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Annotated Bibliography

1. A Brief History of User Experience

Source Citation:

“A Brief History of User Experience.” *Inside Design* , 26 Feb. 2015, www.invisionapp.com/inside-design/a-brief-history-of-user-experience/.

Author:

Ali Rushdan is a Lead Prototyper at Manulife RED Labs. He designs and builds solutions in the financial services space.

Genre of Source: This source is an Article

Author’s Purpose:

The author wrote this article to show that although User Experience is a relatively new concept, the concepts it considers have been around and thought of for hundreds of years.

Main Claim or Focus:

The focus of this article is to delineate the fact that user experience is something occurs whenever we interact with any business product or environment. It shows examples from the Industrial Revolution and the early proponents of design thinking and connects them to the nature of modern computer user experience with operations management in business.

Evidence, Crucial Details:

The evidence for these claims are examples of this phenomena historically. He connects human interaction with technology with an example of Toyota first humanizing the production system, Fredrick Taylor and his early vision for laborer and tool interaction, and Dreyfuss and his focus on designing for people.

Key Citations:

The article relies heavily on the concepts from *The User Experience Team of One: A Research and Design Survival Guide* by Leah Buley. In addition to *Designing for People* by Henry Dreyfuss to provide historical background on the history of design. Additionally, it uses an article called *Walt Disney: The World’s First UX Designer* by Joseph Dickerson to highlight how immersion and design from top to bottom of a business can have crucial implications on business success.

So What?:

This article is helpful to track down the origins of product design and the user experience. It helps me understand the history of this concept before it came to be what it is today.

BEAM type:

This source is helpful as a background for the history of my research question. It will provide some context for what I will be talking prior to exploring the bulk of the content.

2. Envisioning Information

Source Citation:

Tufte, Edward Rolf. *Envisioning Information*. Graphics Press, 2017.

Author:

Edward Rolf Tufte is an American statistician and professor emeritus of political science, statistics, and computer science at Yale University. He is recognized for his research on information design and as a pioneer in the field of data visualization.

Genre of Source: The genre of the source is a book

Author's Purpose:

The author's purpose is to address the question of how to represent the visual world experience in a one dimensional medium such as paper or a screen.

Main Claim or Focus:

The book imparts design strategies for “**enhancing the dimensionality and density of portrayals of information**”(9). The work conducted by Tufte seeks to delineate the general principles that have specific visual consequences on the interpretation, analysis, and creation of data representations. By doing so, it allows the reader to see why some displays are objectively better than others.

Evidence, Crucial Details:

The display of complex data is analysed through the mediums that have been historically successful for interpreting data, such as “**techniques exemplified in maps, the manuscripts of Galileo, timetables, notation describing dance movements, aerial photographs, the Vietnam Veterans Memorial, electrocardiograms, drawings of Calder and Klee, computer visualizations, and a textbook of Euclid's geometry**”(9).

Key Citations:

The key citations which Tufte uses are illustrations that help facilitate the analysis of the concepts which he himself analyzes and develops. Among these are pages from Galileo's notebooks, topographical maps from the Library of Congress,

maps from the Japanese Railroad Association, Euclid's notes, the Vietnam Veteran's Memorial, and drawings by Calder and Klee.

So What?: The representation of complex data in visually striking and intellectually engaging forms is one of the aspects that on a foundational level drive my research. This book is great for presenting the ways in which different scenarios of complex data visualization take abstract approaches for these to cope with the restrictions of showing a three dimensional subject through a one dimensional medium.

BEAM type: This source will be a combination of exhibit and method source. From an exhibit standpoint, this source can be used to extract multiple examples of the ways in which scenarios of data utilization have been used. From a methods perspective, this source is good at showing ways in which I can physically present the findings of my research.

3. Netflix Culture

Source Citation: "Netflix Culture." *Netflix Jobs*, jobs.netflix.com/culture.
Slide Deck: https://igormroz.com/documents/netflix_culture.pdf

Author: Netflix is a subscription-based streaming service which offers online streaming for library of films and television programs.

