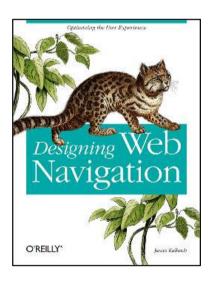
UX Strategy

Using Design
To Solve
Business Problems

@JimKalbach

Principal UX Designer Citrix

LIS Degree Rutgers University













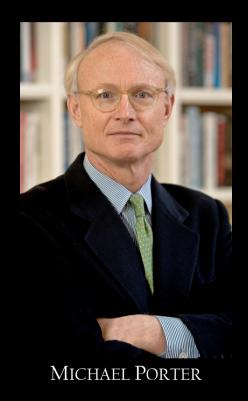
Agenda

1:30	What Is Strategy?
2:00	Identifying the Elements of Strategy
3:00	Building UX Strategy
3:45	Break
4:00	Building UX Strategy (cont.)
4:45	Communicating Strategy & Planning
5:30	End

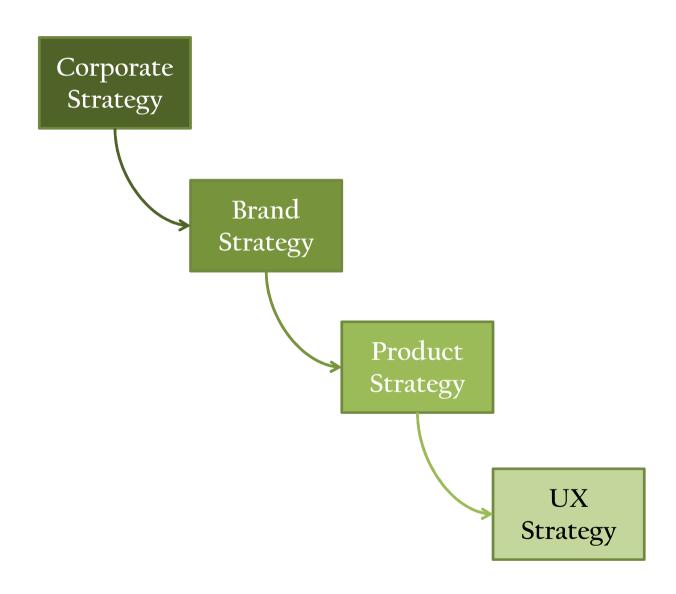
What is strategy?



At general management's core is strategy: defining a company's position, making trade-offs, and forging fit among activities
...Strategy renders choices about what not to do as important as the choice about what to do.



Hierarchy of Strategy



Strategy is...

... a hypothesis: IF > THEN

... about choice and trade-offs

... hierarchical

What isn't strategy?

What Strategy Isn't

Analysis

Budgeting

Resourcing

Project Planning



Q SEARCH



THE MAGAZINE **BLOGS AUDIO & VIDEO** BOOKS CASES WEBINARS COURSES STORE Pagistared | limited access Subscribe | My Account | Trm | Light out To make strategy more interesting — and different from a budget we need to break free of this obsession with planning. Strategy is not planning — it is the making of an integrated set of choices.

Don't Let Strategy Become Planning

by Roger Martin | 8:00 AM February 5, 2013

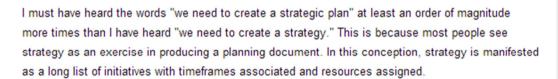
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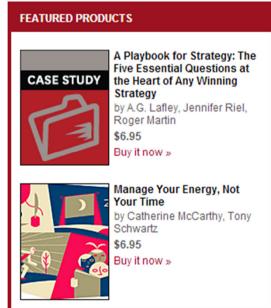






Somewhat intriguingly, at least to me, the initiatives are themselves often called "strategies." That is, each different initiative is a strategy and the plan is an organized list of the strategies.

But how does a strategic plan of this sort differ from a budget? Many people with whom I work find it hard to distinguish between the two and wonder why a company needs to have both. And I think they are right to wonder. The vast majority of strategic plans that I have seen over 30 years of working in the strategy realm are simply budgets with lots of explanatory words attached.



Strategy is...

... a hypothesis: IF > THEN

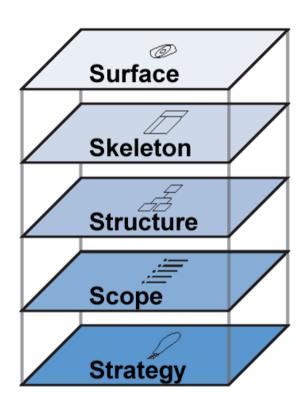
... about choice and trade-offs

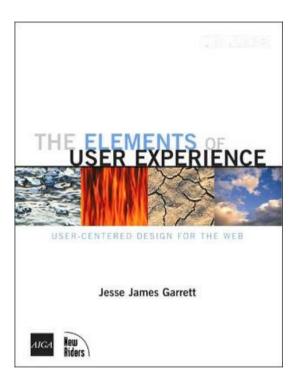
... hierarchical

... not analysis, budgeting, resourcing, or project planning

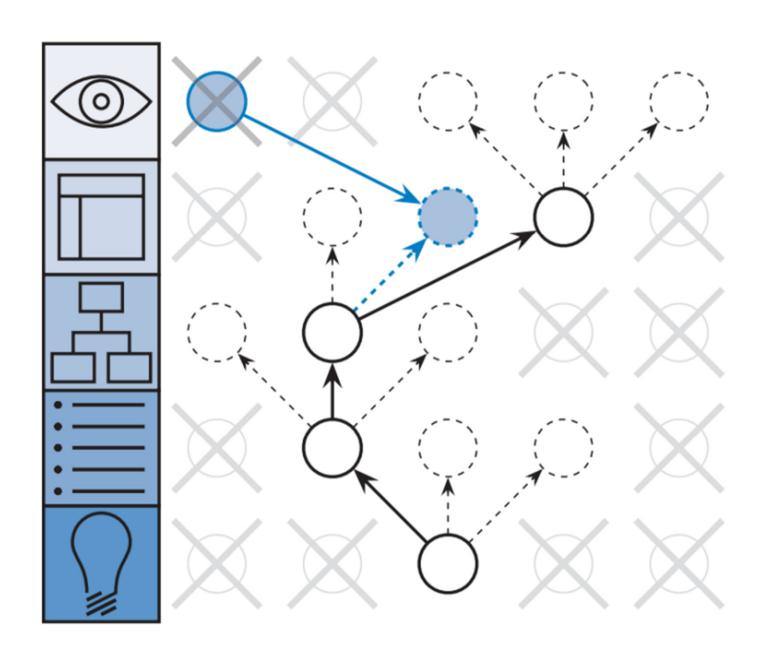
Strategy is a creative exercise to figure out how to win over time.

What is UX strategy?



