

UX Strategy and Strategic UX

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User Experience (UX) and its close relative Customer Experience (CX) are finally hot. After years as a wallflower, begging to be noticed, UX has now been invited to the dance. This new interest in UX reflects a more mature corporate understanding of its strategic importance and the value it brings to the bottom line.

Despite its new found acceptance, there is still a lot of confusion about what UX really is and how it can best create business value. In this article we'll take a look at user experience from a strategic perspective and explore its enormous potential to support and advance business strategy.



WHAT'S DRIVING INTEREST IN UX?

Why has UX suddenly become so popular? The reason is that computers, tablets and smartphones are everywhere. Almost everyone is using them and they're connected pretty much all the time. Younger people don't distinguish between their digital life and everything else. For those born into the information era, digital interaction and everyday life blend into one seamless stream.

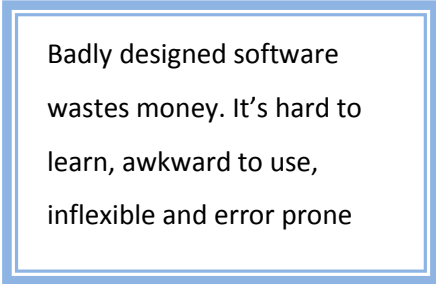
There's power in numbers. When the market speaks, business listens. As interactive technology has become part of daily life, people demand that it deliver great experiences. Just as with other experiences like restaurants, movies and fashion, pleasing the consumer has become essential to profit.

Another factor that is driving interest in UX is the advent of "big data." The ability of ubiquitous sensors to collect massive amounts of data and deliver them to companies over the Internet is making a flood of structured and unstructured data available. Processing this massive data requires technical sophistication. Getting insights from it requires UX sophistication.

USER EXPERIENCE MATTERS FOR BUSINESS USERS TOO

For a long time, business failed to realize the importance of user experience. The rise of Apple Computer and the relentless pursuit of its founder Steve Jobs to create the Apple brand through high quality user experience design has been eye opening to business leaders. Where, in the past, they dismissed UX as a nice to have but hardly essential, they now increasingly recognize that it's basic to the bottom line.

Business users have been a bit slower than consumers to demand great user experiences. Business software has traditionally been poorly designed from a usability perspective. No one worried a great deal about this (except for the users) since workers were being paid to use the software and were expected to learn it no matter how awkward the user interface might be. The problem, of course, is that badly designed software wastes money. It's hard to learn, awkward to use, inflexible and error prone. Fortunately, business has now come to realize that crafting high quality user experiences for its workforce is smart.



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Business workers are also consumers. When they go home at night, they surf the web, play games, and shop on-line. As the workforce became increasingly familiar with websites and smartphone apps, they began to ask why their corporate software was so ugly and so much harder to use. This led to a rise in user experience sensibilities in the workplace and placed pressure on IT to understand user experience and integrate it into its processes. This has not been completely successful but the awareness is there and progress is being made.

It turns out that good user experiences are as important in business as they are to consumers. For the past 30 or so years, business has been focused on cost reduction. Business process has been streamlined and staff reduced to a point where there are fewer opportunities to find efficiencies. Improving the user experience of business software pays off handsomely.

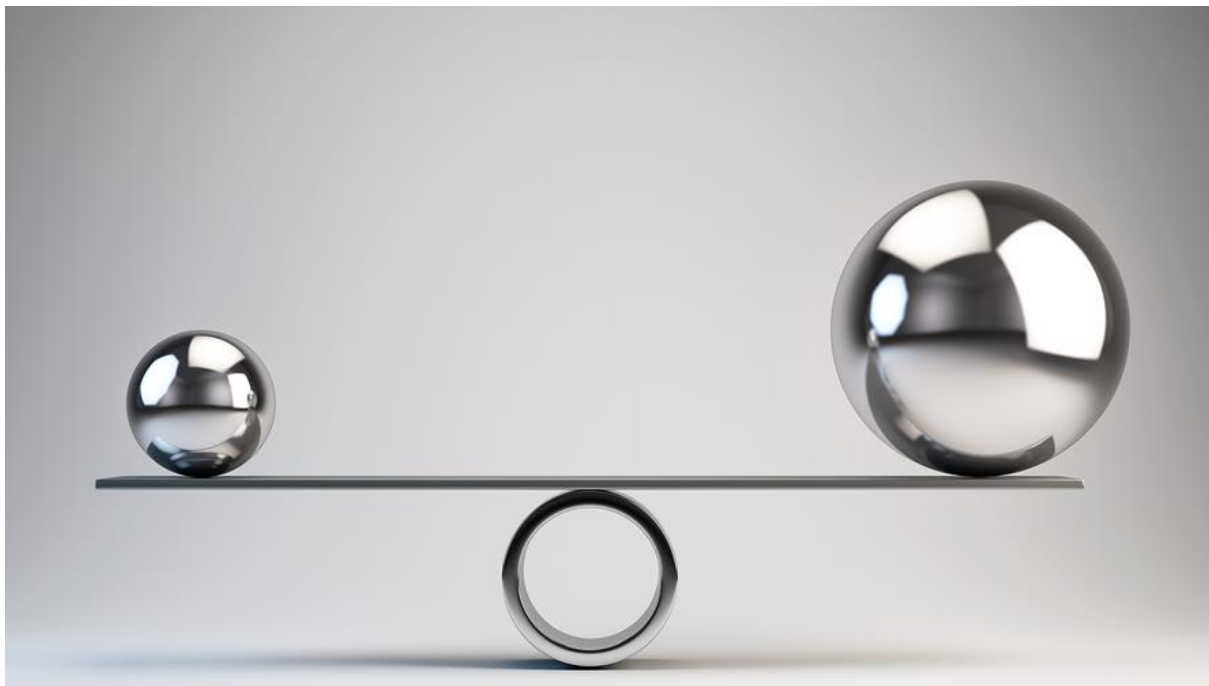
Following best practices in UX design saves a lot of money. Poorly designed business software not only impacts customers but also wastes money. Today, there is hardly a business process that doesn't rely on technology. When competent UX designers and appropriate processes are part of software development, companies recognize a significant net gain. UX more than pays for itself. The cost savings

