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Advisory

How to optimize an Agile Transformation
using the 5 stages of grief
by Teresa Ramos and
Gunash Kamzaevi

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Introduction

This article explores the positive outcomes of a mentorship under the UNDP Women in STEM program. In the first part of the article, Gunash Kamzaevi, a UX researcher in a call center software team at a bank, talks about the difficulties she faces when implemented changes, some of them requested by users. In the second part of the article, mentor Teresa Ramos explains the 5 stages of grief and how a software team that works using agile methods can use them to easy the implementation and uptake of changes by users.

The story shares practical lessons learned in this mentorship process, giving valuable insights for people in the tech and project management world.

Summary

Embarking on a UX research journey within a call center software team, the struggle to facilitate user-friendly changes became evident. Users, initially resistant and disheartened by modifications, exhibited an emotional journey akin to the "5 Stages of Grief" model. Introduced by Elisabeth Kübler-Ross, this model encapsulates stages of denial, anger, bargaining, depression, and ultimately, acceptance. Through the lens of these stages, users' reactions were mirrored: resistance, frustration, bargaining for old features, despondency, and eventual acceptance. To navigate this terrain successfully, it's imperative to respect these stages, embrace empathy, communicate transparently, and grant users the time needed to progress through these emotions, ensuring a smoother transition and heightened user satisfaction.

Being Agile: From users' perspective

Gunash: When I began my journey as a UX researcher within a digital software team at a call center, I initially underestimated the gravity of the situation. My task was to delve into the software's usability, a venture that involved visits to call centers for observations and agent interviews. Two skilled UX designers accompanied me during this research endeavor, but the results were far from satisfactory. Right from the outset, we encountered an overwhelming sense of negativity towards the product team. Call center agents were not only frustrated but also disinclined to offer assistance. Comments like, "What's the point? They're not going to do

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anything anyway," and "I reported this bug weeks ago, but it seems no one cares," were frequently heard. The agents were uncooperative and felt unheard.

Moreover, significant communication issues loomed large between the software team and the head of the call center department, the stakeholders. The call center comprised roughly 200 agents, with the most experienced ones working remotely while only interns or freshly recruited agents were in the office. This introduced a research bias since I had to conduct face-to-face interviews at the office, primarily obtaining feedback from interns who didn't have access to all facets of the software. Initially, with the assistance of the two designers, it took us a considerable amount of effort, spanning one or two full days, to persuade agents to participate in interviews. In the end, we collected a mere 20-25 responses, most of which were not particularly helpful.

In response, I decided to forge a robust communication channel that would encourage users to freely share their feedback. This ultimately brought us to a point where I could conduct research online with nearly full attendance from all agents, enabling them to share their insights without constraints.

However, this approach came with its own set of initial challenges. We started making changes to the software and immediately conducting research after each change, allowing users less than a week to experience the modifications. We believed that rapid response to their needs would lead to increased user satisfaction. Much to our astonishment, the feedback we received was overwhelmingly negative, despite our research suggesting that the changes should have resolved the issues the agents were complaining about. It was as if our team had made a catastrophic mistake, squandering time and resources to worsen the product. In theory, the changes were meant to enhance software usability, yet users were incensed.

Here's an illustrative example: We introduced a panel on the main page for easy caller identification. Without this panel, agents had to navigate through several different pages to gather caller information, which was a mandatory step for almost every call, except for those seeking general information about bank products or branch operating hours. It's essential to note that the call centre received over 300,000 calls per month, with more than 90% requiring caller identification. Despite the panel being in production, agents weren't utilizing it, and this was precisely the suboptimal situation we aimed to rectify.

Our journey to address this issue began with comprehensive research to pinpoint the problems, followed by dedicated efforts to develop the panel. It was made more user-friendly and strategically positioned. Based on initial feedback from agents, it appeared to be an improvement. However, when we started tracking click rates, the story took an unexpected turn. During the first week, there were minimal clicks from most agents, and then, gradually, they began clicking more. This is when we started receiving a flurry of angry comments. I was present, researching an entirely different aspect of the software, but occasionally, I asked off-the-record

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questions to gauge their sentiments about the panel. To my surprise, they were furious and despised it.

The puzzling question arose: How could this be? What had gone awry? I was left perplexed, searching for answers.

During this time, I was being coached and mentored by Teresa Ramos, as part of a UN initiative aimed at empowering Women in STEM. Teresa possessed a keen insight into our situation and recognized that our research had been prematurely executed. It was then that she introduced me to the concept of "5 Stages of Grief". What I learnt from her was the need to allow agents time to absorb the change, mourn the loss of familiar features and come to terms with the new ones.

As a UX researcher, my primary duty is to test the usability of designs-mainly digital ones. For the designers, the goal is always the same: to make things better!

In this age of hyper personalization, fueled by big data, we strive to create products that meet individual user needs as closely as possible. We hope that users will develop an emotional connection with our products and eventually become loyal customers. Therefore, it shouldn't come as a surprise when they react emotionally to product changes, even if those changes are for the better.

It is well known to grieve over the failure of something you have created. However, when we focus too much on emotions of the design team, we may inadvertently overlook the feelings of the other party: the **Users** and that's exactly what we were doing in the Call center software development team. In my research, I didn't factor in the agents' adaptability to change; even to a change that they themselves requested or that improved their work!!

