

# Taming the User (or *The House of IT Tearaways*)

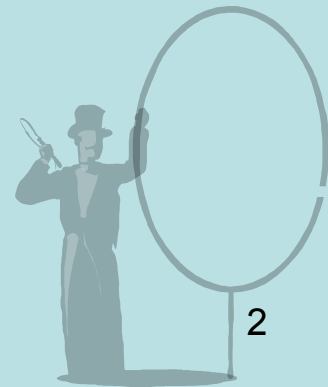
Peter Higginbotham and  
Katherine Craddock

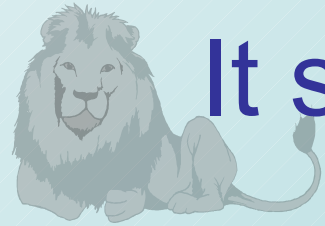
OUCS





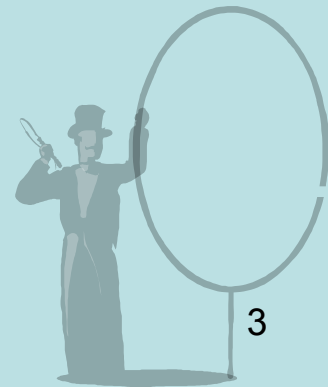
# *A typical user ...*





# It should be quite simple really ...

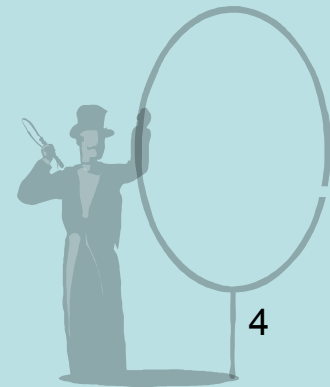
- Take ownership of the problem
- Find out what needs to be solved
- Identify an appropriate course of action
- Wrap it up!

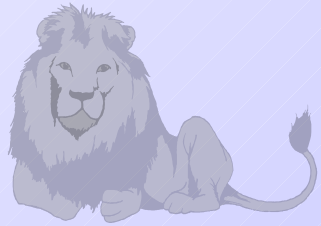




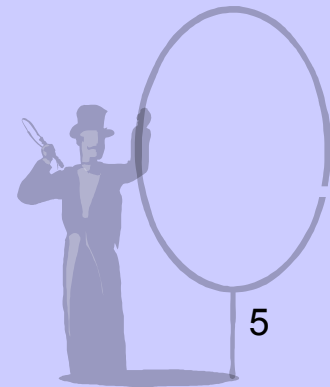
# Taking Ownership of a Problem

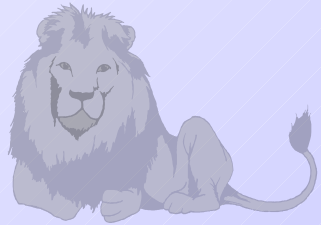
- Doctor vs. plumber vs. IT Support
- Establish the contract – even if this is just an internal acknowledgment to yourself
- Puts you in driving seat
- Doesn't mean you have to solve problem
- Manage users' expectations





*But then the difficulties begin ...*

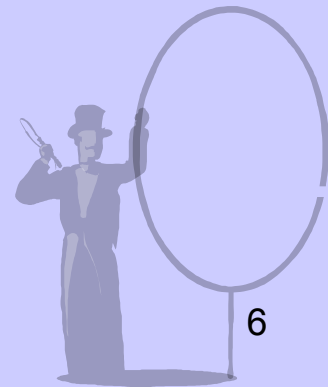




# Identifying the Goal

- The user may say they are trying to:
  - Install an email client
  - Interpret a Windows error message
  - Generate a TIF file on a scanner
  - Discover the FTP command for file transfer
  - Install Kanji fonts
  - Look for a “graphics” program

However, before leaping in...





# Ask what the user is trying to *achieve*?

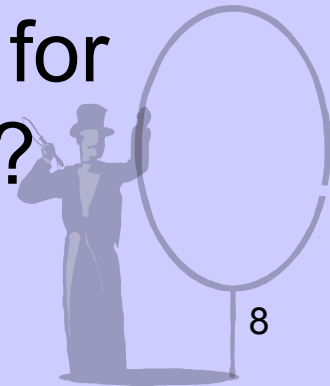
- What the user really needs may be to:
  - View an email attachment
  - Get an essay printed by midday
  - Get a diagram into a thesis
  - Update a web page
  - View Japanese online news
  - Prepare a presentation
- A key question to ask is  
“What is it you *actually* need to do?”



