Data products aren't just for data teams!

Building products for multiple user personas with ⚡Lightdash

I'm Katie, and I work at Lightdash

Data literacy is the new computer literacy.

↑ **Productivity**

↑ **Innovation**

↑ **Customer + employee experiences**

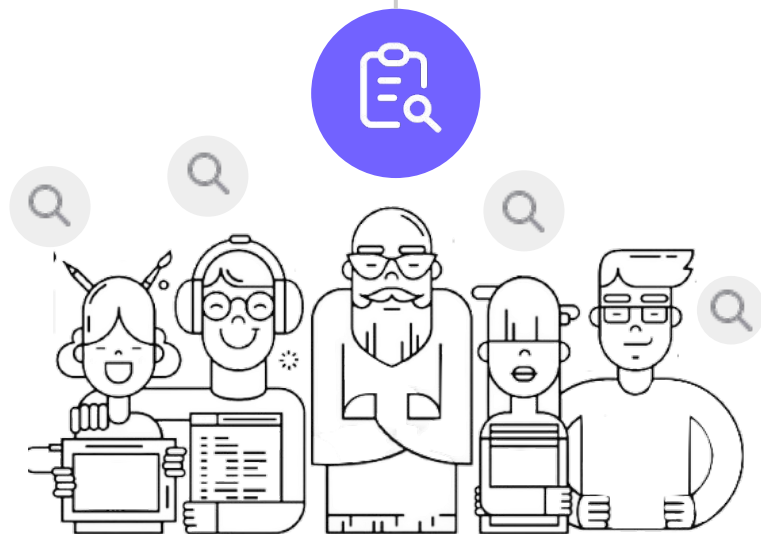**82%**
of leaders expect all employees to have basic data literacy

70%
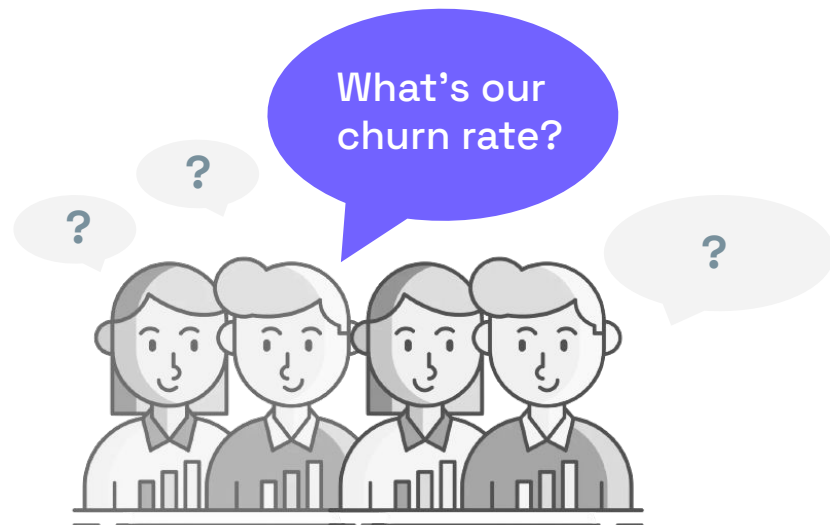of employees are expected to heavily use data by 2025, up from 40% in 2018

https://www.tableau.com/why-tableau/data-literacy

Data isn't *just* for the data team...

I think that...

Data products are no longer *just* for data teams.

We need to build data products that can be used by data teams, but also by the rest of the company!