stem from several places: improved operational efficiency, more flexibility, a better fit between workflow and the software, reduction in errors and, of course, reduced training costs.

When UX practices, known as user-centered design, are followed, development is also streamlined. The user-centered design process involves gaining a clear understanding of the audience and its needs; then building wireframes and prototypes to model the proposed product. These mock-ups enable stakeholders to gain a clear understanding of what is being developed before a lot of expensive development takes place. Traditionally, stakeholders were asked to review requirements documents which were complex, boring and extremely difficult to understand. Requirements were written as text and it was left to the stakeholder's imagination to figure out how the product might look and operate. Not surprisingly, misunderstandings, disconnects and communication gaps between the technical and business side were frequent and led to expensive rework.

When user-centered design is followed, stakeholders have access to screen mockups and visual prototypes that are much easier to understand and review. This is an example of "a picture being worth a thousand words." With wireframes and prototypes, potential problems become easier to spot and can be corrected before expensive and inflexible development work is undertaken.

In both the business to consumer and business to business spheres, the case for integrating user experience into product development is overwhelming. The payoff is enormous and everyone benefits.



EXPERIENCE DESIGN IS MORE THAN SOFTWARE

While user experience is often thought of in conjunction with software, experience design and its benefits are not restricted to interactive products. Experience design can be applied to virtually any human activity. Walk into any Apple retail store and you'll see examples of customer experience design in its physical space and furniture, the sales process, packaging, customer service, instructions, invoicing and billing. Customer experience is the natural extension of user experience and it's becoming increasingly important to business strategy.

Customer experience (CX) designers craft experiences for every touchpoint where a customer comes into contact with a business, across the entire term of the relationship. This is sometimes called *the customer journey*.

The value of UX and CX is not only about efficiency and cost reduction. We are living in a time of great change and this creates an enormous need within business for innovation. Strategic user and customer experience is a foundation of innovation. The reason is that experience design begins with gaining a clear understanding of your audience, their level of knowledge, their needs and the tasks they want to accomplish. This knowledge is also basic to business innovation.

Not only does experience design benefit users and customers but it improves the quality of decision-making and collaboration throughout the organization.

In an article in the Harvard Business Review, researchers from McKinsey found:

"...organizations able to skillfully manage the entire [customer] experience reap enormous rewards: enhanced customer satisfaction, reduced churn, increased revenue, and greater employee satisfaction. They also discover more-effective ways to collaborate across functions and levels, a process that delivers gains throughout the company"
(Rawson, Duncan, & Jones, 2013).

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UX STRATEGY AND. STRATEGIC UX

As interest in experience design has grown, people have begun writing about "UX Strategy" and debating what it means. Coming to agreement on this is important so organizations can develop a clear understanding of what experience design is and how it fits their business. The starting point is to create clear definitions that can be operationalized.

My view is that there are two distinct concepts which have somewhat different meanings: UX Strategy and Strategic UX. These two ideas are quite different but seem to get mixed together when people write about them. As I use the terms, UX Strategy refers to the way that an organization incorporates UX into its business. Strategic UX refers to the way an organization uses experience design as to define and drive

its business strategy. Both are complementary but by making the distinction we can get more clarity about how to position UX for maximum business benefit. And, of course, when I use the term UX we can substitute CX or experience design.

UX STRATEGY.

UX Strategy is the way in which an organization positions user experience for effectiveness and growth.

Paul Bryan has described this as an organization “defining a plan of action...to produce a game plan for their UX, CX, product or service design efforts” (Gabriel-Petit, 2014). In this view, UX strategy is the roadmap that defines how an organization will conduct and manage UX design.

Any organization that wants to take experience design seriously needs a UX strategy.

Clearly, any organization that wants to take experience design seriously needs a UX strategy. Without such a strategy the organization will struggle to create consistency in the way that experience design is managed and integrated into business activities.

UX STRATEGY QUESTIONS

There are many interesting issues around UX Strategy that each organization needs to consider.

Examples of these questions include:

1. What are the roles and responsibilities of the experience designers at various levels? To whom do they report?
2. How do experience designers work with other members of the team and with business stakeholders? What is their authority? At what points does the experience designer take a lead role? For what kinds of decisions, is the experience designer the decider?
3. What are the processes by which experience design will be conducted? How does experience design integrate with other development activities?
4. What design standards has the company agreed to? How are these standards used to create consistent experiences across products and touchpoints?
5. How will the company integrate experience design into its brand and how will it maintain consistency across products and product lines?
6. What experience design processes has the company established. Are there processes in place for user research, persona development, prototyping, and testing?
7. What does the development process look like – for software and for other touchpoints (such as collateral, marketing, sales and customer service)? How does experience design fit into the process? If there is an agile process, how will experience design be integrated into it? How does the experience designer work with the technical lead and with the product owner?