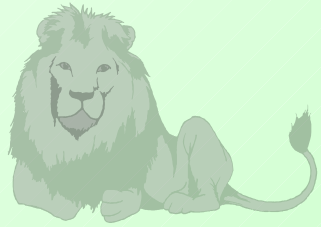


# The most appropriate solution?

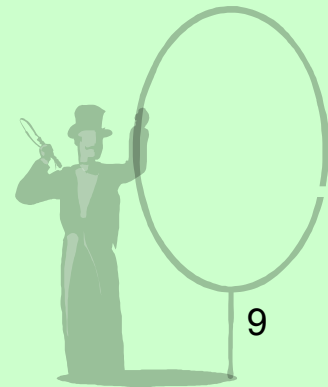
- Is IT really the answer?
- Don't get bogged down in details of inappropriate solutions
  - Trying to install zip software on Windows XP
  - Misbehaving s/ware on under-spec systems
  - Installing PhotoShop to edit a screen shot
- Does user have sufficient resources for current solution, e.g. hardware, time?

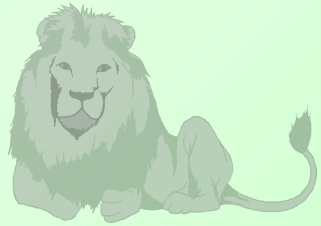






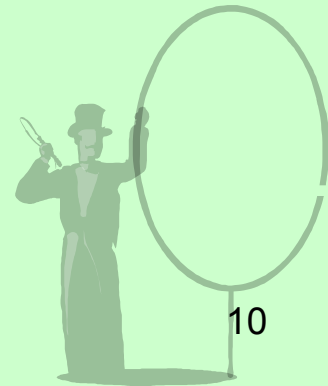
*It can be tricky to pin-point the  
problem ...*

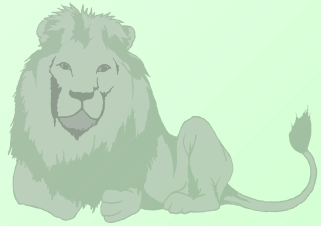




# Has it ever worked?

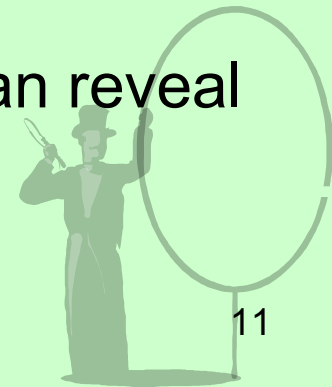
- **Yes**, but now not working. What's changed? Be sceptical if the answer is “nothing”.
- **Works intermittently**. Pattern? e.g. time-of-day, location, existing vs. new files?
- Network problems – “do other people around you have similar problems?”
- **No**, has never worked

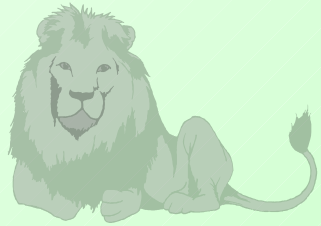




# Take me through what you've done so far...

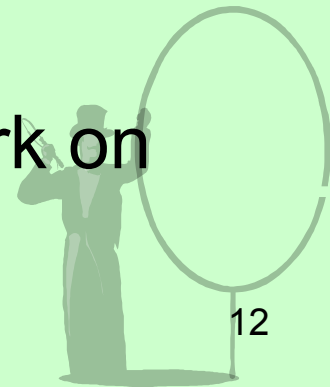
- What steps have you already been through?
- Were any steps omitted or unsuccessful?
- Were there any error/warning messages?
- Have any other solutions been tried (maybe interfering with current strategy)?
- Where instructions have been followed
  - Where did they come from? Up-to-date?
  - Get user to read out configuration settings (can reveal misinterpretations and typing errors)





# Detail, detail, detail...

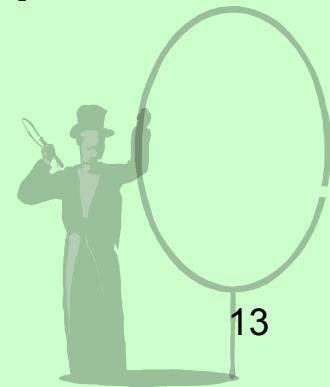
- *Exact* error messages/codes - often useful search terms in Google etc.
- Replicability of problem - does it always happen at exactly the same point?
- Generality - e.g.
  - does it happen with all documents/disks/etc. or just this one?
  - Does this document/disk/cable/etc. work on other systems?