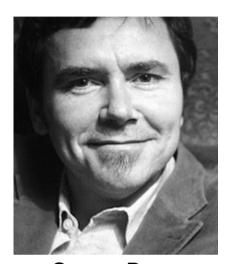


Ripple Effect



UX Strategy Definition

An experience strategy is that collection of activities that an organization chooses to undertake to deliver a series of (positive, exceptional) interactions which, when taken together, constitute an (product or service) offering that is superior in some meaningful, hard-to-replicate way; that is unique, distinct & distinguishable from that available from a competitor.



STEVE BATY

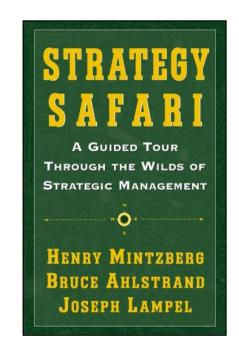
Summary

- UX strategy is the set of choices to reach a desired position over time.
- Strategy is hierarchical, and UX strategy aligns upward.
- UX strategy is **not** budgeting, resourcing or project planning.
- You can NOT analyze your way to strategy; instead, it is a creative exercise to figure out how to win.
- UX strategy is about how design will help the business win in its strategy by providing value to customers in a uniquely meaningful way.

Elements of Strategy

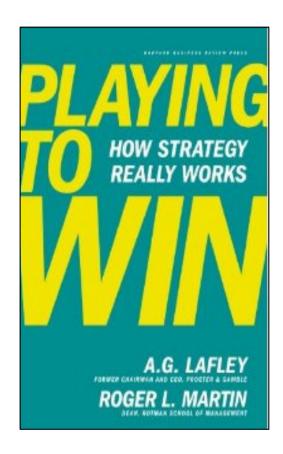
Strategy Safari - 5 Ps

- 1. Pattern Trends from the past
- 2. Position Desired outcome
- 3. Perspective Philosphy of working
- 4. Ploy Out-maneuver opposing forces
- 5. Plan Course of action



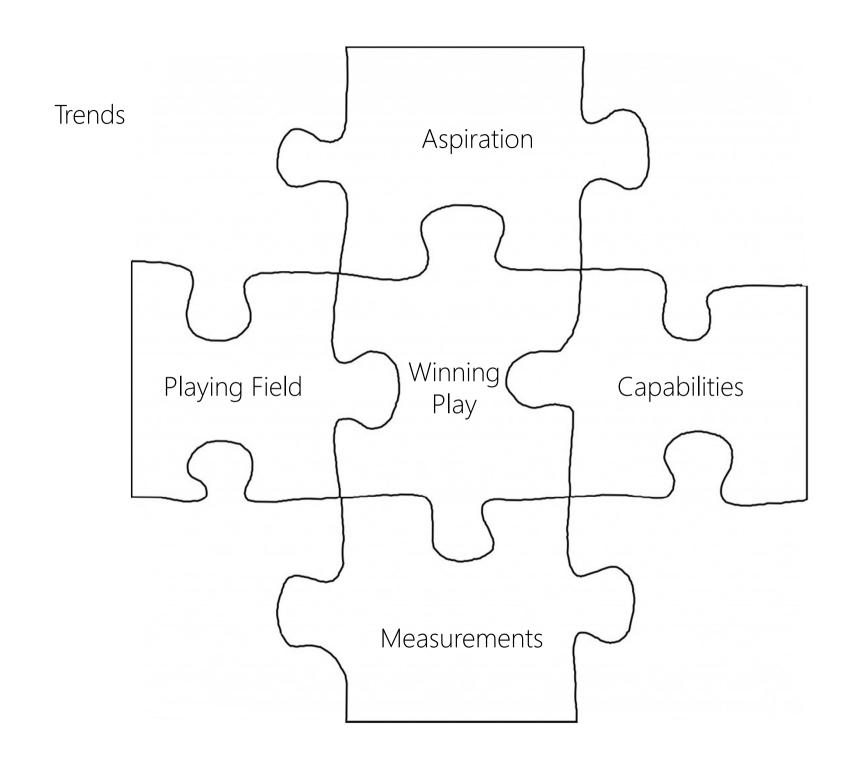
5 Strategy Questions – Roger Martin

- 1. What's your winning aspiration? The objective of your business
- 2. Where will you play?
 Where you do business: geographies, products, segments, channels, business models
- 3. How will you win?
 The value proposition and unique advantage
- 4. What capabilities must be in place? The activities & knowledge to reach objectives
- 5. What management systems are needed? How you know you have succeeded



Elements of Strategy

	Lafley & Martin	MINTZBERG	KEY STRATEGY QUESTIONS		
뜨		Pattern	1. What trends motivate action?		
	Aspiration	Position	2. What are your winning aspirations?		
THEN	Playing field	Perspective	3. Where will you play? Market, Customers, Region Products, Platforms, Business Model		
	How to win	Ploy	4. How will you win?		
	Capabilities Plan		5. What capabilities are needed?		
	Management		6. How will you measure success?		

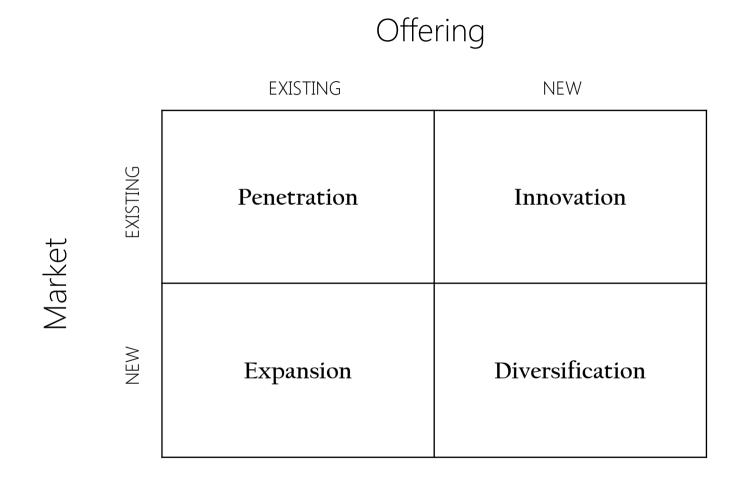


Exercise 1 – Identifying the Elements of Strategy

In groups

- 1. Take five minutes and read your scenario individually. Highlight elements that appear strategically relevant.
- 2. In a group, read your scenario aloud
- 3. Respond to each of the strategic questions on the worksheet based on the scenario.
 - Write down a few keywords for each that reflect a viable answer.
- 4. Skip elements that are unknown or make assumptions as needed.

