



Certified User Experience Analyst (CXA)

The next step for the UX practitioner

A Conversation with Eric Schaffer
CEO and Founder
Human Factors International

CXA Certification—The next step for the UX practitioner

In this conversation, Dr. Schaffer outlines HFI's new CXA certification.

“The CXA program is a reflection of the expansion of the User Experience (UX) field. This program expands and validates a person’s knowledge in key advanced concepts like persuasion engineering, strategy and innovation, and the institutionalization of a UX practice within an organization.”

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“The user experience field has gone beyond just user-centered design in a number of very important ways. The CXA program reflects this step forward.”

Dr. Eric Schaffer, CEO of Human Factors, talks about HFI's new CXA certification.

Hi Eric. I understand HFI is offering a new certification—the Certified User Experience Analyst™ (CXA) program. Can you please tell us what this is all about?

The CXA program is a reflection of the expansion of the User Experience (UX) field. This program expands and validates a person's knowledge in key advanced concepts like persuasion engineering, strategy and innovation, and the institutionalization of a UX practice within an organization.

The program is supported by four new HFI courses:

- › *How to Design for Persuasion, Emotion, and Trust (PET design™)*
- › *The PET Architect*
- › *How to Design for the Big: User-Centric Innovation and Strategy*
- › *How to Support Institutionalization of a Mature UX Practice*

What is the relationship between the existing Certified Usability Analyst™ (CUA) program and this new CXA program?

The Certified Usability Analyst™ (CUA) program provides a foundation for user-centered design work. It deals with issues of modeling human behavior, developing user interface structures, designing wording, layout, color, and highlighting, direct manipulation, control selection, how to do usability testing, how to apply scientific principles and research to optimize the design process and design decisions.

This CUA program has been around for quite a while, and is a powerful foundation for many people in the field. The program includes a set of training courses, and there's also a certification program which allows people to validate their understanding of user-centered design. There's no requirement that people take the CUA courses in order to take the exam. The exam is truly a validation of an individual's understanding of core knowledge in the user-centered design field.

But the user experience field has gone beyond just user-centered design in a number of very important ways. The CXA program reflects this step forward. If you look at the user experience design field, one of the most important steps

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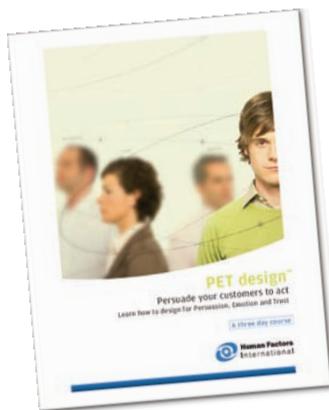


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forward is designing for persuasion. Designing for persuasion is important because the software industry has moved beyond applications that were prepared for operators who were paid to complete tasks—like provisioning phone systems and doing accounting—to a vast number of systems where the user will make decisions based on their interaction. These decisions might be to make a purchase, to change behavior, to ask a doctor about a pharmaceutical, to participate on an ongoing basis in a social network. But the persuasion requirement has become very common in the field. Therefore we need to bring a whole new set of principles and methods into play in order to optimize the persuasion of a website or application. And persuasion design has its own set of research, principles, and techniques.

So HFI is offering training courses to train people in these persuasion techniques?



At HFI we've created 2 courses which provide a foundation for dealing with this area of persuasion which we talk about as PET design. PET stands for “Persuasion, Emotion, and Trust”. The first course is the PET design class—*How to Design for Persuasion, Emotion, and Trust (PET design™)*. This three-day course covers the core tools that we use in order to persuade—everything from needs analysis through methods of triggering responses, to methods of developing commitment. These PET techniques are the foundation of persuasion engineering.

We also have a new two-day course—*The PET Architect* course. This course goes beyond just learning a set of tools. It goes deeply into how to address the market with persuasion tools in order to maximize persuasion. This means we have to develop the right set of tools and the right approach to the market in order to have a powerful and coherent strategic offering. We need to go beyond just throwing a set of magic tricks—persuasion tools—into our website or application.



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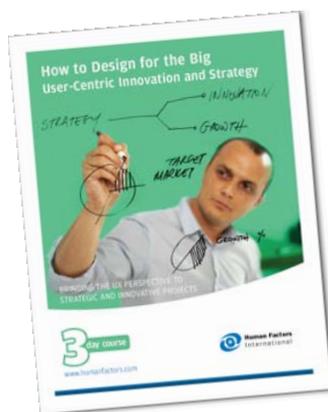
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So this is one part of the CXA program. To be competitive in the field the user experience designer of today must have PET design capabilities because user-centered design is no longer enough. User-centered design is now a normal expectation. User-centered design is really a hygiene factor. It is the PET design skills that are now differentiating organizations and making the difference in terms of being truly successful in the market.