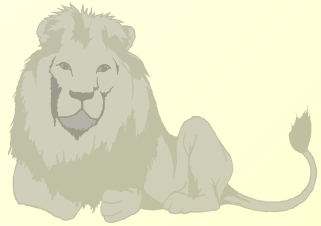




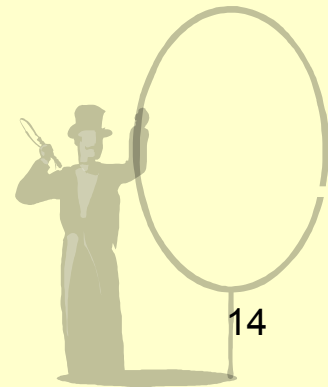
# Never assume anything about...

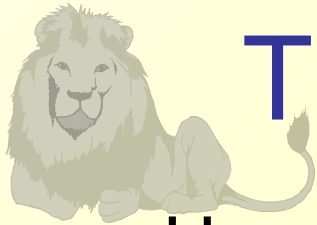
- User e.g. competence, experience, ability to follow instructions, typing skills, location, status
- Hardware – PC/Mac, vintage, spec.
- Software – version, source/legitimacy
- Network – ethernet/broadband/dial-up
- Accuracy/completeness of software configurations instructions





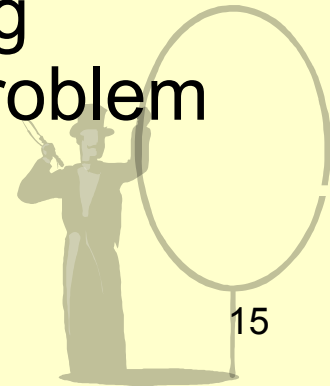
*While solving the problem, don't  
lose track of time ...*

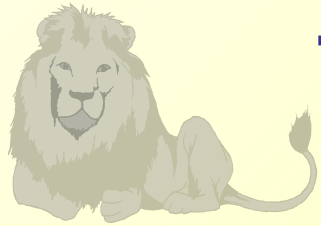




# Time Management - Advisor

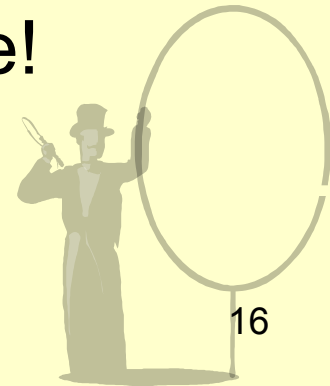
- Users who give too much information – “Let’s not worry about that just now.”
- Users with multiple questions:
  - Prioritise – identify the most pressing problem
  - Postpone until solution really needed – avoid the “while I’m here” syndrome.
  - Offer to research and get back to user
  - Refer user to courses, web pages etc.
- Give instructions for more time-consuming solutions and ask them to come back if problem persists.



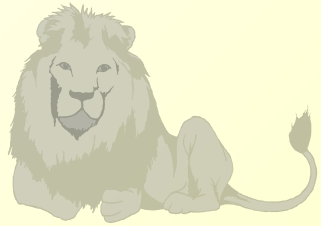


# Time Management - User

- Is the solution time-effective, e.g.
  - lost files - updating an older backup version or retyping whole thing could be quicker than scanning print-outs or using complex/unpredictable/expensive file/disk salvage
  - diagrams etc. - quicker (and possibly better results) to photocopy/cut-and-paste than scan originals. Still a role for the fax machine!

