

UX Strategy:

Let's Stop Building Usable Wrong Things



A Conversation with Eric Schaffer
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“The second question is, “Do we have a cross-channel design that says this is how all the channels coordinate together to create a seamless and positive user experience?”

“And does it fit with the user’s ecosystem in terms of the different kinds of people who need to interact and their different kinds of scenarios?”

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What is UX Strategy?

First, let's talk about the imperative behind UX Strategy. Why is this so important?

Usability people have forever been in the position of finding themselves designing a “usable wrong thing.” You're told, “Okay, we're building this. It's going to have these functions, and you have to make it easy for people to use.” But...it's the wrong thing. And if you don't deal at the higher level with the question of what you're trying to design and how it fits in with other things, then it's catastrophic.

There's a need in companies to have a golden thread. The golden thread is a connection from executive intent all the way through to the detailed design, coding, and release.

Today, what often happens is the executive says, “I want to do this. I want to migrate customers to a digital channel” or “I want to increase sales” or “I want to move into a new market.” Those are great ideas, and they're handed off, often to the IT organization that goes, “We're moving into a new market. Great. Well, we're selling more. Great. Now I guess I have to build a website or build a mobile app or something like that.”

And so, they start building stuff without really answering the question of how that stuff is going to meet the executive's requirement. So, the question is: How are you going to move into a new market? Because, just building a website “for a new market” isn't going to do it. What's going to motivate people to actually do business with you? How are you going to manage that?

Without a UX strategy, often there's a break from executive intent through design. We want to carry that forward systematically. The executive says what you're trying to accomplish. The UX strategy says, “This is how we do it at a very global level.” We may have to do innovation work to sort out how to reach certain more advanced objectives. Then we go into structural design for the different areas and detail design, doing UX work all along the way. And in that sense, the UX practice holds the whole thing together, because the UX practice says, “This is what we want the user to experience,” and then all the technology and all the operations are built around that.

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And the last thing I would say is that there's another critical imperative, and that's cross-channel integration. Cross-channel integration is important because today I'm not going out there with only a website. That almost never happens – I'm going to have a website, I'm going to have mobile apps, I'm going to have maybe a physical brick and mortar store, I'm going to have a call center, and I may have all kinds of integrations between that. For example, my call center may show up supporting chat on my website. So all these things come together, and they have to create a coherent, overall experience.

Now, part of that is having user interface standards so there is consistency in the way it works. So I'm not in one part of the site and it uses “ENTER” to continue, and then I go to another page and it says “OK.” I've seen a single mobile application use “OK”, “Enter”, and “Next Page.” Consistency in the experience is important.

But, there's a higher level issue where the customer has to answer the question, “Where do I go to do various things?” And often, that's incredibly hard. You actually have cases where a customer is looking and says, “Well, okay, I have ‘cell phone banking’ and ‘telephone banking’ and ‘speech banking.’ I guess they're different, but which do I go to?”

We need to be able to see how all the channels fit together aligning to an overall objective of the customer experience. Without a UX strategy integrating those channels, somebody can decide to build an iPhone app, and they build an iPhone app, but the question of what it does and how it fits with the other parts of customer experience often don't get dealt with.

So when a company asks you to come in and advise them on a user experience strategy, what's the first thing you do? Is that when you find out what their executive intent is?

When we start talking with clients, we first see whether there is a strategy. Is there a UX strategy? How do you know? Well, you ask a couple of questions. First you ask, “What is the executive intent?”

There's almost always an executive intent today. Executives know enough to say, “There's a direction, we want to move into this new market. We're going to sell to the bottom of the pyramid, or high-net worth,” or whatever it is. So, an executive says, “I want this.” Great! And you find out what that is.

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Let's say it's something like migrating customers to low-cost digital channels – a very common intent. In banking, I've seen numbers where it costs literally one percent as much to have somebody bank online as it costs to have them bank in a branch. So, they want to migrate to this.

Then you ask the hard question, “What's going to motivate customers to do that?” The motivation is the key thing. You'll often find answers to that question like, “Well, we're going to build a website for them to do it.” Well, that's not going to motivate them. Building it does *not* mean they will come. They might say something like, “We're going to make it easier, we're going to make it simpler.” But even that really isn't a very good answer, because just making things easy is not enough.

There has to be a motivational strategy. Sometimes, you'll also see companies taking the weak way out saying, “Well, we're going to pay people to migrate” or “we're going to give them discounts.” An extrinsic reward strategy is often quite sad and expensive. It is the famous banker's ‘give them a toaster’ strategy. It is an extrinsic reward. They might say, “Why are you going to migrate to online banking? – Well, I'm going to charge you less money.” But, then the customer is coming for the discount or the toaster and will be looking for any company that gives a bigger discount or a toaster that handles more slices.

