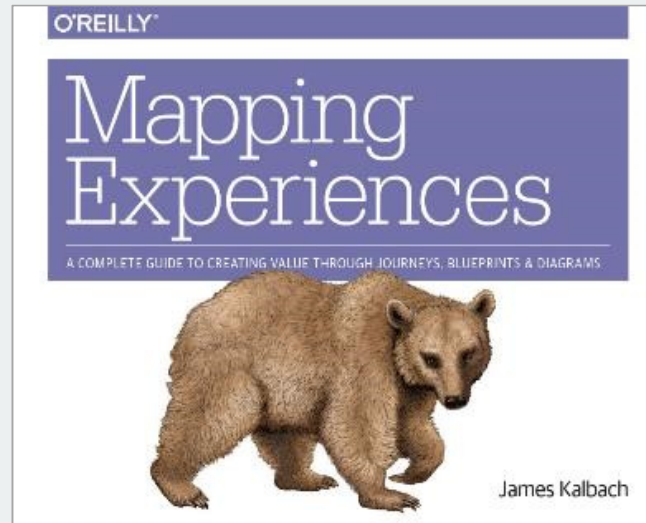
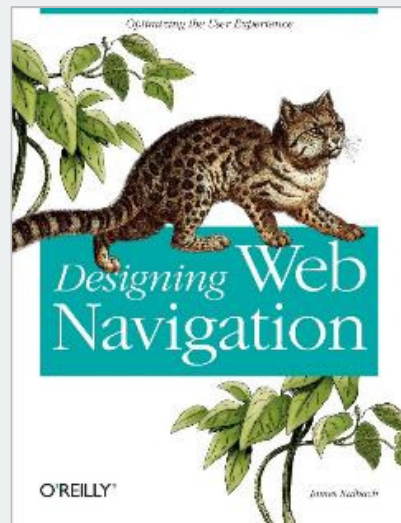


Defining a Core Strategy with the UX Strategy Blueprint

@JimKalbach



AGENDA

14:00	Understanding strategy
15:00	Blueprint exercise
<i>15:45</i>	<i>Break</i>
16:00	Facilitating Strategy
16:45	Communicating strategy & exercise
17:30	Analysis and Planning
<i>17:30</i>	<i>End</i>

What is strategy?

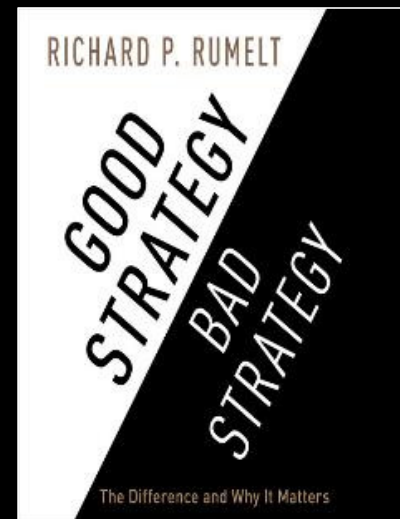
**A strategy is a set of hypotheses
about cause and effect....and
can be expressed by a sequence
of if-then statements.**



ROBERT KAPLAN
& DAVID NORTON

“Linking the Balanced Scorecard to Strategy” 1996

**A good strategy honestly
acknowledges the challenges
being faced and provides an
approach to overcoming them.**

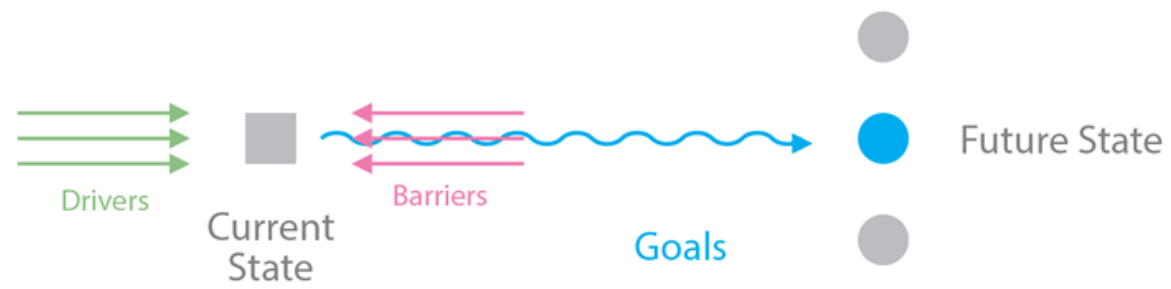


**At general management's core is
strategy: defining a company's position,
making trade-offs, and forging fit among
activities ...Strategy renders choices
about what not to do as important as the
choice about what to do.**



MICHAEL PORTER

"What is strategy?" Harvard Business Review, 1996



**Building strategy is a
creative exercise to design
a way of overcoming your
key challenges to reach a
desired outcome with an
interlocking set of choices
for consistency in action.**

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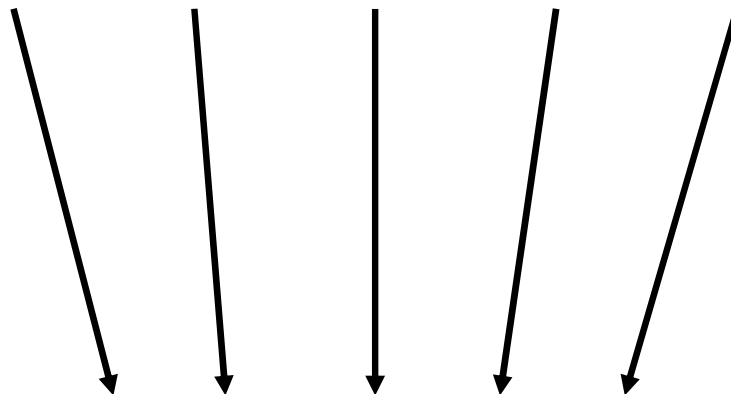
Analysis