HFI has already offered the PET design course for some time. Is The PET Architect course a brand new offering?

Correct. The PET design class has been out for a while now. People taking the class have asked to know more about how to develop effective strategies for the application of PET tools. They want to know more about the methodology of applying persuasion tools to given market situations. The PET Architect course addresses this. This strategic knowledge enables a very advanced level of mastery and will actually support not only persuasion, but also strategy and innovation.

What are the other courses that are offered in relation to the CXA designation?



We have the PET design class and The PET Architect class. There is another aspect in the field, an expansion in the field, which is very important. Moving into user experience design has meant that we have to look bigger. So we have another course which has been taught now for some time, it's very successful, it's called *How to Design for the Big: User-Centric Innovation and Strategy*.

This is first and foremost how to look at human behavior and systems at a larger “ecosystem” scale. Instead of focusing on an individual task and how to optimize that human

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computer interaction, we’ve started to build ubiquitous computing systems where we have much more complex situations to design for. So we use ethnographically inspired methods to analyze our design challenges in terms of ecosystems. Ecosystems mean I have multiple actors, often in multiple environments, with multiple artifacts. We have to be able to see this whole picture.

We also need to see this picture in the context of societal megatrends—in terms of lifestyle models of the future. Being able to design for that big picture is critical. Furthermore, we need to be able to take this design capability and apply it beyond the classical user-centered design problem of optimizing a human computer action. We need to apply it to how we optimize our organization’s strategy and how we innovate solutions that will fit into our market.

So you see a CXA as playing a much greater role than the traditional CUA.

I think that our UX organizations need to move up the value chain. Just simply saying “OK we’re going to optimize radio buttons and check boxes” and things like that, is the role of the past. We still have to do those tasks, that’s a given, But if we really want to add value for our organization and have a sustainable UX team, we need to present bigger kinds of contributions.

Bigger contributions include having a seat at the table in discussions on organizational strategy. What are we going to do in the market? How are we going to handle multiple channels? These problems of market position and channel strategy need to be partly based on our ecosystem models and lifestyle models that are core capabilities today for the user experience designer.

In addition we need to be able to participate in innovation. I’m talking here about professional innovation, not individuals coming up with a good idea, but rather intentional, process-driven organizational efforts. Traditionally many innovation teams have often had just business and technology staff involved. This doesn’t work very well. Rather we need to have UX people on these projects in order to optimize the fit with our users’ lifestyles, with our users’ daily processes. We have toolsets to do this. The Big course is about strategy—strategic contribution to our organization, and innovation—participating in innovation processes. It is about being able to model our customer in this larger ecosystem viewpoint.

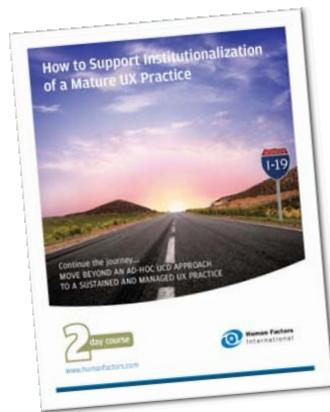
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“We see our field today shifting from work that is based on craftsmanship to a process-driven mature operation, where industrial-strength user experience design is completed routinely in organizations.”

Now this plays in and combines beautifully with the user experience technical skillset, because in many cases the persuasion issues are profoundly intertwined with strategy and innovation. We need strategies that consider and bring to bear the needs of our customers, the buying triggers of our customers, and their drives, blocks, feelings, and beliefs. Same thing when we have an innovation. We need an innovation that will be easy to persuade people about. So persuasion is very important.



The last course is the two-day course on the institutionalization of UX design—*How to Support Institutionalization of a Mature UX Practice*. For me this is very central to the progress in our field.

We see our field today shifting from work that is based on craftsmanship to a process-driven mature operation, where industrial-strength user experience design is completed routinely in organizations. Every user experience designer needs to understand this process, how to promote it, and how to work within this more mature kind of operation. So the institutionalization course is about this shift in the industry—what it takes to have a mature user experience operation, and the kinds of work styles we will require as we shift from work as an individual craftsman in a small silo, perhaps with a few other colleagues, to where we are part of an enterprise-wide operation.