So, the first question is, “Do we have a really good strategy that employs persuasion engineering?” The second question is, “Do we have a cross-channel design that says this is how all the channels coordinate together to create a seamless and positive user experience where the user knows where to go?” And does it fit with the user's ecosystem in terms of the different kinds of people who need to interact and their different kinds of scenarios?

Often you'll go in and hear discussions like, “Hey, oh yeah... We have cross-channel design. We're going to provide some cross-channel flows where you can go to a website and start an application and go into the branch and talk to them about it.” So, you have these kinds of scenarios going across channel, but cross-channel integration must be bigger than that. This is how all the channels fit together logically, not just the fact that maybe they share data and I could move between them.

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“We’re looking at the overall relationship between a customer and the company... which is hard to do today, because you have so many different channels.”

We’re really looking at a picture of the overall relationship between a customer and the company – all the ways they can interact with the company – and have all those fit together into a positive common sense, simple offering – which is hard to do today, because you have so many different channels.

It sounds like establishing the clear direction regarding the motivational strategy is really important. Is that unique to each company's situation?

Yes, different companies definitely need different strategies. It differs based on the company and its culture. If you try to come up with a strategy that doesn't fit with the DNA of the company, it will tend to fail. The company can't fake their core DNA, usually.

The other thing is you need something that fits with the user. So what does the user want? What's going to motivate the user? It can be very specific. If I go to Johannesburg, I could have safety as a major concern. If I'm in Mumbai, I'm likely to have status as a major concern. And so, I have to understand the user.

We need to do research, not just on the user's ecosystem, understanding the different people that are there, the different scenarios, the environments (in an ethnographically inspired way), but also the in-depth emotional schema going on for users as they make key decisions. What are the drives? What are the blocks? What are beliefs and the feelings?

When you're working with large multinational corporations, do you have to factor in all the different cultural variables?

In looking at motivation, we have to look at the cultural aspects of it, and often the approach that I see is quite weak. For example, there's a bank that I work with, one of our clients, and their main focus is they want to be an "Asian bank." Now, that's their answer to the question about why customers in Asia will bank with them – "We're the Asian bank." But what does that really mean? What do you do in the design, what do you do motivationally to make it an Asian bank? Beyond that, they don't really know.

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“Just saying ‘We’re THE Asian bank, we’re tuned to Asia,’ isn’t really going to do the job.”

This is an interesting problem. What are the needs in Asia? How are they different? And how do we actually fulfill that promise? How do we motivate people around that? Just saying, “We’re an Asian bank, we’re THE Asian bank, we’re tuned to Asia,” isn't really going to do the job.

So, you really do need to integrate the user motivations when creating the cross-channel solutions.

Job one is to come up with a motivational solution. We start by doing in-depth research. We do PET research – PET stands for Persuasion, Emotion and Trust. PET research is where we understand the user's deep drives, blocks, beliefs, and feelings. So, we get our hands on that, and then from that we can move ahead to say – What are we going to really address? What's important to people? Is it their self-esteem? Is it concerns about feeling embarrassed? Is it status? Whatever those things are, we psychologists are all very happy when those have to do with fear, food, sex, or protection of their offspring.

Because those are the key?

Those are the underlying fundamental genetic drives.

If we have themes that resonate with that, we feel very safe. So, if I'm going to feed you or I'm going to present you with “reproductively salient stimuli,” we're going to be able to sell. Then based on that, we create a PET architecture that says, “What is the frame that will support that?” So, if I have a food drive – I'm hungry – then maybe the frame is, “Good food delivered fast.” What's good, then, about the company is, “Good food delivered fast.”

This won't sell at a French restaurant. That's okay. The frame says, “This is my underlying message,” and the criteria is going to be “Good food delivered fast,” and then we create a meme like “Dominos' great pizza delivered to your door in 25 minutes or it's free.”

The meme is a saying or a message that supports that frame. Once we have that, we're resonating with the underlying drive, and then we can look at the persuasion engineering tools that we're going to use to support that. It might be social proof, or it might be social learning, or it might be the law of reciprocity.

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“What you’re doing is saying that all the channels have a common reference and a common objective.”

There are lots and lots of methods we can use. If it's social learning, we're going to have people telling stories about how important it was that they could get good food delivered fast because they were hungry and it saved their marriage and whatever it might be.

This solution about what's going to motivate is actually the first thing. And this is something that very few people think about properly. When the executive says, "I want to do this," it's not about the technology. It's not about the business model. It's about what's going to motivate customers. That's job one.

Once you have that, then we can engineer that overall customer experience, and then you could have, based on that, discussions about technology and business models and operations and all the things necessary to support that overall customer experience.

When we talk about customer-led design or customer-focused design, it's not about asking the customer what to do, because they don't know. It's about having a very clear model of that customer experience first, and then that can be the foundation which drives everything else.