Genre of Source: The genre source is a website article and an online slide deck

Author's Purpose: The author's purpose for this article is to give employees a robust guide for the way that they do business and the different core values of their culture.

Main Claim or Focus: The main claim that Netflix asserts with their culture slide deck is that although some companies have "nice sounding" value statements, the values of Netflix are firmly shown by how the company hires, retains, and fires people. They define real company values as "the behaviors and skills that we particularly value in fellow employees"(website).

Evidence, Crucial Details:

Above all, the values that Netflix values the most for in its employees are judgment, communication, curiosity, courage, passion, selflessness, innovation, inclusion, integrity, and impact. They describe their organization as a "professional sports team" as opposed to a recreational sports team or "family". They expand on

this metaphor by stating that it is like the “Coaches’ job at every level of Netflix: to hire, develop and cut smartly, so we have stars in every position”(27).

Key Citations:

Given that this source is part of the Netflix onboarding process, most of the content originates primarily from Netflix as a creative source. Reed Hastings, Netflix’s CEO and Founder, could be listed as the main source for shaping of Netflix’s culture.

So What?: This source provides a candid, high level overview of Netflix as a company, presenting many graphics and examples that make the recently hired employee much more cognizant of the way that things are run at Netflix, allowing them to know what to expect. This is valuable for my research because it shows examples of how companies have successfully ingrained their values to employees in documents that are accessible and easily re read.

BEAM type: This source will be mainly used as an exhibit source to demonstrate prior examples of how companies have chosen to communicate values and teach employees what aspects of their culture are used to shape their way of operating.

4. Poor Charlie’s Almanac

Source Citation:

Kaufman, Peter D. *Poor Charlie's Almanack: the Wit and Wisdom of Charles T. Munger*. Donning Co. Pub., 2011.

Author:

Charlie Munger is an American investor, businessman, former real estate attorney, and philanthropist. He is vice chairman of Berkshire Hathaway, which is one of the largest multinational conglomerate holding companies in the world.

Genre of Source: The genre of the source is a book.

Author’s Purpose:

The purpose of the book is to bring together decades of experience and wisdom that Charlie Munger has acquired through his years at Berkshire.

Main Claim or Focus:

The book covers a variety of topics and approaches in business that Munger credits to his success. Charlie highly advances the idea of using multiple mental models for decision making. It also includes a variety of speeches, mainly commencement speeches, which outlines his outlook towards life and his ways of dealing with economic challenges.

Evidence, Crucial Details: The main evidence that Munger has for having the authority to make the claims that he does are the growth of Berkshire Hathaway over the last half decade and the continued profitability of the firm. The firm has become one of the top performing stocks in the market since its inception.

Key Citations: Although much of the ideas in the Almanack are part of Munger's internal philosophy, he credits sources such as Benjamin Franklin's "Poor Richard's Almanack" and discourses from Cicero as some of his inspirations for writing his book.

So What?:

The casual tone and largely visual segments of the design of this book are what are relevant to my research. This book often discusses complex financial, economic, and philosophical principles, but, unlike other books, its use of images and conversational tone make it significantly easier to retain the information.

BEAM type:

For my purposes, this book will be used as a method source in order to give me a larger structure of how complex ideas of design can be presented in graphical and less academic structure.

5. Principles

Source Citation:

Dalio, Ray. *Principles*. Simon & Schuster, 2017.

Author:

Raymond Dalio is a billionaire investor, hedge fund manager, and philanthropist. Dalio is the founder, Co-Chairman and Co-CIO of Bridgewater Associates, one of the world's largest investment hedge funds. Bloomberg ranked him as the world's 58th wealthiest person in June 2019.

Genre of Source: The genre of this source is a book.

Author's Purpose:

The author is a wealthy investor and hedge fund manager, after many years of success, he believes it is his responsibility "to pass along the principles that helped [him]". He finds a universality of his principles to be one of his reasons for publishing them, stating that "anyone following these principles can expect to produce broadly similar results." If this were not the case, he reasons, he finds that there would be no other motive (altruistic or otherwise) for organizing and sharing them.

