Augment Your Design Practice For Inclusion: Five Best Practices

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She/Her

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BOLD AT WORK

FORRESTER®

Hi, I'm Gina

- Principal Analyst at Forrester covering design and accessibility

- I led UX teams, now I study them.

- I interview companies across the globe to understand how they approach accessibility.

- My interest in accessibility started as a grad student at Georgia Tech where I evaluated the accessibility of consumer products including hot tubs, packaging, printers, and golf clubs!

What I'll cover:

Accessibility in 2022: What I'm seeing

Five best practices to get accessibility right

1. Diversity, equity, and inclusion (DEI) tops the list of business priorities

26%

planned to create a diversity & inclusion program in 2021

Sources: Forrester Analytics Business Technographics Priorities And Journey Survey 2021

2. More companies committed to accessibility during the pandemic

36%

"Our executives have stated their commitment to create accessible products."

+5% year-over-year

Sources: Forrester's Q4 2020 Global State Of Design Teams Survey and Forrester's Q3 2019 Global State Of Design Teams Survey

3. There's some evidence firms are following through on those commitments

78%

Growth in the number of jobs with "accessibility" in the title from July 2020 to July 2021

Common obstacles

- Expectation that one accessibility expert can do it all

- Commitment is "lip service" and accessibility doesn't get prioritized on product roadmaps