Types of Business Growth



Ansoff Matrix

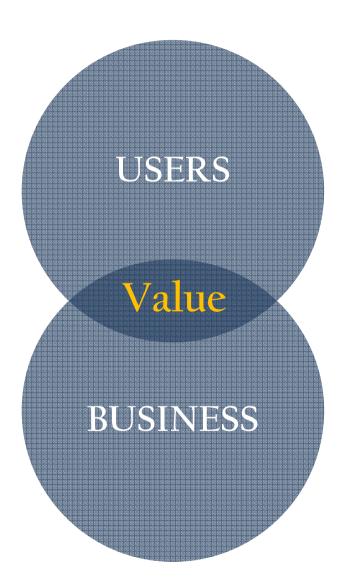
Building UX Strategy

Elements of UX Strategy

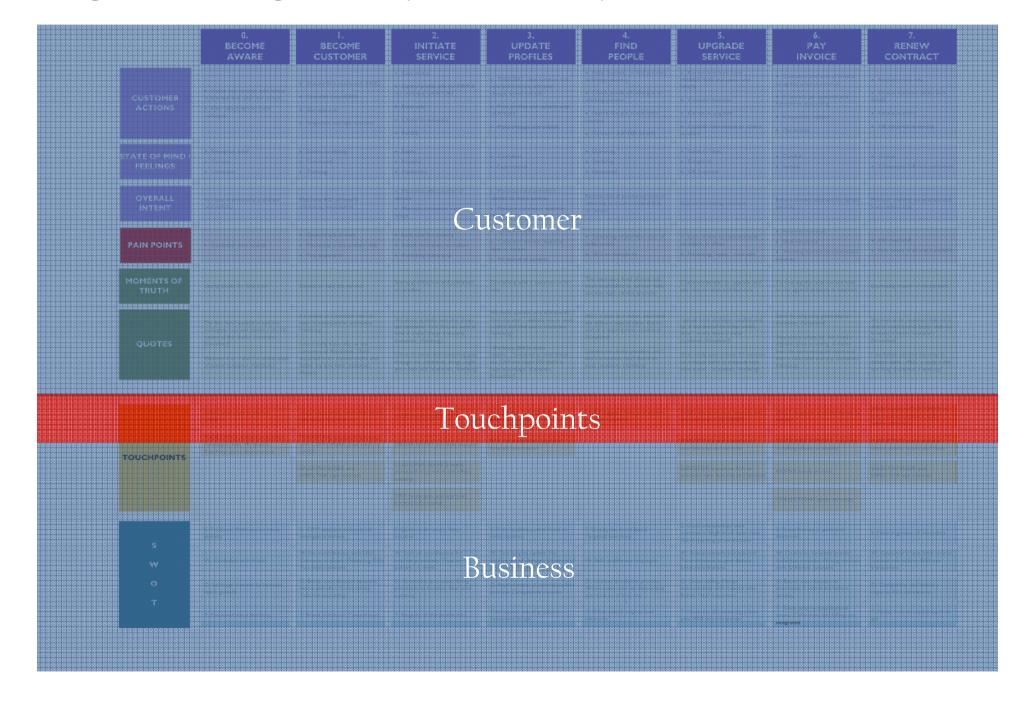
	Lafley & Martin	MINTZBERG	Key Strategy Questions	UX STRATEGY (KALBACH)	
<u>"</u>		Pattern	What trends motivate action?	1. Challenges	
	Aspiration	Position	What are your winning aspirations?	2a. Objectives 2b. Desired UX	
THEN	Playing field	Perspective	Where will you play? Market, Customers, Region Products, Platforms, Business Model	3. Focus Areas Users, Products, Geography, Areas of UX, Aspects of Usability	
•	How to win	Ploy	How will you win?	4. Approach	
	Capabilities	Plan	What capabilities are needed?	5. Activities	
	Management		How do you measure success?	6. Measurements	

1. Challenges

Business & UX Alignment Activities



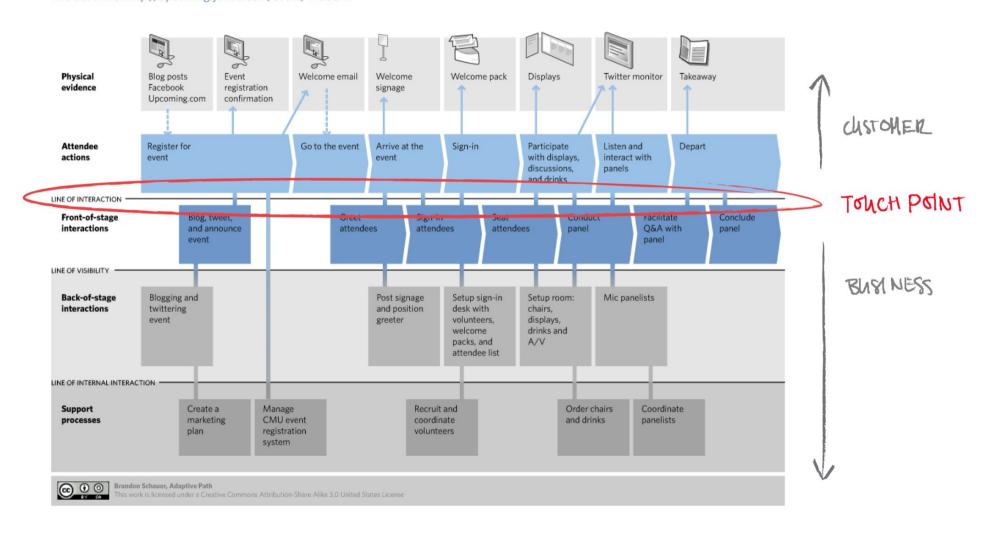
Alignment Diagram: Experience Map



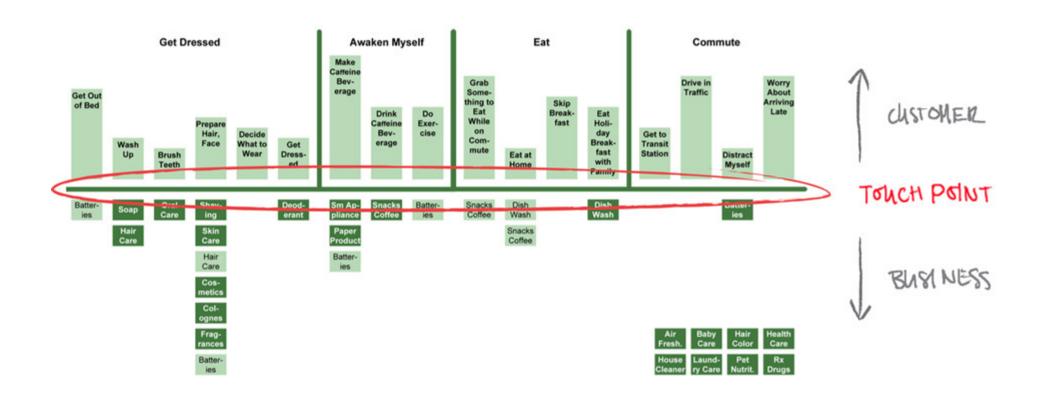
Service Blueprint

Service Blueprint for Seeing Tomorrow's Services Panel

find out more: http://upcoming.yahoo.com/event/1768041



Mental Model Diagram



Challenges: Typical Patterns From Alignment Diagrams

Look for opportunities...

