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 third interviewee is with **Jaime Levy, author of "UX Strategy"**, College Professor, UX Strategy Consultant, and public speaker.

Tim Loo

Jaime Levy

Q. How did you get into experience design?

A. Well, I've actually been doing software design for almost 30 years now and so the short version is I wanted to be a female film director at a time when - and it's probably still true - it was extremely competitive. I see myself as a story teller first and foremost, and I was in San Francisco experimenting with all the new technologies coming out, including everything from the Amiga computers, high level scripting languages, interactivity, animation, a laser disc, and then I decided to go to graduate school at NYU in their interactive telecommunications program.

I decided my master's thesis would be something that would bring everything I'd learned there together and so I created the first electronic magazine on disc for the Macintosh. I was basically an interface designer, already professionally working in 1990 before the web browser had been invented, so I had a bit of a head start.

Since then I've worked my way through all the bullshit titles, you know: interface designer, information architect, interaction designer, UX designer. But ultimately, I've been doing the same thing, which is trying to create innovative products and trying to have as much creative control in terms of the strategy and the design and the experience.

Q. What does a UX strategist do?

A. It really depends on the environment that the person with this title works in. I personally work as a consultant and my clients can range from start-ups to enterprise. They tend to be more start-ups, or people from enterprise, who want to create something new and they want to do it in a way that is cost efficient, or lean.

For me, the main thing that we do is figure out if there is an opportunity in the market for this vision that they have. I have my own methodology and I think all UX strategists who have been in the field since the web was born practice their own version of it because we had advantages like UX designers did back in the day. I had a methodology and then after lean start-ups came I changed it.

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It's hard to answer that question directly, but ultimately, it's trying to validate that the vision is going to solve a problem that people really need solved and then to see if there's opportunity in the market for that product. Can they get funding, can

they get enough of a user base to monetise it and then figure out everything from how to create rapid prototypes to what are the key features and then help them build a direct channel to the customers.

That's the context of where I am as a consultant. That's letting me do everything. I think for people that work in more constrained environments and siloed environments, like enterprise, they may only get to do some of it. I wrote the book in such a way that you can plug and play techniques as needed because not everybody is going to get to do everything because there is so much process, and politics in an enterprise environment.

Q. What made you want to commit to writing a book and get it out there?

A. First of all let me say it's insane to want to write a book. I wouldn't recommend it to anybody. It's like the equivalent of having 3 kids. I've had one son and this took about the amount of time and pain as having 3 in a row without a break.

The issue with writing a book is that we are working in a rapidly changing environment in terms of technology and so it can be outdated very fast. I have always been a part-time professor, even when I finished NYU I started teaching one class and then I'd use that as a recruitment tool to choose the best students at the end to work for me. The issue was that there was never a book that really explained my methodology when it came to strategy. USC wanted a text book that was from a major publisher and I knew that I was moving in the direction to a top ten engineering school and I would need a major publisher. I decided to write the book originally to be a text book.

Once I realised how challenging it was I had to give up everything, including working, and dedicate myself to the book for a full year, sitting in a library writing it in pieces. I had to research the parts of my knowledge that were weak, such as the history of business strategy. I don't have an MBA so I had to give myself a quick one and read a lot of business strategy books.

"There was never a book that really explained my methodology when it came to strategy."

It was an experience doing the research and then putting my thoughts down to paper. O'Reilly put the book out in chapters, and I was getting feedback back, and seeing my students who for the first semester turn in their assignments and see they didn't get 'that', and 'this', and having the opportunity to get to tweak it, fine tune it. At the same time, I had clients calling me up to try and distract me from

finishing my book and the only way I would agree is if they let me do the experiments that I was writing about in the book so that I could use my clients as business cases.

After two years the book was done. It's an amazing experience to write a book. I wish it happened before I was fifty. I could have added more consulting to that, but at the same time it's an amazing experience to get to write that down. For a non-writer I had to have a writing coach throughout the entire experience.

Q. What was your thought process around the audience for the book?

A. I started out wanting to write a book to prove myself to people like you and Paul Bryan and other people who consider themselves experience strategists, UX strategists, strategists of any type really. I was doing the research and as I was seeing the homework assignments come in based upon how I was writing the techniques and practicing them with the entrepreneurs that I was working with I realised that the book was actually for the inverse of who I was writing it for.

It wasn't for people like us, it was for everybody else really. It freed me up to write in laymen's language. I try to avoid colloquialisms and buzz words as much as possible and at the same time I always try to footnote everything, which I don't see in a lot of other UX books. I was trying to make a book for everyone, whether you're an entrepreneur, intrapreneur, product manager, marketing product person, UX designer newbie, which is my biggest audience strangely. I've had a person who runs a hair salon say that the book was extremely helpful for her, and I never thought I would be for brick and mortar people.