8. What are the metrics through which experience design will be evaluated?



STRATEGIC UX

UX Strategy as I've defined it here is largely about organizational implementation and roadmaps. A second aspect to experience design is *Strategic UX*. Strategic UX is how the organization connects experience design to its organizational strategy and how UX can help drive the organization's strategic goals.

For an example of Strategic UX, imagine that an organization has decided that a good way to grow would be to enter a new market where there is little brand recognition and their products are not well-known. This is actually a common strategy as organizations seek to expand their markets globally.

An example of this is McDonalds, a fast food chain whose flagship beefburger product, the "Big Mac," needed significant rethinking when the company decided to enter India – a country where most people do not eat beef (Kannan, 2014).

The organization entering a new market is not likely to have well-developed instincts about its new customers and, to succeed, it may need to make changes to the way it markets, sells and services its products, as well as to the products itself. The kinds of strategic UX questions it might ask are questions like:

- Who are our target customers? What are their priorities and what do they care about?
- How would they use the company's products and how good is the fit?

- Are the sales and service processes currently in place appropriate for the new market? How would we need to modify them to fit the target culture? Are there potential cultural disconnects or land mines that the company should be aware of?

These are examples of the kinds of questions that experience designers can help answer and which will help the organization achieve its strategic goals.



EXPERIENCE DESIGN CONTRIBUTES TO BUSINESS AGILITY

Strategic experience design can be a powerful tool both in the construction of an organization's strategic vision and in execution of its strategic plan. To understand why, think back to the McKinsey study I cited earlier. The researchers found that experience design led organizations to *"discover more-effective ways to collaborate across functions and levels, a process that delivers gains throughout the company"* (Rawson, Duncan, & Jones, 2013). This is a compelling message. It says that when experience design becomes part of the company's culture, it transforms the organization at all levels. Most UX designers would understand this but it's less intuitive to others in the business. There is a learning and maturation process that needs to take place before an organization can gain maximum benefit from experience design.

Twenty-first century business requires a different management approach than traditional 20th century business. This is not to suggest that the underlying fundamentals have changed but that the current environment places different demands on management.

Writing in Forbes, Josh Bersin of Deloitte says that:

"Today's Mantra: Customer Centric or Die....Our new research has shown that the high-performing organizations of today actually operate and manage themselves in a new way. We call it "The Agile

Model of Management” – and while many of the principles may seem familiar to you, they are radically changing the way businesses work....In order to succeed in today’s ‘borderless’ business environment your organization must be insanely customer focused. And that doesn’t just mean listening to customers, it means iterating and improving products and services continuously” (Bersin, 2012).

Business agility is essential to success in the 21st Century. By its nature, business agility is built on customer centricity. Only through a profound understanding of its customers and rapid iterations on what it learns from them, can a company make the adjustments it needs to thrive in a time of complexity and rapid change.

When we lift our eyes from the weeds and look up, look out and look around, we see a far more extensive and value laden role for experience design than a tactical approach would suggest. As experience designers, we are uniquely positioned to help the organization realize the benefits of agile management by becoming more customer-centric and responsive. That value we bring is the core justification for Strategic UX.

HOW DO COMPANIES BECOME EXPERIENCE-CENTRIC?

Is there actually UX Strategy? Some people would argue there is not. Jeff Gothelf published a blog post titled “There is no such thing as UX strategy” in which he argued that UX strategy is not a distinct strategy but should be understood as an integral part of the broader product strategy. He says that *“If the organization is not mature enough in its design thinking (lower case intentional) to invest the time and money required to bring UX design in as part of its holistic strategy, no amount of internal lobbying, seats at tables, new titles, job descriptions nor conferences will change that”* (Gothelf, 2014). His point is well-taken. The key question is how to bring an organization to the necessary level of design maturity so that it considers UX design as a part of its strategy. That’s an organizational change question.

As many CEOs have found to their distress, simply telling the company what they want does not lead to organizational change.

For an organization to reach the appropriate level of design maturity to incorporate UX design into its strategy, it first needs to come to awareness of UX and its value to the organization. This needs to begin with senior management who clearly and frequently need to state its importance to the organization. It’s not enough to say it once. The message needs to be delivered frequently, consistently and in different contexts until it becomes generally understood and accepted.

As many CEOs have found to their distress, simply telling the company what they want does not lead to organizational change. For the desired change to occur, the workforce needs experience with UX so each individual understands its value and how it connects to their specific responsibilities. As they gain experience with UX, and understand that their performance will be evaluated on their ability to factor it in when they set priorities and make decisions, the change will occur and ultimately design thinking will become a core part of the corporate culture.

An example of this was nicely stated in a recent Fast Company interview with former Apple designer Mark Kawano. He stated that the reason Apple has been so successful at creating great design and user experiences is not that the company has the best designers in the world. Rather, it is the extent to which design thinking is embedded in the corporate culture. He said *“it's actually the engineering culture, and the way the organization is structured to appreciate and support design. Everybody there is thinking about UX and design, not just the designers. And that's what makes everything about the product so much better . . . much more than any individual designer or design team”* (Fast Company, 2014)

This is a good definition of a UX culture. How many other companies have it? Probably a fair number among new organizations but many fewer in traditional companies. None of this can occur without commitment at the executive level. Many CEO's want their companies to become the “Apple Computer” of their industry. But it takes more than executive will to change an organization's culture. The shift must occur throughout the entire organization.