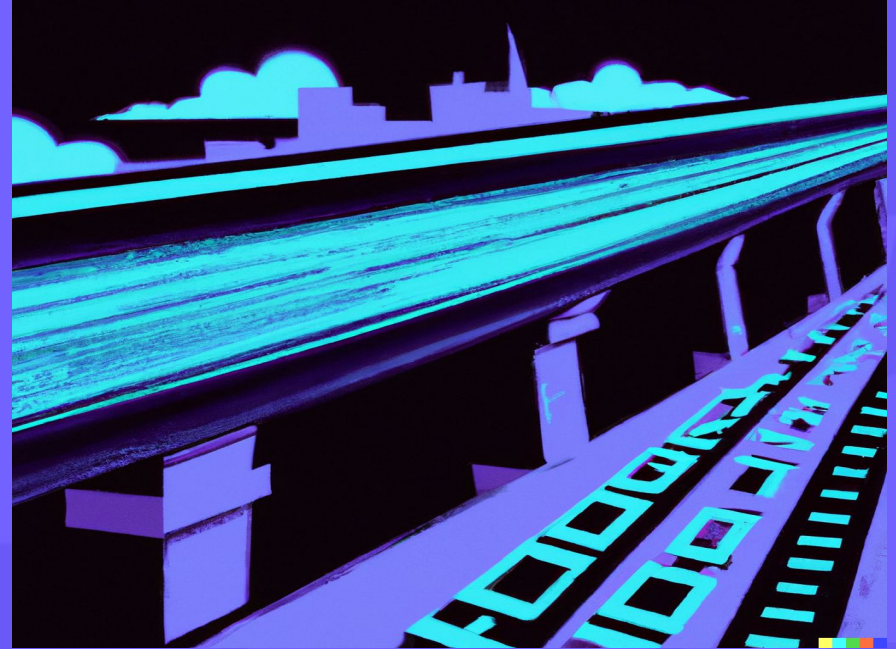# 3 design principles to consider when building for <u>2 personas:</u>

Flexibility vs. Usability

Forgiveness

Familiarity

We're going to talk about these through the lens of **building a BI tool.**

⚖ Flexibility vs. usability

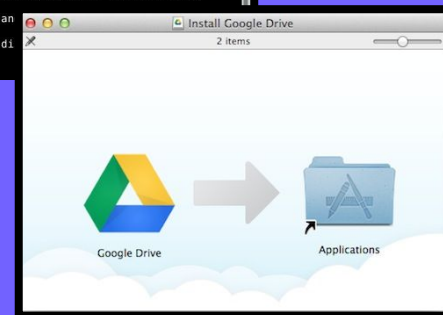**Installing software...**

Linux machine vs. Mac

Which one was built to be super flexible?
Which one was built to be super usable?

⚖ Flexibility vs. usability

When flexibility goes up, usability goes down…

Key question: **What are the user's goals?**

- Want customization + control over the way they complete tasks? **Flexibility**
- Want to make the least amount of decisions to accomplish the goal? **Usability**
- Have a mix of both? Create a way for users to see the difference so they can **pick the kind of experience they want.**