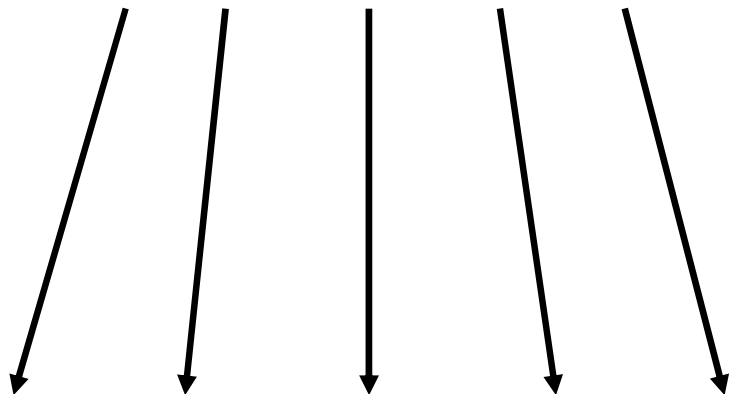
Planning



Analysis



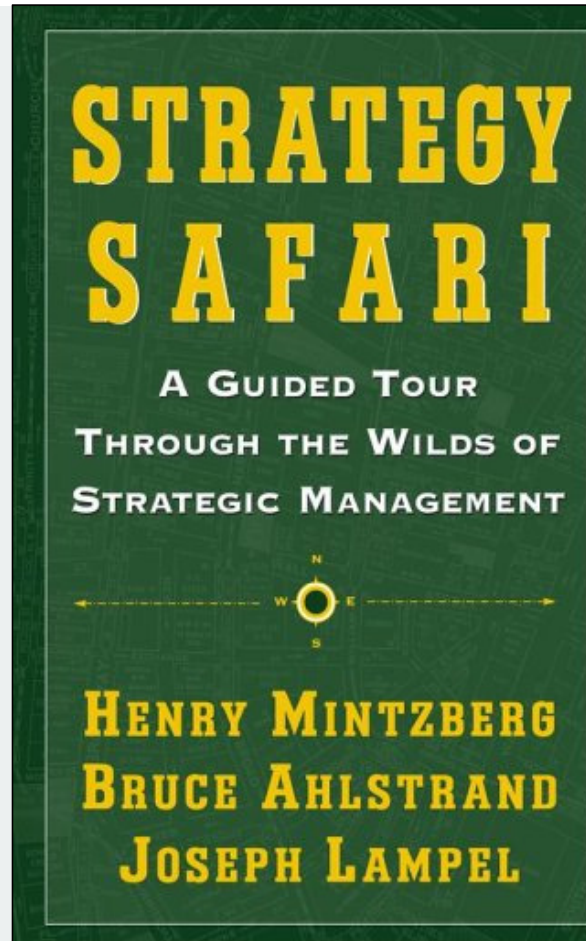
Planning



ELEMENTS OF STRATEGY

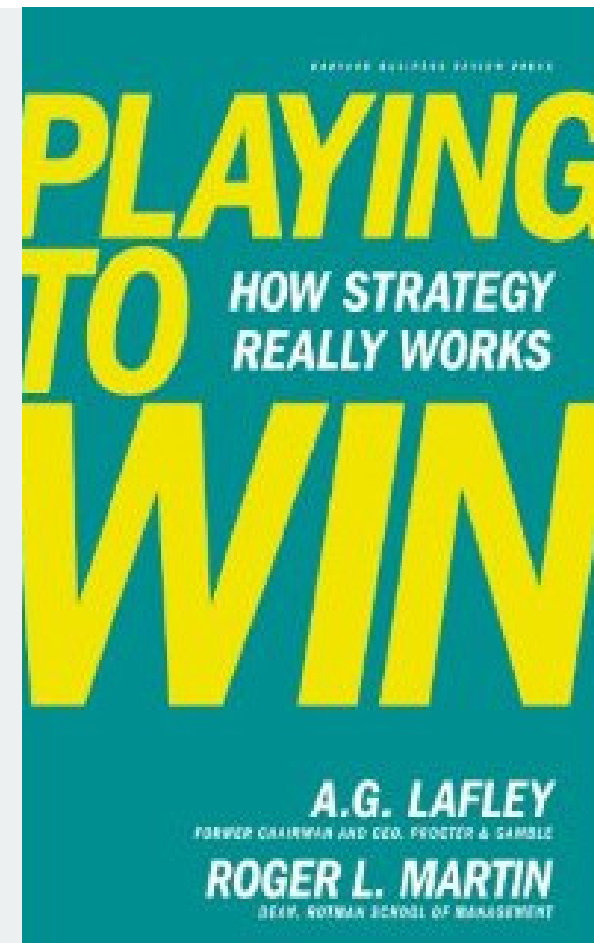
5 Ps OF STRATEGY

1. **Pattern** – Trends from the past
2. **Position** – Desired outcome
3. **Perspective** – Philosophy of working
4. **Ploy** – Out-maneuver opposing forces
5. **Plan** – Course of action



5 STRATEGIC QUESTIONS

1. **What's your winning aspiration?**
2. **Where will you play?**
3. **How will you win?**
4. **What capabilities are needed?**
5. **How will you manage strategy?**



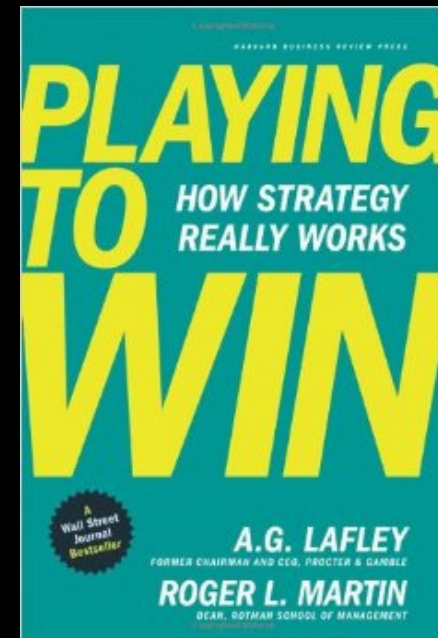
STRATEGIC QUESTIONS

LAFLEY & MARTIN	MINTZBERG	KEY QUESTIONS
	Pattern	What are the key challenges ?
Aspiration	Position	What are your aspirations ?
Playing field	Perspective	What will you focus on?
How to win	Ploy	What are your guiding principles ?
Capabilities	Plan	What types of activities are needed?
Management		How will you measure success?

