

## The Functional Designer Role 3 Reasons it's a "Must-Have" for Successful Products

By John Mansour

The most absent and overlooked role in the entire product delivery cycle is the functional designer. Ironically, it may have a greater impact on the success of a product than any other role. Here's why.

Functional designers are process and workflow experts, acting as *user surrogates* to your organization. They form the glue between product management and engineering, translating market needs and business problems into detailed user scenarios and requirements that drive product usability.

If your products have a high degree of user interaction, there are three reasons the functional designer role is a must-have.

- **Functional Designers allow product management to stay focused on markets and problems.**

The Product Manager determines **what** capabilities should be added to the product and **why**, from a business and market perspective. The Functional Designer determines **how** those product capabilities should work in relation to their users.

Successful products require both roles because people who are good at "*what & why*" are not typically good at "*how*" and vice-versa, not to mention the time constraints that go with fulfilling both roles satisfactorily.

Combining both roles into one usually results in the following: product direction that's well aligned with the market but poor

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#### Simplicity is Power - Winning the User's Heart and Mind

#### With Anthony Deighton of QlikView

By Susan Monroe

Simplicity in software is for everyone, not just consumers, noted Anthony Deighton, QlikView's SVP of Marketing and keynote speaker at SVPMA's May meeting. Simple, however, is not simplistic. In fact, under the hood of some of the most intuitive and easy-to-use software, there is rich, complex, and sophisticated "wiring." The interface looks—and is—simple to the user, but this simplicity is deceiving.

According to Deighton, companies like QlikView that thrive in the business intelligence space create software that works like the human brain.

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# How to Get the Tough Referrals

By Patti Wilson

When it comes to getting referrals to business and career opportunities most people are naturally attuned to doing this with their networks. It is a simple process: reach out appropriately, tell them who you are, what you offer, and when they should refer business to you or what you are looking for. Doing this requires little preparation because you network knows you. Further, they can be enthusiastic, credible evangelists because they have direct experience of your business, background, and abilities.

However, there is always a minority of contacts (it is arguable how small or big that is) who don't seem willing to be willing to easily give referrals. Why not just ignore them? Unfortunately, it is all too often, that through them are the exact opportunities that you seek. It never fails that the juicy deal, great job, or key funding source is behind a person acting as a road-block. These are the tough referrals.

What do you do? First of all, be sure it's not you but their behavioral style you are dealing with. Determine if they simply don't like you or your service, there's not much you can do directly with them. It would be better to work around them.

Or if that's their style in dealing with everybody, then make plan a strategy to approach them in a way that gains you the referral. Handle your end in making sure your referral request is articulated to them in focused, understandable, accurate sound bites. Try test-driving your request on your inner circle of contacts for feedback.

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Then determine the type of roadblock you are dealing with in terms of their behavior. Sure, it is difficult to reduce people into simplistic categories, labeling their behaviors with sweeping generalizations. However, it can be a decent starting point to learn how to adapt and modify your responses to those around you to achieve your results.

Here are five types of tough referral styles that can provide recognizable models to practice strategies that result in referral requests:

#### **The Sorter and Labeler**

How do you get someone who tends to sort and label everything into the known and understood segmentations in their world to get your new brand, service, positioning, or product? They know you as XYZ and you are ABC. They had already had put you in a box, labeled it and shelved it in their memory banks. They will provide referrals based on what you were doing not what you are doing now which makes them relatively useless unless you can get them to sort you into a new bucket.

They are patient people who need to think things through, understand them, and make comparisons to the known and familiar. Start with their world view. This means understanding them and their boxes and labels. Where are they coming from? How do they compare things? What are their sorting buckets? Once you have a grasp on their process, then you can explain your referral request by one of their boxes or buckets. You would use comparisons to what they already know.

For example, use comparison terminology such as “It’s like this product, service, outcome, etc. It’s like when you do this. Do you know when you do this? Well it’s like that.”

And you have to be patient, slow, a step at time as they will not automatically leap to a conclusion. They will eventually re-sort you into a new box or re-label your bucket and make the referrals you want.

#### **The Goal-Driven**

This dominant type is goal driven and focused on their ideas and opinions. Your referral request will be modified to suit what they see as right regardless of your business solution. They will even shoot down your request because it’s not their idea or in their interests.

