

## PAUL JOSEPH SHERMAN

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### PRODUCT AND SERVICE DESIGN, CUSTOMER/USER RESEARCH, USABILITY

#### SKILL AREAS

- ◆ User experience and usability research, design and evaluation
- ◆ Interaction design
- ◆ Project and program management for user experience design teams
- ◆ User experience team development
- ◆ Cross-discipline innovation program management

#### DOMAINS

- ◆ Telecom voice, data and network management
  - ◆ Investing and financial planning
  - ◆ Accounting, finance, HR, payroll and CRM
  - ◆ Mobile devices and applications
  - ◆ E-commerce and online product search
  - ◆ Digital asset management
  - ◆ Document management, production, fulfillment
  - ◆ Corporate Internet and intranet
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### PROFESSIONAL EXPERIENCE

#### **ShermanUX (Sherman Group User Experience) – Austin, TX** **Principal Consultant** (2009 to present)

Founded a sole proprietorship consultancy in late 2008 to provide user experience and usability research, design and assessment for product and service providers.

#### **Key Achievements:**

- ◆ **Business:** Successful and ongoing user research, interaction design and usability evaluation engagements with several medium- and large enterprises in the US, including Dell, Lenovo, Synq Solutions, Microsoft, BusinessOnLine, American Medical Identifications, and others.
- ◆ **Community:** Released under a Creative Commons Attribution-Share Alike 3.0 license “The User Experience Team Kit”, a comprehensive implementation guide for staffing, budgeting, and managing user experience research and design teams. [[Download kit .pdf here](#)]

#### **Sage Software – Atlanta, GA**

#### **Senior Director of User-Centered Design, User Research & Usability** (2004 to 2008)

Hired as Director to drive improvements to customer experience by developing and directing a user-centered design team for this software company with more than 10,000 employees. Defined and implemented the Sage Small Business Division’s Customer-Connected Design & Research program, a key part of Sage’s product/software development lifecycle (PDLC / SDLC).

Designed a customer-focused innovation program to create new products and services. Promoted to Senior Director in 2007. Held full accountability for \$1.9M operating budget, \$125K research budget and a staff of 21 direct and indirect reports.

#### **Key Achievements:**

- ◆ **Customer experience research, design and usability:** Drove improvements to Peachtree’s end-to-end customer experience by identifying gaps then redesigning key areas of the desktop application, product web properties and other customer touchpoints. Redesigned touchpoints included web- and phone-based product registration, web-based software

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purchase, in-product cross-selling, as well as the retail box and user assistance collateral contained within.

- ◆ **Process innovation:** Drove redesign of key R&D processes, including ideation, design, and development. Moved the organization from a linear “waterfall” process to an agile, iterative, collaborative process.
- ◆ **Product and service innovation:** Championed the establishment of and designed processes for innovation teams charged with discovering un- and under-served customer needs, prototyping solutions, and establishing business cases for creation of new products and services.
- ◆ **Software user research, design and usability:** Orchestrated the redesign of the user interface and interaction model of Peachtree accounting software, a \$100M+ software product line. Peachtree 2007 was recognized by the Human Factors and Ergonomics Society in 2008 with a User-Centered Product Design Award Honorable Mention.
- ◆ **Leadership and evangelism:** Developed and delivered training to product teams across North America that covered user-centered design and its incorporation into the product / software development lifecycle (PDLC / SDLC).

### **Andara Digital – Dallas, TX**

#### **Director of User Research (2003 to 2004)**

Oversaw user research services, establishing strategic direction and aligned offerings with practice strengths/constraints for this Internet solution and Web development company.

Prepared user-centered design offerings such as ethnographic studies, user needs analysis, requirements gathering, information architecture, and usability testing. Managed user research and design projects. Served major clients such as MyAutoLoan.com, JCPenney.com, Intuit, Kinkos.com, CompuCom, CenturyTel, American Medical Identifications, others.

#### **Key Achievements:**

- ◆ **Improved JCPenney.com’s search experience:** Researched customer needs, co-designed interactions, and usability tested the updated version of JCPenney.com’s search interface.

### **Intuit – Plano, TX**

#### **Manager of User-Centered Design (2001 to 2003)**

Led research projects for new products and product line extensions for Lacerte Tax Planner, Intuit Document Management System, and QuickBooks Client Manager. Provided personnel and project management for user needs research, serving the Product Management and R&D organizations.

Identified process and design improvements and partnered with Six Sigma “blackbelts” to implement and track improvements following the Six Sigma DMADV method.

#### **Key Achievements:**

- ◆ **Process improvement:** Achieved \$150,000 in annual savings and reduced the misrouted call rate 65% by redesigning Intuit’s Lacerte call center IVR user interface.