Usability
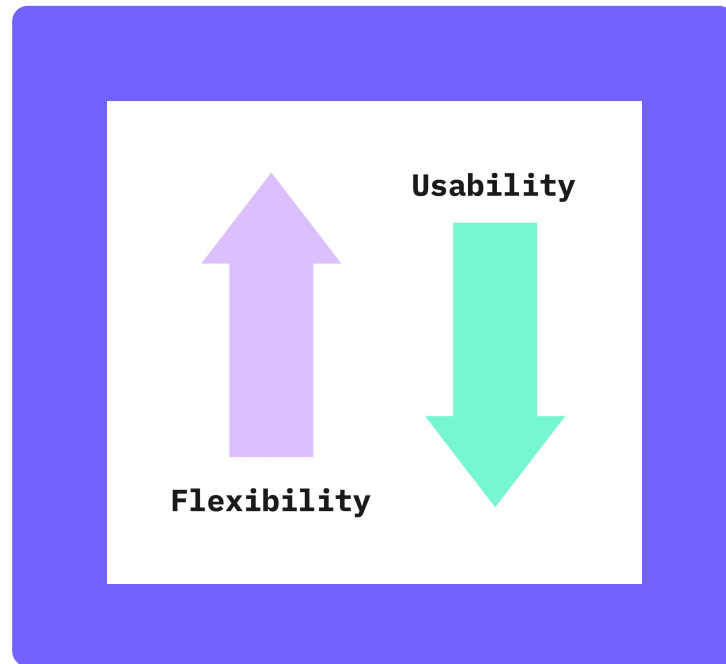
Flexibility

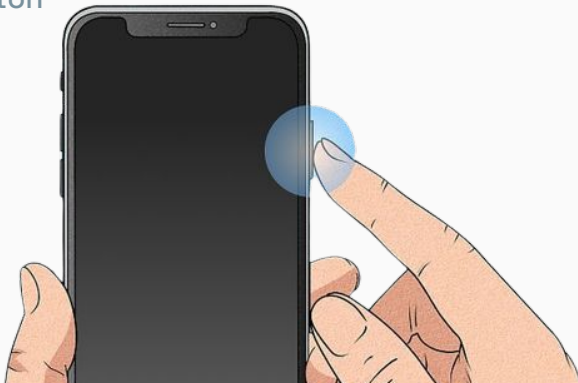# ⚖️ Flexibility vs. usability

Example
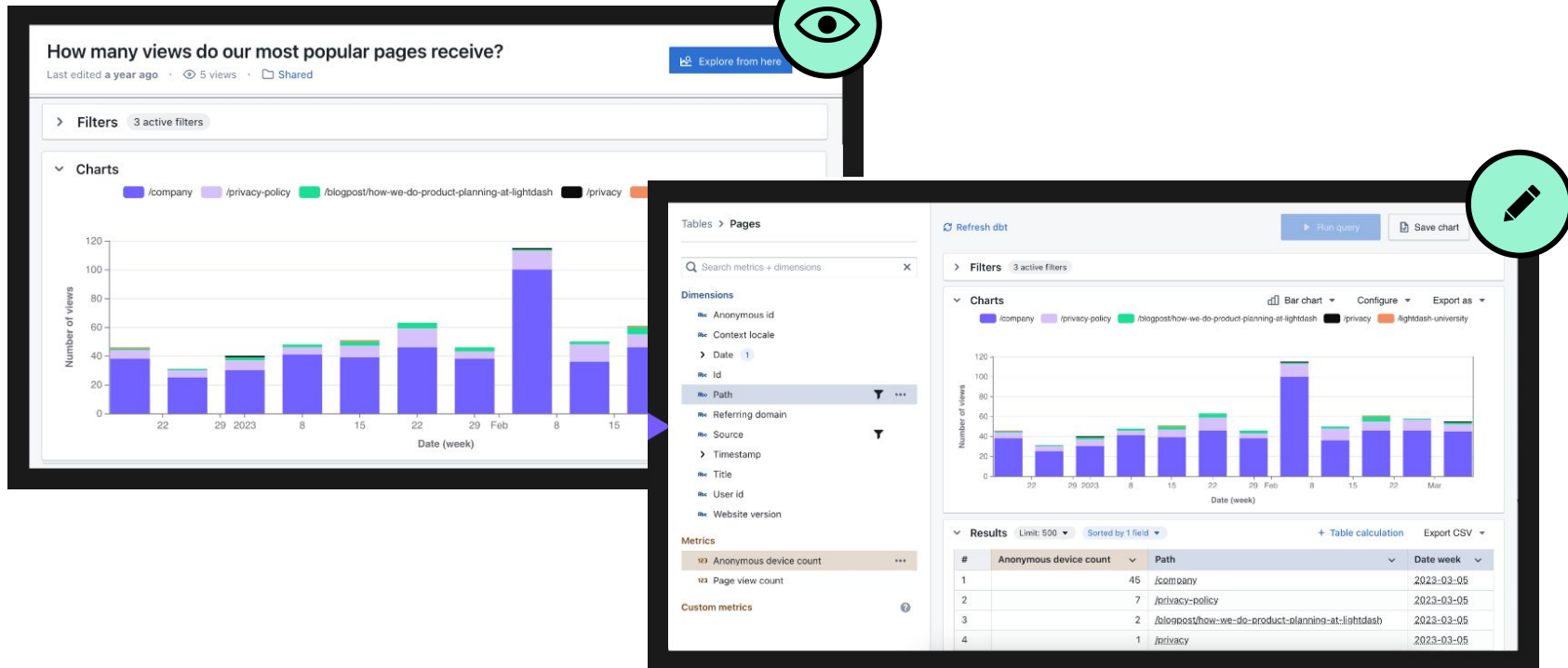
Forgiveness

2- step operations for critical actions

Turning off your phone

Users are more likely to complete 2-step operations