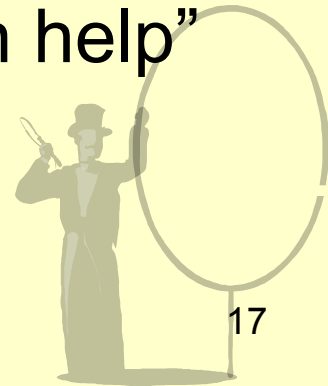


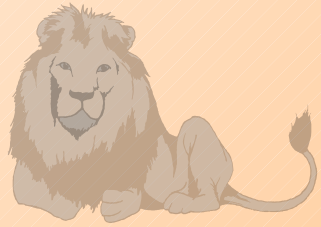




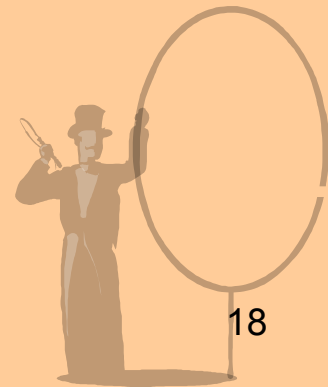
# Empowering the User

- Tell user what you're doing, or where an answer came from, e.g. guide them to relevant web page or help-screen.
- Suggest routes to future self-help, e.g.
  - “Always worth trying a web search”
  - “The Endnote web site has lots on that”
  - “Try looking up ‘labels’ in the on-screen help”
  - “There’s an OUCS course on this”
  - “You could set a bookmark here”





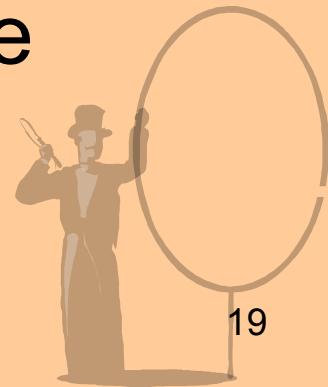
*And the biggest challenge of all  
– the USERS ...*

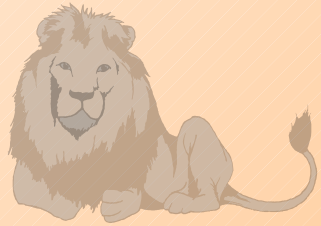




# Self-Important/Demanding Users

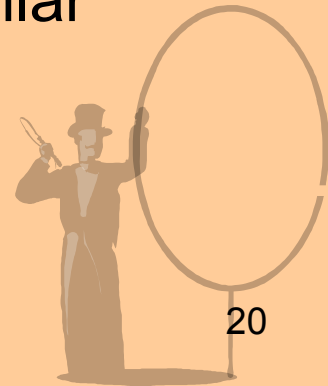
- Treat the Vice Chancellor the same way you would treat the college cleaner
- No-one has right to pressurise you into
  - Bending the rules
  - spending an unreasonable amount of time or effort on trying to fix something
- Be polite, be helpful, be detached, be realistic, be assertive

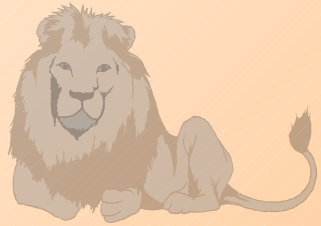




# Non-English Speakers

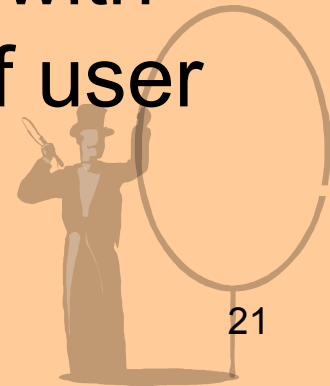
- Don't speak louder – just more slowly and distinctly
- Use simple language and try alternative phrasing if you aren't understood
- Sometimes helps to write things down or draw pictures
- Don't panic over foreign Windows versions
  - Icons are the same
  - Positioning of menus and within menus is similar
  - Keyboard shortcuts still work
  - Ask for a translation

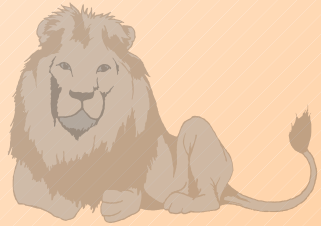




# Angry/Frustrated Users

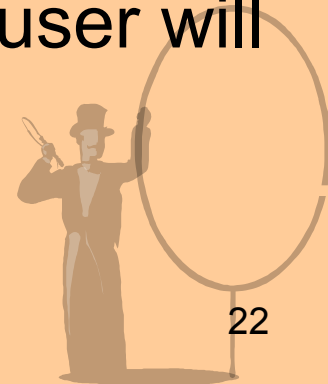
- Listen to their frustration/complaints
- Sympathise (but don't give false hope)
- Establish what it is they really want to do – they have often lost sight of this
- Try and suggest practical alternatives
- Be realistic about what can be done with available time/resources especially if user is being overambitious.