So, if I just build a mobile app, well, where does that fit in? But, if I understand that I'm trying to provide "Good food delivered fast," and I have a mobile app with the message that if I get close to home I just press this one button and my favorite pizza shows up... Okay! Now I have something that fits in and supports the story of what we're doing for a customer, as opposed to something that you pulled out of thin air and you hope does something useful because it is an iPhone application.

So, the overall user experience strategy will really have an impact on the design of all the different channels.

It absolutely does. In many cases, the channels are in progress. Some are there. Many of them are doing the right things, but it's about getting them aligned. It's not that you necessarily have to start all the channels from scratch. But, what you're doing is saying that all the channels have a common reference and a common objective.

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“The challenge today is not about technology fitting together. It's about the wholeness and coherence of the customer experience.”

Think about it like this – Imagine that in the future I want to build a castle and I have a very clear vision and design for that castle, and I'm excited about having a castle that's really going to meet my needs.

Now we have the kitchen project. If I had no design for that castle, I would build a standalone kitchen, and pretty soon I would throw it away, because it's not a kitchen that's going to fit into the castle. But if I know the castle design, I'm going to build a kitchen that fits right into the castle, and as I build one thing after another, it's moving towards that shared model of what we want to do from a customer experience viewpoint.

And it's all integrated.

This is how you integrate it. The idea of a technological integration is important, and I want to be able to know my customer as I move from mobile to web. But today that single customer database is a given, and there are lots of ways to make that happen.

The challenge today is not about technology fitting together. It's about the wholeness and the coherence of that customer experience, and how each channel plugs and plays so that I can watch TV, no longer just on a TV, but I have it on my computer, I have it on my mobile device, I have it on my high-definition television, I have it on my tablet. And how do those things play together in a way that makes a simple solution?

That kind of four-screen, five-screen challenge is common today. And we need to be able to have an answer that isn't designed by five separate groups, each coming up with their ideas, but is designed as one coherent picture, and then with a set of UI standards underlying it. Then you have a successful solution.

Where are companies going wrong when they're working on a UX strategy? What are some common things that they do wrong?

Well, there's really one thing that they do wrong, and it's that they don't do it.

They don't have an overall user experience strategy?

It's very rare to find a real one.

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“Organizations are inherently siloed, and it's difficult to get people to look across channels.”

So, it's more common that you would go in and you would see four different teams working on each of the four different channels?

It's virtually universal today. Even when there's a UX organization, even when the organization is fairly mature – still you usually find the organization working in the weeds building usable wrong things, as opposed to owning a high-level vision of what the user experience is going to be.

Why do you think that is?

Because organizations are inherently siloed, and it's very difficult to get people to look across channels. Each channel has its own vested interest, and in many cases there's very intense politics around it.

So you might say, “This channel is no longer going to be very important. We're moving it to the back.” Ah, then everyone is screaming, yelling, and running around, and trying to prove it's wrong. There's often a lot of politics around it, and it's hard to get the UX team linked in at a high enough level in order to get that done.

The executive will often get some kind of management consultancy whose specialty is strategy. But they look at strategy from a business point of view, and the business point of view doesn't go deep into motivation. It doesn't go deep into cross-channel design. It's just looking at what are the common business practices and what are the markets doing and what are the trends.

And while that's interesting work, it's very extensive and expensive, and it doesn't provide UX strategy. It often kind of falls on the floor. At the end of the day, the IT group is out there and they're building siloed websites and often many different websites, many different web properties. Not all of them hang together, and it's a mess.

How do you get to a high enough level in the organization to really make an impact on UX strategy? It sounds like it has to be coming from a very high executive level in order to have a champion and break through all the silos.

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“Our objective is to see the UX practitioner not just dealing with single channel structures, detailed design and testing, but owning and working on cross-channel strategy.”

Absolutely! This has to be done at a high level. You're going to have to either be talking to someone at the C-level, or have someone specifically responsible for cross-channel integration.

So, how do you do that? As a consultant, it's a bit easier for us to do it, because we come in as a consultancy and start talking about these kinds of issues, and pretty soon we're talking to the CEO. But then, the real objective is to get the UX organization having responsibility and being involved at this level.

There is a long history in the UX field of having people focused on the details of HCI, focused on radio buttons and check boxes. So it is a serious transition to move from just HCI to UX strategy. We're training people how to do it in our How to Design for the Big class, which is about strategy and innovation – designed specifically to help UX groups get ready to talk at this level.

Our objective is to see the UX practitioner not just dealing with single channel structures, detailed design and testing, but getting up to a level of owning and working on that cross-channel UX strategy.

And it comes back to having the UX team involved with the projects at their conception, right?

No, it's before that.

Before that?

Right, so at their conception we'll let you build a really good usable wrong thing.

Oh, I see what you're saying.