(Introduction XXI)

Main Claim or Focus:

The main claim is that by using the principles outlined by Ray Dalio, Bridgewater has been able to become one of the most successful hedge fund companies in the world. They credit their success around the principle of meritocratic thinking, where it is said that "if you can make great collective decision making and you can then write those decision-making criteria down in principles and then we can convert those to algorithms that make computer decisions in parallel, that's been our formula for success." (76)

Evidence, Crucial Details:

Through the use of his principles to structure the culture and business model of Bridgewater Associates, Bridgewater has delivered the biggest net profit of any hedge fund firm ever, since billionaire Dalio founded it in 1975 through the end of 2018. Bridgewater, which has over \$150 billion in assets under management, led the list of performing hedge funds with a net \$8.1 billion gain in 2018 for its Pure Alpha, Pure Alpha Major Markets and Optimal Portfolio strategies, following a gain of \$300 million in 2017. The firm overall has delivered a gain of \$57.8 billion for these strategies since its founding.

Key Citations:

Unlike other academic works, most of Ray Dalio's Principles are based on his biographical experiences at Bridgewater associates. Formed by decades of research across many different resources, such as Bloomberg and news outlets that provide market information.

So What?:

The primary value for the source is that it provides evidence for how a structured list of principles can be compiled and used as a reference for decision making. Unlike a big business plan, the principles are structured like a decision making framework to reference when situations requiring these skills arise.

BEAM type:

The source provides substantive evidence on how a product can be created that is used like a direct reference guide to decision making. It provides a very succinct example of how algorithms (a set of detailed and methodical instructions) can be created for humans to reference.

6. Sticks n Sushi Menu

Source Citation: "Sticks n' Sushi Menu." *SticksnSushi*, sticksnsushi.com/media/1865/sns-menukort-2018-11-uk-150x380-low.pdf.

Author: This source does not have a listed author.

Genre of Source: The genre of this source is a restaurant menu.

Author's Purpose: N/A

Main Claim or Focus:

The main claim for the menu is to have an environmental approach that optimises and continually improves the menu. They seek to take care of themselves as a company while taking care of the customers, with the goal that the customers will enjoy the experience.

Evidence, Crucial Details: The restaurant presents a wide variety of menu items that are modern, and culinary. It presents new ways of looking at traditional dishes and plates.

Key Citations:

Due to the nature of this source, the source does not have any direct citations.

So What?:

The main take away from this source is how it delivers the information of what their menu offers. largely through images. This visually stunning document presents new ways of showcasing traditional menus in a way that is design intensive and as a result, makes it more pleasurable and informative for the reader to retain information.

BEAM type:

This is an exhibit source that will allow me to analyze it and recognize the design aspects that they are using in order to facilitate information delivery.

7. The Design of Everyday Things

Source Citation:

Norman, Donald A. *The Design of Everyday Things*. The MIT Press, 2013.

Author:

Don Norman is the director of the Design Lab at UC San Diego. He is widely regarded for his books on design such as *The Design of Everyday Things* and *Emotional Design*. He is credited as an expert in the fields of design, usability engineering, and cognitive science. He is a co-founder and consultant with the Nielsen Norman Group, an IDEO fellow and a member of the Board of Trustees of IIT Institute of Design in Chicago, and holds the title of Professor Emeritus of Cognitive Science at the University of California, San Diego.

Genre of Source: The genre of this source is a book.

Author's Purpose:

Much of Norman's work revolves around advocating for a greater focus around user-centered design. His books all have the underlying purpose of furthering the field of design, with implementations ranging from doors to computers.

Main Claim or Focus:

Norman asserts that the design research community has had little impact in the innovation of products and that, while academics can help in refining existing products, it is technologists that accomplish the breakthroughs.