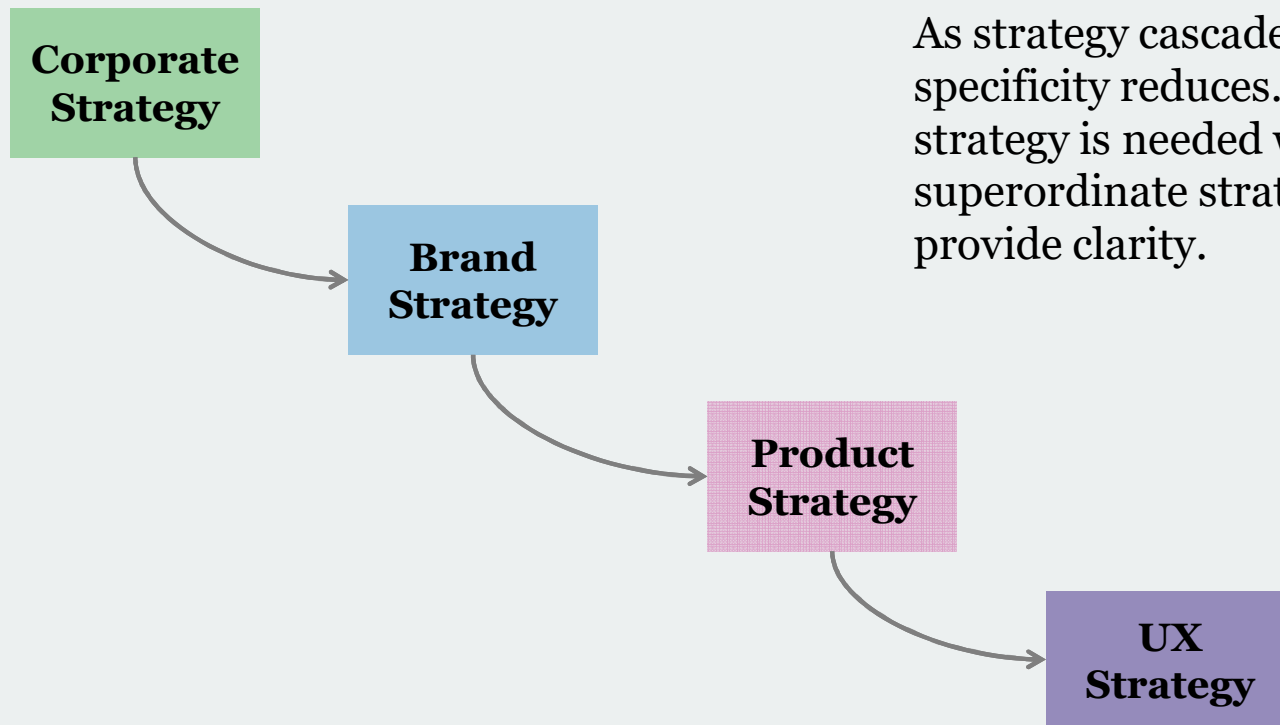
UX STRATEGY

So, what the heck is UX strategy?

But these choices beget more choices in the rest of the organization... Each level in the organization has its own strategic choice cascade.



HIERARCHY OF STRATEGY



As strategy cascades down, its specificity reduces. A subordinate strategy is needed when superordinate strategies don't provide clarity.

UX STRATEGY

UX strategy helps the business solve its problems through an interlocking set of choices that coordinates UX activity for a desired experience.

