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CONTEXTUALIZING THE DOTS
A Short Guide to (Meaningful) Contextual Design
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Contextual Design, after all is said, is a digital ethnography. A form of research seeking to understand a particular culture by gaining a “native point of view”. We achieve this by immersing ourselves in a community—studying habits, languages and worldview. From remote African tribes—I have just studied the lost /Xam culture myself as an ethnographic and mythology project—to international war correspondents, or Cornish surfers, ethnography is a unique way of researching micro-cultures and ‘hidden’ populations.

Content and context designers also try to understand the habits and motives of a hidden population: online users. But unlike ethnographers, we don’t need to camp out in a community for a year to gain key insights into the people we research. From internet forums to keyword searches, much of the data we need about our users is already online. Also, our task isn’t to write “about” communities, but “for” them.

This means we have to know what their needs are as well as how they behave. When we interview users, pinpoint their needs, map their journeys and speak their language, we can create user-centric information which best anticipates what a user wants to get done. As with ethnography, it’s all about gaining the “native’s point of view.”

Information can be complex. And part of our jobs as content designers is to find a way to hide this complexity and make it quicker and easier for the user to understand and complete their tasks. As content designers we can reduce the cognitive load for the user through clear language, content format and how we organize the page.

The process begins with discovery. Gathering as much information as possible so we can start to find meaning. Discovery functions best if we are driven by curiosity but more than that, it’s vitally important to stop your curious brain from leaping to solutions. Here are seven gaps to be mind as we embark on each process of context and content generation.

1. *The Purpose Gap*

Truly. Have a reason. That someone—a client—is expecting a result is not enough. We need to dig a little deeper. When context and content designers are brought onboard too late some groundwork needs to be covered and here is a short list of questions to ascertain purpose:

- What is the issue or opportunity we're trying to address?
- What do we want our user to think, feel or do?
- What research do we have to back this up?
- What does success look like?
- Has anything already been designed or tested?
- Are there constraints we need to know about?

When designing content, we keep the purpose in our minds—not just from broader level, but at a micro level too.

- What do we want the user to do or feel when they click a call to action.
- What's the purpose of a particular navigation label, or element of a page?

The 'why' often defines the 'how'.

2. *The Context Gap*

Our content becomes the user journey—no one *accidentally* lands in our word soup. Something has to happen before they see the content. And something will happen afterwards.

We need to understand the various routes in and out of content—sketch them out. I try to analyze the content the user has seen before they got to my content. It's about making those links/ motivations.

Good contextual design strives for brand and message consistency. It stands to reason that if the page prior to current content was conversational, it would be jarring for the current content *not* to be. Or, if we create something to explain a log-in process that is sitting elsewhere, are we explaining the process correctly—with the appropriate tone and style? It's about seamlessness.

I think about the context that work will be consumed in. A mobile app for food delivery for example, it's likely to be used by multi-taskers—often multi-tasking while using it—and therefore needs quick, clear navigation so the user can complete the task as effortlessly as possible. User research helps is to understand context better.

** Ensure that words/sentences/commands are as intuitive and clear as the physical design of the application.

3. The Knowledge Gap

Content design means creating something that is functional and usable—for everyone. The format content assumes, is vital. We therefore consider various abilities and reading levels, as well as the growing number of users who use English as their first language—the subtleties of the language have to be taken into account. It could happen that text is whittled down, and replaced with iconography or symbology. Images could act as metaphor for the call to action. The point is, good contextual design considers visual metaphor as a language, used to bridge knowledge gaps.

Content doesn't always have to be words or large chunks of copy. Think about diagrams or visuals. This is where working alongside a designer is so important. If we need copy, consider making it digestible—chunky and short. Techniques such progressive disclosure (revealing information bit by bit, as and when it's relevant) is of immeasurable help.

4. The Clarity Gap

It's best to write in plain English, avoiding jargon. And don't feel that the audience wants to sense a formality through the text. Think everyday and stick to it: *buy* instead of *purchase*, *continue* instead of *proceed*. You get the picture.