- 1. Efficiencies "lean consumption"
- 2. Redundancies
- 3. Gaps
- 4. Barriers to consumption
- 5. User behaviors to impact or influence
- 6. Competition and disruption

Example: "Author Experience Map"

	0. IDENTIFY NEW OPPORTUNITY	1. MAKE AGREEMENT	2. Draft Manuscript	3. EDIT TEXT	4. Publish Title	5. PROMOTE WORK	6. Maintain Relationship	7. REVISE & UPDATE
AUTHOR ACTIONS	Jagor convauthors start: Colleague (existing addior or author) usks author Dibisher approaches millio (variocommondation) Author approaches gual. Also defins tople, audience	Agree title, scene, formet Synch with legislation and other external schedules Have proposal reviewed Set theeline, roles		Communicate with adflor and respond to enquiries Check facts, accuracy Review of others' work Wate updates	Heriau prods Confirm styles Set list manuto changles Get publ	Proceeds work and salf Speak, make appearances Ohe trainings Affood ments, sign bealer	Afficial IN events, functions Collect pagement, regulates Answer enquiries from IN Note aprintes	Olicess possibilities of revisions with EDITURS Review but, scape changes that are necessary
GOALS / MOTIVATIONS	Write unique work that makes a sig. contribution Flattered to by asked by LIC	Fecus averall writing offert Sotup regimine, discipline		*	Enjoy satisfaction of completing a work	Maximine penetration Eiulid pensonal repetation	Maintain & expand network Keep relationship w/ LH	
MOMENTS OF	Finding an interesting, viable topic that has an nuclience			G e	Seeing finished, published work	Appearing as "author of (hook)" in public	Recognisonise import on reputation and/or business (e.g., direct esculess)	
PAIN POINTS	- Finding right topis			2 8	Desays in schedule Lack of legual into index Text committed/ revised	Lack susport, conditioning, concling from LN Cost, pricing structures	 Lack of reader feedback 	
Quores				9 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	You see your name on the spine the Let thee and you think, whoopeel (QC, ALS). It comes out and It's out of it.	If I make suppose suggestions assurt ways in which it could be marketed, I expect? I might be listened to, but not necessarily to	E'd he very interested to know the numbers of (my work) as	
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Toller.	CONTENT adjustition Identifies AUTHOR (via lists, recommendation, peaching, directories, antine)	EDITOR registates contract (Hindred) with AUTHOR for existing works	CONTENT acquisition or EDITOR has regular check- points with AUTHOR	EDITOR comments on text and interacts with ALTHOR as needed, revises with appropriate	MARKETING plans compaigns and synchs with AUTHOR activities (e.g., speaking)	CONTENT acquisition organisa leanch party for new works, and welsinars, events	EDITOR organise, hold author moetings and working meeting around a title	CONTEXT acquisition commissions a supplement or update online
PONTS	CONTENT acquisition approaches author; time, interest, desire to write?	PUB DIR signs contracts after going through NPP roview	CONTIAT acquisition or EDITOR gives regular feedback, check progress, esp. for new authors	EDITOR queries author on cases and situtions (after table of cases is created)	CONTENT angulation choose with progress, liming, marketing, if needed	CONTENT acquisition coaches and helps AUTHOR to promote	EN (various people) contect AUTHORS for legal, feedback and advice, as needed	CONTENT sequisition or EDETOR approach suffer with revision contract and terms
	CONTENT acquisition discuss commercial aspects w. AUTHOR, is there a market? Who is the audience?			EDITOR creates front and back marker, checks with AUTHOR on preference	EDITOR communicates dates and progress to AUTHOR	CONTENT acquisition gets built orders for firm		NOS reviews proposal for revalens
	S: Regarded a leading publisher; Brand recognition	S: Well-dofined contract templates	S: Editerial and content sou process well-defined; Niced publishing model w/ Internal experts	5: Internal aditorial expertise across the board	S: Quality of finished product	5: Premotion done well; Author parties; Brand traditions	S: Existing activities, events	5: Integre professionalism and expertise
w	W: Lack of monograph opps: Don't define audience well	W: Look of expectation setting early on	W: Unclear policies about what resources we can provide authors	Vi: Perception of Index creation process	W: Delays are conspicious: Perception we are out-of-date	Wt Cae't do everything at same level—set expectations; Brand confusion calling tack of Joined up marketing	W: Lack of Internal coordination across authors	W: Strict publishing schedules
O T	O: Innovate print formats; Manage author expectations; Keep authors in loop	O: Better value prog. to attect authors; fiew author refutionships; Synergies auross wider business	Or Provide authors more resources; Better content assessment processes; Better author monagament.	Or Responding quickly to change; involve authors in Index	0: Communicate precess better, keep authors in loop; Synch with colline pubs	O: Help authors self promote; Cross promotion; Help authors Increase ED from writing	O: Increase and link author profiles: CRW for authors; Extend author party to "confoliator party"	O: E-books with septiates
	7: Competitors have mere moreograph opps:	T: Standard contract no agreeable for some	T: Action time management bases, struggle to write and meet deadlines	T: Lagai lasscape changes; Competitor beats us to market	T: PLC differentiation	T: Market/laracepe can shift since NPP process	T: Branking confusion from editors, content acq	T: Inconsistency

2a. Objectives

How does UX support the business goals?

- Increase revenue
- Decrease costs
- Strengthen brand image
- Improve customer loyalty
- Reach new customers
- Maximize visitor conversion
- Raise average order value
- Broaden market share
- Increase social responsibility
- Increase usage
- Save user's time
- Reduce chance of errors

Examples

From Gerry McGovern (http://www.customercarewords.com/strategy-and-online.html):

- Reduce phone and face-to-face support costs by 15% by increasing customers' ability to complete their support tasks using online channels.
- Increase the conversion ratio from 30:1 to 28:1 by improving the ability of airline customers to see the costs of flights on days close to their preferred dates.
- Reduce repetitive, simple questions to doctors by 50% by allowing citizens to answer these questions themselves online.
- Increase the number of sales leads by 25% by asking the customer for as little personal information as possible when they seek to contact or otherwise engage with us.
- Make the purchasing process as convenient as possible for the customer by asking them for as little personal information as possible and asking for that information at the last possible point in the purchase process.
- Improve customer satisfaction and loyalty 5% by being the most transparent organization in the industry by using online channels, particularly social media ones.
- Increase your customer base by 10% every year by being the simplest to use and most convenient online service.
- Reduce time to market by six months for new products by actively engaging customers in the product development process.
- Reduce checkout times by allowing customers to scan products with their mobile phones as they do their shopping.
- Allow customers to save more money by using their mobile phone to scan an item and find out if there are any special coupons or discounts available to them.
- Allow customers to use their mobile phones as a shopping list that checks off as they scan and then reminds them if they have forgotten something.
- Allow customers to use their mobile phones as a budget planner, informing them how much they have spent so far this month as they shop.
- Allow customers to use their mobile phone to plan a healthy diet by reminding them to purchase a range of health products.
- Combine offline stores with the online shop to allow for faster and more convenient delivery of purchases.