I think the internet and how it's evolved as a marketing tool for all businesses makes it necessary that people understand how to conduct competitive strategy, regardless of what their value proposition is, and do customer interviews. Maybe they can't make a prototype for a brick and mortar store, but it's still the experience of validation, of finding that opportunity space that people who don't have a business background, and are intimidated by it like I was. Now I'm not, but I had to listen to all those business books audible because I can't read, and they're very dry. I can listen, and eventually I learned the vocabulary and now I see my students, who most of them English is a second language, get up and present and they'll be dropping words form "Blue Ocean Strategy", using words like value proposition and design words and all very calmly and in the context of explaining why they chose to make certain design decisions.

I'm kind of happy with how it turned out and obviously based on the sales and popularity of it I think I lucked out in terms of what was written to be a text book turns out it appealed to a wide audience.

Q. The second chapter is interesting, there's a section called "how I discovered my UX strategy framework", could you tell us a little bit about that?

A. Basically, even after I'd already worked before the web, for 10 years after the web, after the .com bubble burst in New York, and nine eleven attacks, I came back to LA and I was totally unemployable as a .com CEO. I had to fake my way into a UX design job at what was then called Schematic, now Possible Worldwide.

They wanted to see wireframes and so I faked some out from sites that I'd built. Once I was in there I wanted to climb to higher ranks so I could be more involved with product definition, not just be given this deck of "here's the flimsy brief", or "here's a product requirements document with 100 features". I had no opportunity to do research because it was an agency with limited budgets for certain things.

When I finally got assigned to do the discovery phase of Oprah I went out to Chicago with the other leads and what I saw was aspects that were interesting because of consensus building. It was like we just dialled it in. It was like we had a week to create a discovery brief with these bogus personas where we never got to talk to the customers they were based upon. The stake holders weren't interested in our ideas. It wasn't even something that we could really interject into the conversation beyond advertising how we could potentially monetise their amazing content. Everything was just about turning a static site into a dynamic site.

The thrill of doing this discovery phase was amazing, but then immediately it turned into 6-9 months of wireframing and the stakeholders going back to fighting over real estate and who would be in the global nav. But I got that taste of what strategy could be and so I went to work for other agencies that took business strategy seriously, where we could conduct serious competitive audits and do actual field research. Once I had that taste of doing the UX strategy phase I could never be a wireframe monkey again.

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Q. Could you talk us through the 4 tenets of UX strategy as mentioned in your book?

A. I'll try to do it quickly because there are long pages of text there. So every methodology typically has a venn diagram and I present them as four plates on a table, not only because I'm a foody, but to give you this idea that it's not necessarily these four tenets that they need to be done in a linear order. It's almost like tapas where you eat a little bit off of each plate and that you do it not only at the beginning while you're trying to figure out product definition, but throughout the phase 1. Phase 2 you revisit the strategy because the marketplace is dynamic and changing, and it's competitive. It's very dog eat dog out there with people copying the UX.

Business Strategy

I had to come up with a formula to base the techniques on, so the first one obviously is business strategy. A lot of designers seem to think they live in a bubble and they're just here to make this, do this, do this product, and they may not think about the big picture and how this ultimately is going to fit in with the brand, or the product suite, or the rest of the products or services coming out from this company and to understand ultimately what are the business goals.

The first tenant is really to get people to understand terms like value proposition. How to validate it and how to do competitive research properly, not the way I've seen at certain agencies where they'd just do searches and put it in a word doc with screen grabs - that's not empirical, that's not methodical. I created a tool kit that's with my book and basically you list all the competitors and you go through attributes that range from business attributes to UX attributes. Something like monthly traffic and funding would be around the business side, and how many clicks does it take to achieve the primary use case of the product would be on the design side. So business strategy would be a huge tenant.

Validated User Research

After business strategy comes validated user research, which leaned heavily on Steve Blank's methodology of customer discovery and "The Lean Startup" by Eric Ries, this idea of validation taking his build, measure, learn, feedback loop and applying it to strategy.

It's so similar the crossover of learning about trying to validate everything from competitive intelligence and teaching people that you want to start by validating there's actually a problem before jumping into a solution. People always think I

have this problem so everyone else does, or my manager says this is what the value proposition is so I'm just going to do it because that's my job. I get that we have to do that to make money, but for me I want to make sure it's a problem that needs to be solved and that it's a big problem - like a migraine problem, not just a small headache problem, because if it isn't then you're talking about a potentially small customer segment, or one that's hard to reach.

Validated user research is not "oh I have empathy for my customer user and walk in their shoes". If they don't want to buy the shoes then what good are they really. We need to make sure we can empathise with them, but at the same time that they actually have a problem that needs to be solved and that they will spend money or get engaged with our product or service so that we can monetise them, or we're going to go out of business.

