UX Strategy - thinking & doing

Welcome to our interview series on Experience Design Strategy.

In this series Tim Loo, Executive Director of Strategy at Foolproof, will be talking to global leaders and experts on the thinking and doing of experience design strategy.

Tim's first interviewee is **Paul Bryant, a Consultant Strategist and organiser of UX Strat Conferences and Masterclasses**, which are held around the world.

Tim Loo

Paul Bryant

Q. Paul, could you describe what you do?

A. I organise UX Strat. We hold conferences, as well as masterclasses, and 1-day and 2-day experience design workshops in different cities, mostly around Europe and the USA.

Q. How did you get into experience design?

A. Well, because of my age, that's rather a long answer so I'll summarise. I started designing websites in 1995, then lived in Barcelona and worked for a small web design company. I moved back to the US a couple of years later and started working as an Information Architect for Sapient. They were top of the consulting pile back in the late '90s.

I started my own consulting practice in 2002 doing mostly user research, ethnographic research, and some quantitative and qualitative research. The term user experience came in around the year 2000. At Sapient we were pretty quick to jump on that. So, from the beginning, my consulting was around user experience and then I started doing the events. UX Strat is in its fifth year now.

Q. When and why did you start thinking about experience design strategy?

A. Well I had a project. I did a project for lowes.com - a major retailer in the US. We were at a very tactical level with the company doing usability studies, heuristic evaluations, wireframes, task paths, interviews etc. But they hired a new Business Strategist for Lowes.com, she was brilliant, she graduated from Darden – Liz Guthrie.

We started working together and realised we had a lot in common, a lot of goals in common and, in order to affect the business side of ecommerce, we would have to do user experience a little differently. So, we created a project way back in 2009 called UX Strategy of Lowes.com. I was the UX lead and she was the business lead – it was kind of like chocolate and peanut butter. Soon after that I started the LinkedIn group UX Strategy and Planning. Today it's about 30,000 members so not huge, not small. But it confirmed the idea that business strategy and experience design were going to have to be related for companies as they move into the new world of business at that time – 2009/2010.

Q. How do you define user experience design strategy?

A. Well, actually, I use your definition Tim in my materials so I'm just going to read that off of the workbook: How does Tim Loo define UX Strategy?

> "A long-term vision, roadmap and key performance indicators to align every customer touchpoint with your brand position and business strategy."

I guess I get asked that a lot because of people saying "there's no such thing as UX strategy" - due to an article a long time ago called 'There's no such thing as UX Strategy', but there should be and I said that at the time back in 2012. I think it's more around not necessarily UX strategy and what is that, but what is the thing and then the strategy that goes with it.

There's strategy in every area of life. I'm on a very strict diet right now so I have a diet strategy. There's food I keep around the office and other food which I don't. On a tactical basis I'm trying to refuse certain kinds of food. But on a strategic basis I'm trying to have positive things around me and trying to reach my goals through those efforts. Strategy applies to every area of life. It has to do with using your resources to go from a current state that you're in to a future, desired state. So, apply UX strategy to that - or experience design, XD, strategy to that - and you just have to look at the user experience and see how do I use my resources and user experience to win, to succeed – to get from where we are now to where we want to be.

I think the term user experience is getting a little dated – it's been 17 years since I first heard it. I think the idea of the user with driverless cars, and the Internet of Things is a little bit outdated, but I think experiences are never going to be outdated, it's something which is universal, so I think the shift to experience design strategy makes a lot of sense to me.

Q. One thing you mentioned is about a shift from user experience to experience design, and you've spent a lot of time thinking about that. How has your thinking evolved over time?

A. When user experience came out, the idea that you centred your efforts on what the people using the technology were thinking, feeling, needing, rather than on a list of product features, was a revolution. I think the idea of user experience often brings to mind screens, whether that's a phone screen or computer screen. UX seems tied to screens so in that sense I don't think it's a forward-looking term. At that point it was very useful, but now not so much.

I also think that when agile and lean UX took off companies took up product focus, product management focus, to things that were designed within their companies. I think that was a big step backwards. Although it's very efficient and very meaningful, at the same time the product is not the centre, the service is not the centre, the experience is the centre. I think a move towards experience is the right way to go.

At the same time, in terms of experience, I'm mainly interested in design. Our event has the word UX in it just because historically that has been important and is still a growing field. My advisors, like yourself, have agreed that experience design is a broader, more future-looking term, but there is also a certain credibility and a certain applicability that people feel with UX. So there is a sort of river crossing that we're in the middle of. This year we will have some XD events: XD Silicon Valley, XD Amsterdam, XD Hamburg, XD Austin, XD Boston etc. Our flagship conferences will stay UX Strat this year but at some point - when we reach the tipping point - we'll switch that to XD Strat.