Evidence, Crucial Details:

Don Norman provides a holistic view of product design by showing how and why innovations in design come about, often making the crucial distinction between incremental and radical innovation (279). He states that most radical innovations fail, and even when they do succeed, they can take multiple years or decades to be accepted (268). His most important takeaway is that with the passage of time, the tools and objects in the world that people use will change, however, the psychology of people will remain the same (298).

Key Citations:

Although the first edition of the book is credited with paving the path for the field of Human computer interaction and UX, Norman took the work of other mavericks in the field of design to update his book to accommodate for the changes in the theory of design and technology improvements of the 21st century. He takes away aspects of Computer Interaction Design from the books *Design Interactions* and *Design Media* written by Bill Moggridge, who helped design the first portable computer. Another source is *Ecosystem of Innovation: The history of Silicon Valley Design* by Barry Kats, which forms his main ideas that technologists are the ones that drive radical change. Third, he uses part of Bernhard Bürdens book *Design: History, Theory, and Practice of Product Design* to establish background on the history of product design itself.

So What?:

The primary value of this book is that it conceptualizes many of the mental models and characteristics involved in thinking about user centered design. It helps me get closer to my research question in that it gives me a foundation on design principles and several structures that are used to quantify design characteristics of an object that is trying to be improved.

BEAM type:

This source will be used as the primary method/ theory source for my project. The application of User Centered Design to many overarching fields in the book creates a guiding theory that can be refined to be applicable to my own field of business. It is also partly a background source in that it creates a common ground for design theory and common terms that are recurrent and necessary when talking about design.

8. The Ropes at Disney

<https://www.brainpickings.org/2011/09/29/the-ropes-at-disney-1943-employee-handbook/>

Source Citation: Popova, Maria. "The Ropes at Disney: 1943 Walt Disney Employee Handbook." *Brain Pickings*, 18 Sept. 2015,

www.brainpickings.org/2011/09/29/the-ropes-at-disney-1943-employee-handbook/

Author: Disney Corporation

Genre of Source: The genre of this source is a workbook.

Author's Purpose:

The author's purpose is to onboard oncoming workers into the Disney Culture as well as familiarizing them with the standard work FAQs.

Main Claim or Focus:

The personnel division at Disney set out to make a document that would address common questions regarding company practices by creating a workbook to teach people "the ropes" at Disney, doing so in a more "informal, irreverent, [and] fun" light, in accordance to Disney's image.

Evidence, Crucial Details: The author uses a casual tone and illustrated images to create a booklet that feels friendly and welcoming, and that explains the concepts in a less formal way than traditional work manuals.

Key Citations: Given the nature of an employee workbook, most of the content has been created by the team themselves at Disney

So What?: The workbook shows another example in which a focus on the user of the product results in the use of design to facilitate understanding of otherwise mundane or boring topics.

BEAM type: This source will be used as another source to use for analysis and exhibition, I am looking to provide examples that use design to facilitate learning from different business areas or topics.

9. The User Experience Team of One: A Research and Design Survival Guide

Source Citation:

Buley, Leah. *The User Experience Team of One: a Research and Design Survival Guide*. Rosenfeld Media, 2013.

Author:

Leah Buley is a seasoned designer in the experience design industry. She is a former Forrester analyst, where she spent time researching the evolving role of design in business. She spent 15 years in the design field as a UX practitioner, and prior to that, she worked as a design strategist in the design innovation group at Intuit, which specializes in making design thinking a cultural competency for companies. Before Intuit, she was a lead experience designer at Adaptive Path, a user experience and service design consultancy, where she worked with clients in financial services, healthcare, social media, and consumer products.

Genre of Source: The genre of this source is a book.

Author's Purpose:

The purpose of the author is to bring more awareness to the field of User Experience and to educate people on the nature of UX and where it can be applied. She tries to proclaim that regardless of a person's job title, it is possible to introduce and bring more awareness of the "user's perspective" to the work that you do and the people that you work with. The book is aimed at growing the user experience sensibilities of a team beginning from the individual.