Right. This has to be before conception. This gets to the level of saying: What are we going to do systemically all the way across our organization? What are the projects that we should have?

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“A good UX strategy is about actually helping decide what we’re building and what it’s going to do and what the concept is.”

At the end of the day, deciding which things to build is really the outcome of a UX strategy. That’s where we say, “We need a mobile device that has this kind of function, because it fits in with all the other channels.” This is the mobile device where I have one button that orders my favorite pizza as I get close to reaching home. Once we understand that’s what it is, when we do UX strategy projects, we come out with actual concepts for each of these things.

It’s not enough to just say strategic things. You have to have a design that shows what you mean so it’s concrete. Then it’s a much more straightforward activity to do the structural and detailed design for that mobile app, as opposed to just designing some sort of mobile app. That’s the beauty of having a good UX strategy. It’s about actually helping decide what we’re building and what it’s going to do and what the concept is.

This sounds like a total paradigm shift.

Correct. And, this means that our UX practitioner needs to grow. So the UX practitioner who’s used to dealing with radio buttons and check boxes needs to learn, be educated, and move up.

Not everybody is going to be able to do this, but certainly people in the UX organization need to be reaching up to have these kinds of roles and being able to staff it, maybe initially with external consultants who are sophisticated and used to dealing with it, and then transitioning, hopefully, to more internal staff who can be involved.

When you build a UX strategy for companies, do you help them to develop their internal teams, as well?

We see this as a very separate thing. Our normal business model today is to have two parallel concurrent tracks of involvement.

One track is about helping doing showcases, meeting tactical needs. If you don’t do that, then frankly, everything slows and it becomes a complete discouraging mess. You must meet the immediate tactical needs of the organization and keep showing progress and value. The UX strategy is the beginning of that. Generally speaking, I like to see a UX strategy first, and if not that, as soon as possible.

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“If you don’t have a strong, mature, and process driven internal team... it ain’t sustainable.”

Concurrently, there’s a capability building track. And that’s where we help organizations to set up a mature practice that has governance, that’s involved in things from the UX strategy level. Capabilities building is a separate set of activities that usually starts with what we call an institutionalization strategy. That’s a strategy for how to set up a mature practice in customer centricity. That’s different than the UX strategy, which is about what you design.

Those two things put together, in my mind, are the biggest signs of health and likely success for organizations. The UX strategy says the things we’re going to design make sense in terms of an overall customer experience, and I have a cross-channel solution, which is going to work, and everything is going to be aligned. The institutionalization strategy is about building capabilities to do mature UX work internally.

One of the things that we’ve discovered is that absolutely the global best practice is to have internal UX operations.

It is not a good practice to hire vendors piecemeal to do your UX work. If you think about it, each vendor has their own methods, their own practices. It just makes a big mess. You can use vendors, but there needs to be a strong central organization with its own methods and standards, and governance, and knowledge management, and then vendors can be brought in to support that.

It actually sounds pretty brilliant, because what you’re doing is helping them establish their direction and then showing them how to get there.

Correct. And those parallel tracks are synergistic. As we do capabilities building, we can integrate the showcase work.

For example, we might build a UI standard. As we create the standard, we can start to apply the standard into a showcase project. We can use the standard in the showcase project and then we can get feedback so we can improve it.

We also have the opportunity, as staff come into the organization and get trained, certified, and mentored, to have them actively engaged in the showcase projects, (often working with HFI staff). That’s what we want. We want to phase them in to take over the work, rather than having external vendors (even HFI) on a sustained basis. If you don’t have a strong, mature, and process driven internal team... it ain’t sustainable.

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About Eric



Dr. Eric Schaffer
Founder and CEO
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Dr. Eric Schaffer is the founder and CEO of Human Factors International, Inc. (HFI). In the last quarter century, he has become known as the visionary who recognized that usability would be the driving force in the “Third Wave of the Information Age,” following both hardware and software as the previous key differentiators. Like Gordon Moore’s insight that processor power would double every 18 months, Dr. Schaffer foresaw that the most profound impact on corporate computing would be a positive online user experience – the ability for a user to get the job done efficiently, easily, and without frustration.

Dr. Schaffer’s book, *Institutionalization of Usability: A Step-by-Step Guide*, provides a roadmap for companies to follow in order to make usability a systematic, routine practice throughout their organizations. Dr. Schaffer also co-developed The HFI Framework™, the only ISO-certifiable process for user-centered design, built on principles from human-computer interaction, ergonomics, psychology, computer science, and marketing.

Dr. Schaffer has completed projects for more than one hundred Fortune 500 clients, providing user experience design consulting and training. He has recently been traveling the world teaching HFI’s course, *How to Design for Persuasion, Emotion, and Trust*.

Dr. Schaffer is a member of the Human Factors and Ergonomics Society and a Certified Professional Ergonomist.

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