- Minimal or no funding for accessibility training, technologies, and services

- People with disabilities aren't consulted because "we don't know where to start" or "there's no time."
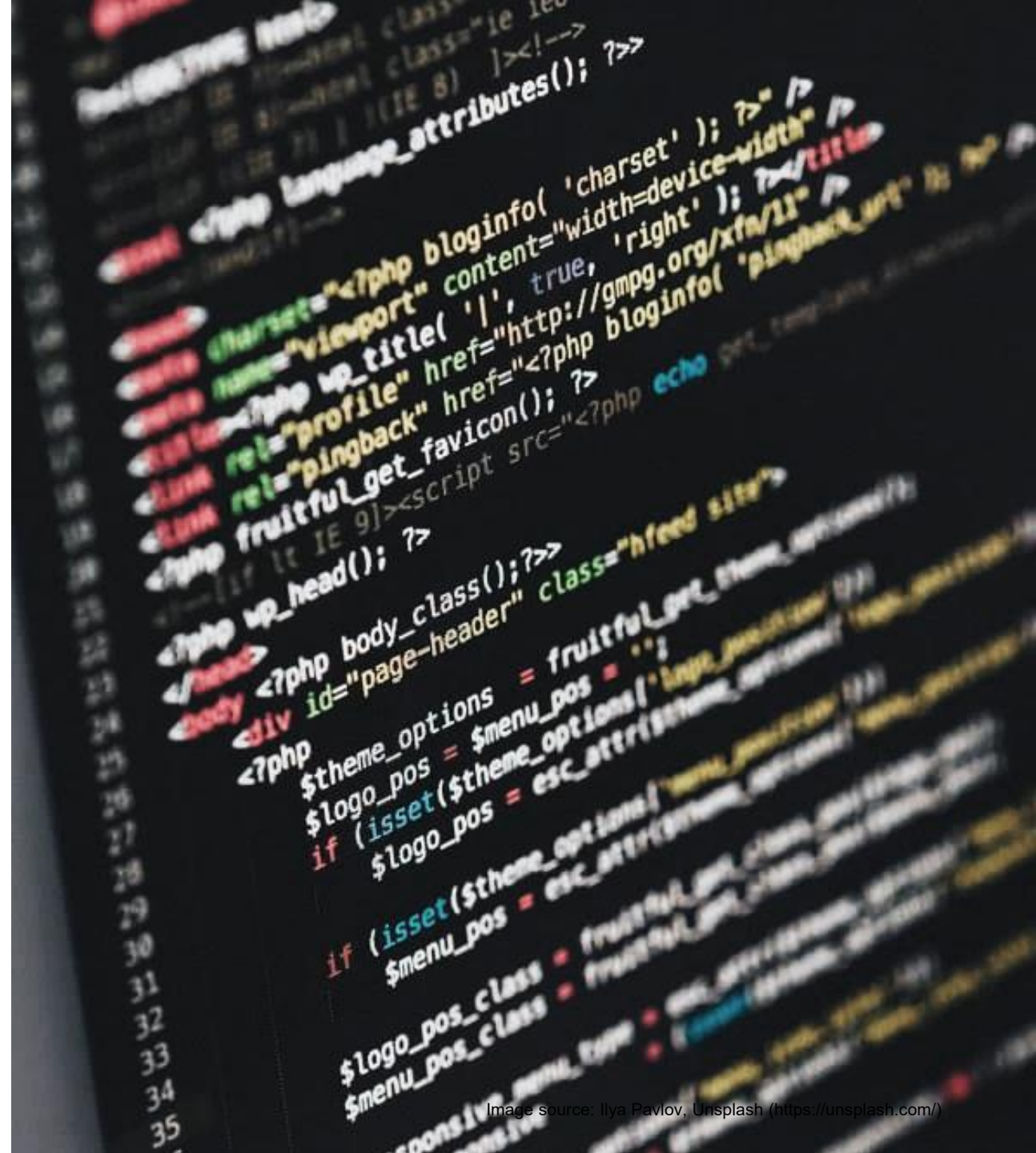
And…
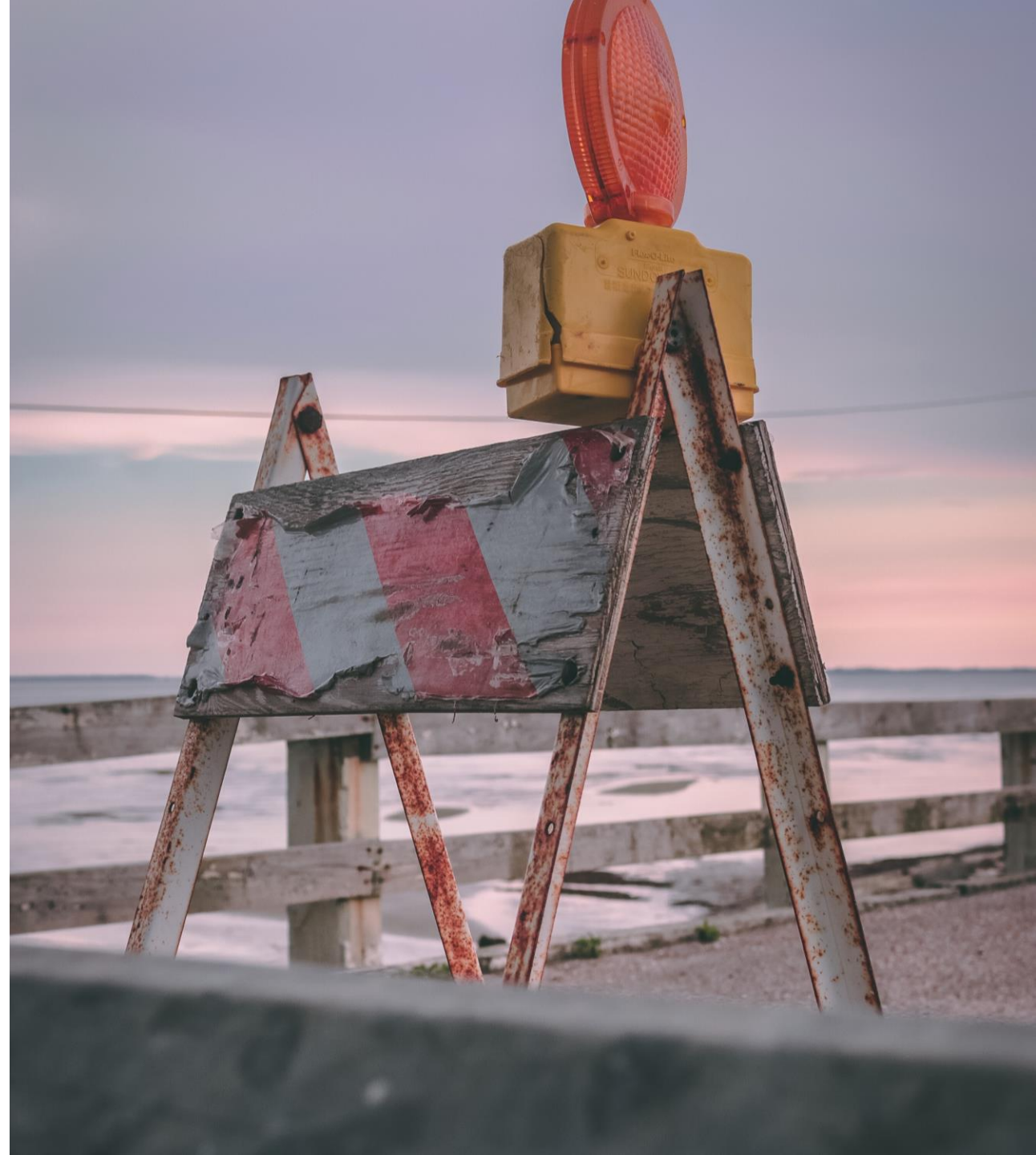
A major obstacle:

Objective is narrowly focused on creating *compliant* not *inclusive* experiences.

Accessibility is relegated to development and testing only.

Image source: Ilya Pavlov, Unsplash (https://unsplash.com/)

Augment your *design* process for inclusion with five best practices

1

Start with your team

"Inclusive design starts before you even think about designing the solution. Inclusive design starts with you."