> "My advisors, like yourself, have agreed that experience design is a broader, more future-looking term."

Q. What are the core elements of the UX Strategy and Planning process?

A. It involves a lot more roles than it used to. As UX strategy or experience design strategy become a focus within a company we don't only speak to team members in a product team – that's part of it, but that's more on the execution side. On the strategy side we're going upstream. I just got off the phone with a really well-known company in Europe and that's exactly what they were saying 'we understand what we're doing in our team of designers and product teams, we

know what the approach is on execution, but the problem is we're not upstream in the planning in the concept or even pre-concept phase'. I feel that's an important component of experience design strategy.

Moving upstream before there are requirements, before there are teams, before there are timelines and when maybe even the product manager isn't even named yet, that's when experience design strategists get involved and help to begin setting the equations, put the practices in place that are going to yield to a product service experience which is designed to be successful in the marketplace – that's a key element. Of course, the traditional elements of design - visual design, typography, information architecture, interaction design, user research and content strategy - are all still pieces in that puzzle, but that's been figured out for a while on the execution side. On the strategy side it's quite new, and I'd say in Europe newer than in the US.

[TL] That's interesting, I was having a discussion with one of my colleagues about methodology and I think you're right that the idea of the 'how' is quite mature in terms of working processes and skills, but the 'why' and the 'what' and the role of experience design in helping businesses shape that, it's still fairly early days.

Agreed, and the companies that are legacy companies – BMW, Home Depot, Tesco – have built up either engineering departments or business strategies or operations - these are very muscular, very strong, very robust practices within a company, so for experience design professionals to move upstream and have an impact on those areas, I don't think that is an overnight process.

What the UX Strat events are about is how do you build up influence? What should you focus on? What are the pieces to put in place so that as you begin to have successes you are invited into a bigger and bigger role?

But I treat it as a very gradual thing. In our workshops, at the very end when we talk about communication, I say that this is not an immediate process. You have to do homework; maybe you don't even get the money to do this work right now, but you still need to do it if you want to have that influence over time. Building that up takes proactivity.

Q. Are there conditions in an organisation where XD strategy/user experience strategy soon take a foothold?

A. I think there's a maturity curve. Last year at UX Strat Europe Telefonica talked about their maturity curve, you just can't jump levels of maturity, it doesn't happen

that way. You might hire an executive who suddenly makes a lot of progress so there may be a turbo boost, but that comes from hiring a certain executive in a certain position. In general, the organisation is going to have to go through certain stages to get there and I feel like that has to happen on a case-by-case basis. As you begin to do your homework, to develop a point of view of where your company's products and services and experiences should be going, to define small wins where you can show that if we can do a little bit more of this then we could win more and buy that sort of influence from those successes.

I was talking to a very traditional company yesterday about doing a consulting project for them and I had to say 'I don't think you're really ready for that particular piece, I think instead what we should do is look at this particular aspect and build some credibility before moving onto something more aspirational.'

Q. Are there common barriers to the success of getting experience design happening in an organisation?

A. One of the biggest barriers is a trend that started in 2011/2012 with agile and lean UX. They brought a great deal of efficiency to the process and I think that was really important. As Michael Porter, Harvard Business Professor, said efficiency is not having a strategy. It's very important to management, but it's not strategic, it's not going to set you apart and differentiate you from competitors. The hindrance is that organisations are so bought into agile, into lean UX, that they're not able to dedicate resources to the strategic side.

Often, people in our field use a double-diamond – the left diamond being the strategic aspect of product and service design and the right side being execution. I