STRATEGY BLUEPRINT

Challenges

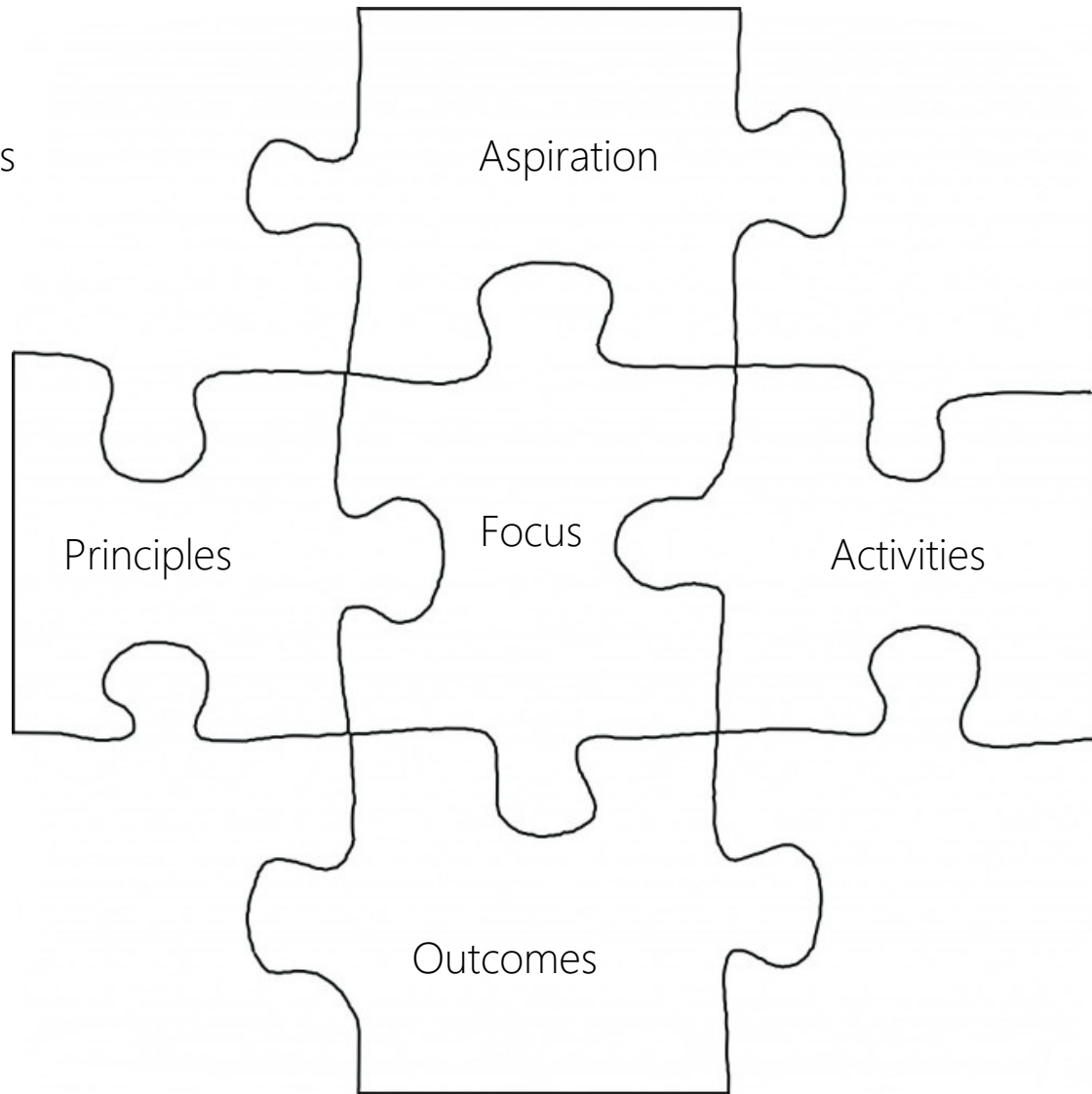
Aspiration

Principles

Focus

Activities

Outcomes



UX Strategy Blueprint

<h2>Challenges</h2> <p><i>What problems are you trying to solve?</i> <i>What obstacles must you overcome?</i></p> <p>EXAMPLES Lack of coherency Migration of customers Deteriorating image Internal constraints —</p>			
<h2>Aspirations</h2> <p><i>What are the ideal desired outcomes?</i> <i>What do you want to achieve?</i></p> <p>EXAMPLES Unification of experiences Accelerated adoption Market recognition Transformational impact on users —</p>	<h2>Focus Areas</h2> <p><i>What is the scope of the strategy?</i> <i>What will you focus on for the most impact?</i></p> <p>TYPES Users and persona Regions, languages, cultures Services and products User cases and scenarios Areas of UX (e.g., IA, content) —</p>	<h2>Guiding Principles</h2> <p><i>How will you overcome the challenges?</i> <i>What specific mantras will guide teams?</i></p> <p>EXAMPLES Particular sequence of activities Approach to persuasion Coordination of touchpoints Differentiation play —</p>	<h2>Activities</h2> <p><i>What types of activities solve the problems?</i> <i>What capabilities achieve your aspirations?</i></p> <p>TYPES Research methods Information architecture Design activities Prototyping and testing Best practice and patterns Skill development —</p>
<h2>Outcomes</h2> <p><i>What types of measurements will you employ?</i> <i>What metrics will be used to gauge success?</i></p> <p>EXAMPLES Increase in user satisfaction (e.g. SUS) Better task completion Higher frequency of use Increased self support —</p>			

Einstein Media Co.

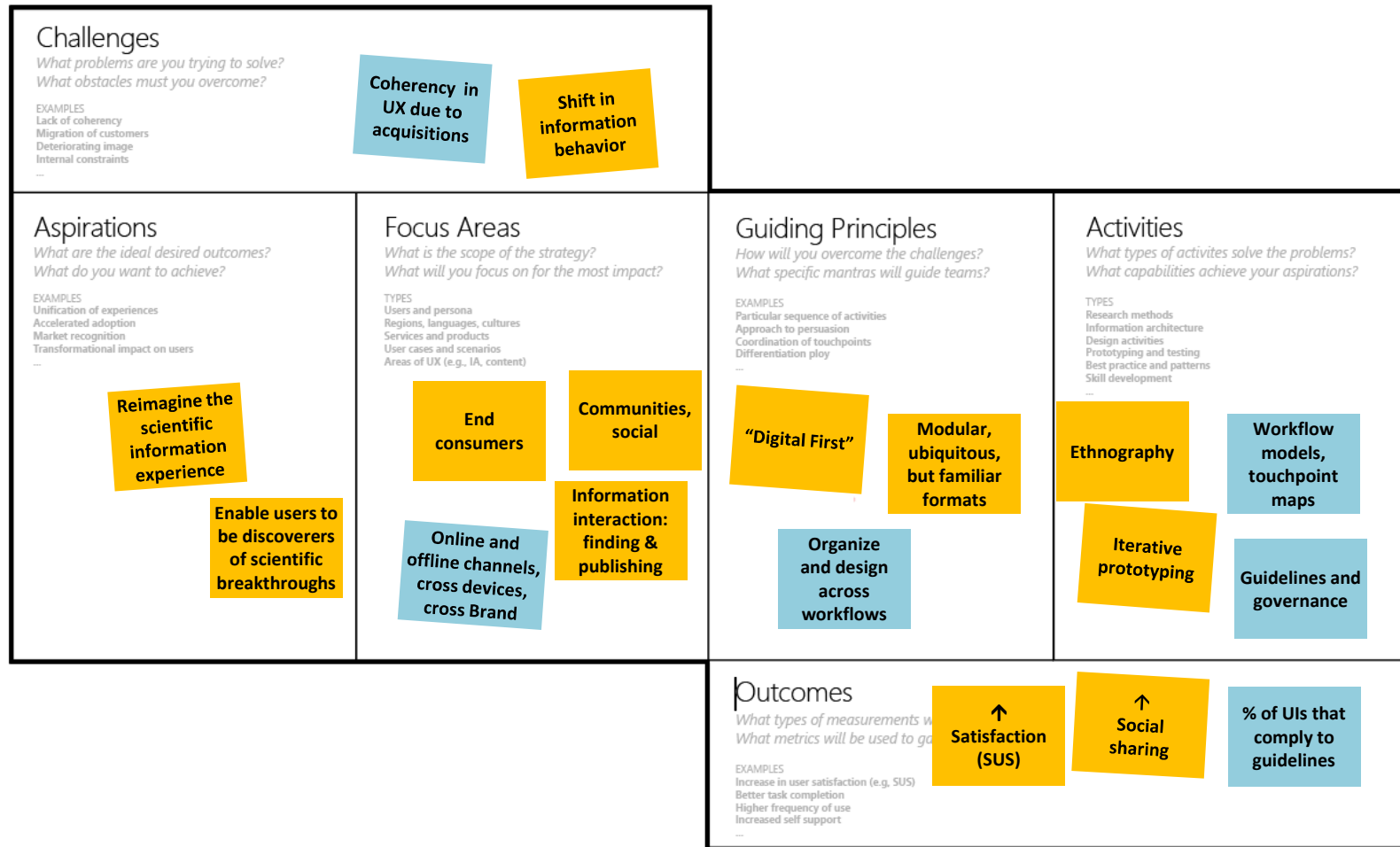
Worldwide leader in scientific publishing

ELEMENT	BUSINESS STRATEGY
<i>Challenges</i>	Losing customers and revenue due to disruption and slipping market relevance
<i>Aspiration</i>	Reinvent the business to maintain leadership
<i>Focus Areas</i>	<ul style="list-style-type: none">• Global• Research institutions• Online channels• Social media
<i>Guiding Principles</i>	Leverage scale and authority to win
<i>Activities</i>	<ul style="list-style-type: none">• Acquire• Innovate business model• Refresh brand• Build expertise in social
<i>Outcomes</i>	↑ Retention ↑ Revenue