2a. Objectives

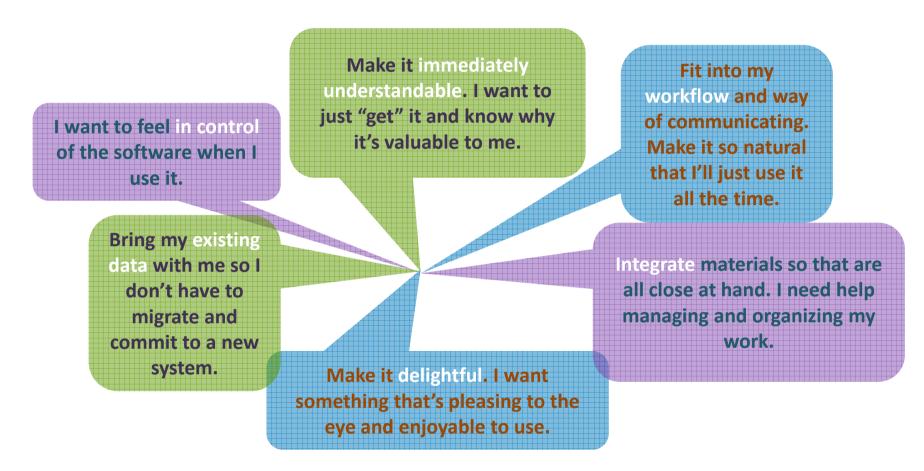
Example:

- Deliver a high quality user experience that:
 - Improves customer satisfaction by 25%
 - Increases active usage by a factor of 2
 - Drives preference: 90% of users select new solution
- Maintain UI consistency across products and services
 - 80% of designs pass a "consistency check"
- Optimize and modernize our design processes
 - Shorten design time by 25%

Don't forget: Tie the objectives to the measurements.

2b. Desired UX -- Example

Key Principles – Familiar, Natural, Delightful



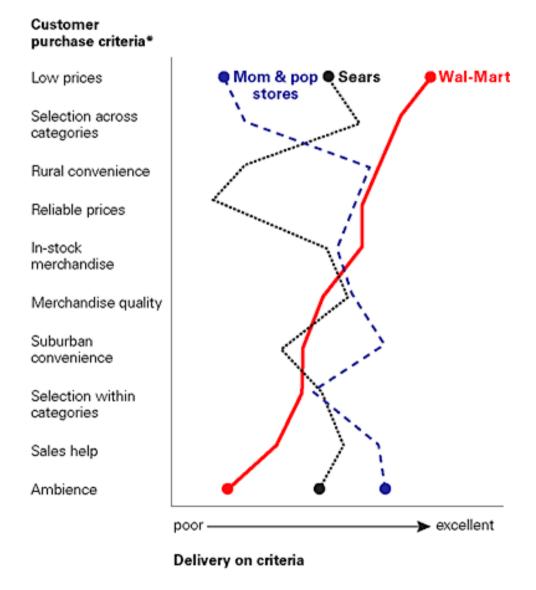
Tie the desired UX to the measurements.

3. Focus Areas – Types

1. Users	Segments Needs, behaviors Workflows Skill levels: average vs extreme users
2. Geography	Countries Languages Cultures
3. Products	Websites, Software Devices, Hardware Types of UI
4. Areas of UX	IA IxD Visual Design Content
5. ASPECTS OF USABILITY	Effectiveness, efficiency, control, learnability, memorability <i>Also</i> : Interruptibility, shareability, glanceability, findability,

Picking focus areas is about making decisions on trade-offs in advance.

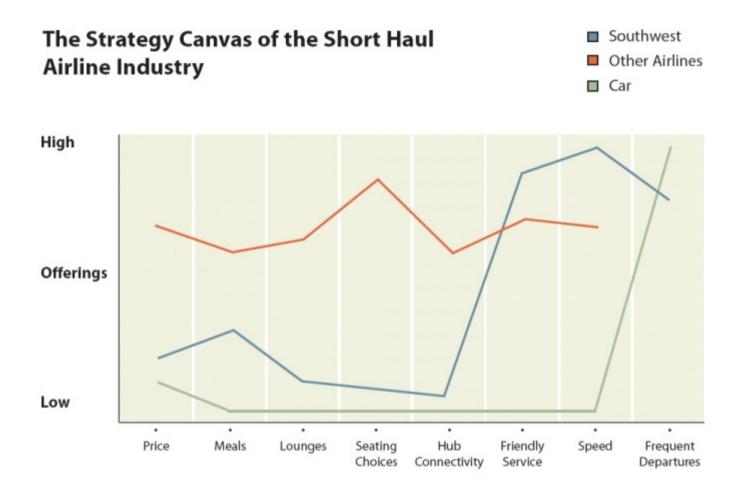
Strategy Canvas



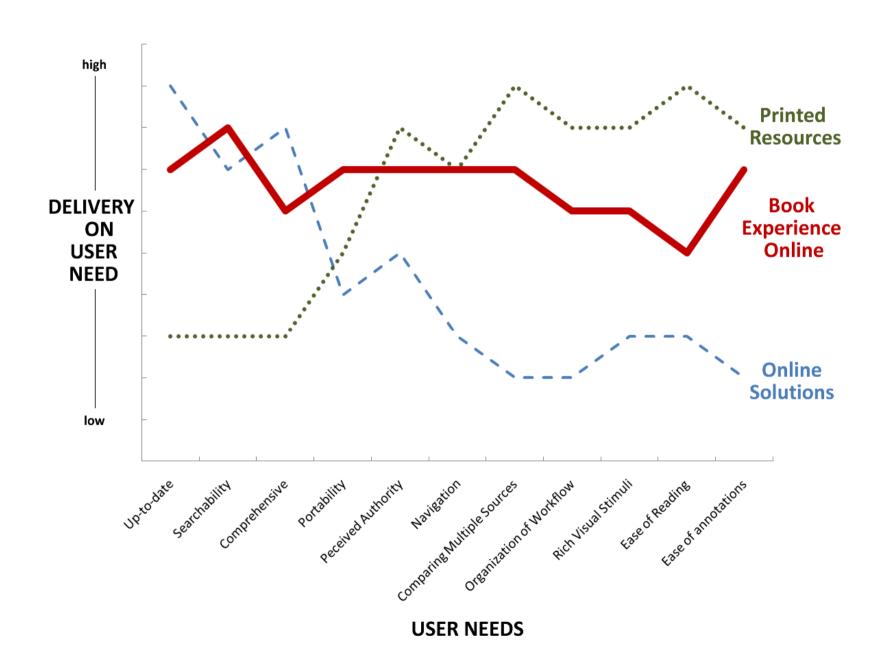
^{*}in approximate order of importance to Wal-Mart's target customer group

Source: Jan Rivkin, Harvard Business School

Strategy Canvas



Example UX Strategy Canvas



4. Approach

What approaches, processes and/or principles will overcome the challenges to reach the desired outcome?