Robert Fabricant has argued that for this shift to occur companies need to develop a *“bottom-up, risk-taking culture that is central to succeeding in the 21st century market....The big challenge now is to drive these same skills into the more traditional, top-down management culture at big companies”* (Fabricant, 2013).

To become experience-centric, organizations need to understand how to implement iterative design, how to operate in an environment of high transparency, how to listen to their customers and learn from what they are hearing. Experience-centric organizations need to forge a new relationship among business, technology and designers that enables interdisciplinary teams to work effectively together to craft products and experiences that speak to the market.

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To help companies rethink their culture and management practices we need to enable them to understand UX in a nuanced way and support the necessary organizational change.

Steve Denning points out that *“Changing an organization's culture is one of the most difficult leadership challenges. That's because an organization's culture comprises an interlocking set of goals, roles, processes, values, communications practices, attitudes and assumptions. The elements fit together as an mutually reinforcing system and combine to prevent any attempt to change it”* (Denning, 2011)

Yet, to gain real value from strategic UX, the culture must change. UX must be integrated at all levels throughout the organization.

PEOPLE WILL FIGHT BACK

In attempting to change organizational culture, there will inevitably be opposition from interests that want to maintain the status quo. That's the nature of organizational change and to make it work

requires a sustained effort. According to the Center for Creative Leadership, 75% of change efforts fail (The Center for Creative Leadership).

Some of the resistance stems from individuals who don't see value in experience design and find it competitive with their own agendas.

One of the major problems that needs to be resolved is the perceived lack of fit between agile development paradigms and UX. This topic has been extensively discussed in articles and blog posts but still has not been fully resolved. Agile development paradigms offer a lot of advantages compared to waterfall approaches and make sense in 21st century companies. However, the agile process was not conceptualized by experience designers and it's biased toward code development. As more and more organizations move to agile development, they may find resistance to UX taking a leadership position.

UX AND AGILE DEVELOPMENT

A core principle of Agile development is to avoid BDUF – “big design up front.” That's good. Anyone who has attempted to read and comprehend a five foot shelf of requirements understands that it's an impossible task. No one can possibly understand all the implications or find the problems with so complex a set of requirements.

Agile attempts to deal with this problem by designing iteratively. Through the process of *iterative refinement* a product is produced in successive cycles. At each cycle – called a *sprint* -- new capabilities are added based on feedback from the previous cycle and a review of priorities. There are many different techniques for managing the agile process and variations on the approach but the basic idea is sound and research suggests that well-run agile projects are more productive than traditional waterfall approaches.

When there is no design up front, people come to the table with different mental models about what's going on. No design up front is a recipe for churn.

Where I think some agile practitioners go wrong, is they interpret the avoidance of BDUF as meaning that there should be *no* design up front. When there is no design up front, people come to the table with different mental models about what's going on. They fail to realize that they are not aligned around a common vision and don't recognize the problem because everyone is using the same words and telling the same stories without realizing that they all see things somewhat differently. As a result the team moves forward thinking they are all on the same page until they get fairly far down the road. Then the differences in assumptions surface to the detriment of the project. No design up front is a recipe for churn.

Many agile practitioners agree that agile works best when there is already a version of the product in existence. That shouldn't be surprising. When everyone can look at the same product it's a lot easier to discuss what needs to be rethought or changed. When a project is starting from scratch, a UX designer can produce a conceptual design using wireframes or simple prototypes. This provides the team with an initial design to react to. In agile terms, the product concept is iteration zero.

UX DESIGN PROMOTES ALIGNMENT

Getting to an initial design concept is an area where UX has enormous strategic power. The fundamental task of the experience designer is to listen to all stakeholder voices and synthesize them into a conceptual design which is then rendered as wireframes or some form of prototype. Once there is a mock-up for people to look at, it is much easier to bring the team and its stakeholders into alignment around a shared vision of the project outcomes.

This doesn't mean that the designer has to get the product exactly right the first time. The initial wireframes are the first iteration in the conceptual design and they can be refined based on feedback from the stakeholders and the team itself.

While UX can be a powerful tool for creating alignment it's not unusual to run into resistance from developers who feel that design up front is antithetical to agile principles. It's necessary to reassure developers that product conceptualization is not BDUF – not always an easy task as some practitioners of agile methodologies are almost religious in their fervor and rigid in their approach. It's also necessary to separate the conceptual design from the detailed design required for each sprint.

Conceptual design is strategic. Ideally it's tied to the business plan that was used to justify the project. In that plan are desired outcomes that can be tied to experience design. Perhaps the goal is to capture additional market share by leapfrogging the competition. An innovative conceptual design can show the company and the development team how this can be accomplished.

It's important to distinguish conceptual design from detailed design. Where conceptual design is strategic, detailed design is far more tactical. For each sprint, there are a set of capabilities that are arranged in priority order. The designer needs to lay out these detailed screens. Decisions about how to position controls, how they will operate, what prompts and content to display are needed by the developers and are defined in the detailed design.

As a project progresses, the team's thinking evolves. Over time, they come to understand the problem in a deeper and more sophisticated way. As the team's thinking evolves, the conceptual design should evolve as well. It should always be available to the team as a reference point to guide their activity. But the conceptual design should not be tied to sprints. The goal of a sprint is maximum productivity. The UX designer's role in a sprint is to provide the developers with the wireframes they need to complete the iteration. These designs need to be in place early enough so that the developers are not waiting and can produce product at full throttle.