- Antonio Grillo, Design Director & Adjunct Professor for Inclusive Design

An exercise to establish inclusive team rituals

Collect Individual Rituals

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COLLABORATE	Enablers	Collaborating all together being able to edit each other stuff, but asking first.	Prepare topic and map out our schedule in advance.	Creating a base for the presentations on Figma, to better understand what we need to do and split accordingly.	Set a specific time for some tasks that are less based on decision and more on secondary stuff (like presentations)	Better spreate our team work and keep track of progress.	
	Tools	Figma or Miro according to group preference since we all have access to both	Calendar	Figma	Communicating rapidly on whatsapp after splitting task when meeting on webex.	Trello	
COMMUNICATE	Enablers	Communicate all day while there is content to be produced and not all people can attend the meeting	Updating each other via text message on the tasks we've done/what we are missing/other updates	communicate through live meeting the most, in order to fasten the process	Making sure everyone is on the same ground, no afraid to ask stupid questions.	Organizing a meeting / call with everyone. (In case receive agreement from the missing member.)	
	Tools	Through whatsapp/ webex	Communication online tools such as Webex and whatsapp	Through webex/teams meetings	Mouth, team building	Whatsapp	
LEARN	Enablers	Keep track of every exercise, professor feedback, what we can improve.	Collect all opinion and cluster them in order to better understand.	Creating a shared 'library' for sharing interesting case / post / anything nice to know.	Ask unknown points whatever to teammembers.		
	Tools	Shared document (rapport on Figma)	Doing good final conclusion on miro/ slides after every exercise	Figma	whatsapp		
SHARE KNOWLEDGE	Enablers	Giving each others time and listening to everyone to share opinions.	Sending each others links or materials of anything that can help	Asking each other questions about something we are not quite understanding	Share notes of classes to be more complementary.	Keep posting informations/content we find related to the different topics.	
	Tools	webex	whatsapp, webex	whatsapp; mouth	Shared document (notes)	Figma or miro (maybe creating a new section in the lower part of the board)	
TAKE DECISIONS	Enablers	Listening to everyone's opinion	don't waist too much time	Share the strengh and the weakness of our options	vote in case of multiple option in order to fasten the process, trusting also the other judgment	setting a time for open discussion and making everyone express himself but still not wasting time	ask opinion	List pro and cons about options
	Tools	-	Time limits	SWOT matrix	through miro dots/stars	through live meeting session	mouth	Through miro or figma listing them all together

Team 01   - 04

Team members then highlight frictions they have with certain ways of working

Highlights Frictions

COLLABORATE	Enablers	Collaborating all together being able to edit each other stuff, but asking first.	Prepare topic and map out our schedule in advance.	Creating a base for the presentations on Figma, to better understand what we need to do and split accordingly.	Set a specific time for some tasks that are less based on decision and more on secondary stuff (like presentations)	Better spreate our team work and keep track of progress.
	Tools	Figma or Miro according to group preference since we all have access to both	Calendar	Figma	Communicating rapidly on whatsapp after splitting task when meeting on webex.	Trello
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Friction notes:
- Always specifing when we are editing something and keep a copy, otherwise we could miss some work from someone
- Might be problematic to prepare in advance due to the different time and dynamics we have to face individually, I would try to be more flexible as possible and keep updating each other on WA
- Not so many time slots in common
- I like it but maybe is better to install a plugin for to do list on figma or miro (there are some)
- keep in mind different time zones : better in the meeting that we are all awake
- some of us might feel shy to ask or speak out whatever they think because they are afraid of judgement
- Classes and different timezones
- still would chose between miro and figma since we all already have access
- time consuming, can become messy
- Whatsapp is blocked in China
- is important to set timings and rules, not to exclude anyone but still trying to be efficient
- still having discussion time before
- everyone has their own speech pace and it takes different time for each one to express themselves, it's normal for it to take time

Example:

Giving everyone 2 minutes to voice an opinion, on the spot, regarding an important decision the team needs to make may work fine for some but be a friction point for others who need time to formulate and articulate their perspective.

Source: "Five Best Practices For Inclusive Design" Forrester report

The team then prototypes inclusive solutions

Prototype inclusive solutions

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COLLABORATE	Enablers	Work on shared document while still communicating among each other and letting everybody know about the process	after class on Thu, we can arrange the team task and divide work,not on next meeting.	creating a base for the presentations on Figma, to better understand what we need to do and split accordingly	assign secondary tasks between each other, to manage better our time better and work whenever we can	better spreate our team work and keep track of progress
	Tools	figma/miro/google drive doc	TO DO LIST / Shared calendar	Figma	communicating rapidly on whatsapp after splitting task when meeting on webex	plugins on figma
COMMUNICATE	Enablers	Improve the efficiency of meetings rather than time	updating each other via text message on the tasks we've done/what we are missing/other updates	communicate through live meeting the most, in order to fasten the process	Set a team rule (kinds of), keep ourselves open to ask stupid questions, and be patient and respect each other's question.	make sure we take into consideration everyones schedule and find the option that works for all. Maybe do some task on our side
	Tools	Through whatsapp/ webex	Communication online tools such as Webex and whatsapp	Through webex/teams meetings	live voice, while doing team work meeting	(instead of whatsapp) download webex on telephone
LEARN	Enablers	keep track of the teacher note in order to improve our group work	Name someone (per week for example) in charge of collecting opinions and cluster them	Creating a shared 'library' for sharing interesting case / post / anything nice to know.	Ask unknown points whatever to teammembers.	create a dedicated section on miro (under every exercise) where we add the information we find about certain topics/exercise
	Tools	maybe dedicating a space in our shared board next to the phase he had a suggestion about	Good conclusion on miro/slides after each exercise	Figma	whatsapp	on miro board
SHARE KNOWLEDGE	Enablers	giving each others time and listening to everyone to share opinions	sending each others links or materials of anything that can help	asking each other questions about something we are not quite understanding	Share notes of classes to be more complementaty	keep posting informations/content we find related to the different topics
	Tools	webex	whatsapp, webex	whatsapp; by voice when meeting	Shared document (notes)	figma or miro (maybe creating a new section in the lower part of the board)
TAKE DECISIONS	Enablers	define for each crucial decision a certain time for open discussion and then move to a more functional way of deciding if it's going too long (voting etc)	don't waste too much time giving a turn to each of us	Share the strengh and the weakness of our options	for multiple option choice use voting after having heard the opinion of every group member	make sure everyone has fairly the same time to express themselves, while still taking into consideration individuality	list pro and cons about options
	Tools	through webex and miro together	flexible timer	SWOT matrix maybe combine with pro & cons list	through miro dots/stars	through live meeting session	through miro or figma listing them all together

Source: "Five Best Practices For Inclusive Design" Forrester report

Conduct inclusive team meetings.

usbank.