Surprisingly, this type is the easiest to maneuver around. Again, understanding their needs, their goals, and what drives them is the starting point. Focus on how you can make your career goal, new service, product, business opportunity worth their while. In other words, what’s in it for them? Tell them and tell them again in different ways. Remember it’s all about their goals and results so deliver your referral request that way.

Give them a bottom-line on how giving you referrals will make them richer, smarter, more connected, and successful. It’s all about them so take away their pain or add to their pleasure.

#### **The Narrow-focused Expert**

They always seem to be behind the curve in understanding or knowing about anything except their narrow field of expertise, which excludes, of course, your business and career efforts. These people tend to be involved experts in a vertical niche, usually the one you want to break into. This is why you are approaching them for referrals in the first place.

You need to have a genuine appreciation, respect,

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even reverence for their expertise. You will need to demonstrate a better than passing comprehension of that niche and their accomplishments so you can compliment them. They pride themselves on knowing their niche so never challenge that knowledge with your product or service or professional offering. Ask them how it would fit in instead. Let them, as experts, inform you as they refer you.

### **The Risk Averse**

These people are concerned for their reputations, and are overly protective of their all important contacts. They tend to overpopulate places like LinkedIn.com. Sadly, their world view doesn't allow them to fully embrace the socially networked global economy's style of doing business.

They may get what you are doing, understand your business value proposition, and/or support your career goals but they may not be willing to stick out their necks to refer you on to their contacts. They are con-

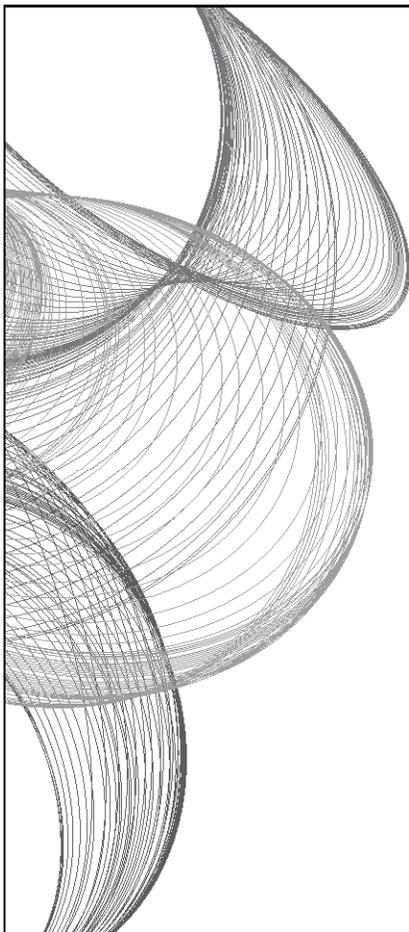
cerned about being wrong, making a mistake or harming their reputation. What if their referral of you, your product/service is not well-received and they are associated with it?

It is a very simple strategy to gain their acceptance, trust, and willingness to refer. Make them last on the bandwagon. When you approach them, name drop everyone else who would impress them that has already referred you, adopted your product, asked you to speak, and suggested that you talk to this risk averse contact. Make them the last one to join your parade so that they feel like its safe and that they are actually missing out. Of course this means you can't have them first on your list to approach for referrals as you will be batting zero.

### **The Helium Balloon**

They tend to float along making commitments and promises that they just never deliver on unless someone has set their agenda, made a demand, and attached

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# QlikView

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repercussions to it. They are continually being distracted by the next person and contact that comes their way. Whatever you tell them goes in one ear and out the other.

It's hard to hold down these people long enough to get them to fulfill on a referral. The best way to handle this delightful, tough referral is get their agreement on deliverables up front, know what they love, and then guilt them into performing.

They love visibility, recognition, and being acknowledged by others. You want them to give you referrals? Recognize them with something and make them feel guilty about owing you. What tickles their fancy? Chocolate? Event tickets? Dinner? Give it in advance and then keep reminding them as you ask for that referral. Typically make it something that is not immediate, thus enabling you to remind them of the gift and



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### Upcoming SVPMA monthly events :

- August 6th, 2008 - John Burton, SAP
- September 3rd, 2008 - Brian Cox, HP

### Save the dates:

- October 1st, 2008 - TBA
- November 5th, 2008
- December 3rd, 2008

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the request for referral as well.

Your call to them sounds like, "How was the concert? Did you order Pad Thai? Did you send the email to Jack yet?"

