

Choosing the Right UX Vendor



by Eric Schaffer
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Choosing the Right UX Vendor

“Many UX vendors are intent on just doing the projects. They don’t focus on helping internal staff to learn UX skills or building a UX infrastructure for their clients. Some even try to hide their practices. Get a vendor who is on your side in building internal knowledge and capabilities. Get a vendor who will work itself out of a job.”

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Today, if you really want strong UX, you will probably need a UX-focused vendor.

When 97% of companies have “good customer experience” as a strategic imperative, you might want to get a vendor who is focused on world class experience engineering.

It might be because you want to get a project done and get the benefits of good UX for that design. It might be that you are starting up an internal UX practice, and you want to make sure it is an effective operation from the start. It might be that you have an established and mature UX practice and you want to support that organization with focused training, tools, or staffing.

Someday, UX engineering will be baked into every system integrator’s practice. And someday every organization will have an internal UX team – if you just rely on vendors, it won’t work. “Quality” has gone that path. And so will UX. But today, if you want really strong UX, you will probably need a UX-focused vendor.

You could choose a vendor based on price. But, like most things, the cheap solution can be really expensive. You will typically spend about 10% of your development budget on UX. So you might get a vendor that is *half* as expensive! That could save maybe 5%. But if the work is poor it can slow the project, or make it fail, or decrease the return from the 95% of your investment that is now building the wrong thing.

Now there is a powerful persuasion engineering principle that “high price is equal to good quality.” But when I first started UX work in the mid-1970s, I bought a scary-expensive Burberry coat. All the buttons fell off the first week (yes, they sewed them back for free). And a series of Montblanc fountain pens leaked all over my dress shirts.

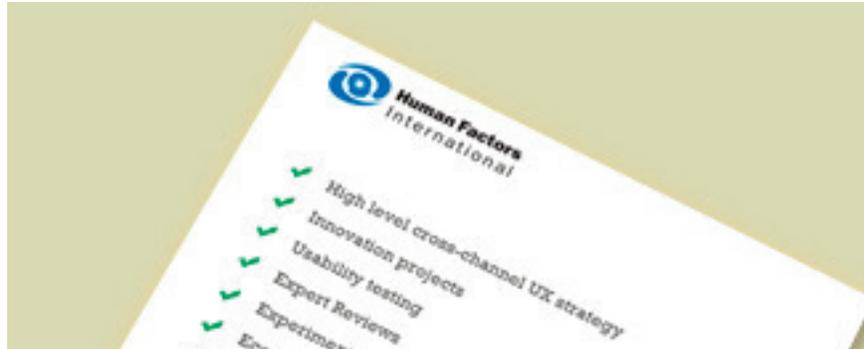
So sometimes you can pay a lot but have poor results. We know some companies that just try lots of vendors and see what happens. But maybe you can ask a few questions and be able to tell which vendor to use.

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Avoid using a consultant that relies heavily on part-time contractors. These practitioners are less likely to be fully committed or completely familiar with the vendor's practices and tools.



Choosing the Right Vendor – To Get Your Project Done

Here are some questions that you may want to ask to make sure that you find the right user experience vendor for your project.

Can the UX vendor provide high-level experts?

The UX field is complicated. And if you have a mission critical design problem that has complex requirements, you need mature practitioners on the job, with decades of experience. Those experts will ensure that the overall design is solved strategically, with the right structure, and high quality detailed design. They can bring to bear creative solutions that will save you design time and avoid expensive rework. Be sure that the experts will work on your project and not just be there for the sales process.

How large is the vendor?

A consultancy is unlikely to reliably provide more than about 10% of their staff to one project, on an as-needed basis. So, if you anticipate needing six people on short notice, you should find a consultancy with at least 60 UX staff members. Avoid using a consultant that relies heavily on part-time contractors. These practitioners are less likely to be fully committed or completely familiar with the vendor's practices and tools.

Can the vendor provide the full range of UX services?

You might need assistance with a simple project now, but as you continue your program, you may need more advanced assistance. Avoid switching UX vendors midstream. A UX vendor should be able to provide or conduct:

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You don't want a vendor that works in an ad hoc manner or needs to develop their process and templates from scratch.

- ▶ A high level cross-channel UX strategy
- ▶ Innovation projects
- ▶ Usability testing
- ▶ Expert reviews
- ▶ Experiments
- ▶ Ecosystem research (sometimes called contextual inquiry)
- ▶ Structural design
- ▶ Detailed design
- ▶ Continuous metrics-based usability improvements

You may also need expertise in persuasion engineering and cross-cultural design.

Does the vendor have good project management and quality assurance practices?