It's a good idea to keep the call to action labels simple—verbs work! Passive language does not.

“Account area” = passive.

“View your account” = active.

Good writing is prosaic. We should always strive for a sense of poetry even when working with limited words. We don't always need active voice—passive voice can be effective and add texture, but it's important for a business to assume accountability—upfront—and active voice is one way to do that: “We've closed your account,” instead of “Your account's been closed.”

User instructions benefit from clarity: “You'll need to send us an email” is much more instructional than “When we get an email.”

5. *The Brevity Gap*

Shakespeare must have thought about context design when he wrote “brevity is the soul of wit, And tediousness the limbs and outward flourishes, I will be brief.”

Users absorb and retain less than 30% of what they see on screen, so less is more when it comes to content. Any irrelevant content that isn't at the heart of the journey should be edited out. If I can replace copy with visuals I do so—content and design collaboration helps. It's good to take out unnecessary words at a sentence level, and try to keep them below 25 words, which makes them easier to read.

6. *The Relevance Gap*

Who is the target audience?

Do we know how they speak—the kind of words and phrases they use?

Being relevant is at core about being human. It creates a warm welcome, initiates a conversation, and provides the right information at the right time. To the right reader.

Conversational design help to the right content in an appropriate place, in an appropriate order. We start with a pen and paper, and we note a two-way chat that theoretically we would have with a user if we were imparting the information verbally—or in person.

We then study the flow—and the order, determining a rhythm or a cadence.

We also, at this point consider the relevant format for these user—is it voice UI? Is it conversational UI? Or, perhaps, it it more visual—like a video. The format of content shapes the digital product experience.

7. The Flexibility Gap

Content designers should avoid creating something—putting it live—and walking away.

Testing and iterating is an important part of the process. Learning whether something works is the reason we prototype. Optimizing live content is part and parcel of working on digital products.

This means we flex content, and are not afraid to redesign it for testing (A/B or multivariate tests) or to accommodate changes. When working on websites built in a modular template, we may consider how to flex page layouts and change message hierarchies or incorporate campaign messages.

Being nimble. And AGILE.

It seems unlikely but a 2001 meeting of software developers in Snowbird, Utah, changed the way that we think about our users and their interaction with whatever it we throw at them. The developers suspected that there was a better alternative to the unwieldy plans they were using to build software. They were right. Agile isn't one thing. Yet it *is* one thing. It's a lot. But it is also just

68 words. At its core, agile is a manifesto. But it's a declaration that directly relates to a constellation of concepts, ideas, and terms that orbit it.

At its core, the agile manifesto espouses:

Individuals + Interactions > Processes and tools

Working Software > Endless comprehensive documentations

Customer Collaboration > Customer contract negotiation

Response to Change > Doggedly sticking to a plan

To clarify, "Documentation" refers to big, long specification plans, however, if you feel better when providing documentation, help, support to the user, agile doesn't suggest you do otherwise. But it likes software to be intuitive and learning curves to be immersive.

Agile refers to *implicit* contracts, such as the idea that we must ensure product management writes detailed specs; and then we should check that the engineer writes 'appropriate' software according to that spec that never breaks—but it turns out the approach isn't functional, and a collaborative structure works better. It is this collaboration that's at the core of agile—its also about the only part of agile that everyone will agree is indeed agile.