Value Innovation

The third tenant is value innovation. Value innovation is obviously from "Blue Ocean Strategy" and it's - if you look at examples like Airbnb and Uber - the idea of bringing the cost structure, or the cost of what you're charging down. In the case of Airbnb it would be perhaps cheaper to rent an apartment than stay in a hotel, especially if you're with your family and you want to spread out and be able to use the kitchen, or be in an area not near the touristy area. And then also bring the value of it up. Cost down, value up. This comes from a hybrid from Michael Porter's idea of having a competitive advantage where you want to have the cost down, and a differentiation.

People need to really understand that we need to approach product strategy and design not as "I'm going to make something that's going to have a million features, like a chopped salad", but instead that less is more. We need to take a more minimalist approach to product strategy and put really what's just necessary.

If you look at Uber they haven't added a 100 features to it; years later it's still click a button and the car comes and you never have to pull out your wallet and you get from point A to point B and it costs less. So you get a better experience and it costs less. How do you compete with that? Clearly, they're killing it in the market right now and that's the value innovation, and the same with Airbnb.

Killer UX

And then lastly would be killer UX. I call it killer because I'm from California, with killer waves. But killer for me is not about amazing design or genius design, but about understanding things such as convergent. Understanding how to build in-product marketing into the product so that we keep our customers/users

engaged so they don't bounce out the top level when they're just a suspect. That they don't put something in the cart and leave, or they don't browse and leave, but that they're continuously prompted to come back if they leave, or that they love and become addicted to our products and services so that they stick around. That's killer UX. All of those things together, to me, add up to potentially having a very strong product or service at launch.

[TL] I was told a story about Airbnb that in the early days when there were many similar start-ups, about 15 start-ups with a model similar to Airbnb, and when Airbnb were asking for initial funding they were asking for a lot more funding than some of their competitors. When they were asked why they thought part of their proposition would hang on professional photography of these fantastic places and they actually spent quite a lot of money on thinking about the experience of actually someone going in and falling in love with the place that they would want to live in, not just stay in. That this would be actually going and living there would be a big part of my holiday, not just sort of visiting the town and seeing the sights, but staying in this amazing place. And to have that level of thinking about the experience that they were creating on the site, I thought they had real insight into what was actually going to be a big part of the appeal of that proposition.

A. You're right, and part of where they got that notion is when you look at their competitors at that time: VRBO, Home and Away, Craigslist, and the pictures of course - if there were any pictures – were shot by people like me who aren't photographers, with low resolution iPhone photos, not wide-angle lenses.

A friend of mine goes off and on as a photographer because he loves going to beautiful homes in LA and basically that really set them apart. I'm an Airbnb host. I actually drive about 50% of my income from people, maybe they start on Airbnb where I trial them, but ultimately, they become tenets in my guest house. I'm going on my trip this summer with my son and we're staying in a mansion in Paris, it's crazy. This is a huge part - as you said - of our trip, of value innovation, of the transaction as seamless. It's seamless, frictionless, and it's so engaging and addictive. I'm never going to go back to some other means. I'm not going to Craigslist where there's no trust; who knows what I'm getting. They really built something that is highly addictive and truly enjoyable to use and so I think it's a very good business case to look at.

Q. One of the chapters in your book is called "creating prototypes for experiments" and I've started to talk about strategy, not just with my clients, but with my team, in that we need to get people away from this idea that strategy is an

abstract concept and that you can contain it in a PowerPoint slide and everyone will understand, but rather that strategy ultimately needs to turn into a thing that people can touch and feel and experience. I'm interested to hear your thoughts around the idea of strategy producing things.

A. The point of having a strategy is a game plan with a caveat that I may have to pivot on my game plan as I learn along the way. At the very beginning we might throw out a bunch of guesses on what we think, what is this vision that we sought to create and instead of it being something that we have to spend all of our resources up front - whether it's a million dollars or even a hundred thousand dollars - how can we figure out ways to test what is truly the value proposition, what I call in there the key experiences to make sure people want this thing, what Eric Ries called the minimum viable product. It's the same idea as creating the rapid prototype.

I've even stopped doing wire framing; I try to talk clients out of it. I've gone back to my early 90s ways of wanting to mock something up quickly. Now there are prototyping tools that are way faster than creating a bunch of wires and getting them approved and I don't believe our users can look at wires and storyboards, or fake low fidelity prototypes, any more than our clients can, and truly understand.

"Getting feedback early on to make sure that the value proposition is resonating is absolutely crucial."

There are these amazing prototyping tools out there - "Just in Mind" happens to be the one I like the most because it's easy and they have an amazing widget library and I can get it to play on any device I need. You can knock out the main aspects of the value proposition. We're not doing usability testing with these prototypes, we're not doing the "I'm going to create the entire linear prototype on rails, taking them from onboarding to the very end". Instead we're focused on what are the key experiences we need to get feedback on from our potential customers, or existing customers, and we need to get it in front of them as fast as possible.