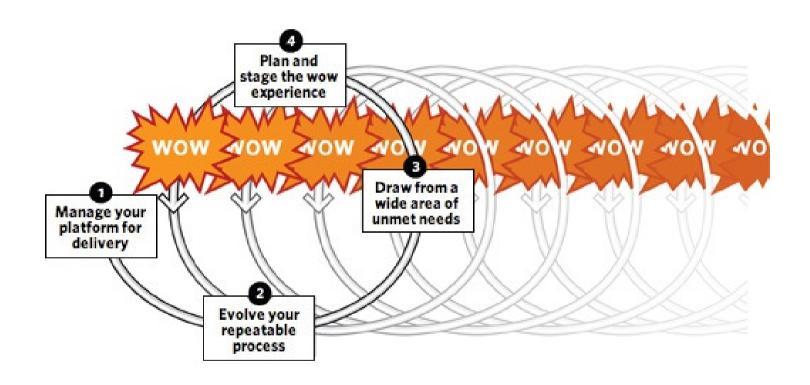
Examples:

- Mobile First
- Persuasive design
- Skeuomorphism
- The Long Wow
- ..

- Lean Startup
- "3-in-a-box" Development
- Paired Design
- ..

4. Approach

The Long Wow



4 Example Design Approach (Migration Strategy)

	Speed Bump"	(Guard Rail"	Safety Net"		
PURPOSE	Interrupt users and grab their attention to communicate PI changes	Remind users of PI behavioral changes, as well as support them in their tasks on the site	Catch users who miss and and and support deeper understanding of PI		
WHEN	Upfront, immediate; At the beginning of key flows for both buyers and sellers.	Constantly visible throughout flows; Associated with payment information and options	Constant, but in background; This communication call also appear contextually at relevant moments		
HOW	Loud and clear, full page messages (or a majority of the page width), interstitials	Consistent, repetitive and embedded near call to action, in particular near payment information and interaction	Varies; examples include "Learn more" hubs and tips in M2M		
WHAT	Announcement of a change, instructions as to actions to take, and the benefits of PI	Direct instructions to the user and confirmation of correct actions, as well as some benefits	Detailed descriptions of the PI process or specific aspects of it; Can also include contextual instructions and FAQs		

5. Activities

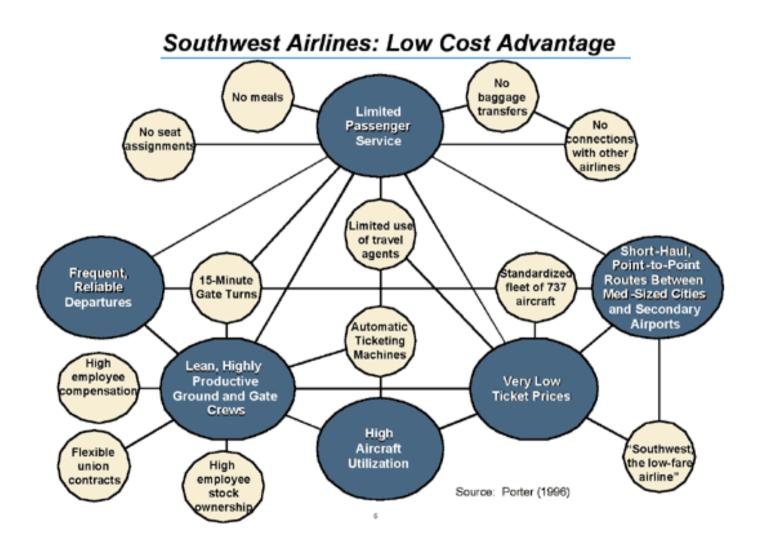
Examples

- Competitor benchmarking
- User Research
- Card sorting
- Personas
- Design exploration
- Wireframing
- Prototyping

- Beta testing
- RITE testing
- Kano analysis
- Build > Measure > Learn
- Surveys
- Web Analytics

5. Activities

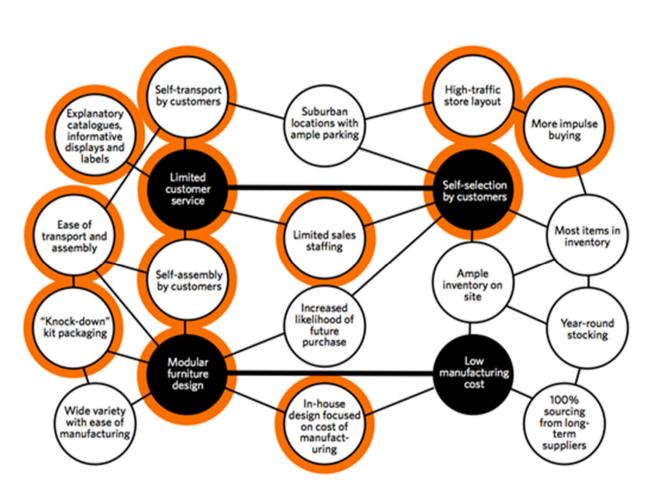
Activity Map



MICHAEL PORTER "What Is Strategy" Harvard Business Review (1996)

5. Activities

IKEA Activity Map: UX Overlay



6. Measurements

How do you know the UX design was successful?

Qualitative

- User Research (tests, interviews, etc.)
- Inspection (heuristic review, checklist review, etc.)

Quantitative

- Surveys (questionnaire, SUMI, SUS, etc.)
- Metrics (conversion, funnels, analytics, etc.)

Benchmarking - Before-and-after comparisons

Triangulation – Combine measurement types

Tie measurements to the objectives and desired UX.

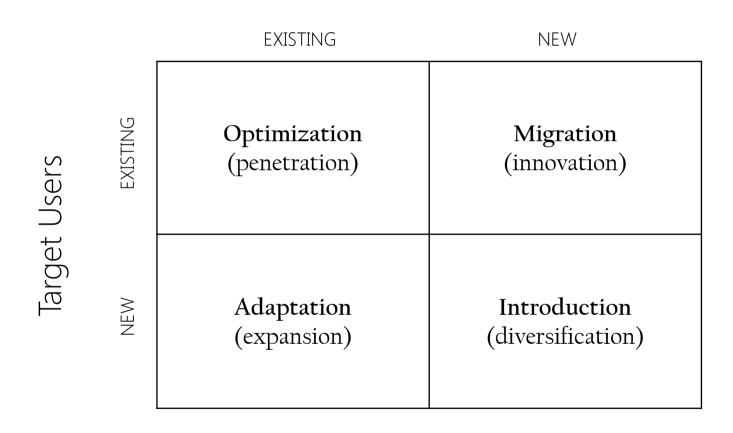
Exercise 2 – Building UX Strategy

In groups

- 1. Refer to the previous scenario and analysis of the business strategy
- 2. On the worksheet, record key points for each element of the UX strategy.
 - Write down a few keywords or phrase for each that reflect a viable approach.
- 3. Skip elements that are unknown or make assumptions as needed.

