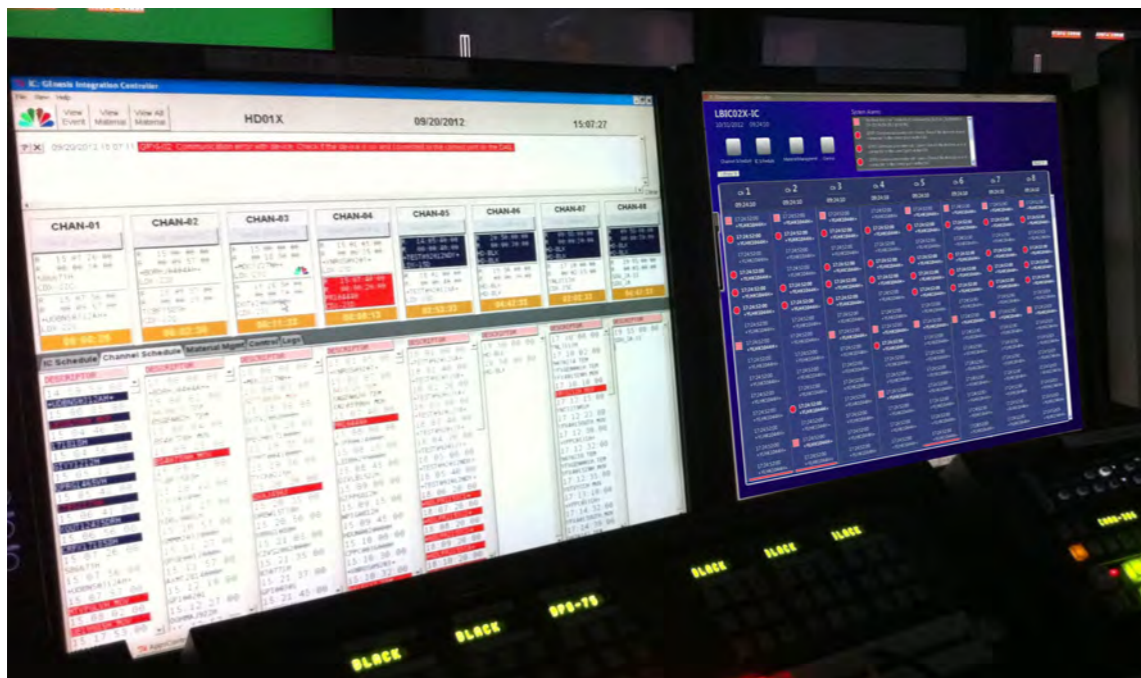
Designing a monitoring and alert software for fast-moving, critical tasks

The brief

NBC Operations needed to replatform a mission-critical monitoring application written in C++ and Tcl onto Java. They realized its ancient, blocky user interface needed to be modernized.