We should knock out these prototypes in a week and there shouldn't be one, it should hopefully be ten or eight. We need to stop this idea of "this is the right one" when we can afford to do A, B, C, D and create versions. I love being proven wrong. Maybe I think this idea is the one, but with both options doing rapid prototypes that are interactive on our device. I do landing pages and I run Facebook ads at them to see how many people are interested in signing up.

Getting feedback early on to make sure that the value proposition is resonating is absolutely crucial to me.

I wonder as someone who works at an agency, is this approach counter-intuitive to the agency model. Here we are at an agency where you want to charge as much as possible and get the scope of work and just make it and spend as much time on it and get them to buy-in and then make it. I find that my approach may be counter-intuitive to the agency model because here we are trying to work with a client and say we're going to do experiments. Maybe you're right, maybe you're wrong, but instead of putting all our money into one basket let's try a couple of different things and see what kind of feedback we get and then go full bore into a specific direction.

[TL] It's very challenging I think. For the client's we've worked with for a long time what we're trying to move to is an advisor partner role. The procurement in a lot of big companies is actually all built around outputs, not about outcomes, like what are we going to get at the end of this period. And to be able to say we're not quite sure, but we think we're going to do these activities, these experiences and at this point here we're actually going to have to take a call on what we're actually going to do next requires a fairly sophisticated agency client relationship and it's hard.

In a way, most of my work is about trying to get the sponsors and procurement people to understand this is the way to work. I'm working with a big energy company where the product owner is being fantastically successful in teaching procurement and that this is a completely different way of working and that you're going to have to trust us that this is going to produce better results.

But we have to think about different engagement models. Most engagement models that agencies create are about products, when actually we need to think more about programs and partnerships. That requires different skills. Management consultancies and technology companies are pretty good at getting in there and saying "we're going to be here for 5 years and we're part of your team" and design companies need to be able to do that, because you can't do UX strategy in six months; you can't do this in 2 years if you actually want to get something end-to-end into the marketplace. I work with really big companies and so two years is aggressive in some cases.

Q. There are a lot of sort of practical techniques and tools that you've not just captured in the book but made available; how different is it between the world of start-ups as you move towards enterprises and bigger companies?

A. I have to admit it's kind of frustrating. I know that in the second edition of my book I need to focus more on enterprise and b2b because that's really the one thing missing. Most of the business cases were start-ups willing to do something new. We were starting from scratch, we could do these experiments and they were open to risk. In an enterprise environment, it's not that way.

However, the companies, enterprises that I'm researching - that I'm attracted to - are the ones that are focused on innovation. The word innovation is a small word in the subtitle of my book, but it's a big word to me. If someone wants to just make a knock-off of a product out there then I might not be the best person to do that. Sure, I can lead the UX phase, but if they want it to be a game changer then we need to experiment and what that means is you need to be with corporations that adopt different ways for innovation.

I saw Steve Blank and Alex Osterwalder recently talk about innovation and innovation horizons at a workshop and how a lot of enterprises have this thing called innovation theatre, where they have the shiny room and you can go in there and you can look at all these really cool things, or they do it like Google where they say "we're going to let you have 2 hours of your day, or your week, that you can work on something innovative. Or they have an innovation culture, and it's just thrown around as a buzz word and ultimately if you want to create innovate products it needs to be imbedded into the company culture in a genuine way.

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Recently I went to this conference called Conversion XL and it was all about conversion and a lot about, what I love, growth hacking. I know that's a buzz word, but it's ultimately trying to get companies understanding that if they don't get new customers, and that if they stay the same and just keep floating in the ocean, happy with what they have, they're going to be the next Kodak.That's why we see so many acquihires.

Facebook and Google are so successful because they buy start-ups like Waze or whatever and imbed them into their companies. Google let Waze exist on their own, but they use the people that work there and the data that they mine from the apps to learn. I hope to see a change in Silicon Valley to start with, and then worldwide, where enterprises aren't afraid to let the people that work there be intrapreneurial. That we'll see more of what's called "balanced teams", or "growth teams", where it's not like "let's jam the designers there and the engineers over

there". I'd like to see these multi-functional teams, or these cross-functional teams have a marketing person engaged, an analytics person engaged, a developer engaged, a designer engaged, working together ultimately to figure out, and do design experiments, and do field research together.

A big thing I do is I require my clients to be with me on the field research and I say shut up and take notes please. Keep your mouth closed and listen for once and hear what these customers have to say. I find that the traditional forms of user research and data collection don't give us a true picture of who our customers are and what their needs are and so right now I'm looking for those opportunities where companies are open to experimentation, not just doing. They may have agile built into their development phase, but it needs to be built into the strategy phase as well.

Subscribe to our YouTube channel to catch the next interview in the series with Pamela Pavliscak.

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