### **Perceptive Sciences (Formerly Austin Usability) – Dallas & Austin, TX**

#### **Usability Engineer (2000 to 2001)**

Provided usability engineering services for major clients such as Intuit, Dell, ADP, HP, Landmark Graphics, and Motive Communications.

#### **Selected Contributions:**

- ◆ **Web site and browser-based application design and usability testing:** Elicited requirements, designed information architecture and process flows, and wireframed a number of web sites and web-based applications.
- ◆ **Mobile device, application, and OS usability evaluation and testing.** Assessed the initial user experience and over-time usability of 19 smartphone devices, applications, and OS's, including devices from Nokia, Sony Ericsson, Samsung, Sanyo, and Motorola.
- ◆ **Business development and sales supported:** Directly generated more than \$240K in revenues through effective and targeted client add-on sales and business development initiatives; supported sales efforts through participation in pre-sales and pitch initiatives.
- ◆ **Client and project management:** Ensured exceptional service for clients including Nokia, Intuit, Diebold, Motive, Palm, Kodak, and Dell through hands-on management of client engagements.

**Lucent Technologies – Holmdel, NJ**  
**Member of Technical Staff (1997 to 2000)**

Provided a wide array of technical functions as systems engineer and UI design supervisor. Wrote functional and UI requirements for network management, billing, and customer management software applications. Also created internationalization guidelines for product suites.

**Selected Contributions:**

- ◆ Designed the user interface for two optical networking element management systems (EMS), a type of network operations support system (OSS) application.
- ◆ Wrote and maintained functional requirements for an OSS product suite consisting of element management systems, subnetwork management systems, and network management systems. Also wrote and maintained functional requirements for an OSS and billing management system integration project.
- ◆ Wrote and maintained functional requirements for a converged voice-video-data solution delivered via residential and business cable infrastructures.

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*Additional experience includes a position as a **Lecturer** with the University of Texas at Dallas, teaching a three-course sequence in human-computer interaction for the Applied Cognition and Neuroscience graduate program.*

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**EDUCATION AND CREDENTIALS**

**University of Texas – Austin, TX**

PhD, Psychology (Concentrations in Social Psychology & Human Factors, Minor in Statistical Methods)

**Rutgers University – New Brunswick, NJ**

Master of Education, Psychology (Minor in Statistical Methods)  
Bachelor of Arts, English (Minor in Economics)

## SELECTED PUBLICATIONS AND PRESENTATIONS

### Publications

- ◆ Testing Your Own Designs Redux. Published in UXMatters Magazine, December 2009. <http://uxmatters.com/mt/archives/2009/12/testing-your-own-designs-redux.php>
- ◆ Testing Your Own Designs: Bad Idea? Published in UXMatters Magazine, September 2009. <http://uxmatters.com/mt/archives/2009/09/testing-your-own-designs-bad-idea.php>
- ◆ 8 Things You Should Be Doing in Your UX Practice, but Probably Aren't. Published in UXMatters Magazine, July 2009. <http://uxmatters.com/mt/archives/2009/07/8-things-you-should-be-doing-in-your-ux-practice-but-probably-arent.php>
- ◆ The User Experience of Enterprise Software Matters, Part 2. Published in UXMatters Magazine, March 2009. <http://uxmatters.com/mt/archives/2009/03/the-user-experience-of-enterprise-software-matters-part-2-strategic-user-experience.php>
- ◆ The User Experience of Enterprise Software Matters. Published in UXMatters Magazine, December 2008. <http://uxmatters.com/MT/archives/000362.php>
- ◆ Malware: Whether on the Desktop or the Web, It's a Perception Thing. Published in UXMatters Magazine, September 2008. <http://uxmatters.com/MT/archives/000318.php>
- ◆ Where's My Stuff? Beyond the Nested Folder Metaphor. Published in UXMatters Magazine, April 2008. <http://uxmatters.com/MT/archives/000271.php>
- ◆ The Perpetual Super-Novice. Published in UXMatters Magazine, December 2007. <http://uxmatters.com/MT/archives/000249.php>
- ◆ How Do Users Really Feel About Your Design? Published in UXMatters Magazine, September 2007. <http://uxmatters.com/MT/archives/000223.php>
- ◆ Your Design Is Infringing On My Patent: The Case Against User Interface and Interaction Model Patents and Intellectual Property. Published in UXMatters Magazine, July 2007. <http://uxmatters.com/MT/archives/000210.php>
- ◆ Connecting Cultures, Changing Organizations: The User Experience Practitioner As Change Agent. Published in UXMatters Magazine, January 2007. <http://uxmatters.com/MT/archives/000162.php>
- ◆ Usability Success Stories: How Organizations Improve By Making Easier-To-Use Software and Websites. Book published by Gower Press, Aldershot Hampshire, UK, 2006.
- ◆ Engineering the User Experience: UX and the Usability Professionals' Association. Published in ACM-SIGCHI Interactions 12-3, 2005.
- ◆ Redesign of a Technical Support Interactive Voice Response System: Applying Heuristics to Business Problems. Published in Proceedings of the Human Factors & Ergonomics Society 47th Annual Meeting, 2003.
- ◆ Toward More Accessible Web Sites. Published in Ergonomics in Design Magazine, Winter 2003.