- Accessibility team includes employees with vision, mobility, and cognitive disabilities

- Established norms for meetings:

  - ✓ Everyone announces themselves by name when joining a virtual meeting

  - ✓ Designers verbally describe the designs under review so blind colleagues can provide feedback too.

Understand and respect the needs and preferences of each team member.

Monzo employees are encouraged to complete a "working with me" document that gets linked to their Slack profile.

Making Monzo
@MakingMonzo

What's a "working with me" doc at Monzo, and why are they so important? 🤔

THREAD 👇

> **Working with me: Richard**
>
> **What I'm good at**
> - Bringing order and structure
> - Accuracy and quality
> - Fact-checking
> - Making sure everyone is heard
> - Fun ideas for social media
> - Jokes! (I hope)
> - Notion
>
> **What I'm not good at**
> - Making big decisions under pressure
> - Giving an instant answer to things I'm not sure of
> - Staying positive when things are hard
> - Taking big risks
>
> **How to work with me**
> - Ask me what I think, but give me time!
> - Talk quietly.
> - Be precise with what you want. I like to know facts and plans.
> - Give me direct, timely feedback if I'm doing something you don't like. Otherwise I might think you hate me.

2:50 AM · Aug 12, 2021 · Twitter Web App

Establish a design review process that includes asking more questions in design critiques

How will this design "sound" when read by a screen reader?

Is this type large enough for an aging adult to read? If not, will it scale correctly when zoomed?

Will those bright contrasting colors cause anxiety for users with sensory issues?

Will that term be understood by a non-native English speaker?

Will that link name make sense when read without surrounding text (e.g., by a screen reader)?

Have you tested the contrast ratio for these color choices?

Will people of different ethnicities feel included in this campaign?

Strengthen collaboration with your development and testing teams

Design practices

Development and testing practices
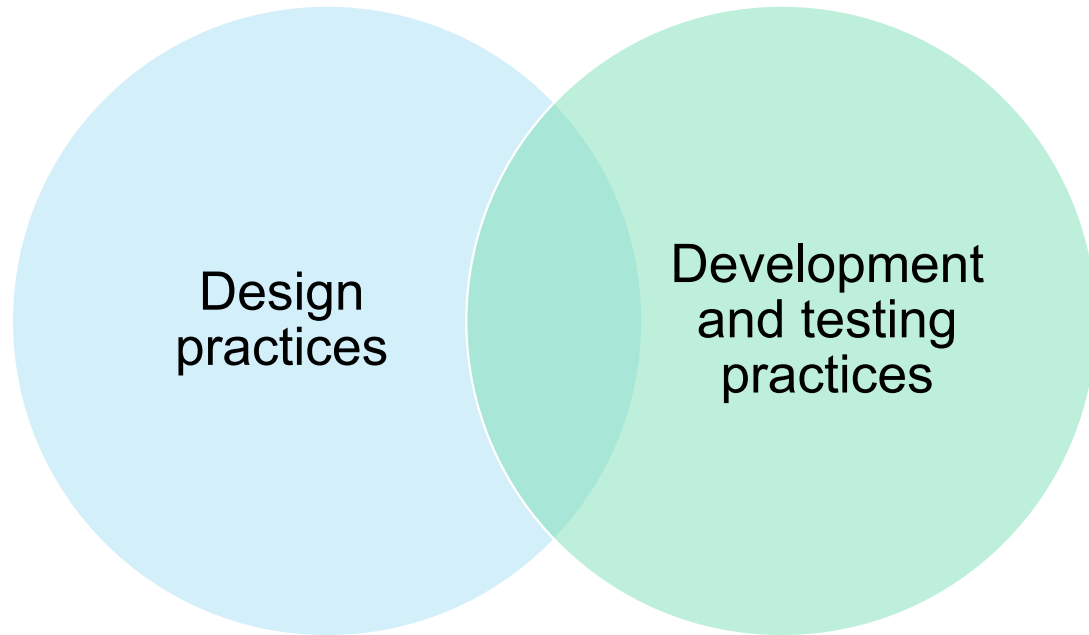
Key collaboration points:

✓ Build accessibility into your design system

✓ Capture accessibility considerations in your design artifacts' annotations

✓ Test designs early on for accessibility violations

✓ Align on shared measures of success
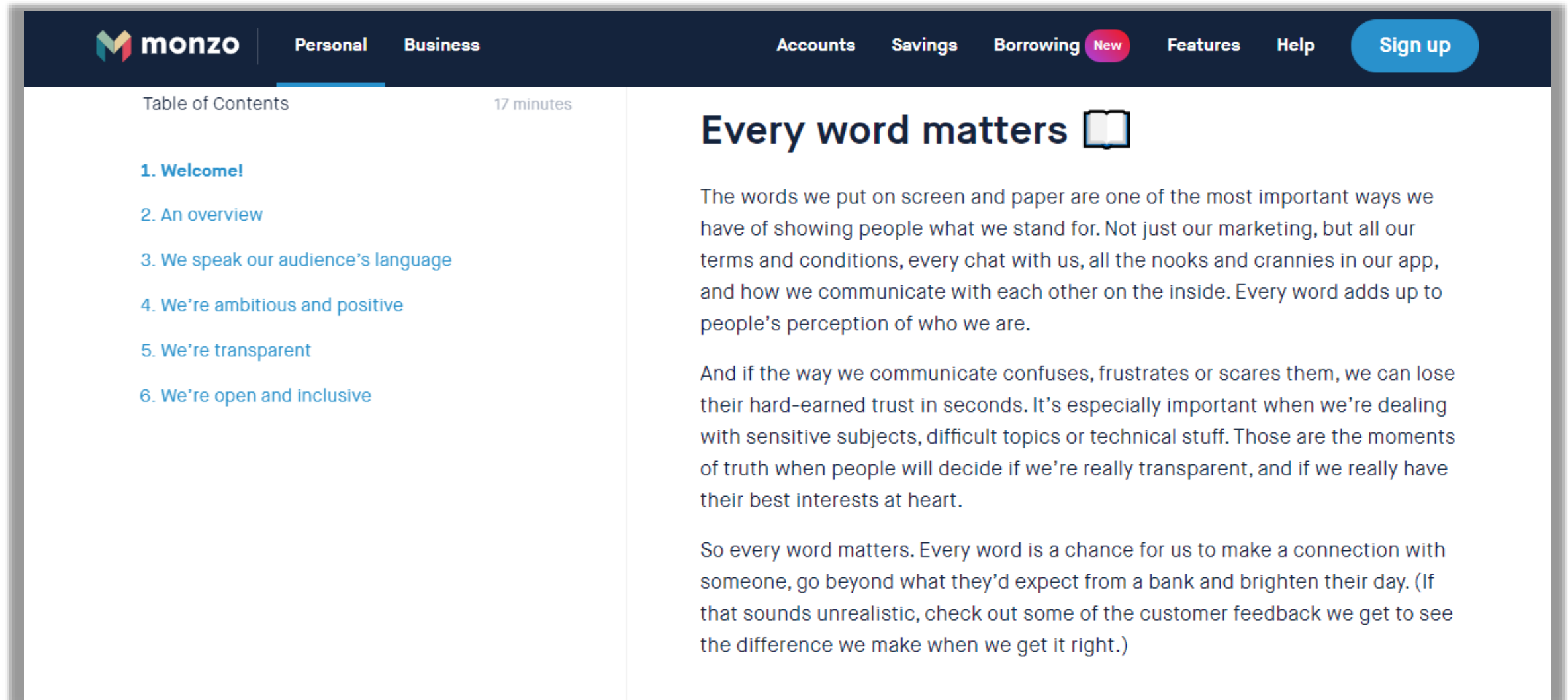
2

Focus on inclusive language

Inclusive language:

Language that acknowledges the full range of human diversity with respect to ability, gender identity, language, race, socioeconomic status, and other characteristics.

Monzo has a principle of "every word matters" ...

Monzo | Personal | Business | Accounts | Savings | Borrowing New | Features | Help | Sign up

Table of Contents — 17 minutes

Every word matters 📖

The words we put on screen and paper are one of the most important ways we have of showing people what we stand for. Not just our marketing, but all our terms and conditions, every chat with us, all the nooks and crannies in our app, and how we communicate with each other on the inside. Every word adds up to people's perception of who we are.

And if the way we communicate confuses, frustrates or scares them, we can lose their hard-earned trust in seconds. It's especially important when we're dealing with sensitive subjects, difficult topics or technical stuff. Those are the moments of truth when people will decide if we're really transparent, and if we really have their best interests at heart.

So every word matters. Every word is a chance for us to make a connection with someone, go beyond what they'd expect from a bank and brighten their day. (If that sounds unrealistic, check out some of the customer feedback we get to see the difference we make when we get it right.)

We anonymized and usability tested the privacy policies of Monzo and a large national US bank.

When we don't use plain language

Reactions to Typical Privacy Policy Language during our usability test

"Vague and didn't like the wording. Quite aggressive."

"Just doesn't seem trustworthy and seems to be intentionally shady and vague."

"Uses convoluted language, is hard to follow, isn't transparent, and makes it seem like they do whatever they want to."

Bank Delta

Sharing of personal information
During at least the past 12 months, we have disclosed your personal information for the following business purposes:

- With our affiliates to the extent permissible under applicable law.
- With third parties, to permit them to send you marketing communications on our behalf.
- With our service providers, who provide services such as website hosting, data analysis, information technology and related infrastructure provision, customer service, processing your transactions, e-mail delivery, auditing, and other services.
- With individuals you associate with your social media account and to your social media account provider, in connection with your social sharing activity.
- With a third party in the event of any proposed reorganization, merger, sale, joint venture, assignment, transfer, or other disposition of all or any portion of our business, assets, or stock (including in connection with any bankruptcy or similar proceedings).

Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.

When we use inclusive language

Reactions to Inclusive Privacy Policy Language

"I felt respected reading [this policy], because it is showing me exactly what is going to happen with my data and nothing sounded sketchy."