Types of UX Strategy

User Experience



Communicating Strategy







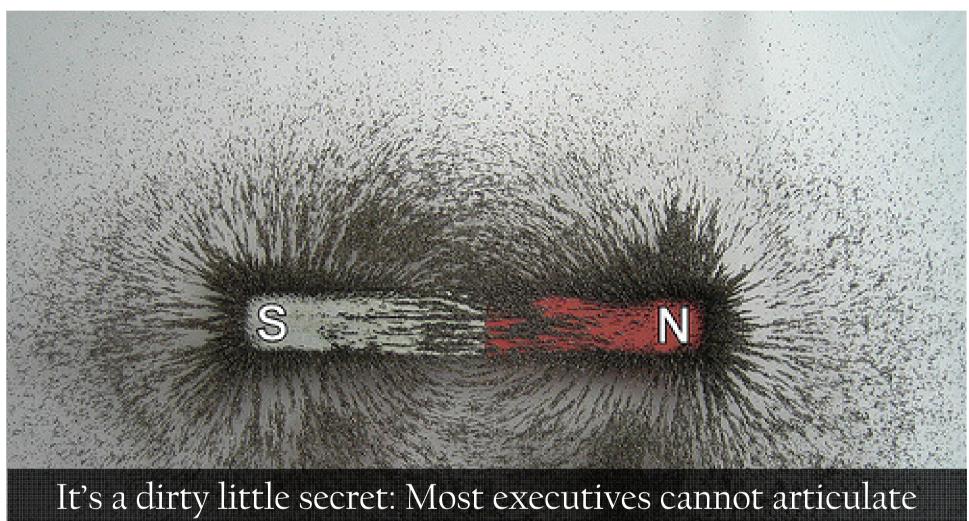












It's a dirty little secret: Most executives cannot articulate the **objective**, **scope**, **and advantage** of their business in a simple statement. If they can't, neither can anyone else.

Communicating Strategy

- 1. Documents
- 2. Diagrams
- 3. Strategic Conversations

Multiple forms and repetition are essential

1. Document Strategy

Start with a Strategy Statement in three sentences:

- 1. Change: What's motivating you to change?
- 2. Gap: What's missing?
- 3. Resolution: What's the strategic solution? How will you overcome the opposition.

Strategy Statement -- Business

Business Example

Although ChemCo is well positioned in custom silicon, lower market prices from direct channels for non-custom products threaten our market share.

ChemCo's current capabilities do not allow for direct sales and competing at lower prices.

To prevent disruption from smaller players, ChemCo will launch an online service under a new brand name, leveraging our deep technical knowledge to differentiate ourselves in a rapidly changing field.

Strategy Statement

UX Design Example

After completing the new technical platform, the next challenge for The Opal Project is creating differentiated value for existing customers through a new user experience.

The current user interface for the core product, as well as customer support, however, both need significant overhauling to meet the expectations of the current consumer market.

To deliver a world-class user experience and to integrate services in a way that drives customer retention, the UX design team will create a program of incremental improvements to the product and service for ongoing customer delight.

Exercise 3 – Strategy Statement

In groups

- 1. Refer to the previous scenarios
- 2. In three sentences, form a mission statement following the scheme:
 - 1. Change
 - 2. Gap
 - 3. Resolution

UX Strategy Document

Document your strategy:

- Strategy statement
- Elements of Strategy
- High-level Roadmap
- Team members, roles and responsibilities

2. Diagram

UX Strategy Canvas

UX Strategy Canvas FOR: **Business Objectives** Value Propositions User Goals What does the business want to accomplish? How will we measure progress towards the goals? What is the breadth of the solution space? What is not in scope? What benfits does the solution offer users? How does the solution help the user? What are the primary user segments? What types of people will use the solution? What are the jobs users are trying to get done? What are users ultimately trying to accomplish? Competitors Pain Points What problems do users have getting their tasks done? What issues stand in their way? Who are the main competitors? What types of experiences does the design compete with? Revenue Channels Differentiators Usage Barriers How will the business make money? What channels will money come from? What distinguishes this solution from others? How will the solution create unique value for customers? What might keep users from adopting the new solution? What will make using a new or different product difficult?

UX Strategy Canvas

FOR:

C	hal	ler	Q	les
C	hal	ler	Q	le:

What are the opposing forces to overcome? What opportunties exist for UX design to provide value?

Goals

How will design meet the business objectives? What problems will the designs solve?

Desired UX

What is the intended user experience? What do we want users to say about the solution?

Focus Areas

What areas of the user experience bring the most value? What are the overarching principles that guide design?

Approach

What design techniques will be employed? How will design operate within the initiative?

Activities

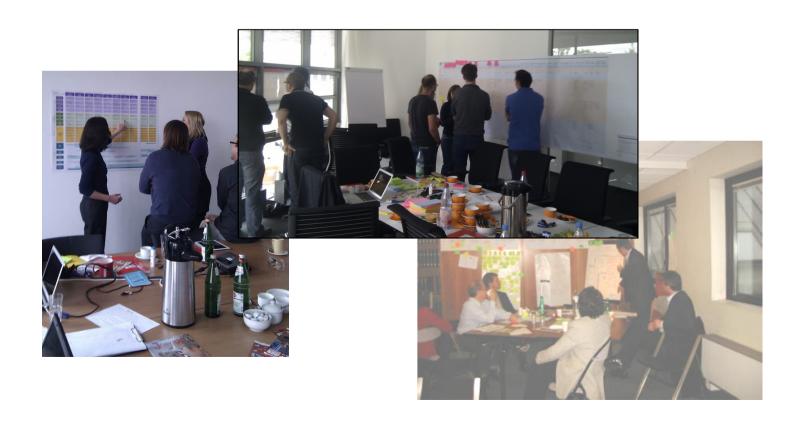
How will the design team organize for success? What types of tasks will be carried out?

Measurements

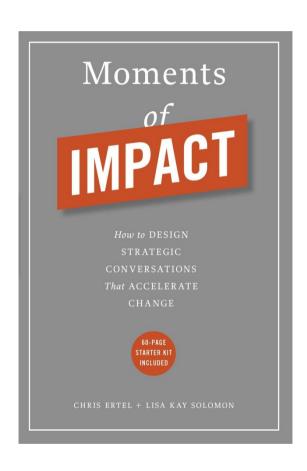
What types of measurements will be employed? What metrics will be used to gauge design success?