So you can see how these courses reflect an expansion in our industry, an expansion of our role within our organizations, and therefore an expansion of the skillset of practitioners.

Our CXA certification is a reflection of this same philosophy.

Again, there is no requirement that a person take HFI's courses to test for this CXA certification. The certification will reflect this capability to work in a mature operation, to participate in strategy and innovation, to look bigger in an ecosystem model, and to apply persuasion engineering methods to design problems.

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“The field is in the process of changing its name from usability to user experience design and I think there’s a message here.”

This is the step forward we see our field taking and the program we are offering to help it happen faster and move individuals forward in terms of their contribution and value to their organizations.

It’s interesting that you call this designation the User Experience Analyst as opposed to the Usability Analyst—it’s exciting to have it spelled out clearly what’s necessary for someone dealing with user experience. I think a lot of people think of user experience in terms of what you visually see on the screen. But you define user experience in a much broader way in terms of persuasion design, strategy, innovation, and a really mature operation that someone would be able to develop in their organization.

Correct. The field is in the process of changing its name from usability to user experience design and I think there’s a message here. Usability really reflects user-centered design, optimization of human computer interfaces—we want to make the thing usable. User experience design is bigger, and it’s bigger in ways I have discussed. User experience design means we have to look at the big picture of how somebody works with our organization, how somebody experiences every part, every contact point with our offering. To do this we have to deal at this bigger level, we have to make these bigger contributions.

We’re no longer just making effective human computer interfaces, we’re really looking at how our offerings are impacting people’s entire ecosystem with multiple players, multiple environments, multiple scenarios, multiple artifacts. All of this complexity needs to be understood and managed, then we need to apply this understanding to our designs—not just optimization of radio buttons and check boxes, but optimizing strategies, innovations, and persuasion.

This is powerful because it moves us into a more rarified environment within our organization. We need to begin to talk at the board level, at the director level. It’s not just about optimizing a computer system, but about the kind of decisions that are made at that level and I hope these courses will give every participant the language to be able to walk into a board-level discussion and speak the language of the board, speak about megatrends, lifestyle changes, and design trends, and make the contributions that can really only be made by somebody with a user experience perspective. This goes beyond what a marketing organiza-

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tion traditionally does. It really looks deeply into the ecosystem, the behavior, the daily operation and tasks of the user in whatever environment they are in.

Who would benefit most from this certification and training?

Well, clearly the focus is the CUA, somebody who has a core understanding of user-centered design. They may or may not be actually certified but I think that having a clear understanding of core usability work is pretty important. But we have had people from the marketing field take the PET design and the Big courses. Taking these courses allows someone in the marketing space to better understand the value of the user-centered perspective and techniques, and bring those to bear from their perspective as well.

So I would say these are the core target audience of these classes. The user experience design team, marketing-oriented staff, innovation-oriented staff, and their management at a working level.

Are there any prerequisites to taking these four courses? Should a person take HFI's previous courses first? Or can anybody take any of the courses?

The one key prerequisite is before you take The PET Architect class you really should have taken or be familiar with the content of the PET design class. Other than that, I don't think people will have trouble if they take the courses in various sequences.

What about the exam? Do you have to be a CUA before you can take the CXA exam?

Yes. Only those who have already passed the CUA exam can take the CXA exam.

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We know that the CUA designation has really helped people in their careers. CUAs have told us that companies who interview them are actually looking for a designation of CUA or equivalent in order to take on a certain position or job in the field. How do you see that the CXA designation will help the career of a UX practitioner?

At one level I think that the certification allows organizations that are hiring to quickly scan and ensure that applicants have core skillsets that they need. Even when HFI hires today, we look for people with a CUA because it’s easier to start with a group of people who we know have an established proven foundation in the field. I think organizations will quickly recognize the difference between a CUA skillset that ensures that people have baseline capability in user-centered design and understand the language and concepts in the field, and a CXA which takes that to another level, allowing somebody to contribute not just to user interface design, but to institutionalization, strategy, innovation, and persuasion engineering.

So it follows that there is a real business value to getting your UX team trained and certified with the CXA certification.

Yes, absolutely. We went for many years with just the CUA and without seeing a value in going beyond that because the field wasn’t mature enough. There wasn’t a clear set of advanced content to validate. But today we see the field maturing and contributing in these larger ways, so the CXA reflects this higher order capability.

From a business perspective what would be the kinds of problems that could be solved if my usability team got the CXA training and certification?