### Reading People

It's who you know and who they know that can help you get ahead. And it's how you know and understand them that expedites and enables them to help you.

Learning how to turn roadblocks into referral machines is one of the best ongoing efforts you can make for your professional career and business growth. That takes developing people-reading skills.

Using people-reading tools can make a quantum difference in the outcomes you achieve. I know. As a counselor, I am trained in a multitude of personality and behavioral tools to help clients. These tools can help navigate corporate political waters, determine the best career move, attract and recruit the right talent, and motivate people to do their best.

Recently, I became the Silicon Valley representative for the Predictive Index (PI), a behavioral assessment tool, which for 55 years (and that many years' validity studies) has consistently, cost-effectively and successfully helped put the right people together in organizations. Using the PI for recruitment, selection and to build and manage a team results in optimum outcomes for both companies and professionals in terms of productivity, profits, job satisfaction and retention.

If you would like more information about the Predictive Index™, and its uncanny ability to read people, send me an email ([patti@pattiwilson.com](mailto:patti@pattiwilson.com)) and I will be happy to show you. ☘

*Patti Wilson is affiliated with the Haas School of Business, UC Berkeley, Anderson School of Business, UCLA and Stanford School of Engineering as an adjunct consultant and counselor. With an MA, Career Development, emphasis in Clinical Psychology, she is a certified trainer in Behavioral Interviewing, the Myers-Briggs, and the Predictive Index.*

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## June 2008 Event Review

### Marrying Design and Analytics to Deliver a Compelling User Experience

By Susan Monroe

Most of us don't think like accountants, do we? Mint.com was born of the frustration of managing our personal finances with the cumbersome, feature-laden tools currently available. Throw in the plummeting personal savings rate in the U.S. and our national borrowing binge, and you have the right conditions in which a free, consumer-friendly financial tool can thrive. (To learn more, visit [www.mint.com](http://www.mint.com).)

Without doubt, Mint.com was the right service at the right time, but great design and analytics have also played a huge part in the fledgling, 20-person start-up's success.

As Forth put it, user experience is a "big deal," yet Mint.com is fundamentally a data business. The trick has been to keep its intensely information-driven nature away from the consumer and ensure a simple and engaging UI.

Here's how design and analytics have come together at Mint.com:

**Apply reasonable design principles consistently** — Simple really is better. Don't ask the user questions if it's likely that you already know the answers. If you must ask questions, then listen intently to the responses. Show a little pizzazz, too. Design to inspire those "wow" moments in your users.

**Make sure that your organization encourages good design** — Come up with a common sense strategy and hire people who demonstrate innate product sense. A good test is to ask potential hires to whiteboard, explain, and defend a potential product feature. Balance rigorous intellectual honesty with emotional intelligence. In this environment, there should be no sacred cows. When in doubt, rely on metrics, because they don't lie. The road to a great product is fraught with iteration, so retain your passion for the path as well as the ultimate goal.

**Understand that design should influence all stages of product development** — During strategy, discovery and ideation, know why you're building a product and filter everything through the user experience. Know what you mean to your users, and hire "product people" to deliver the right result. In design and definition, start with the root issues, give your designers real power and iterate, iterate, iterate. When your design goes live, foster a sense of community among users. Listen to everything they say, but don't get

bogged down. Keep the momentum going by "releasing early and often."

According to Forth, analytics closes the developmental loop. Looking at user behavior enables the team to instrument a product that uncovers the truth. Use analytics to discover what you want to know. Rather than refraining from building a product because it's unclear whether or not you can prove the case for its existence, build the product and see what happens. At the end of the day, analytics exist to measure the value of features you've built and provide guidance for improving them—not for determining what to build. ☘

*Susan Monroe is principal of Written Right, a business copywriting boutique that specializes in creating content for technology companies. A veteran of mar-com and PR agencies, she has gnashed her teeth over the arcane nature of accounting and personal financial management solutions.*

#### Events Around Town

FountainBlue's Clean Energy Entrepreneurs' Forum

*Clean Green Transportation Machine*  
Monday, August 4 from 5:30 - 7:30 p.m.  
DLA Piper, 2000 University, East Palo Alto

SVPMA members can pre-register for the discounted rate of \$18 by noon on Friday, July 31 at <http://www.acteva.com/booking.cfm?bevaId=146084> More info at: <http://www.fountainblue.biz/>

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product usability, or great usability on features the market doesn't care about.