Double-diamond

STRATEGY   EXECUTION
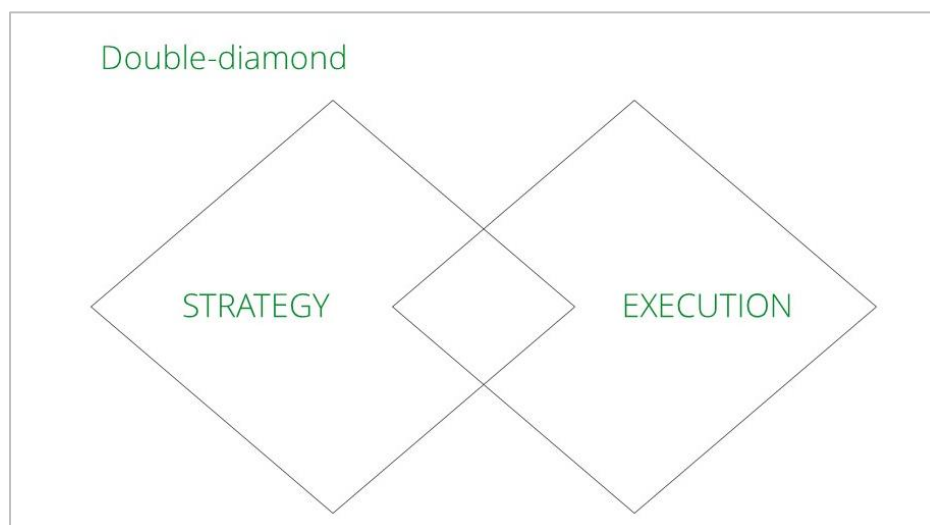
think that agile and lean have thrown UX, user experience, and experience design squarely into the right diamond and focused on what will help us get this out quicker, what will help us get this out more efficiently at lower cost. These companies are dealing with speed as a key criteria and if you can't generate that speed and that efficiency you're going to lose people, lose sponsors, lose advocates throughout the organisation.

So I get that's super important. But at the same time **if you don't know where you are going, but you just get there very quickly that's not helpful.** I think the strategy side is to have the kind of influence where you can say the experience needs to go in a certain direction, we have some research, we have some data to back that up and to have some influence over the organisation to give us the resources, the time, the energy we need to go in the right direction and then to do it right and get there quickly. But first you need to get those resources and that time to be able to collect data, analyse data, to formulate models etc. I think formulating a quantitative user model is key to that, but in order to do that, that takes time, it takes resources, it takes energy. I think that the biggest hindrance is the conveyor belt of releases that people are on where I can see just two weeks forward, well this doesn't work in a two-week timeframe, it works in a much longer timeframe to be able to develop a strategy.

> "If you don't know where you are going, but you just get there very quickly that's not helpful."

Q. Picking up on that, Agile is really working its way into IT organisations around the world and some Lean UX but I'm seeing more agile than anything. Are there themes that you're seeing around the world?

A. Yes, there's a legacy strength to different companies, they have this strength that let them be successful for 10, 20, 30, 40 years, whether that's engineering, manufacturing, IT, operations, retail, whatever the strength of that company is, is an asset but also a hindrance to moving forward. The barrier to breaking into that inner circle with methodology's like customer journeys, immersive research, analytics, processing big data for experience design - those are not easy to sell into these more traditional areas. In fact, a lot of people I talk to in different companies in different countries can't really get access to the people, the documentation. I was fortunate at lowes.com with Liz that we were sharing both of our sets of information so I was able to see information that was critical to the development of the company – not secret information – but things that were important to understanding the inner workings of the company.

That's a big barrier. If you can't get annual operating plans, if you can't get key strategic initiatives and if you can't get forward-looking brand initiatives it's difficult to develop ideas, to develop processes that are going to use those ingredients to create a strategy on the experience design side. If you're only limited to what you currently have - testing screens and things like that - it's going to be difficult to have the kind of elevator pitch that is meaningful to executives in the company because you don't know the language, you don't know what's current with them. That is a huge barrier that I see often.

What I advocate in our workshops to get around that is to **find an ally on the business strategy side, find an ally that understands that companies are changing**. In fact, our theme for 2017 is 'Transformation Outward, Transformation Inward'. In other words, we have to transform our products, services, and experiences to meet the needs of today's consumers – especially those who are younger, more digital. We have to change the way we're doing products and services for that – that's transformation outward. But there's also transformation inward, companies are not structured to produce compelling experiences across platforms, across physical/digital worlds. They're just not ready to produce those kinds of innovative experiences and so that's transformation inward. I think that balance of transformation outward and transformation inward is a theme I'm seeing across many, many companies and countries.

Q. Are there any differences in say North America, Europe or Asia?

A. I think we have differences even within those areas. I'm not so familiar with Asia. When we tried to put together UX Strat Asia I discovered that Asia is a construct of the European imagination. There's really no Asia, it's countries and those countries are quite different and they expect different kinds of events. So I don't know about Asia. To me it's country by country, some of them are very mature in their experience design aspects, some are not very mature.

In Europe and the US it's a little easier to see, they've been at it for a while. We've had different kinds of companies take precedence in those areas, but even within the US and Europe I'd say there are different levels of maturity. I'm going to San Francisco in a couple of weeks, I gave a workshop at Facebook a couple of weeks ago, I'm going out to SAP to do workshops – when I'm on the West Coast everybody already speaks the language, already know what I'm talking about, they have already done lots of projects like that and so as they begin to hear about

different ways to use big data to drive design innovation it's already their natural language, culturally they're ready for that.