intentionally than actions that only require one step.

Step 1.

Press & hold power button

Step 2.

Drag right

🛡️ Forgiveness

Prevent errors when you can, but make them easy to fix when they happen.
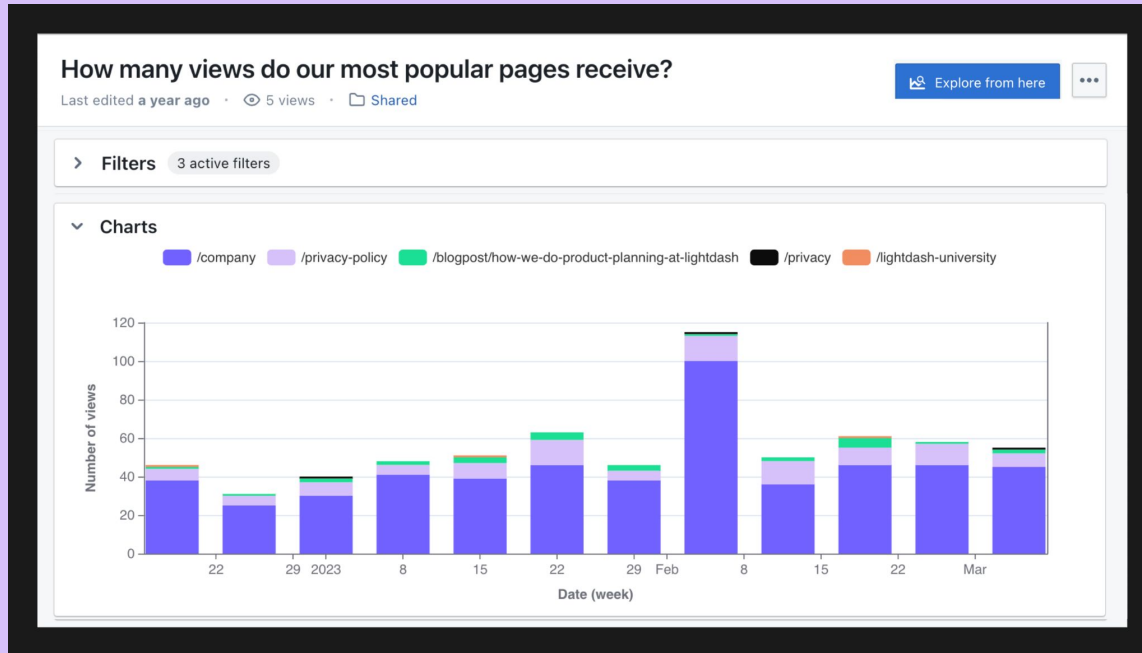
Key question: **What's the worst thing that can happen here?**