This suggests that there should be two streams of UX design. One is an evolving conceptual model that serves as a framework for the team's understanding of the product and clarifies the goal. The other stream is the detailed design that supports the sprints.

Because agile development is iterative, some of the code developed may not be as tight as desired. To solve this problem, a technique called *refactoring* may be applied. According to the Agile Alliance, a non-profit organization that supports agile development, refactoring is defined as *"improving the internal structure of an existing program's source code, while preserving its external behavior."* Specifically

excluded from refactoring are “*observable aspects of software such as its interface*” (Agile Alliance, 2013).

This makes good sense. Changing the user interface as the product evolves would be problematic as a stable UI is essential to a good user experience. But it also creates a problem. If the product has not been designed, how would you know what the UI should look like in advance so you can maintain its stability? The product concept prototype should provide an extensible framework for the UI.



GETTING BEYOND TACTICAL UX

In organizations which lack a high level of UX maturity, there will be a strong tendency for UX activities to be seen as primarily tactical. UX ends up as tactical when the job of experience designers is seen as simply laying-out screens for a well-defined product. The underlying assumption that the product is well-defined and merely needs layout is almost always incorrect.

As we discussed earlier, in the real world, there is usually a lot of ambiguity about what will actually be produced and each stakeholder has a slightly different idea of what the product will be. To solve this problem, UX must lead. Through creating prototypes and wireframes, the UX designer provides the team and the stakeholders with the visual props they need to have a productive conversation.

Here is an extract from an actual job posting for an experience designer. You can see that the job is positioned as highly tactical (the only possibly strategic word is “conceptualize”) and the focus is heavily on implementation.

We are seeking an outstanding UX Designer who is expert at cross browser compatibility, responsive design, and web application development. The best candidates

will be able to manage a design from concept to final output in optimized HTML/CSS/JS and must know how to code by hand. The candidate must be able to design digital experiences that are seamlessly responsive for web, tablet and mobile devices. The candidate will be responsible for designing project specific UX solutions and developing simple, intuitive workflows.

Job Responsibilities:

- *Interact with the clients and stakeholders to gather requirements, conceptualize design and define user interactions.*
- *Create visual design templates and design prototypes.*
- *Designing and developing user interface solutions using established technologies and working closely with product management and product development.*
- *Testing and debugging web applications working closely with developers to roll out complete projects.*

This posting reflects the way a lot of companies position their UX designers. The designer is seen as someone whose role is to ensure a consistent positive experience across browsers and different delivery devices. This is all good stuff. But it does not suggest that the UX designer has any role or influence in product conceptualization, in designing other touchpoints related to the product or in creating a project that supports the organization's strategy. If this job description represents the company's total commitment to UX, they are not getting all the possible strategic value from their design investment.

Once the organization recognizes that UX is far deeper than simply laying out screens, it is on the path to strategic UX. The insight that design requires an understanding of business objectives and technical constraints, as well as a grasp of the product's audience: their needs, capabilities and the environment in which they will operate, is the basis on which strategic UX is built.

So the first step to achieving strategic UX is to get past the tactical positioning of the experience designer. Once experience design is seen as a strategic asset, the path to full strategic UX maturity becomes clearer and the worst roadblock to culture change is removed.

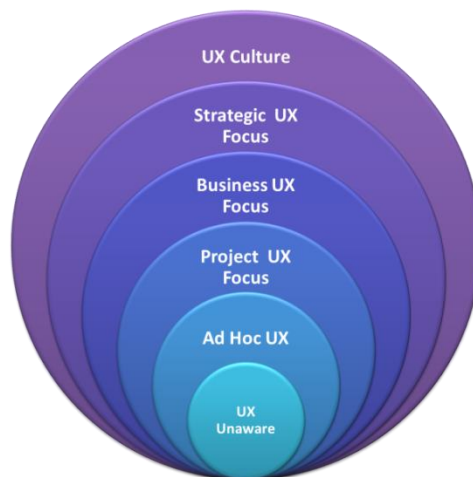


THE STRATEGIC USER EXPERIENCE MATURITY MODEL

Maturity models are frameworks that enable organizations to categorize the quality and effectiveness of their processes. Maturity models enable organizations to gauge the strengths and weaknesses of their processes and target areas for improvement. Maturity models also help businesses evaluate risks; generally the more mature the business process the lower the risk.

There are different ways to construct maturity models. Several have been published. While there are somewhat different approaches to UX maturity, they generally show an organization passing through multiple stages.

The model shown here lays out a hierarchy of six stages of UX maturity, the lowest level is the organization that is “UX unaware.” The highest level is the organization that has developed a design-centric culture.



As you can see from the diagram, each level contains the levels below it. The maturity model is additive. As the organization's grasp of UX increases, it becomes capable of making increased strategic use of UX without losing the capabilities it has already developed.

SIX LEVELS OF EXPERIENCE DESIGN MATURITY

LEVEL 1: UX UNAWARE

At Level 1, the lowest level, the organization is essentially unaware of UX and the value it can bring. At this level, product functionality is seen as most important. If user experience is considered at all, it's likely to be confused with visual design.

One UX Unaware CIO said to me "I'm designing and building all the plumbing. And all you're doing is putting up wallpaper."