A serious UX project cannot rely on the expertise of a few craftspeople. There needs to be oversight and control of the program. There should be a project management office to ensure that the work stays on track. There should be quality assurance to ensure solid and consistent design. And the organization should be committed to take steps to manage the issues that invariably come up.

Does the vendor follow a detailed methodology?

You will want to find a UX firm that can provide a detailed methodology and associated templates. You don't want a vendor that works in an ad hoc manner or needs to develop their process and templates from scratch. These approaches take time, budget, and staff away from your project. It is important that the firm follows their own methods regularly.

Does the firm have design standards and templates?

Find a firm that has a baseline standard for browser, workstation, or mobile interfaces as appropriate. At least 85% of the interface designs they do on your project should be based on pre-engineered templates. Without standards the firm will take far longer to design, the ad hoc designs will be of lower quality, and the designs will be inconsistent.

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Does the vendor have staff specifically working on account management, legal, and accounting issues?



Does the firm have experience in your domain and understand the ecosystem of your target users?

Most people overestimate this factor. But it IS useful if the vendor is familiar with your domain. They should know the focus of UX work in your domain (e.g., UX for medical systems must meet government standards, save lives, and be able to show due diligence if any legal questions arise. Or, in e-commerce, UX should focus on conversion, size of basket, and customer retention).

Can they manage a global footprint?

If your team is working in one location, focusing on a design that will only be used in that location, there are no global issues. But if your team is working across multiple locations, you may need a vendor that knows how to work with a distributed team.

Is the vendor easy to do business with?

It is important to have a vendor that is easy to do business with. Do they have staff specifically working on account management, legal, and accounting issues? It is awkward to try to explain business requirements and contracting practices to technical specialists who don't really understand the importance of non-disclosure agreements (NDAs), master sales agreements (MSAs), reporting and other business requirements.

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Does the UX firm have experience in helping complex organizations deal with issues of executive alignment, governance, culture change, infrastructure, organizational design, and staffing?

Choosing the Right Vendor – To Set Up Your UX Practice

Does the vendor have expertise in setting up a UX practice?

If you are setting up a hospital, you do not want to hire only a team of surgeons. Doing good surgery is not the same as setting up a hospital. Similarly, you need a UX firm that knows the issues in setting up a practice. Do they have experience in helping complex organizations deal with issues of executive alignment, governance, culture change, infrastructure, organizational design, and staffing?

Can the firm provide strategic guidance?

Surgeons will not do well at creating a plan to set up a hospital. In like manner, does the vendor have experience in designing a plan of action to set up a UX practice? Can the firm help flag potential pitfalls? A strategic partner will provide executive guidance to ensure that the UX capability is fully actualized and integrated.

Can the firm support a program of governance?

Today, governance is an area of significant risk in the UX space. How can executives and managers know that good UX work is getting done? Does the vendor have a means to ensure that UX work can be evaluated and that you can see that UX work is done on all necessary programs?

Does the firm have baseline infrastructure or are they starting from scratch?

It takes about a year to develop an interface design standard from scratch. It takes at least a year to write a UX methodology from scratch. Does the vendor offer baseline standards that can be customized to your environment and culture?

Does the firm offer training consistent with its methods and standards?

As you build staff you will need training. It is important that the training provided by the UX firm be consistent with the methods and standards. This is true for consistent design decisions but also for the language used (e.g., if you use different vendors for infrastructure and training, one may talk about use cases and the other about scenarios, confusing everyone). In addition to training for professionals there should be training built to support culture change, by teaching your non-UX staff about the UX field.

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Does the vendor have experience and tools that can be used to develop a dashboard of UX metrics?

Can the firm support a knowledge management program?

A hallmark of a mature UX practice is an effective knowledge management program. Without this, the team will re-research ecosystems. They will struggle to reinvent solutions. And in the end, “knowing your customer” becomes a function for individuals. Without knowledge management you do not have a sustained practice.

Can the firm support development of metrics?

It is hard to assess the value of UX work without a dashboard of UX metrics. Does the vendor have experience and tools that can be used to develop this sort of dashboard? Note that this dashboard is not the same as business metrics (you probably have conversion rate, support center call handling time, etc.). These are metrics about the quality of UX design.

Can the vendor help with tactical needs and showcase projects?

While you are developing capabilities, there will usually be a set of tactical needs for UX design. In addition, most roadmaps for institutionalization of UX include showcase projects that demonstrate best practices. Can the vendor provide staff to support these startup programs? It is best if this work can be handled concurrently with capabilities building.

Can the firm support a staffing solution?

It does not help to build a factory and then have no one to run it. Getting enough UX staff of the right quality is important. Can the vendor help you to hire the right people? Will they help train and mentor your internal staff? Can they provide people on a staff augmentation basis?

Can they manage a global footprint?