### Presentations

- ◆ Usability...Or Strategic User Experience? Invited webinar presentation for Usability Marathon 2, Moscow, Russia, October 2009. <http://marathon.uidesign.ru/sherman.html>
- ◆ Attaining A Great User Experience For Enterprise Software Applications. Invited presentation at Product Camp Austin Summer 2009, Austin Texas, August 2009. <http://www.slideshare.net/PaulSherman/attaining-usability-and-a-great-user-experience-for-enterprise-products>
- ◆ From Personas to Production: The Role of The Role of Personas, Design Briefs, Stories, Storyboards, and Wireframes in the Ideation/Design/Build Process. Invited presentation at ProductCamp Austin Summer 2009, Austin Texas, August 2009.

<http://www.slideshare.net/PaulSherman/from-personas-to-production-the-role-of-personas-design-briefs-stories-storyboards-and-wireframes-in-the-ideationdesignbuild-process>

- ◆ A Kit For Building User Experience Teams in R&D Organizations. Invited presentation at Big (D)esign Conference, Dallas Texas, May 2009. <http://www.slideshare.net/PaulSherman/user-experience-kit>
- ◆ Usability For Strategic User Experience. Advanced user experience track at the 2009 Online Marketing Summit, San Diego, California, February 2009. [[Download .pdf here](#)]
- ◆ User Experience: Drive Change, Become Strategic. Opening plenary presentation at User Friendly 2008, the 5<sup>th</sup> Annual Conference of the China Usability Professionals' Association, Shenzhen, China, October 2008. [[Download .pdf here](#)]
- ◆ Keynote Speech, 7<sup>th</sup> Annual International Conference of Ergonomics and Usability, Interface Design, and Human Computer Interaction, July 2007, Balneario Camboriu, Brazil.
- ◆ Shaking the Tree: A Case Study of A Usability Turnaround. Invited Speaker Presentation at User Friendly 2006, the 3<sup>rd</sup> Annual Conference of the China Usability Professionals' Association, Hangzhou, China.
- ◆ Some Right - and Many Wrong - Ways to Incorporate Usability into an Organization. Workshop at User Friendly 2006, the 3<sup>rd</sup> Annual Conference of the China Usability Professionals' Association, Hangzhou, China.
- ◆ Setting up a Usability Team. Roundtable Leader at User Friendly 2006, the 3<sup>rd</sup> Annual Conference of the China Usability Professionals' Association, Hangzhou, China.
- ◆ Usability Successes and (Gasp) Failures: More Case Studies in Usability Engineering. Presentation at the Usability Professionals' Association 15th Annual Meeting, 2006.

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## PROFESSIONAL AFFILIATIONS

Usability Professionals' Association (President 2008; Vice-President 2007; Board of Directors 2004-present)

Human Factors & Ergonomics Society (Full member; Presenter; Conference colloquium organizer)

Association for Computing Machinery-Special Interest Group, Computer-Human Interaction (Member)

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## AWARDS AND HONORS

- ◆ 2009 – Usability Professionals' Association President's Award – for service to the user experience community and the UPA.
- ◆ 2008 – Human Factors and Ergonomics Association – HFES User-Centered Product Design Award – for user research, design, and usability analysis on the Peachtree Accounting 2007 redesign project.