There’s a golden thread that ties together your organization’s highest level executive strategy with the delivery of an application. If that golden thread is broken, at any point, your organization is profoundly damaged. If the golden thread is working, there’s an executive intent which then passes into an executive strategy of product offerings and channel integration, which then drives that thread forward into innovation, that then comes together into user-centered design—

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right down to the most detailed level—and then it’s supported through coding and continued improvement. This thread is broken in most organizations.

The CXA program will let us use the user experience team to pull together that thread in their contribution to executive intent, to strategy, and to innovation, and their ability to instantiate that strategy and innovation work into the design itself, and drive that all the way through delivery and continuous improvement. The user-centered design team is really the group that can glue together this golden thread which is so important in making organizations successful. It’s frustrating for executives to realize they have an intent and a strategy which doesn’t end up being driven to the market. The CXA program provides a skill set that lets that happen—lets executive intent come to fruition. And that’s what it takes to make an effective organization today.

Does anyone else offer this certification or is HFI the only game in town?

In terms of a core certification there is a Board of Certification of Professional Ergonomics that has a very good program in core usability skills. It’s an example of a program that we recognize when we certify organizations. If an organization has someone with a Certified Professional Ergonomist (CPE) or a Certified Human Factors Professional (CHFP)—that person will count in the census of certified staff. However, clearly that program does not really focus on or address the CXA content yet. I’m sure they will eventually look to expand in that direction.

When HFI came out with the CUA program people had the question - what gives HFI the authority to give certification? Since that time HFI has certified about 3000 people, and it’s now well recognized around the world. But I’m sure the same question will come up again—what gives HFI the authority to certify a practitioner as a CXA?

HFI being the largest organization that specializes in user-centered design and user experience design, we have a certain responsibility to contribute to the field. Just as Microsoft provides Microsoft certification, and that’s important for people, HFI provides a set of certifications. And if you think about it, those 3000 people that we’ve certified with a CUA represents about 10% of the world’s census of user experience designers. So we really do this as a service to the field because

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“In the CXA exam, in the course set, HFI is making its corporate statement about what we believe the next generation skillset, next generation contribution, will be for our field.”

nobody else is standing up to do it. So now we've made the investment and expanded on that. But both the CUA and the CXA programs stand on their own based on the rigor of the test program and recognition in the field. We have also now developed programs for organizations to have a Certified Usable Practice™ in UCD, and for a product to be validated as a Certified Usable Design™.

The first two courses, the PET Design course and Design for the Big, have been offered for a few months now. What about The PET Architect and Institutionalization courses? When will these be offered?

They're both in design and I believe we'll have them out in March, 2011. I think we will see the first CXA exam offered in June.

Can you give us an idea of the kinds of things people will be tested on in this exam?

Just as the CUA certification exam reflects not the courses themselves, but our underlying understanding of the important content in the field of user-centered design, the CXA exam will take the same philosophy. We absolutely strive not to test the fact that someone has taken the HFI courses, but rather a person's familiarity with the core content in the field. So somebody who has studied and learned about the techniques in the field will have no problem passing the CXA exam without the HFI courses. As long as they understand issues of megatrends, design trends, lifestyle changes, processes of innovation, strategy issues, persuasion engineering, and institutionalization of usability; they will certainly be able to pass the CXA exam.

This is really exciting Eric. The CXA program really raises the stature of a UX practitioner to a whole new level. Do you have any closing remarks or comments?

I agree it's exciting. This set of knowledge represents the current major step forward that we are taking as a field. The field is facing new technologies which

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drive us into a ubiquitous computing environment, towards ethnographically inspired techniques and models such as the ecosystem model. We are also beginning to contribute to higher levels of discussion within our organizations. These changes are imperative to help our organizations be competitive.

Today everybody expects a website to be usable. It's a given, it's really a hygiene factor as it contributes to user experience. But we need to go beyond that. That old approach to usability is no longer enough. We need to go to a higher level of user experience design.

And really in the CXA exam, in the course set, HFI is making its corporate statement about what we believe that next generation skillset, next generation contribution, will be for our field.

For more information on HFI's CXA certification and training, please visit:
www.humanfactors.com/certification/CXA.asp

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About Dr. Schaffer



Eric Schaffer, Ph.D., CUA, CPE
Founder and CEO
Human Factors International

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 100 Fortune 500 clients, providing user experience design consulting and training. He has recently been traveling the world teaching HFI’s newest 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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Human Factors
International

410 West Lowe, P.O. Box 2020
Fairfield, IA 52556
Phone: 800.242.4480
Fax: 641.472.5412
hfi@humanfactors.com
www.humanfactors.com