If I'm in other areas of the US, not as much. It's more about trying to get engineering to listen to them, to get engineering to take some of what they're saying into consideration, trying to get business leaders to understand that experience is the battleground. Many of those leaders are saying that, but the company below is not necessarily ready for it. In Europe, it's the same thing. I'd say it's more hierarchical in Europe, more of a focus on service design rather than product design – it's not necessarily universally true, but I hear a lot more about service design in Europe than I do in the US. Product design is very firmly entrenched in the US.

On the team side of things, it seems that the European companies have more of a hierarchy of positions. So, if you change the structure, it's going to take you a while. In the US it seems to be a bit more fluid and a little less well defined as to who is able to have the next idea or the next plan. In general, I'd say there is more of a difference between the vanguard in the US and Europe versus the laggards in both. I'd say there is more of a difference there than across the continents.

Q. How would you describe the role of the experience design strategist?

A. Some people are fortunate to have that title. I see everyone who joins the UX Strategy LinkedIn group and I approve everyone who joins that group and so I also see job titles and I see the title coming up a lot more today than 2011 when I started the group. Some people are fortunate enough to say your job is to create a strategy for us. That title may also be UX Director, it might be Product Owner, Product Manager – these might be the titles, but they've been given the mandate to create a strategy for products and services.

I do feel that product strategy is limited in some ways, experience design strategy is broader than that. I think experience design focuses on the experience of our customers, employees etc. Product and service to me is looking at something that we're doing, something internal. It's this thing that we're making or this process that we're making. To me, that's a compelling revolution, something that focuses not on us and what we're doing, but on the experience that someone is having.

Other folks don't have the title. I'd say most people that are going to be involved in user experience strategy don't necessarily have the title that gives them that right and that's when the hard work begins of building influence. What our workshops

are about is building that kind of influence. In that case it's more of a referent, an inferred type of leadership where you begin to shop around your map of the world, the models that you've created, your understanding of what moves the needle in your particular organisation and what's going to move the needle further, what trends are happening in the marketplace, what consumers are looking to – particularly younger more digital consumers.

I'd say that kind of more informal authority comes from doing your homework, presenting models at key times and perhaps saying no to some projects that are very execution focused and perhaps where you can't add that much value and then using that time that you've purchased to make a difference in a highly visible product or service experience that your company is designing and then use that informal authority to say if I had more resources and more time etc. to build this then we can have an even greater impact moving forward.

[TL] Sometimes you have to try to be the smartest guy in the room because organisations who are grappling with how to re-invent ourselves and how we engage and create value for customers – the real knowledge of that isn't sitting with senior people, it's sitting with people who are closest to what customers do, how they feel, and where the opportunities lie, so I totally agree with that Paul.

Q. Is there any specific advice you would give to someone who wants to pursue a career in experience design strategy?

A. Yes, first of all I'd say are you sure? Because some people like to design things and like to sit down with Photoshop and Illustrator and make things and I think that's awesome. I'm not that gifted in that area, but I am very familiar with information design and information architecture processes and things like that, but I'm not a designer per say. So, if you really love design, it's not to say you can't be a strategist, but if you are you may be focused on other kinds of things – more metrics, numbers, KPIs – your day won't necessarily be crafting a cool interaction that has nice movement, nice narrative etc. **So, I'd ask first of all: are you sure? Is that really what you'd like to see your career do?**

If it is then first thing to do is some homework. How does your company or your agency's clients make money? A lot of designers don't know that. Why did you have a down year last year? Is a competitor doing better than you in the marketplace? Who's the long tail competition that's coming up rapidly with a great new experience? As a designer working on two-week sprints for releases you may

not have that kind of insight, or that kind of information coming to you, so it requires doing homework in your market, knowing what's happening, what moves the needle, and what kind of data do we collect.

I've been to cubicles around the world, or open work environments around the world and I often see on designer's walls typography or really cool images or colour palettes, but I rarely see a graph of here's what my design did last month in terms of results. Some designers don't take a results-focus to their work because it's scary, it's like looking at your value in numeric terms just like it's scary to look at the bank balance and think 'oh my gosh how did that much money leave so quickly?' The second thing is to actually focus on how you make money for clients, or your company, or your products etc.

"Focus on how you make money for clients, or your company, or your products."