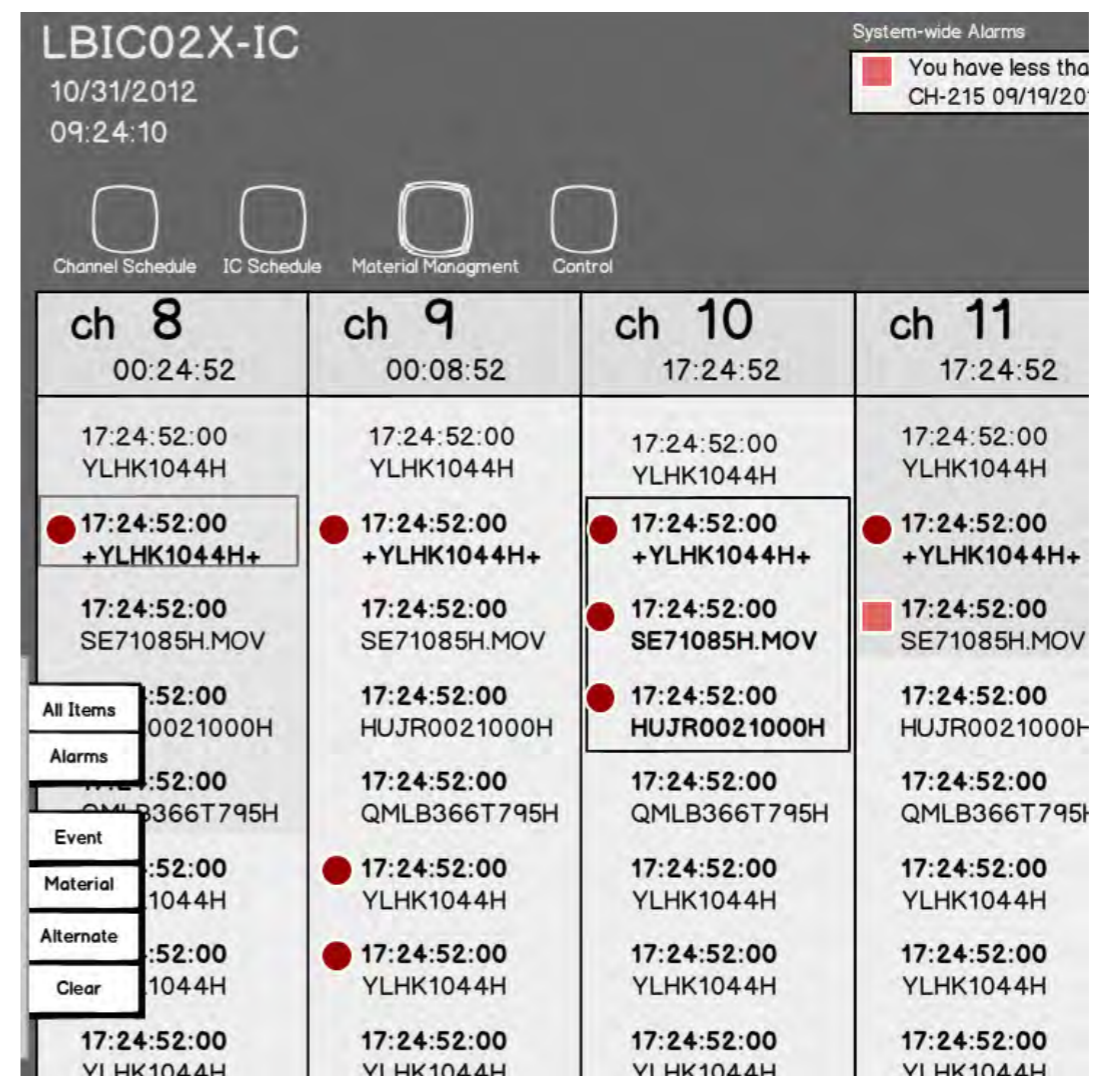
What I did

I spent several days in both New Jersey and Manhattan operations centers, observing and interviewing users. I determined human factors elements of visual acuity, motor movements, and other contextual inquiry findings.



Contextual Design The original software on the left created pools of light in an otherwise darkened control room. My design on the right showcases both the appropriate palette as well as a more immediate focus on alerts.

I then created a prototype and conducted eight usability tests with actual users in the operations centers. Adjusting the design, I defined exact specifications for the programmers to realize the design.



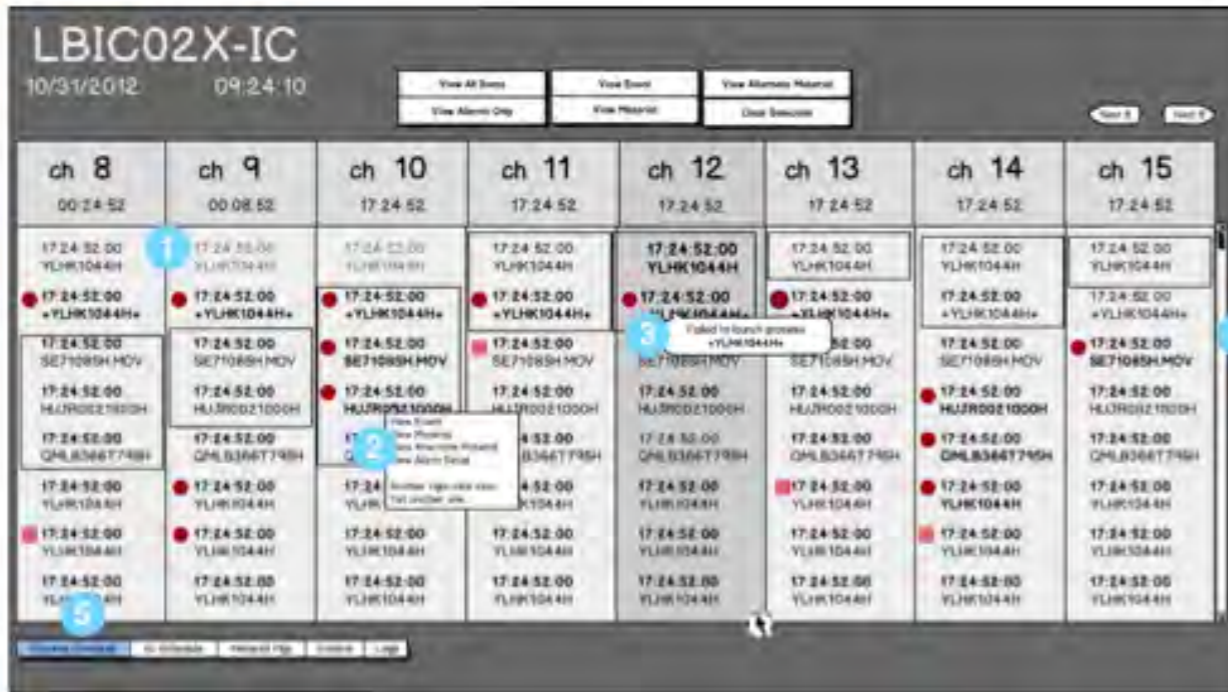
Balsamiq Sketching Using software familiar to the development team, I created concepts in interactive Balsamiq files. These quick sketches enabled me to achieve understanding with the team so that I could build a more faithful prototype for usability testing.

NBC Operations 2/2

Designing a monitoring and alert software for fast-moving, critical tasks

IC User Experience Redesign

Channel Schedule 2



Main Fonts & Colors



Lo-fi Prototyping. Using Balsamiq, I sketched patterns of light versus dark areas to focus attention. I created a visual hierarchy that supported quick access of alertive conditions.

Detailed Styleguide. While often a detailed styleguide can bog developers down, in this case we decided it was important. The distributed nature of all team members enhanced the need.

Key tools and deliverables

- Balsamiq (wireframes)
- Fireworks (page comps)
- PhotoShop (bitmaps)
- InDesign (styleguide)
- Axure (prototype)
- Silverback (usability testing)

Results

The developers received easily understood and appropriately detailed information so they could rewrite the application. The client was extremely pleased, so much so that they decided to move toward a complete suite redesign based on the user-centered design I provided.