Wallpaper, of course, is the last thing to be put up. When the development team had completed its work, I was to be invited to 'layer on the UX.' Of course, since the project was significantly behind schedule, it never happened.

UX unawareness comes with real risks. At one company I worked with, I strongly recommended that we build wireframes and prototypes of the proposed system so customers could review them. I was met with a blast of hostility from the project leader who informed me that they were using an object-oriented methodology that neither needed nor wanted UX until the end.

After the project was in development for a year, it became clear that the underlying architecture was inadequate to support the customers' workflow needs and the project was delayed by 12 months while the architecture was redesigned. If the organization had followed good UX practice, they would have shown the users wireframes and prototypes before embarking on the architecture. Users could have more clearly explained how they managed workflow and the developers could have designed the appropriate architecture to support it.

LEVEL 2: AD HOC DESIGN

At Level 2, ad hoc design, there is the beginning of UX awareness within the organization. At this level typically someone in management attends a conference and learns about UX or a staff member becomes aware of UX and attempts to gain organizational support by demonstrating its value to the organization.

At this early stage the staff member may attempt to introduce UX into a project or an outside consultant may be hired to bring in expertise. It's unlikely that either approach will be effective because the organization lacks the skills and experience to successfully integrate UX into its existing process.

A further problem is that at this level, the organization is unlikely to have a staff with the full range of essential UX skills: discovery, interaction design, visual design, information architecture and user

research. This lack of skills, coupled with limited resources and support means that UX cannot be not practiced fully.

Because managers have no incentives to support UX, at this level, there is likely to be limited management support. When projects encounter the inevitable problems, priorities will not favor UX. Since the designer lacks authority he or she will be unlikely to prevail when conflicts arise.

At Level 2, the organization has developed some awareness and interest in UX but lacks skills, formal processes and roles. The organization's initial attempts to integrate UX into development activities are likely to meet with limited success.

LEVEL 3: PROJECT UX FOCUS

Levels 1 and 2 are "pre-UX" levels of maturity. Level 3 is the point at which UX can become an enduring component of the development process. Level 3 is also the point at which the organization can begin positioning UX strategically.

Although many project managers aggregate projects into programs and portfolios, in practice most projects are treated as siloed, stand-alone entities. While everyone realizes that projects are interrelated, there are few practical mechanisms for on-going coordination. Occasional meetings to share status are not enough to promote synergy and integration.

A lot of the reason for this tracks back to the incentive structure of the organization. Leaders and teams are rewarded for making delivery dates and not exceeding budget. Rarely are people compensated for smoothly integrating a project into the business process or for designing experiences that facilitate organizational change.

At Level 3, the organization sees value in UX and decides that it should be consistently integrated into projects. Some form of formal process is put in place and job descriptions and a career path for UX may be established. The organization may hire a director of UX and build a UX team. The team may either be centralized in an "agency model" where project leaders request services or in a distributed model where UX designers are allocated to the various development teams.

There are advantages to each model. In the agency model the designers have colleagues to work with and can also have access to shared resources like a user testing facility. In the distributed model the designers can build deeper relationships with the project teams and come to a better understanding of the users and their needs. Ideally, the organization would be able to create a hybrid model where UX designers can be allocated to project teams but can also come together for professional growth and mutual support.

At Level 3, the organization can position UX in a tactical or strategic role. This is a critical decision. Placing UX in a tactical role is much easier but if it chooses to keep the designer in a tactical role, the organization is likely to remain at Level 3 indefinitely.

The job posting I shared earlier is a good example of tactical design at Level 3. To get beyond this the designer needs to understand the business goals of the project and play a leadership role in creating a

product design to facilitate them. The designer needs enough authority and influence to keep the strategic design elements alive while the team is trying to simplify and minimize the product to reduce risk.

Imagine that a company is developing a new mobile application for its customers. The application will allow customers to view their accounts and purchase additional product if they need it.

A tactical approach would simply identify the desired functionality and then produce a series of screens to implement it. A strategic approach would start with the company's business goals. The business goals are what initially lead to the project creation and may go beyond the functional requirement of ordering new product. Perhaps the company wants to shift customers' perceptions about how and when to use the product; perhaps they want to seek competitive advantage; or broaden and deepen customer relationships. These business goals were likely discussed when the project was under consideration and may be found in a business plan, in the project charter, or in discussions with the project champions.

If the team is focused on functionality, these goals may not be supported in the product. Yet there may be design opportunities to support them. Perhaps the application should include brief videos that show customers new ways to use the product. Or perhaps the application could include a calculator that makes it easy for the customer to determine the amount of product needed. These are innovative ideas that a strategic designer might come up with and demonstrate in wireframes.

At Level 3, the organization can position UX in a tactical or strategic role. This is a critical decision.

It will not always be easy for the designer to gain support for strategic elements that the project leader or team may see as creating extra work or placing the schedule or budget at risk. If a strategic element requires support from another group such as training or marketing, there may be difficulty in gaining it. The development team may not know how to produce videos or may not have a resource to design and implement the calculator. Yet including such elements could really help the company's competitive position.

To gain strategic value from the design process, the designer needs to be in a leadership position and should be able to influence decisions that relate to the strategic project goals. Strategic goals should be clearly stated in the project's charter and innovative ideas that support them should be part of the evaluation of the project's success.