- Talk to both sets of users to understand the "scariest" consequences.
- Design to make this unlikely to happen.
  - Use established usability patterns (e.g. red button = bad)
  - Add previews of changes
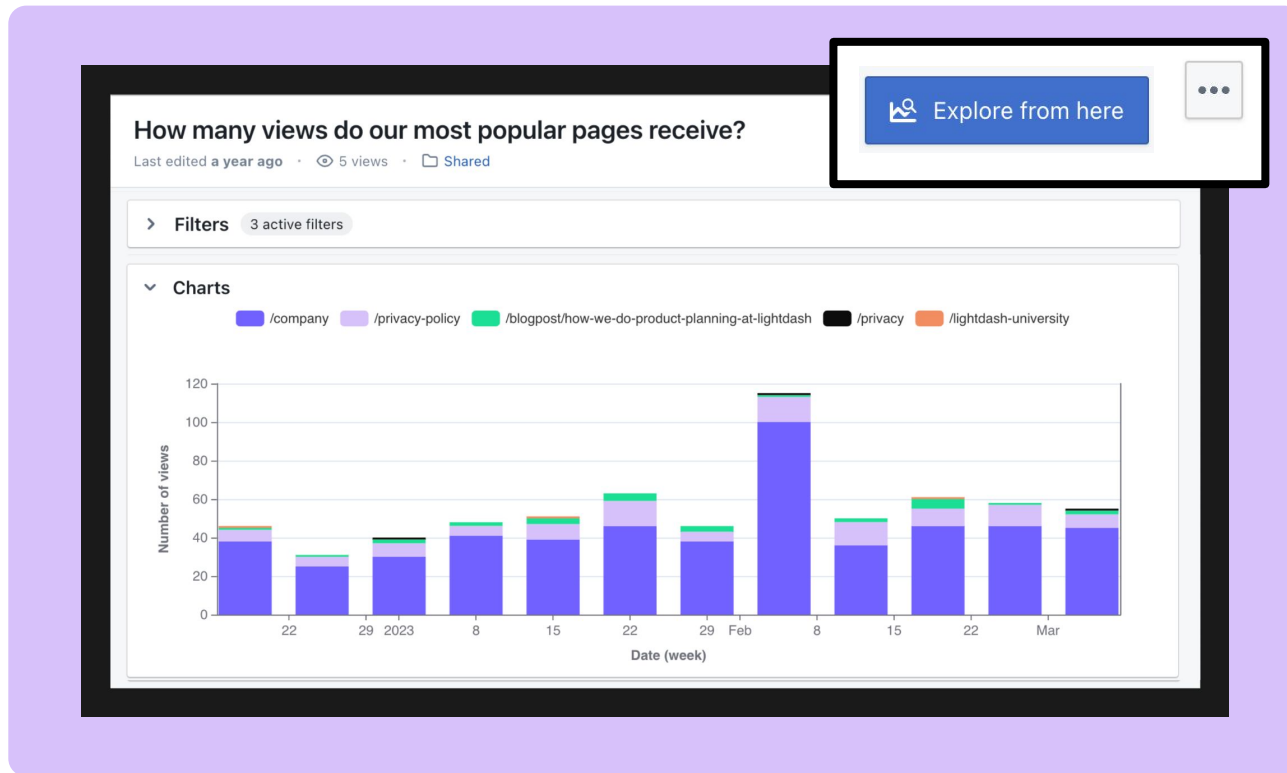 - Use confirmations and warnings