3. Strategic Conversations

- Mix of stakeholders
- Planned exercises and activities
- Discussions and decisions



3. Strategic Converations



- Define the purpose
- Engage multiple perspectives
- Frame the issues & choices
- Set the phyical environment
- Make it an experience

Planning

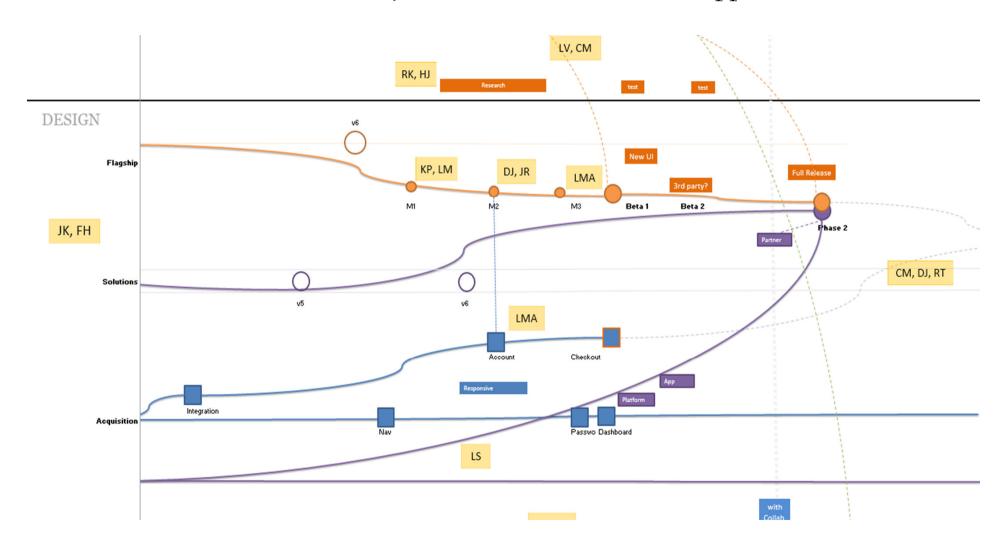
Prioritization

EASY Do these third Do these first Effort Do these last Do these second HARD Low HIGH Impact



River Diagram

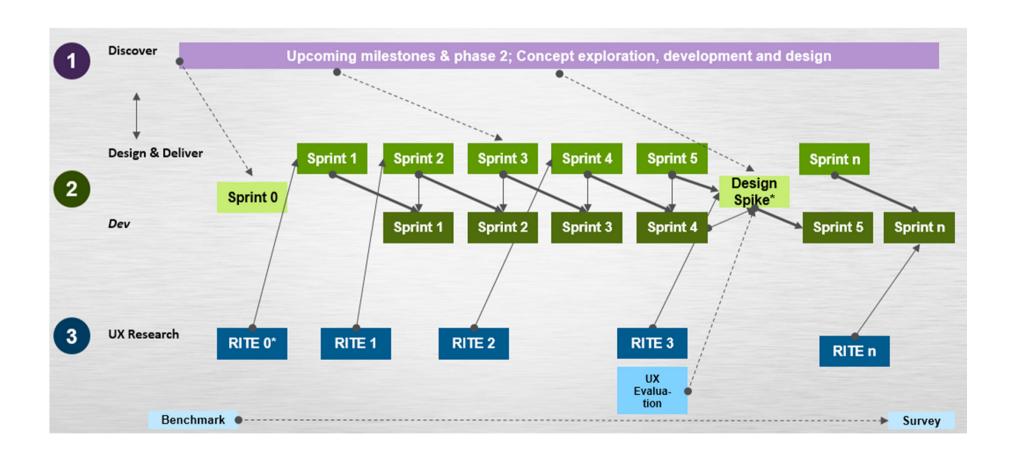
What is sequence of events that has to happen?



Not a project plan (yet)

Process

Swimlanes: How do the multiple dimensions of activity come together



Not a project plan (yet)

Project Canvas

Project	Motivation					PROJECT CANVAS
Participants List the team members, stakeholders and third parties involved in the project. Indicate their names, titles and role on the project. You can also show dependencies. Goals Indicate the primary objectives of the project, including success metrics. Distinguish between program goals and project goals in separate lists, if necessary		Users List the users of the product or service as target groups or segments. Also indicate more specific information about users, such as persona names, if available. User Benefits Show the overall value proposition and benefits users will get after the project is sucessfully completed.		Activities List the concrete tasks and actions treach the project goals.	he team will take to	Deliverables Indicate the outcomes and documents that will be shown to stakeholders or to customers. This does not include working documents, project plans and similar.
Risks Identify possible future events that could have a negative on the project.	Milestones List the key dates and events that frame the project.	e overall timeline of the	Constraints Identify the limits and conditi affect the deliverables, activit	onal requirements that directly ies or project as a whole.	Scope Indicate he bread consideration for	Ith of the product or service to be included for this project, including what is out of scope.

DANKE SCHÖN

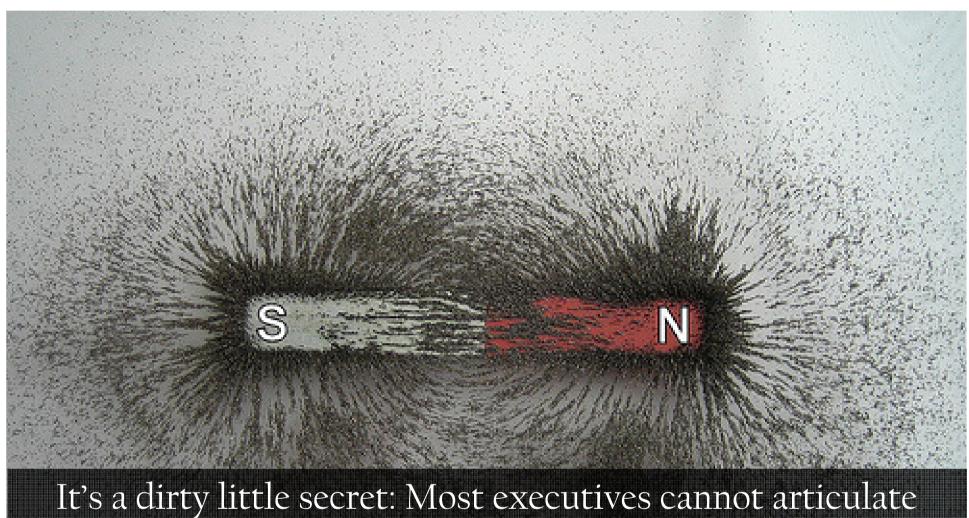
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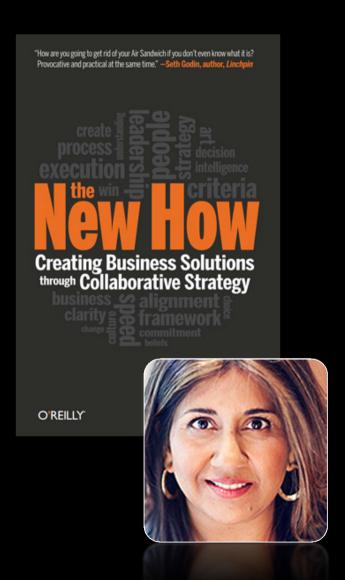
Why do we need UX strategy?





It's a dirty little secret: Most executives cannot articulate the objective, scope, and advantage of their business in a simple statement. If they can't, neither can anyone else.

"An Air Sandwich is a strategy that has a clear vision and future direction on the top layer, day-to-day action on the bottom, and virtually nothing in the middle-no meaty key decisions that connect the two layers."



UX Strategy Now

- 1. Fundamental shift in business
- 2. Companies not doing strategy anyway
- 3. You need to fight the "air sandwich"