- **Functional Designers accelerate product development.**

There's easy to use and there's easy to build. Rarely do the two go hand in hand. Functional designers are the middlemen that produce detailed user requirements to ensure products are simple for users to use but also reasonable for engineers to build.

Functional designers accelerate product development cycles in two ways. They keep engineers focused on technical designs by eliminating the need for engineers to become user domain experts, and they improve quality by making sure user functionality works as designed.

For those who think the functional designer role is unnecessary, remind them that you never want to take the time to do it right but you always have to take the time to do it over.

- **Functional Designers improve the quality of product rollouts**

A key objective of every product rollout is the self sufficiency of sales, service and support teams. A low self sufficiency quotient translates into poor sales, lack of customer references and slow time to market because product management and engineering end up doing everyone's job but their own, which by the way, slows future development to a crawl.

The functional designer is critical in raising self sufficiency across the service and support teams. They possess the knowledge and content required for a successful rollout, and are in the best position to transfer that expertise to the service and support teams at the end of a development cycle.

Product management then has the bandwidth to focus on improving self sufficiency across the sales and marketing teams while driving the next set of market and customer priorities through product development.

In summary, Functional Designers make the product delivery process click. They allow product managers to focus on the market and engineers to focus on technology. Their combination of domain and product expertise improves product usability, quality and self sufficiency across the organization. No other role has a greater impact on the success of a product than the Functional Designer. ☘

*John Mansour is the founder of ZIGZAG Marketing.*

*ZIGZAG Marketing and [Product Management University](#) were founded in 2001 with a simple goal: simplify the steps between good ideas and market leading products. ZIGZAG's [framework](#) and training programs offer the market's simplest approach for planning and delivering the right products to the most lucrative markets and communicating value propositions in plain simple English. To learn more go to: [www.zigzagmarketing.com](http://www.zigzagmarketing.com)*

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These products make associations by quickly connecting data from many different sources, and they manipulate it in real time to come up with usable answers.

He wove these themes into his discussion of three powerful, emerging trends in enterprise software:

**Consumerization** – We developed some “ridiculous” ideas during Enterprise 1.0. For example, companies typically became invested in delivering software on CDs, and corporate users went along with the drill. Now, the traditional rules (where the vendor calls the shots) no longer apply. The new generation of IT buyers and CIOs sees their role as empowering users to load anything that will make them successful in their jobs. (Contrast Gmail with Outlook and Salesforce.com with SAP.)

Though the corporate sphere is notoriously slower than the consumer world, Web 2.0 has begun to show up here. The debate has shifted from delivering a solution in the most convenient way possible for the vendor to creating a simple, rewarding user experience. Don’t be fooled, though. New models such as SaaS and open source are powerful but don’t always achieve desirable levels of simplicity, and the much-vaunted K.I.S.S. approach typically doesn’t result in a complex problem solved in an elegantly simple way.

**Top-Down vs. Bottom-Up Performance Management** – It used to be that software executives set product performance objectives. Then development teams and users alike all “ran harder until the gauges turned green.” Relationships with customers and internally

have become much more symbiotic. Teams build product, and everyone works on it iteratively until it gets better. This new “old” vision of performance management as Deighton called it, keeps development efforts small, local, and agile and prevents them from being driven by mammoth data warehouses.

**Business Intelligence Industry Consolidation** – The middle layer of BI solution developers has all but disappeared. The remaining stack consists of Enterprise 1.0 companies with the technical resources and financial firepower to be around 15 years from now. Despite this, Enterprise 1.0, like Francisco Franco, is still dead. Innovators who manage to stay on the “right side” of technology and build products people like will grow rapidly.

Summarizing his remarks, Deighton reminded the SVPMA audience that the relevance of traditional Enterprise 1.0-influenced business intelligence solutions is eroding, driven by Web 2.0’s strong and salutary influence. Companies are focusing on creating compelling, color-coded point-and-click interfaces and reduced feature sets that provide users with the tools they need to solve business problems—on their terms. ☚

*Susan Monroe is principal of Written Right, a business copywriting boutique that specializes in creating content for technology companies. A resident of the “upper” Silicon Valley, AKA San Mateo, and a veteran of marcom and PR agencies, she has first-hand experience with how difficult it can be to make the complex appear simple.*



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