🛡️ Forgiveness

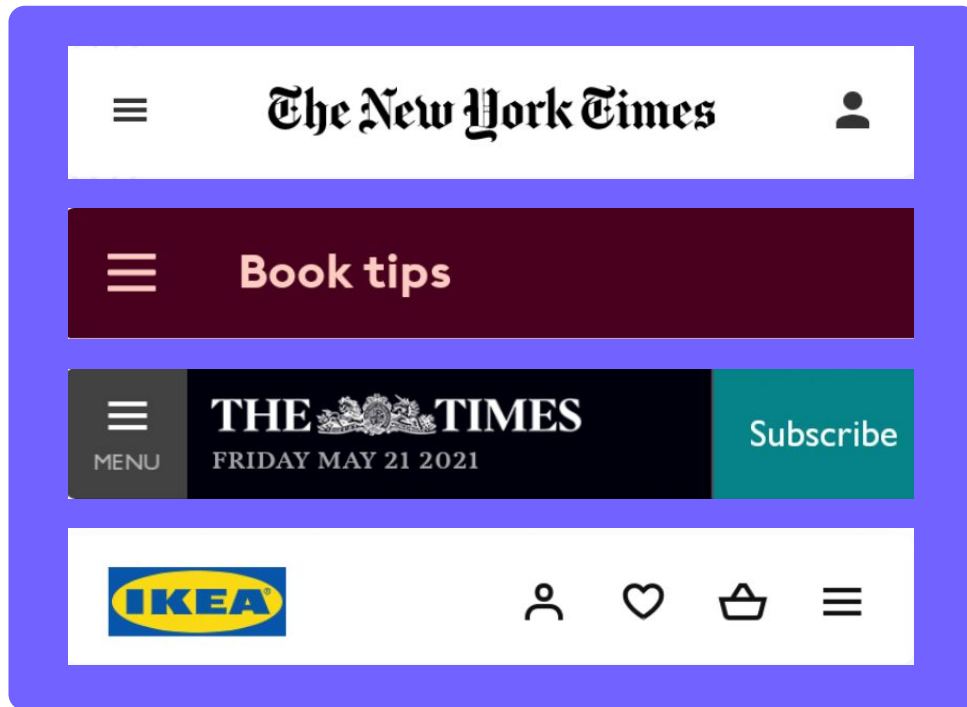## Example

🛡️ Forgiveness

Example

Familiarity

Using familiar design patterns

Menu icons

How would you access the menus from these headers?

Familiarity

Key question: **Is there a familiar experience for *both* personas that we can use here?**
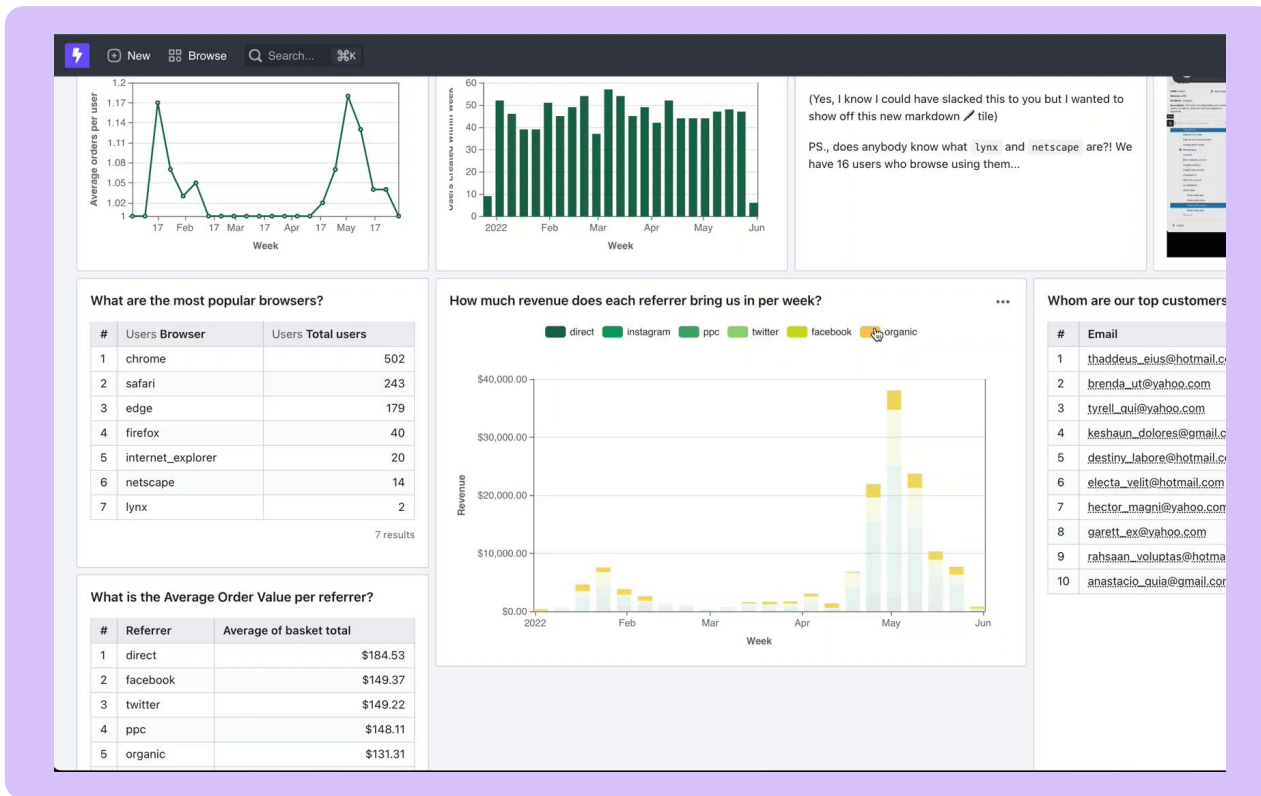
- Do competitor research to see if there are existing patterns.
- Use basic established usability patterns.
- Give users a prototype and use it to test familiarity:
  - Can they guess what it does?
  - Can they complete the task successfully?