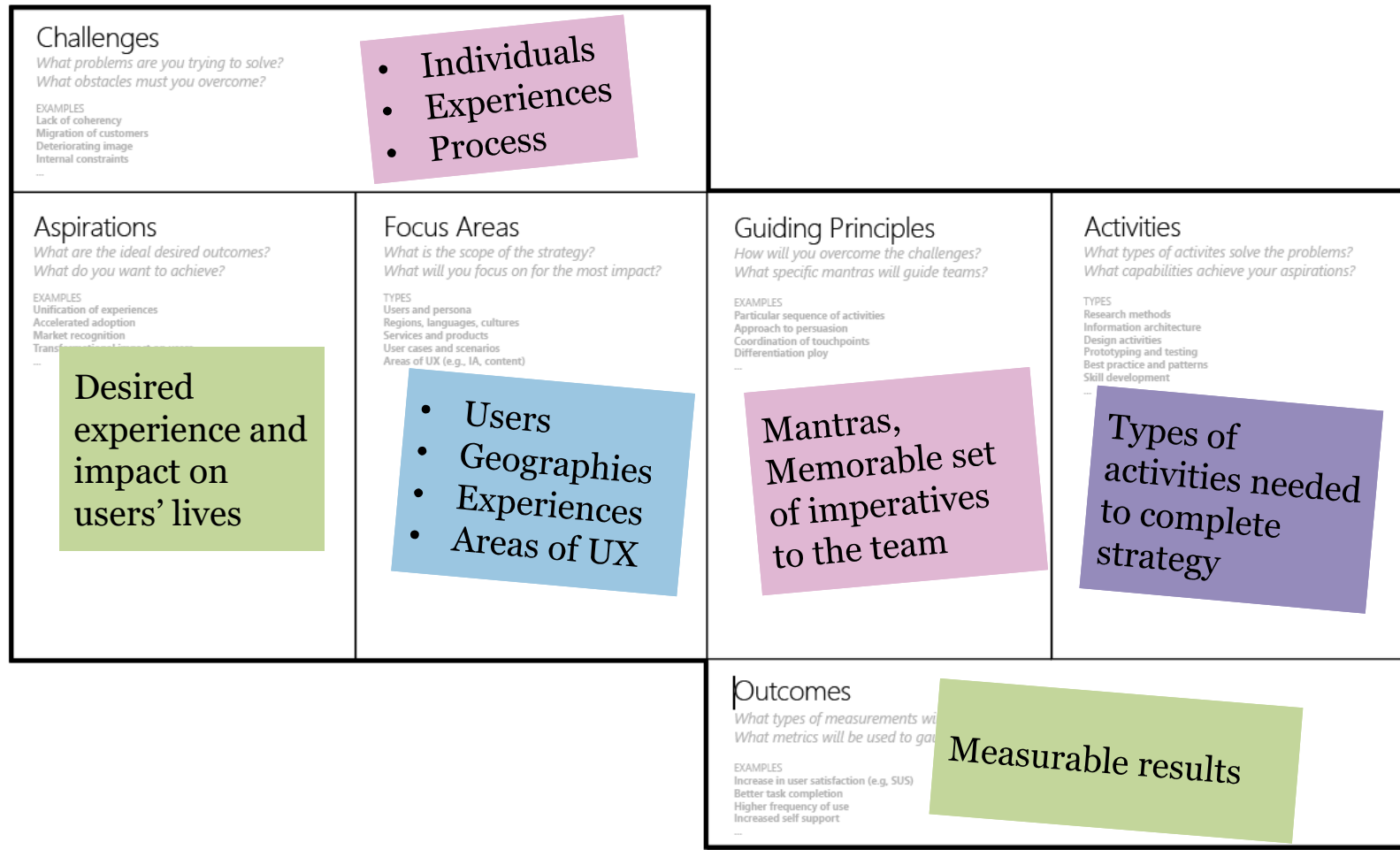
UX Strategy Blueprint

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UX Strategy Blueprint



UX Strategy Blueprint



TYPES OF CHALLENGES

1

Individuals

Adoption

Engagement

Persuasion

Friction

2

Experience

Coherency

Modernization

Innovation

3

Process (internal)

Efficiency

Effectiveness

New methods

Political

ASPIRATION

What is the impact you aspire to have on people to transform their behaviors, experiences and lives?

FOCUS AREAS

1. USERS	Segments Needs, behaviors Workflows Skill levels: average vs extreme users
2. GEOGRAPHY	Countries Languages Cultures
3. EXPERIENCES	Websites, Software Devices, Hardware Service touchpoints Cross channel
4. ASPECTS OF UX	IA IxD Visual Design Content Effectiveness, efficiency, control, learnability, memorability <i>Also:</i> Interruptibility, shareability, glanceability, findability, ...

Picking focus areas is about making decisions on trade-offs in advance.

PRINCIPLES






- **Single words or short phrase**
- **Imperatives to the team**
- **Easy to remember and repeat**
- **Pneumonics**

What mantras will guide the team?

EXAMPLE: MILITARY

BASIC RULES OF COMBAT	
TYPE	RULE
1	SECURE Use cover and concealment Establish local security/recon
2	MOVE Establish moving element/move to position of advantage Gain and maintain initiative
3	SHOOT Establish base of fire/mutual support Kill/suppress enemy
4	COMMUNICATE Inform everyone/tell soldiers what you expect
5	SUSTAIN Keep fight going/care for soldiers

EXAMPLE

	 "Speed Bump"	 "Guard Rail"	 "Safety Net"
PURPOSE	Interrupt users and grab their attention to communicate PI changes	Remind users of PI behavioral changes, as well as support them in their tasks on the site	Catch users who miss  and  and support deeper understanding of PI
WHEN	Upfront, immediate; At the beginning of key flows for both buyers and sellers.	Constantly visible throughout flows; Associated with payment information and options	Constant, but in background; This communication call also appear contextually at relevant moments
HOW	Loud and clear, full page messages (or a majority of the page width), interstitials	Consistent, repetitive and embedded near call to action, in particular near payment information and interaction	Varies; examples include "Learn more" hubs and tips in M2M
WHAT	Announcement of a change, instructions as to actions to take, and the benefits of PI	Direct instructions to the user and confirmation of correct actions, as well as some benefits	Detailed descriptions of the PI process or specific aspects of it; Can also include contextual instructions and FAQs

ACTIVITIES

What are the TYPES of tasks you will carry out?

- Ethnography
- Personas
- Journey mapping
- Wireframing
- Prototyping
- Design exploration
- Pattern, style guides
- Research
- Lean UX
- Beta testing
- Rapid prototyping
- Benchmarking
- Analytics
- ...

OUTCOMES

Align to business outcomes

1. **Increase revenue**
2. **Decrease cost**
3. **Increase new business**
4. **Increase existing business**
5. **Increase shareholder value**

= *Growth*

EXAMPLE OUTCOMES

- **Deliver a *high quality* user experience that:**
 - Improves customer satisfaction by 25%
 - Increases active usage by a factor of 2
 - Drive preference: 80% of users select the new solution
- **Maintain consistency across touchpoints**
 - 80% of UIs pass a “consistency check”
- **Optimize our design processes**
 - Shorten design time by 25%

UX Strategy Blueprint

<h2>Challenges</h2> <p><i>What problems are you trying to solve?</i> <i>What obstacles must you overcome?</i></p> <p>EXAMPLES Lack of coherency Migration of customers Deteriorating image Internal constraints ...</p>			
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EXERCISE 2 – DEFINE CORE UX STRATEGY

In groups

1. Refer to the scenario
2. On the UX Strategy Blueprint, record key points for each element of the UX strategy.

Write down a few keywords or phrase for each that reflect a viable approach.