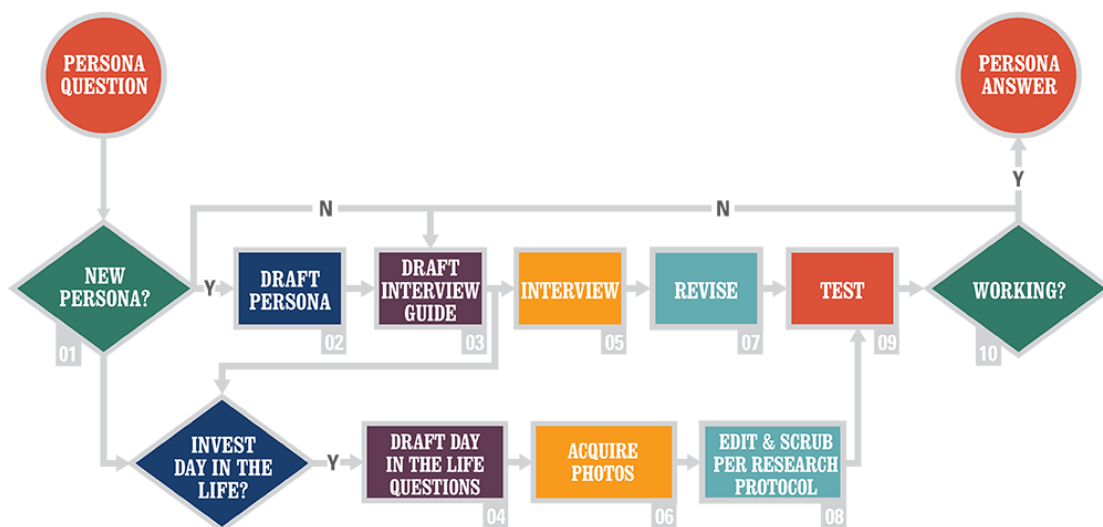
On one hand the manifesto was perfect—breathtakingly ambitious and simple. But, anything that brief is tough to action. And practicing the process of agile is, as expected, part coach—part peer review—and part revisionist freak. It suggests that we pick our methods, based on evaluating what would work for the project and benefit the greater team. We discuss and adjust as a team—ensuring that we are applying the methodology. Finally we peer review and asses each iteration to evaluate how well the methodology held up. And we do it all over again. But don't be fooled, like most ideas of its type, it's simple in concept and complex in practice. Practicing agile is hard. If anyone want to cross things off a list, confident they did 'their job', don't didn't do agile. It's harder than that. Hour after hour, agile

encourages the practitioner to think harder and dig deeper—and make sure we “get” colleagues. All that said, agile is a rewarding way to do meaningful work rooted in innovative, valuable outcomes.

Agile in Persona or Contextual Design Character Development

The persona is a humanized view of the customer, whether as buyer or user. In addition to a general description—supplemented by photos or even a day-in-the-life narratives, it’s common practice to lay out what the persona thinks, sees, feels, and does in the area of interest.

The problem scenario is a statement of something the persona wants to do—it may be a job/task or a habit/desire. The idea is to make sure we know what problems the persona wants to solve so we don’t build something that doesn’t matter to them. This also sets you up to ask: “What alternatives are they using today and how do I know what we’re doing is better?” Personas and problem scenarios aren’t something we just check off a list. Personas are a durable assets we use to ask, answer, and test the right questions about what’s valuable to your user. Ideally, we work on them iteratively and they get better over time:



From an agile perspective, the purpose of personas is to write better, more valuable stories to discuss with the team. The purpose of these stories is to create a strong understanding within the team about what exactly is valuable to the user.

Within the context of Contextual Design, however, we develop a character/persona that represents the product in the most satisfying way. We ensure that the the character uses a specific tone and style that is consistent over the full interaction with the product. On a website for example, every button and every banner has to reflect this character voice and stance. Searches have to be predictive and voice responses—when applicable—have to be intuitive, based on evaluative inputs for all the terms and search words, and responses have to assume the same voice and stance. This line of thinking, that we are actively building a unified voice and style through appropriate agile processes, will eventually reach peripherals such as PR, advertising, and social engagement. Lastly the agile approach to Contextual Design and Content Strategy leads to ontological consistency. There are

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And even more distractions coming at us from messaging and media and a generally well-lived life.

To stand out—to be noticed—we need contextualized, designed content.