If your team is working in one location, focusing on a design that will only be used in that location, there are no global issues. But if your team is working across multiple locations, you may need a vendor that knows how to work with a distributed team.

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Does the vendor have an ongoing development process against a model of practitioner competency?

Choosing the Right Vendor – To Support Your Mature UX Practice

Here are some questions you may want to ask to make sure you find the right UX vendor to support your mature UX practice.

Staff augmentation

Does the vendor have enough people?

Just now you might need a few people. But we often see that initial number grow as your team grows in its reputation and influence. Will your vendor be able to provide the number of people you really need? Has the vendor provided 20 people to one operation? How about 30 or 50 or 100?

Can the vendor adapt to your optimal geographic footprint?

You will need people onsite (full time or at least part of the time). You can control costs by having remote staff (in your time zone, or even saving more in remote time zones). Can the vendor adapt to your needs to find the best solution in terms of quality, convenience, and cost?

Is there a consistent level of high quality training and certification?

A vendor can try to recruit staff to match some criteria. And you might get a few staff with some useful skills. But only a solid training program can provide a scalable team of people with a reliable skill set. Do the practitioners have a foundation in core UX concepts? Do they have skills in the tasks you need now, and might need in the future? Can they do expert reviews, usability tests, detailed design, etc.? And how will you know that they really have the background claimed? Do they have testing or certification?

Does the vendor provide ongoing mentoring, training, and personnel management?

Providing initial training is great. But development and maintenance of practitioners means an ongoing growth path. They need continuing training and mentoring or they will get stale and leave. And they need management of their career plan and tactical needs. Does the vendor have an ongoing development process against a model of practitioner competency?

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Mature UX work requires an enterprise infrastructure that lets you use an integrated set of methods, templates, standards, wireframing tools, ecosystem objects, and maintain an accessible record of projects and designs.

Will the staff work well in a mature practice, following your methods and standards?

Recruiting ad hoc people will likely get a set of practitioners who are used to working as freelancers. They will not be tuned to working in a mature operation. Will your vendor have staff who are aligned with the use of methods, UI standards, and industrial strength tools?

Can the vendor manage turnover and any quality issues?

If you have a few UX practitioners you might get through a year without turnover or quality issues. If you have 50 people or more, a bit of trouble is just routine. Does your vendor have practices for handling turnover and quality issues? Will they handle replacement of a person who leaves, or gets sick? Will they be there if the quality of work starts to fall apart?

Can the vendor provide high-level design and management support?

In some cases you will want to have full high level control of every project personally, or with your internal managers. But you may also want to have your vendor supplement their staff with high level experts, specialists, and project managers. You might need a cross-cultural designer or persuasion engineer to supplement the generalist UX practitioners. You might need a very senior designer who can manage cross-channel strategy, innovation programs, or very complex applications.

Enterprise UX tool

Does the vendor provide an enterprise framework that makes UX work easier?

Mature UX work requires an enterprise infrastructure that lets you use an integrated set of methods, templates, standards, wireframing tools, ecosystem objects (users, environments, scenarios, artifacts), and maintain an accessible record of projects and designs. Mature UX work is only easier if you can leverage all that your UX team knows, as opposed to working in little UX silos. Can your vendor solve this massive enterprise UX issue?

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Is there training that can be used to promote your UX practice within your organizational culture?

Training and certification

Does the vendor provide a complete and seamless training solution?

Does the vendor have a complete and seamless professional level training program for UX professionals? Do the courses use a consistent set of terms and concepts? Do they reflect global best UX practices? And in addition to professional training, is there training that can be used to promote your UX practice within your organizational culture?

Does the vendor have the capacity to teach the number of courses you need and handle the geography?

You may need many courses and you may need courses presented around the world. Can the vendor handle this, over time, with reliability, consistent quality, consistent content, and limited travel costs?

Does the vendor provide training in advanced UX skills?

Fundamental skills in usability are critical. But does the vendor offer more advanced training? Can they cover UX strategy, user-centered innovation, persuasion engineering, mobile devices? Your operation will usually need the advanced content eventually.

Does the vendor provide a way to validate accomplishment?

You might have people who you think already understand UX fundamentals. It makes sense to test them to make sure that the skills and knowledge are in place. It also makes sense to validate all your practitioners, to ensure that their training has been absorbed. Does the vendor have a certification program or test to ensure that you are deploying the capabilities that are needed by your organization?

General

Does the vendor help build your company's UX infrastructure?

Many UX vendors are intent on just doing the projects. They don't focus on helping internal staff to learn UX skills or building a UX infrastructure for their clients. Some even try to hide their practices. Get a vendor who is on your side in building internal knowledge and capabilities. Get a vendor who will work itself out of a job.

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About Eric

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 UX: A Step-by-Step Guide to a User Experience Practice*, 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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