What we sometimes fail to see is that, any slight change to a personalized product may not be readily embraced by the end user. The fact that the agents despised the new development to the software explicitly describes how the change wasn't embraced easily. The success of improving an existing product depends on the adaptability of our users to that specific change or, in other words, on how agile the users are. For instance, every release of a new IPhone model invariably sends shockwaves across the internet. Yet, in due time, these initial reactions fade out, leaving us with a product users can't seem to live without. The situation I faced at the call center software development helped me to realize that when conducting the follow up research, I'll have to let the users to grieve over the change.

In line with the grief and loss concept, I made a decision to wait at least 2 weeks before collecting feedback, giving agents the time to go through denial and grief. The result was incredible. Not only did negative comments disappear, but agents also began to appreciate the changes.

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I waited some more and, at the end of the month, approximately three weeks after the changes were implemented, I conducted new research focusing on the panel. The outcomes were great. Agents not only embraced it, but they also started reporting bug cases, showing great engagement and satisfaction with the product.

Empowering Change: A Journey through User Emotional Transitions in Agile Software Evolution

Teresa: As a coach and mentor for the UN initiative aimed at empowering Women in STEM, I had the privilege of guiding our Gunash through a transformative experience in the world of technology.

The concept of the "5 Stages of Grief" is not exclusive to the tech world and is a universal model that helps understand how humans respond to change, loss, and challenging transitions. Interestingly, this framework was originally formulated by psychiatrist Elisabeth Kübler-Ross in her work on end-of-life care, where she observed and documented the emotional journey of terminally ill patients.

These 5 stages are denial, anger, bargaining, depression, and acceptance and capture the array of emotions individuals undergo when confronted with change or loss. They mirror the journey of grief, a process that is deeply personal and distinctive for each individual. According to the model, all these stages are experienced when navigating loss and transitions. They are not linear and can be experienced more than once before the transition is completed.

We tend to think that these stages of grief only apply to big personal losses like bereavement, divorce, job loss, death of a loved one, etc.. However, they provide a useful framework to explain why users can be reluctant to embrace changes, even the ones they, themselves, have requested. After all, losing well known software features and functionality is also a loss and can elicit the same reactions.

The five stages of grief, when applied to the user experience in the call center software development team, provide a fascinating lens through which we can interpret our users' reactions to system modifications.

In the denial stage, users may resist change and cling to the familiarity of the previous system, just as our agents initially did. The anger phase manifests as frustration, with comments like "What's the point?" echoing the emotional turmoil users may experience. The bargaining stage aligns with attempts to negotiate or find workarounds, akin to the reaction we observed when agents sought to circumvent the new panel. Depression is characterized by despondency, which was evident as our users felt alienated by the updates. Finally, the acceptance stage signifies the moment when users fully embrace the changes, as our agents eventually did when they started appreciating the revamped panel.

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The **_key takeaway_** is that the 5 Stages of Grief model can serve as a valuable guide for introducing change in tech. To enhance user satisfaction and ease the transition, it is crucial to recognize and respect these stages. Empathy, clear communication, and strategic pacing are essential. Allow users the time they need to navigate these emotional phases, understanding that each stage is a step toward eventual acceptance. In this manner, you can transform resistance into enthusiasm and ensure a more successful and user-centric adaptation to software changes.

About the Authors

Teresa Ramos

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Teresa Ramos is a senior executive with a diverse background bridging technology, business, and academia. Armed with degrees in theoretical physics, music, telecommunications engineering, and an executive MBA, Teresa has over 23 years of executive experience with global tech giants like British Telecom, Vodafone, Telefónica, and Siemens. Her leadership roles were pivotal in driving digital transformations at BT Europe and Infineon, part of Siemens, where she spearheaded innovation initiatives company wide. Trilingual in Spanish, English, and German, Teresa's global outlook is enhanced by her extensive work in various countries and collaboration with prestigious academic and public institutions like Harvard University, where she is a Fellow at the IoC (Institute of Coaching), Stanford University, where she is an Innovation Champion and United Nations where she is a mentor and trainer. She is based in Spain and works globally.

Teresa helps leaders navigate the complexities of the digital world, fostering innovation and Agile leadership. She can be contacted at (4) Teresa Ramos Martin | LinkedIn

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Gunash Kamzaevi is a seasoned professional with a robust background in economics and research. Holding a position as a full-time senior User Experience (UX) researcher in one of the largest retail bank in Azerbaijan, Gunash is also a research fellow at the Economic Scientific Research Institute, specializing in digitalization, innovation, and entrepreneurship policy analysis. As a UX researcher, she has cultivated expertise in understanding user behaviors, preferences, and needs to enhance digital products and services. Gunash's expertise extends to collaborating with local and international companies, non-governmental organizations (NGOs), and government entities. Born and raised in a small town in Georgia, she has embarked on a professional journey that led to relocation to Baku, Azerbaijan where she now lives and works. She can be contacted via LinkedIn at: https://www.linkedin.com/in/gunash-kamzaevi-a9aa19a3?utm_source=share&utm_campaign=share_via&utm_content=profile&utm_medium=android_app