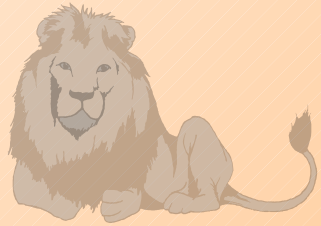




# “Helpless” Users

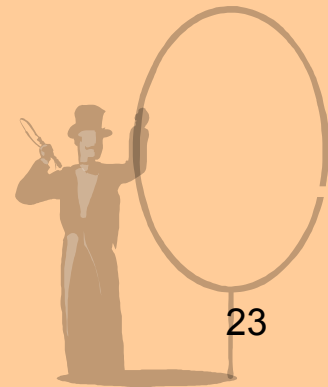
- Persuade users to try it themselves – hand-hold first steps, give encouragement...
- If instructions complicated, highlight the main steps in simple terms.
- “It’s designed for ordinary people to do. Of course, if you do get stuck...”
- “I’ll do it for you” *occasionally* best strategy e.g. obscure command-line operations the user will not need to repeat

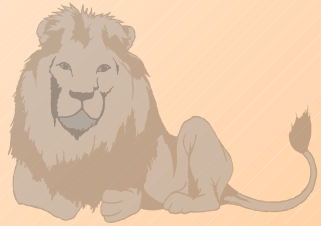




# Over-Inquisitive Users

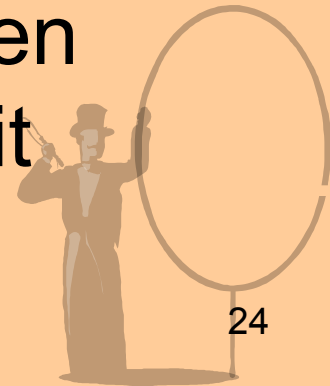
- A job can take twice as long when the user constantly demands details of what you are doing
- Find another occupation for them, i.e. ask them to look up information on the web
- Suggest they leave the machine with you



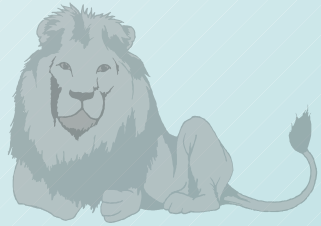


# Talkative Users

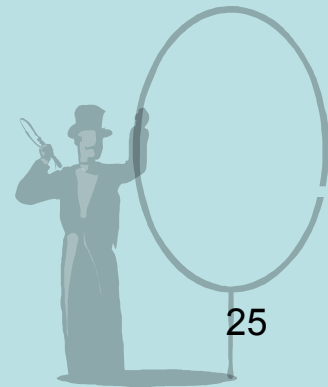
- **Rambling:** interrupt with targeted questions whenever they drift off-course
- **Too much information:** Ask user to summarise the problem – “and then we’ll come back to the details”
- **Won’t let you in:** say “Can we just stop here while I get my bearings” and then sum up problem as you understand it







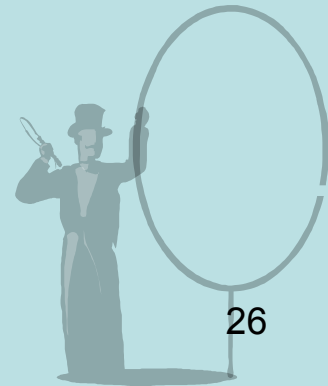
*But always keep in mind ...*

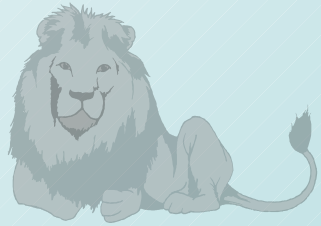




# The Essentials...

- Step back from the *presented* problem
- Try to understand the *real* problem
- Don't get sucked into the details of inappropriate solutions
- Don't assume – check it
- Be realistic
- Be assertive
- Listen to the user
- Don't listen to the user





# Phrasebook Essentials

- “What is it you actually need to do?”
- “Take me through what you’ve done.”
- “Does this always happen?”
- “What makes you think that?”
- “Let’s not worry about that just now.”
- “I’m only available until 4:40.”
- “It’s better if we leave that until you’ve...”
- “You might find it useful to...”