Familiarity

Example

Okay, those are 3 useful design principles...

...Now what?

Flexibility vs. Usability
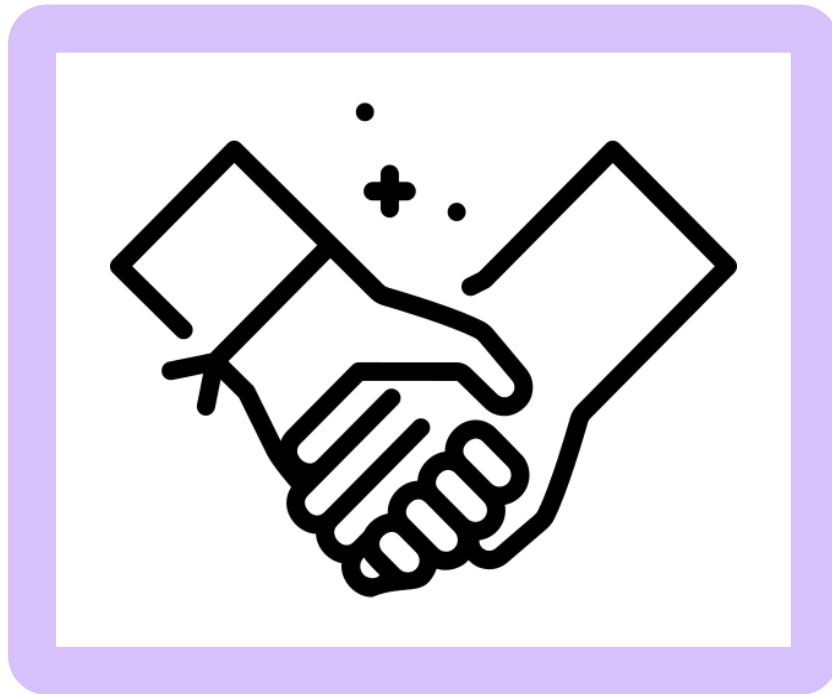
Forgiveness

Familiarity

The increase in data literacy is going to be limited by data tools **unless we make changes in how we build them.**

We need to start building tools for a data literate future.

- Building tools for business users means **thinking about their preferred UX**:
  - Native integrations in Slack or Notion?
  - Using natural language for querying data?

- Helping them **use data in decision-making** means:
  - Increased and standardized context in data tools.
  - Better leveraging of metadata to help them feel confident in self-serve decision making.

- Otherwise, **data tools will be the limiting factor in how much we can increase data literacy**.

How can we do this?

Build data tools with **both** data teams and business users in mind.

We can use design principles to help us, like:

- Flexibility vs. usability
- Forgiveness
- Familiarity

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Thank you! ⚡

Scan me!