The third thing is to begin to **build bridges with people**. If you like to work alone and just have your beats on - be in your zone and do your work - then strategy is probably not the area for you as you're going to have to meet with people. I'd say the first person I would want to meet with in my company, or in a client's company, is a business strategist and get synced up with where that business is going and to get the inside scoop on what's important to the business today and for the coming year. Another relationship to make is with IT because they're probably doing a lot of the architecture and that has an impact on how you can build things.

As you mentioned in your talk with Sarah from Shell last year, there's a lot of moving parts behind the scene if you want to influence customer experience. In a large Corporate there are a whole lot of departments like the finance department, and operations; as designers people may not feel that comfortable as information architects, as interaction designers, content strategists, those may not be people you have immediate access to. I'd say build some bridges and take time to take people to lunch.

One lonely person I often find in a company is the data scientist or the data science group. They're kind of walled off and do reports for the executives, they use fancy analytics packages and they're doing these highly aggregated metrics for executives – they like it, they're dealing with data, they're dealing with executives, they're happy, but we need their data, we need to understand what's happening. Some of the best projects I've ever done in consulting have been where I've said can you give me a password to the analytics package. Let me just see what's

happening, and some strange things turn up when you're digging into the analytics, hour after hour and you spend time understanding what's actually happening. So, I'd say befriend the data analyst.

At first, they're going to be very suspicious of you and will ask what exactly do you want to know, what exactly is the metric you want to know because that's the easy way out for them, they can just give you that one metric. But instead say "here's what I'm thinking about, here's the kind of questions I'm trying to answer, can you construct something like this?" I'd say building a relationship with the data science group is very important.

Once you have those relationships I would say the next level after that is to bring data. **Take a data focused approach to what you're advocating in terms of strategy.** I don't think anybody's going into a business strategy meeting in any sizeable company and saying "I think we should do this, I really feel like we should, Bob likes it, Sue likes it, I feel good about it so this is the direction we should go in…". That's not how business strategy works – it's numbers, it's metrics, competitive metrics, it's market data, it's historical data. So, the next step is to become comfortable with data and have your ideas synced up to data.

When I give persona workshops in the UX strategy workshops I say if it's not built on data – if it's not wired to data coming out of the personas – it's just a story, it's a good story and it's helpful for people to gain some empathy for customers and to understand what they're up against when they try to use our products and services, but as far as a predictive model – it's not. You can't base it on something that you made up and expect it to be something real, you made it up before and it's still made up. I'd say getting comfortable with data means - in a persona, or a user model, or archetypes - data has to go into it and be wired to scorecards etc. so you can say "here's how successful we were when we made that new release, it was mainly targeted to this segment and from that segment we can see these bumps, or not, after the release and that tells us something about the strategy, is that a good strategy?"

Q. What excites you most about the future of the experience design strategist?

A. Well, I don't think we could be in better times than we're in. I've been in the industry quite a while. I actually started designing user interfaces back in the 1980s for a pharmaceuticals company – our Vice President actually bought us Macs! That was when Macs were really new, right after the commercial bringing Macs into the world. So our company, a very conservative company, bought Macs

and I was responsible for designing a user interface. That was the '80s and now it's 2017. I've not seen a better time for us than today.

I'm very excited about the future, we're in the stream of the conversation. The world is changing. Transformation is again UX Strat conferences' stream for this year. In that world of change, we're the ones helping to guide the ship forward into successful, winning strategies for the coming combination of physical and digital things and, as many people are recognising, we're just at the tip of the iceberg.

I'm not speaking about a dystopic, matrix sort of machines rule the world, rather that we can influence the direction that the world is going in, in terms of strategy, in terms of products, services, experiences, so that we guide it to a place we want to live in, that we think is really cool, cool for our kids and the people we love and know and so bringing that element of what's important to us. **I would say we're at the leading front of where that should go and I'm super excited about that.**

[TL] Paul, I absolutely share that excitement, I feel exactly the same way about the future of our profession and the community that work within that.
Thanks very much for your time today Paul, I'm hoping we'll be able to re-connect with you, as we'll be talking to other thinkers and leaders within the industry.

Subscribe to our [YouTube channel](#) to catch the next interview in the series with Ronnie Battista, Practice Lead of Experience Design at Slalom Consulting.

Contact

Tim Loo, Foolproof
t. +44 208 539 3840
m. +44 771 441 5677
e. tim.loo@foolproof.co.uk
www.foolproof.co.uk

UX Strat Europe 2017

June 15 – 16 Amsterdam
https://www.uxstrat.com/europe/

UXSTRAT