"Easy to understand and is clearer in the descriptions."

"Gives a more in-depth reason why they're sharing your details and the likes of whom it could be shared with."

"Much more transparent and honest ... "

Bank Alpha

Who we share your data with
Companies that give services to us. Here we mean companies that help us provide services you use and need to process details about you for this reason. We share as little information as we can and encrypt and/or make it impossible for you to be identified by the recipient where possible (for instance, by using a User ID rather than your name).

- Companies that make our bank cards.
- Card producers and networks, like MasterCard.
- Cloud computing power and storage providers like Amazon Web Services (AWS) and Google Cloud.
- Our business intelligence and analytics platform provider Looker.
- Companies that help us with functional analytics (to help us solve technical issues with the app, for instance).
- Companies that help us with marketing (but we won't share identifiable personal data with third parties for their own direct marketing unless you give us permission, and you can opt out any time).

Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.

Writing content that is accessible pays off from a business perspective too

- Monzo was the top-scoring brand globally in Forrester's CX Index 2021

- When asked *"Which bank would you be more willing to open an account with?",* 30 out of 32 participants selected the bank with the more accessible experience

Learn from firms that have published inclusive language guidelines

Design system or guide	Guidance on language
18F Content Guide	• Use **older person** or **senior** rather than **elderly**. • Avoid using **citizen** as a generic term for people who live in the United States. Many government programs serve noncitizens and individuals with a wide range of immigration and visa statuses.
Adobe's Spectrum	• Use **play video** instead of **watch video**, because not everyone is "watching" the video. • Avoid using software terms such as **master** and **slave**. Use **primary** and **secondary** instead. • Use gender and sexuality descriptors as modifiers, not nouns, e.g., **transgender woman** rather than **a transgender**.
Apple Style Guide	• Use people-first language when referring to people with disabilities. e.g., **people who are blind** instead of **blind people**. • Use diverse names as examples. Also keep in mind that some cultures don't use a Western-style name structure.
Monzo's "our tone of voice" guide	• Speak the audience's language and avoid business speak, e.g., use **help** instead of **assistance**. • Use more verbs and fewer nouns, e.g., **we decided to** instead of **we made a decision to**.
Zendesk Garden	• Avoid **blacklist** and **whitelist**. Use **blocked** and **allowed** instead.

Scale good practices by creating and including your company's accessibility content guidelines in your design system.

Ensure alt text is actually useful — you're not just checking a box.

The Starbucks mobile app has great, descriptive, alt text to describe its gift card designs.
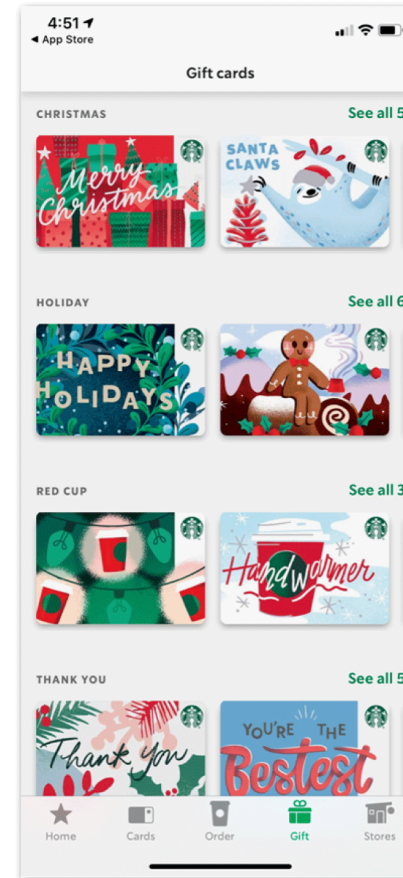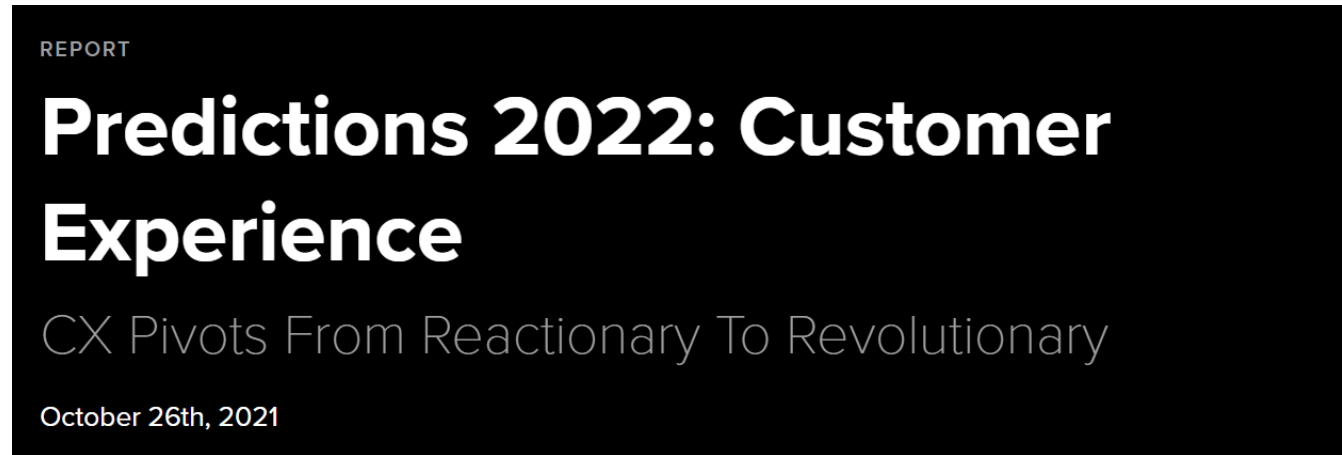

Alt text reads:
"A light blue and white background covers this card. On top is a light blue sloth hanging off a branch with a Santa hat on. The sloth is reaching to the left to put a gray star on top of a red tree. The top left corner reads 'Santa Claws' in darker blue and red letters."