3. Skip elements that are unknown or make assumptions as needed.

FACILITATING STRATEGY

Why do we need UX strategy?

— Democratize creativity

Quantity trumps quality (at first) —

There is no such thing as UX strategy

Posted on February 17, 2014 by Jeff Gothelf

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The 800lb gorilla in the room
(Image courtesy of Shutterstock)

2013 saw a lot of discussion around the topic of UX Strategy. In fact, there was at least one conference on the topic and a string of articles. However, all of this activity around a topic doesn't actually mean it exists.

The reality is that there is no such thing as UX strategy. There is only product strategy.

Search

Search

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Lean UX

By Jeff Gothelf

Ebook: \$19.99

Print & Ebook: \$27.49

Print: \$24.99

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Lean UX Workshop

By Jeff Gothelf

Video: \$69.99

Buy from oreilly.com

A close-up photograph of Steve Jobs, wearing his signature round glasses, looking directly at the camera. He is holding a silver laptop, which is open, and his hand is visible at the bottom of the frame. The background is dark and out of focus.

**“You’ve got to start with the
customer experience and work
backwards to the technology.”**

STEVE JOBS (1997)



Steve Denning
Contributor

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LEADERSHIP 2/28/2014 @ 11:08AM | 5,675 views

Why Building A Better Mousetrap Doesn't Work Anymore

[+ Comment Now](#) [+ Follow Comments](#)

Once upon a time, you could succeed in business by building a better mousetrap—a product that was better than your competitors. Yesterday, you could succeed by building a better ecosystem.

Today, you need to build a better ecosystem that continues to be perceived as better and that somehow generates revenue in a world where customers expect things to be free.

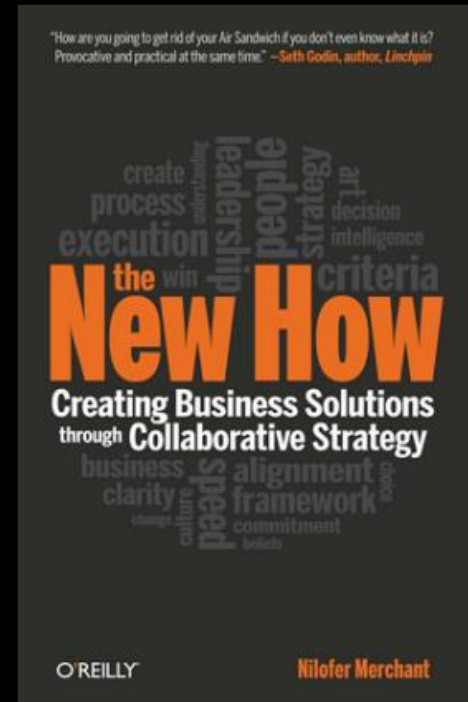
“In 2011, Consumer Reports proclaimed the Nook the best e-reader in the land, saying it surpassed the Kindle in just about every way.... Things haven’t played out well since... with its recent reductions in e-reader staff, the Nook’s end looks nigh.”

Mr. Manjoo goes on to explain the how smart customers think:

WHY UX STRATEGY

1. Shift in business
2. Ecosystem design
3. “Air sandwich”

An Air Sandwich is a strategy that has a clear vision and future direction on the top layer, day-to-day action on the bottom, and virtually nothing in the middle—no meaty key decisions that connect the two layers.

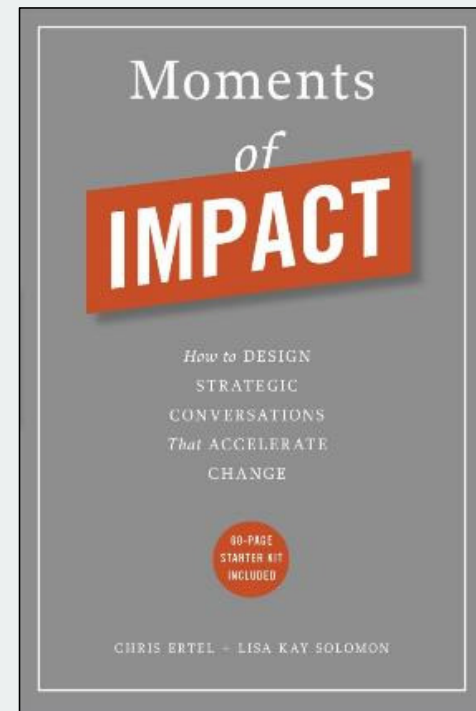
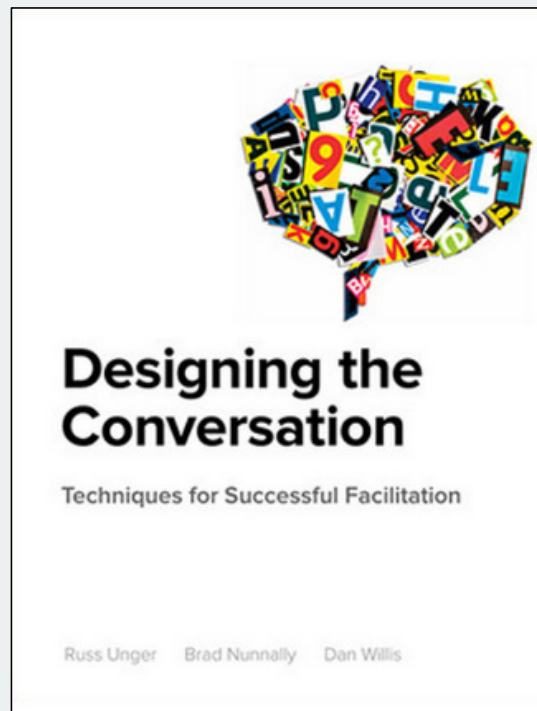


NILOFER MERCHANT

WHY UX STRATEGY

1. Shift in business
2. Ecosystem design
3. “Air sandwich“
4. Large org with dependencies
5. Migrations and acquisitions

STRATEGIC CONVERSATIONS





Will Miner,
Director of UX
2U Inc

Challenges

Too many steps to perform simple tasks
Not helping customers grow
Multiple screens required for 1 task
LEGACY + REVENUE
JOB

Large product

When introducing new functionality, release Product, Complete functionality

Complex functionality due to different contractual processes

Challenges Financial interfaces

Difficult Deployment

Challenges Interfaces

Peer working

Users require too much training

END USER SKILL LEVEL

Challenges Better education

Be more proactive less reactive

Not Scalable

Act of 'old' stuff

Survey Designer

More time spent on Maintenance

Too hard to upgrade

One way of using functions

Difficult to know what needs done in process

Not Meeting Competitors Functionality

TCM UX STRATEGY BLUE PRINT

Aspirations

Customizable Solution

Customer-Centric Design

Design with Configurable workflow for users

Out of Box Ready to use & easy to Configure

Become 'Best of Breed'