Main Claim or Focus:

The main claim that the author makes is based around the fact that design in its essence always deals with a constrained set of variables and circumstances, whether those come from a type of capacity or from limitations of the environment of the thing being created. She defines design, and its restraints, as “the act of creating new solutions under constrained circumstances, whether those constraints are aesthetic, technological, or resource-driven. That may sound like a restriction, but actually it's a gift. Constraints, in the end, are a designer's friend.”(Chapter 10)[ebook]

Evidence, Crucial Details:

Buley recognizes that in many companies, it can still be difficult to get others to stand behind the UX approach, especially when it comes across the constraints of time and budget, or a busy project schedule. She attempts to find strategies and frameworks for integrating UX to a person's work despite these challenges, she asserts that this can be done “by building trust, setting expectations, and then showing progress against them.” (Chapter 3)

Key Citations:

One of the most important books that shaped her early thinking was *The Design of Everyday Things* by Dan Norman. She uses it in her book to establish a foundation for what User Experience is, and uses it as a reference to deconstruct the elements of a positive or negative user experience. She uses Henry Dreyfuss' *Designing for People*, to mention the general ideology that she is trying to push for. She notes that the experience of a product is all in the hands of the designer, remarking that “when the point of contact between the product and the people becomes a point of friction, then the [designer] has failed. On the other hand, if people are made safer, more comfortable, more eager to purchase, more efficient—or just plain happier—by contact with the product, then the designer has succeeded.”(Chapter 11)

So What?:

The primary value from this source is that it provides a very thorough framework and strategy for implementing UX in areas where UX is not well known. Because this is a book about implementing user experience in places where user experience is not known, it gives me very helpful guidance on how I can attempt to navigate this challenge with my own project.

BEAM type:

This source is in part a method source in that it provides outlines and frameworks of how the work can be implemented. This is also an argument source in that it provides proof to the value and the usefulness that integrating user experience into the considerations for business has on a product or a project.

10. Valve Handbook for Employees

Source Citation: *Valve Handbook for New Employees*. Valve Press, 2012.

Author:

The handbook was created by many employees, designers, and artists as a collaborative effort for the Company Valve.

Genre of Source: The genre of this source is an Employee Handbook

Author's Purpose:

The handbook is created to facilitate onboarding and other frequent questions about culture and how to act regarding joining valve as a company.

Main Claim or Focus:

The main focus of this guidebook is to establish the working structure of the company, which values creativity and individuality. It serves as a pseudo manifesto on how they differ from a normal company. Among their distinctions they claim that “**hierarchy is great for maintaining predictability and repeatability. It simplifies planning and makes it easier to control a large group of people from the top down, which is why military organizations rely on it so heavily. But when you’re an entertainment company that’s spent the last decade going out of its way to recruit the most intelligent, innovative, talented people on Earth, telling them to sit at a desk and do what they’re told obliterates 99 percent of their value.(4)**”

Evidence, Crucial Details:

The reason that Valve cites for their unique approach is that they “**want innovators, and that means maintaining an environment where they’ll flourish. That’s why Valve is flat. It’s our shorthand way of saying that we don’t have any management, and nobody “reports to” anybody else. We do have a founder/president, but even he isn’t your manager. This company is yours to steer—toward opportunities and away from risks.**” As a company, Valve tries to work like a conglomeration of creative forces as opposed to a company with rigid structure, giving the employees complete freedom to produce their products.

Key Citations:

Given the nature of the handbook, much of the background material stems from company culture, as opposed to a specific academic text.

So What?:

The primary value of this is that it provides an example of a modern, friendly, and innovative handbook that employees can use in order to navigate the business environment. Its use of imagery and design concepts make it much easier to understand and interact with than a standard black and white text manual. These concepts highlight the value of design and graphics when integrated with a part of the business process.

BEAM type:

This source is useful as an example and exhibit of how companies have implemented a design and aesthetic focus to present their ideas in new and more interactive ways.