Source: Starbucks mobile app

3

Integrate accessibility into your procurement process

Accessibility is increasingly a focus when selecting services and technology vendors

REPORT

Predictions 2022: Customer Experience

CX Pivots From Reactionary To Revolutionary

October 26th, 2021

$10B in design spending will shift to vendors and services that commit to accessibility.

How to make sure your vendors prioritize accessibility:

- Build accessibility into new contracts and renewals.

- Ask probing questions.

- Tap accessibility experts to help vet vendors.

Image source: Ilya Pavlov, Unsplash (https://unsplash.com/)
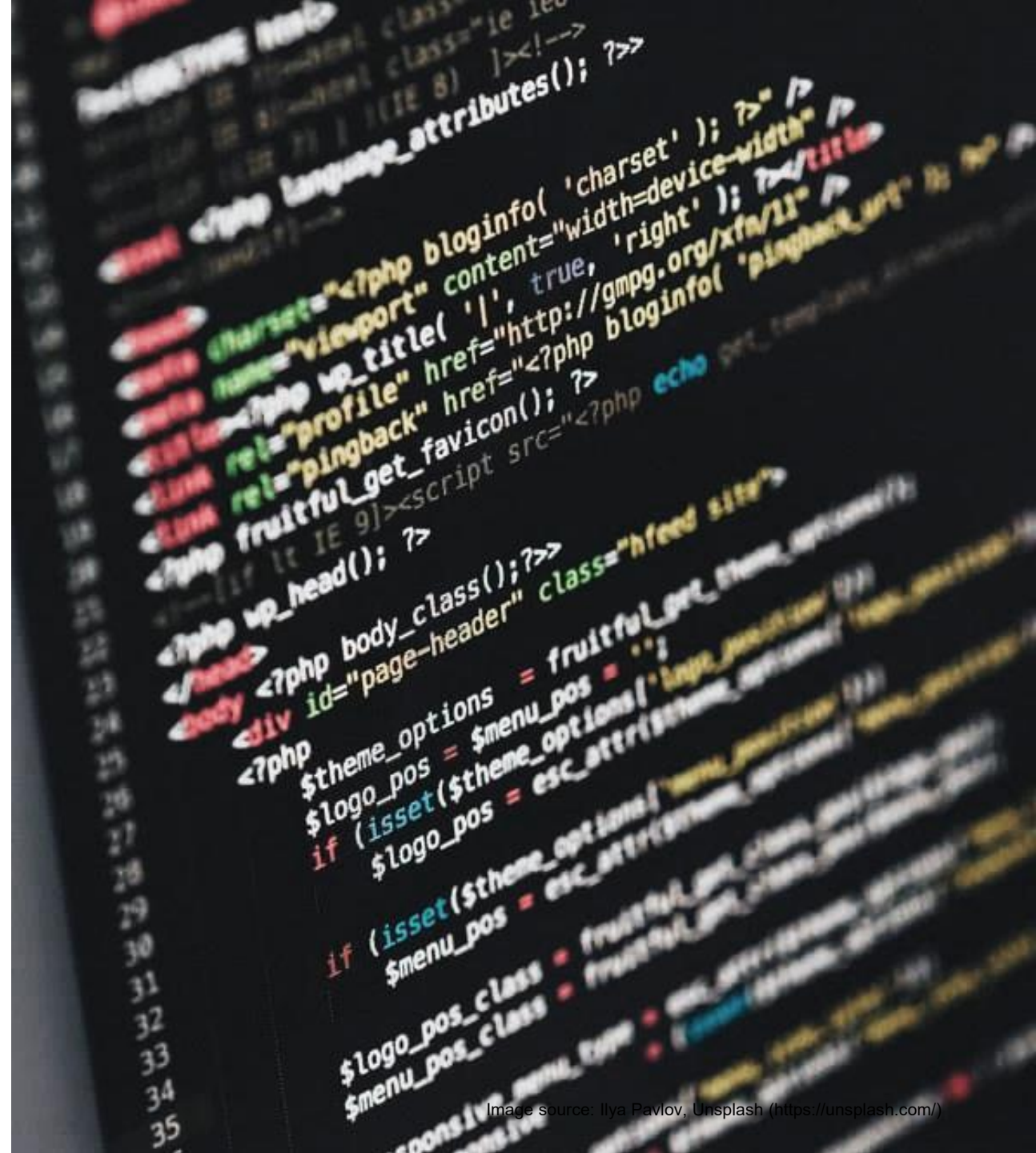
Work with your legal department to document:

- What level of conformance you will hold vendors accountable to

- That you're entitled to verify conformance

- What remedies your company will require if the delivered solution doesn't meet the requirements

Source: "Q&A: Establishing Your Organization's Accessibility Practice" Forrester report

Ask probing questions to confirm and further understand vendors' capabilities

- Do you have an accessibility practice lead?