CRM Pre Intake

Some custom Reporting

Can see or change

Fast

Obvious workflow to guide users through tasks

Say Yes more often

Documentation

Keep up with the industry

Best Community Care, 5.1 in the market

HAVE END USERS SAY THAT 'USE' TCM

Product

Produce help desk calls

Market leader

Continue to improve

Focus Area

Business Solutions for operations

Workflow is different for every customer

More Mobile

Whole Business

Measure

Customer Happiness

less Disruptive

CONSISTENCY IN UI/UX

Complexity

Performance

Customization

Adoption

Retention

Performance

Team Collaboration

SAAS

Modular

Std Interface

Fun/pleasant to use

Task Success

SIMPLICITY

MAX OF 3 CLICKS TO GET TO WHERE THE USER NEEDS TO BE

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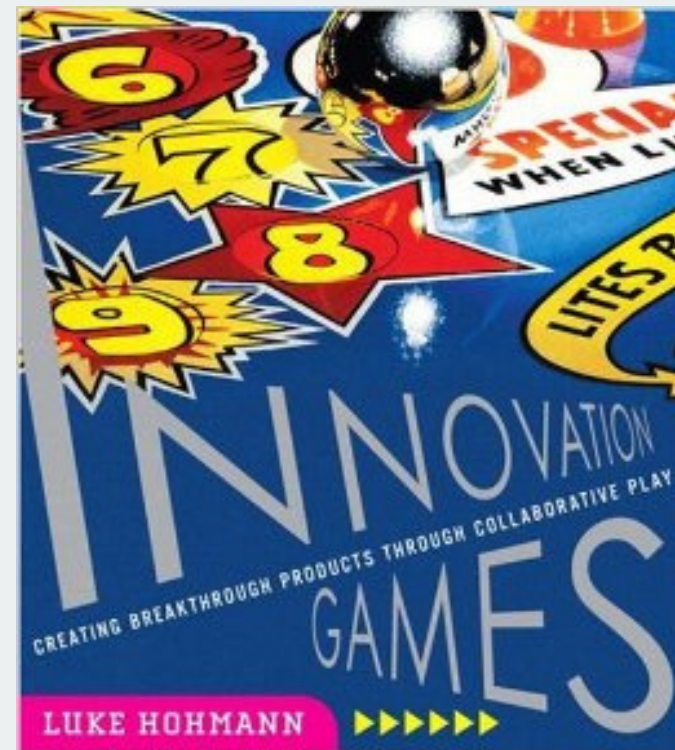
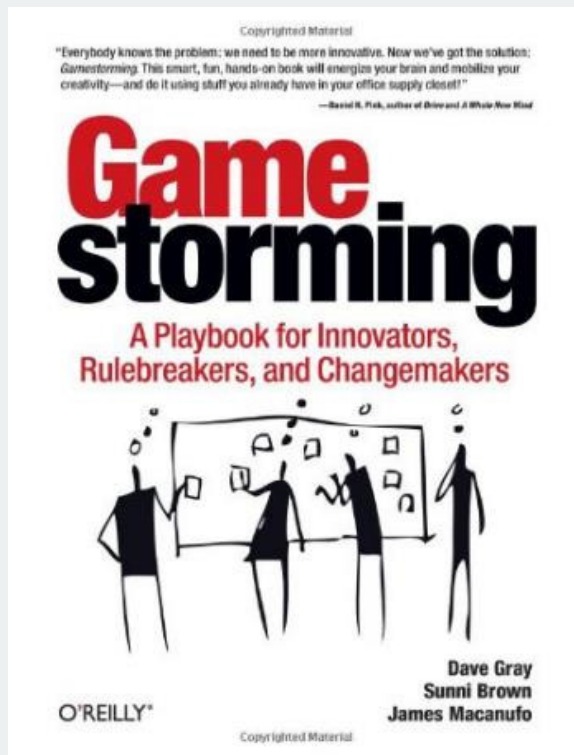
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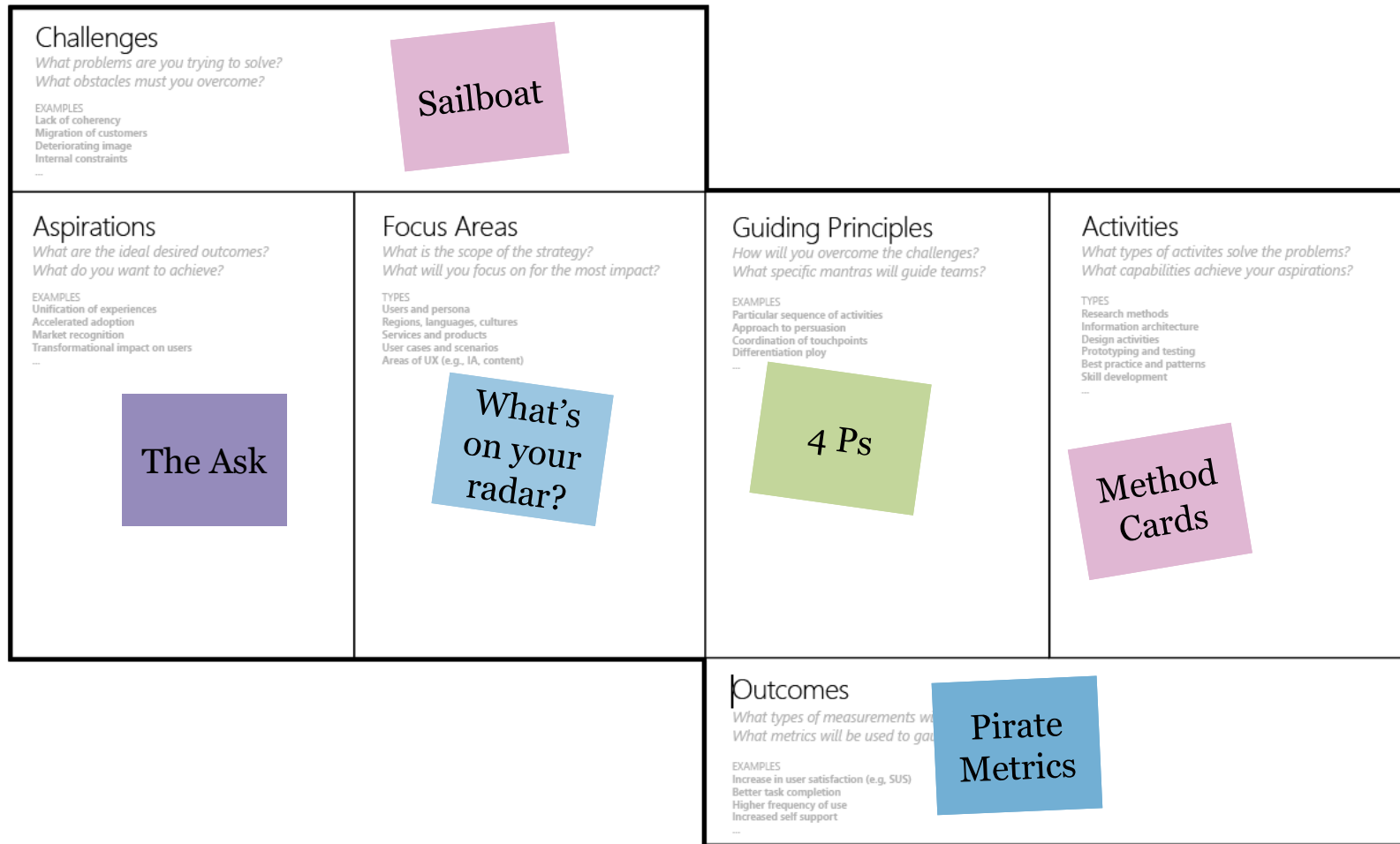
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ENGAGE