Here are some of the questions that an organization might consider to identify strategic opportunities in a project:

1. Who are our users and how will they use our product? What understanding do they bring to the table and how will they structure their activities? What training or information will they need to make effective use of the tool we're developing and how will we deliver it? How can we design to give them the most value?

2. Who are our stakeholders, other than the direct users? What's important to them, both in the context of this project and beyond it? How does what we're creating support their goals and priorities? How can we design to give them the most value?
3. What are the business goals of this product? How can we design the product to maximize its ability to produce the desired business effect? How can we design to deliver the most business value?
4. What technical goals and constraints are the development team working with? Are there longer-term infrastructural considerations that impact our current work. Does the selected technology limit our ability to customize the user interface and interaction design? If so, how can we minimize the impact on our users?
5. How will our users control or navigate the product? What is the environment in which they will use it? Does our design fit the environment well? Is the navigation and control obvious and intuitive? Are there places where a user might make errors? Can we design to avoid them? How can we design to make the product as easy to learn and use as possible?
6. What tasks will our users accomplish with our product? How can we design so our product fits the way that our users are likely to want to work?
7. What content do our users require? How can we organize the content so that it's easy to comprehend? Can we make certain that whatever information is needed is always available and visible to our users?
8. Is there an opportunity to cross-sell or more deeply engage our users? How can we design to take advantage of it?

Exploring and answering questions like these elevates experience design from a utilitarian task to one that delivers a great deal of strategic value, even in the context of a stand-alone project.

LEVEL 4: ORGANIZATIONAL UX FOCUS

At Level 4, projects are approached at the organizational level. Rather than being looked at as stand-alone tasks, as happens in Level 3, there is recognition that projects impact people and processes and that designing seamless linkages should be part of the UX design process.

When related projects are part of a program, it's easy to discuss their dependencies but even stand-alone projects operate in a business context and can be designed at the organizational level. Consider the example from Level 3 in which we imagined a new mobile application that would allow customers to view their accounts and purchase additional product if they need it.

Although this application may have been chartered as a stand-alone project, it will affect many business processes. For example, the customer service department will need to support the users and resolve their problems. The warehouse may need to share stock levels. The shipping department will need to know what materials are to be sent to the customer and how. The billing and credit departments will

need to manage the financial aspects of the transaction. Perhaps the desired item is out of stock or there will be a shipping delay. If the customer exceeded her credit line the purchase may require special approval. Sales may want to take the opportunity to broaden and deepen the customer relationship by proposing add-on products.

All of these situations involve customer touchpoints and will affect the overall customer experience. Each touchpoint is a candidate for experience design. Each touchpoint is also a potential problem for the affected departments. If the department does not receive the information it needs in a form that makes it easy to process or has to modify its internal processes to accommodate the new application, there is potential for inefficiency and error.

A big picture view of the project will allow the organization to optimize the linkages, resulting in a more efficient and effective operation. By recognizing the organizational impact of the project and all the potential touchpoints, a strategic UX approach creates an opportunity to update the business processes and bring affected people into the conversation so their needs and issues can be addressed.

Of course, not all the dependencies in a project are UX issues. Some issues, like what data needs to be exchanged with related systems, are the responsibility of the developers. But the discovery process may well rest with the UX team which is analyzing the workflow for both customers and internal users.

With larger initiatives, the organization may create a collection of inter-related projects. Project managers call this a *program*. Programs are often driven by the organization's strategic plan.

For example, imagine that a company is creating a new product line. There will likely need to be a program that brings together projects dealing with manufacturing, warehousing, fulfillment, sales, distribution finance and customer service.

All of these projects inter-relate and have mutual dependencies. So a customer's order will generate a request for stock from the warehouse, shipping instructions and invoicing. If stock is low, it may signal a need for manufacturing and trigger all sorts of processes along the supply chain.

Because the projects in a program share a set of inter-dependent processes and the software to support them, there are many opportunities for synergy and efficiencies if the projects are conceptualized together and the linkages are optimized.

Identifying the points of contact between project, processes and people is a responsibility best shared by the development team and the experience designer. At Level 4, the experience designer should be able to work as an equal partner with the technical lead and the business product owner. Developers

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tend to focus on functionality – what data needs to be exchanged, where it will be stored, how it will be maintained and updated. Experience designers tend to focus on how people work – what are the tasks they will undertake, what information do they need, when do they need it, how is it best presented, what decisions do they need to make and how does this affect workflow.

The functional orientation of the developer and the task orientation of the experience designer are highly complementary. At Level 4, the experience designer can clarify what people need from each other and design ways to deliver what's needed at the appropriate time and in the appropriate format.

Examples of the questions that should be explored are:

1. Who is affected by the product we are developing? What people and business processes are impacted? What do these affected people need from us and what do we need from them?
2. What content do we need to deliver? When is it needed and in what form?
3. What are the tasks and workflow that link our project to other processes and people? What decisions do people make and how does this affect the workflow? How can we best design a seamless and efficient on-going relationship?
4. What errors, exceptions and unusual situations might occur? How will we deal with them?
5. Who, in management, is impacted by our project? What does management need from us in order to do their job and what do we need from them to do ours?
6. What existing business processes are affected? How will we adjust these processes to account for the new product and its impact? Are there new processes that need to be put in place?
7. What other projects are underway that relate to ours? How can we design our product so that we can maximize the synergy with other related projects?

CHANGE MANAGEMENT

Change management is another aspect of strategic UX which should be managed at Level 4.