- What are examples of accessible experiences you've created?

- What is your methodology for accessibility testing?

- How is accessibility reflected in your product roadmaps?

- How do you include end users with disabilities when designing experiences?

- Do you have people with disabilities on staff who are able to provide these important perspectives?

Verify claims and rely on experts

- Request a Voluntary Product Accessibility Template (VPAT) or audit report and make sure to note the date on it.

- Tap accessibility experts to test independently and to engage in conversation with the vendor's accessibility experts.

Source: "Q&A: Establishing Your Organization's Accessibility Practice" Forrester report

4

Identify and address bias in your research sample and personas

Intentionally recruit people with different characteristics, including different abilities.

Hewlett Packard Enterprise

- Created a Diversity Questionnaire for research studies:
  - Questions about age, gender, pronouns, race and ethnicity, and disability — all optional.
  - Explains how the information will be used – e.g., "to better understand our population."

- Use this data to identify and address bias in research samples and for analyzing and reporting insights.

Create inclusive personas.

Personas include job titles instead of names. Abstract images showing a range of identities are used instead of stock photos.
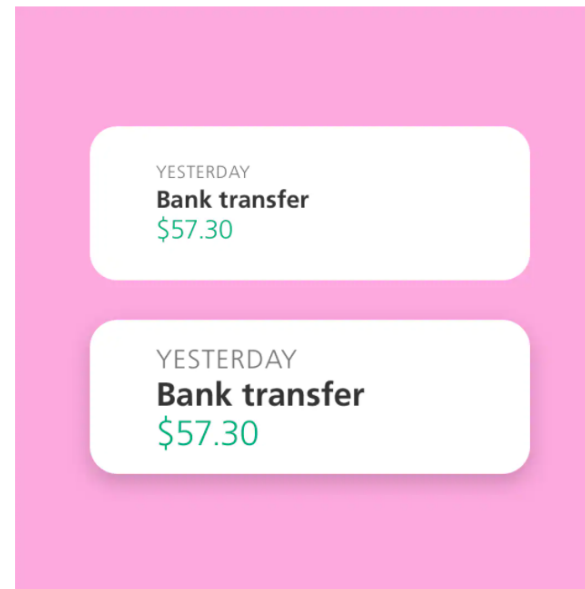
Job title
Description

5 Include people with disabilities as partners in your design process

Design with people with disabilities from the start — don't wait until you have something to test.
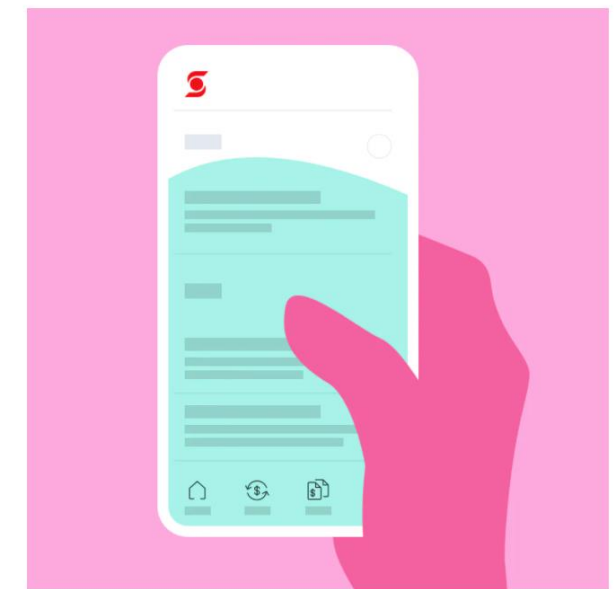
Scotiabank

"Barrier-free banking"

YESTERDAY
Bank transfer
$57.30

YESTERDAY
Bank transfer
$57.30

Banking you can see

With scalable fonts and rich colour contrast, the new Scotia app makes everyday banking easy to see.

Banking you can touch

Everyday banking is within your reach, even if you only have one hand to grab it. The new Scotia app is laid out so you're able to easily access and navigate content.

Establish inclusion criteria at the start of each design project

- Invite internal users and external customers who represent the underrepresented populations they want to reach

- Created an internal pool of "dogfooders" that product teams can draw from for feedback from underrepresented users. Partnered with ERGs as a start.

Source: "Building For Everyone" book by Annie Jean-Baptiste

Run inclusive design workshops to understand common challenges and identify new feature ideas

Partner with organizations that serve communities of people with disabilities

INTESA ⬛ SANPAOLO

- Formed partnerships with nonprofit organizations Fondazione Asphi Onlus and the Italian Union of the Blind and Partially Sighted (UICI).

- Engaged members to provide feedback on current experiences and participate in workshops to hear the firm's strategy and then suggest improvements.

To summarize:

- ✓ Start with your team

- ✓ Focus on inclusive language

- ✓ Integrate accessibility into your procurement process

- ✓ Identify and address bias in your research sample and personas

- ✓ Include people with disabilities as partners in your design process

Questions?

Connect with me:

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https://www.forrester.com/blogs/author/gina_bhawalkar/

Thank You.

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