**MAJOR PROJECTS AND DOMAIN EXPERIENCE**

Dates	Company	Product	Project goal	Domain	Technology / platform	Feature ideation, business rqmts	Contextual research - task analysis, profiling, personas	Functional rqmts	Information architecture definition	Interaction design - wireframes, storyboards, interaction specs	Usability review and testing	Project mgmt	Team mgmt, leadership, strategic direction
1997-2000	Lucent Technologies	ITM-SNC - a network management application	Redesign ITM-SNC for greater ease of use; design new ways to graphically represent new network elements and devices.	Voice & data network management; operations support systems (OSS)	Java thick client on HP-UX			X	X	X			
1997-2000	Lucent Technologies	Lucent SNMS, a suite for managing network elements and subnetworks.	Write and maintain functional requirements for element and subnetwork management. Elicit requirements for operations- and billing-support system integration.	Voice & data network management; operations support systems (OSS), billing support systems (BSS)	Web-based application	X		X	X	X			
2000	Moneystar / Cofiniti	A consumer-focused financial planning website	Conduct usability evaluation of Moneystar's online investment and financial planning applications.	Investing and financial planning	Website / web-based application		X				X		
2000	Mediaprise	Marketing / merchandising digital asset distribution and management	Design the information architecture and workflow for Mediaprise's online marketing asset management system.	Marketing and merchandising asset management and distribution	Website / web-based application			X	X	X			
2000	ADP	Desktop payroll application	Evaluate the usability of ADP's desktop corporate payroll application.	HR & payroll	Windows desktop application						X		
2000	Calendars.com	E-commerce site	Evaluate the usability of Calendar.com's e-commerce experience.	E-commerce	Website / web-based application						X		
2001	Dell	Dell OMSA - a network management application	Gather user needs for and redesign the experience of Dell's OpenManage IT management system.	Voice & data network management	Web-based application		X		X	X	X		
2001	Motive	Mobile remote PC management application	Evaluate the usability of Motive's mobile application for remote management of PC's.	IT network management	Mobile application						X		

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2001	Landmark Graphics	Corporate Internet web site	Evaluate the usability of Landmark's corporate website and secondary web properties.	Corporate Internet identity & presence	Web						X		
2001	Surgient Networks	Surgient Network Management System	Evaluate the usability of Surgient's network management application.	Voice & data network management	Web-based application						X		
2001	Waveset Technologies	Waveset Identity Management System	Evaluate the usability of Waveset's IT managements application.	IT network management	Web-based application						X		
2001	Terawave	Terawave Optical Network Management System	Redesign Terawave's network management application for greater ease of use and to support additional network devices.	Voice & data network management	Web-based application				X	X	X		
2001-2003	Intuit Inc.	QuickBooks, QuickBooks Customer Manager, Lacerte Accounting	Provide user research, design, and usability evaluation services for several Intuit product lines.	Accounting and finance, CRM	Windows desktop applications		X		X	X	X	X	X
2003	Intuit Inc.	Intuit professional tax call center IVR	Redesign IVR menu and prompts to decrease handle time and call routing errors	IVR	na		X	X	X	X	X	X	
2003	Fedex/Kinko's	File-Print-Print To Kinko's	Redesign the workflow and interaction design for Kinko's consumer-level document management, production and fulfillment application.	Document management, production, and shipping	Windows desktop application and web-based application			X	X	X	X		
2003-2004	Radiotime	Radiotime Recorder and Player	Design the basic interactions of browsing for, selecting, recording and playing back Internet "radio" spoken word programming.	Consumer entertainment software	Windows desktop application and web-based application	X	X		X	X	X	X	
2003-2004	American Medical Identifications	E-commerce site	Evaluate the experience of shopping and purchasing on the site.	E-commerce	Web		X		X	X	X	X	
2003-2004	JCPenney	E-commerce site search	Redesign JCPenney.com's search experience.	E-commerce	Web					X	X	X	

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2004	Nokia	Several Nokia and competitors' handsets	Assess usability and initial user experience of Nokia's and competitors' handsets and handset OS's.	Mobile handset and OS usability	Multiple manufacturer handsets and mobile OS platforms		X				X		
2004	Sage Software	Peachtree Accounting, QuickBooks	Conduct a competitive usability test of Peachtree and QuickBooks Accounting.	Accounting and finance	Windows desktop applications						X		
2005-2008	Sage Software	Peachtree Accounting, MAS 90/500, ACT!	Set strategic direction for Sage products' user interfaces and visual design.	Accounting and finance, CRM	Windows desktop applications	X	X	X	X	X	X	X	X
2005-2008	Sage Software	Sage North America web properties	Provide usability evaluation and testing of Sage North American corporate and e-commerce sites.	Corporate Internet identity & presence; e-commerce	Web		X			X	X		
2009	Synq Solutions	Synq Learning Systems	Redesign the application for greater ease of use, ability to spec multi-document production, and multi-destination shipping.	Document & digital asset management, production, and shipping	Web-based application	X	X	X	X	X	X	X	
2009	Synq Solutions	Synq Online Fulfillment	Redesign the application to increase workflow efficiency, decrease user errors, increase user self-service.	Marketing and merchandising asset management and distribution	Web-based application		X		X	X	X	X	
2009	ShareOnce	ShareOnce.com	Set strategic direction for ShareOnce.com, gather customer needs, create business requirements and product roadmap, conduct usability evaluations of service.	Business networking and CRM	Web-based service	X	X	X	X	X	X	X	X