Not only is every project embedded within a business context but every project also anticipates a future different from the present situation. Think about it this way – a company funds a project because they want change, As a result of the project, the future will be different from the present.

Every project, therefore, involves some level of organizational change. Managing that change should be a strategic consideration that is part of every project.

Experience design can be extremely useful in fostering the desired organizational change. The reason is that while organizational change is often discussed in broad terms, in reality it takes place one individual at a time. One large company got the message that it was deeply disliked by consumers when a social media storm erupted around it and was picked up by mainstream media. Consumers complained that contacts with customer service personnel and installers were universally unpleasant and frustrating. The

company decided to address these problems but to do so, every individual touchpoint had to be fixed. This meant that every customer service agent and every installer had to learn a new way of relating to customers. To fix the problem, each individual needed to adopt a new way of working. To facilitate the new way of working the company needed to rethink its business policies and processes.

Another strategic aspect of the future is thinking through possible unanticipated consequences that could arise and may need to be addressed once the project is complete. This is also a strategic opportunity for the experience designer.

Here are some of the questions that the strategic UX designer would consider:

1. How will the business be different when this project is complete from the way it is now? What new knowledge, skills and behaviors will be required from people? How will we inform and support them?
2. What possible unexpected outcomes might arise? How would we know they were happening? What actions would we take?
3. Are there decisions we are making in the course of the project that have very long tails? How might these decisions limit (or expand) our flexibility in the future? Are there ways we can increase our longer-term options?
4. If there were shifts or changes to the business (such as new products, or new markets the business might enter) how easily could we adapt?

LEVEL 5: STRATEGIC UX FOCUS

At Level 5, the organization links experience design to its strategic vision and plans. The purpose of organizational strategy is to create actionable visions of the future. By seeking to understand where things are going, the organization can make decisions about how best to sustain itself and grow in the future.

Of course, no one knows what the future will bring so the process of building a strategy must always accept uncertainty and be subject to revision as the organization learns which of its assumptions are valid and which are not.

Strategy in the 21st Century requires agility. Business is now operating in a time of continuous and rapid change. This change is driven by advances in technology, limitations of natural resources, the rise of new economic powers like China and India, deep demographic and market shifts as a new middle class arises in newly advantaged countries.

The need to quickly and effectively respond to change is essential to sustaining a business

The need to quickly and effectively respond to change is essential to sustaining a business. Product development cycles have become shorter and the need for innovation is critical. Business is learning that success in the digital age requires new ways of identifying

and responding to opportunities. Companies and products like Twitter, Facebook, the smartphone and tablet are not simply extensions of existing products and services but novel responses to needs that most businesses didn't realize existed.

If a company is to be agile and innovative in the 21st Century, user and customer experience needs to become central to their strategic vision. Understanding who the customers are, what they need and what's most important to them becomes central to the organization's thinking about the future.

Organizational strategy often starts with an assessment of the external environment. The organization asks "how is the environment in which we are operating changing?" Of course no one knows, with certainty, what the future will bring so the strategic vision of the future is always tentative and subject to change.

Organizations, in contemplating their strategy, will often focus on what the future holds for them. They ask questions like:

- How are demographics shifting and what does this mean for our ability to attract customers?
- How is the competitive landscape shifting? What new competitive threats are we facing?
- What are the political, legal and environmental issues that we will be facing in the years to come?

These important questions come from an organizational perspective. A UX perspective might ask questions like these:

- How are our customers' lives changing? What will they be doing differently?
- What will be most important to our customers in the future?
- How will the shifts in the external environment affect our customers? What threats and concerns will they have? What will bring them excitement, joy and satisfaction?

By seeking answers to these UX questions the UX designer can contribute to the organization's strategic vision. Through customer-centric research and design it becomes possible for the organization to think about what the customers will be doing and caring about in a year, in three years and a decade into the future. Understanding how customer's lives and priorities are changing can spark ideas for new products and services to support them. In this way, strategic UX can serve as a foundation for innovation.

LEVEL 6: UX CULTURE

The ultimate level of UX Maturity is the development of an experience-centric corporate culture. At Level 6, experience design becomes an integral part of the organization's thinking at all levels.

Have you watched the reality TV show Undercover Boss? Each week a CEO goes undercover to learn how his or her firm really operates. I am always bemused at the leader's surprise when he or she encounters the reality of the firm's operation.

At Level 6, such disconnects would not be found. Every employee, from the CEO on down, would be aware of the experience of working within the company and of being its customer. A core value would be for everyone to understand these experiences and seek ways to design improvements at all levels.

There is a lot of potential value for companies that are able to reach Level 6 in UX Maturity. These companies will have the advantage of agility, customer-centricity, the efficiencies of refined internal processes and the innovative advantage that comes from a profound knowledge of and concern with the customers point of view.



CONCLUSION

UX Strategy and Strategic UX are two aspects experience design. UX Strategy creates a roadmap for embedding user experience with an organization. It defines the roles and responsibilities of the UX team and the processes through which experience design is incorporated into products and services.

Strategic UX is the way that UX design can help a company move its organizational strategy forward. Through Strategic UX the company can leverage the value of UX in products, to improve its own internal business processes and to drive an agile, customer-centric strategy going forward.

An organization's ability to benefit from Strategic UX depends on its UX Maturity level. At the highest levels of UX maturity, user and customer experience become the engine of an experience-centric culture that leads to organizational growth and innovation.

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