UX Strategy Blueprint

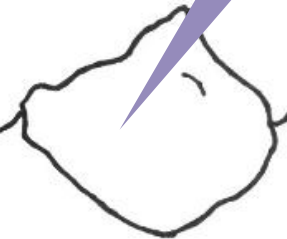


CHALLENGES: SAILBOAT

What would
make us go
faster?



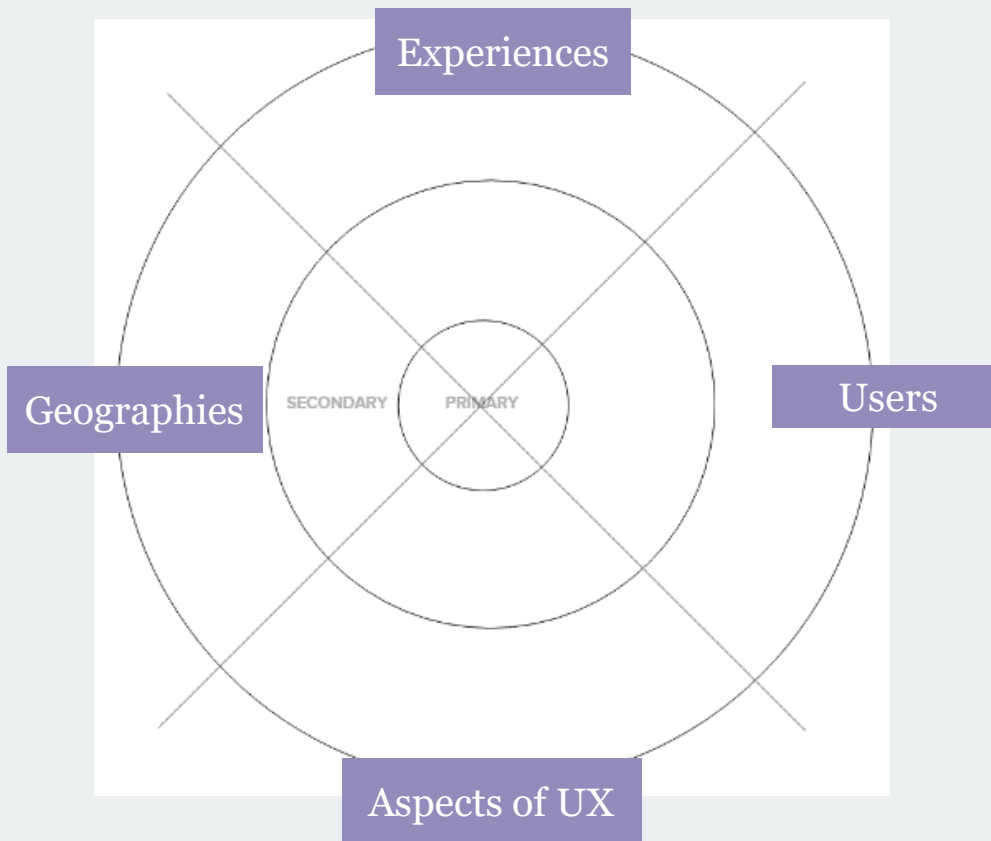
What might
get in our way
ahead?



What's holding
us back now?



FOCUS AREAS: WHAT'S ON YOUR RADAR?



- 1. Define the key areas of concern**
- 2. Brainstorm examples and aspects for each**
- 3. Prioritize by primary, secondary, tertiary**

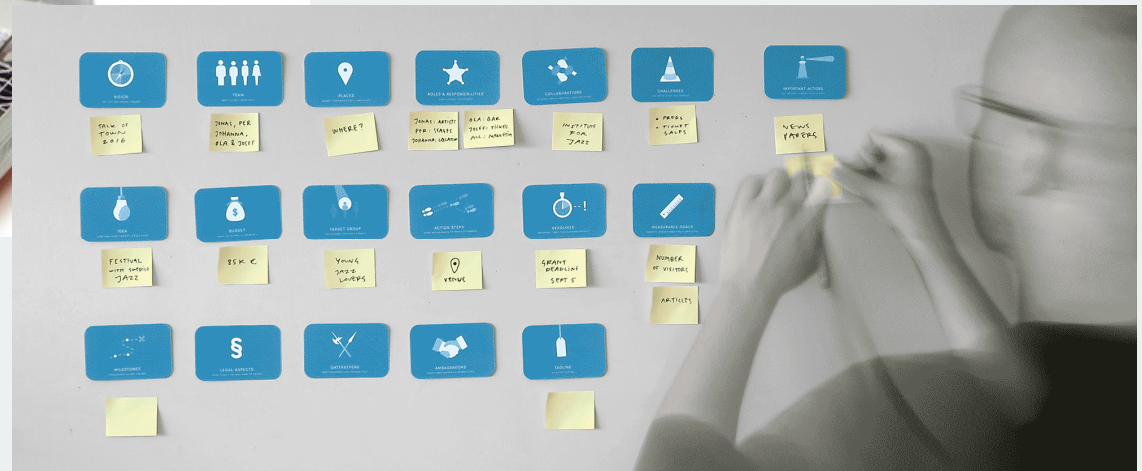
PRINCIPLES: 4 Ps

In marketing, the 4 Ps describe the key factors to consider

- Product
- Price
- Promotion
- Place (distribution)

Find a letter that can be used for 3-5 words defining your mantras

ACTIVITIES: METHOD CARDS



Methodkit.com

OUTCOMES: PIRATE METRICS

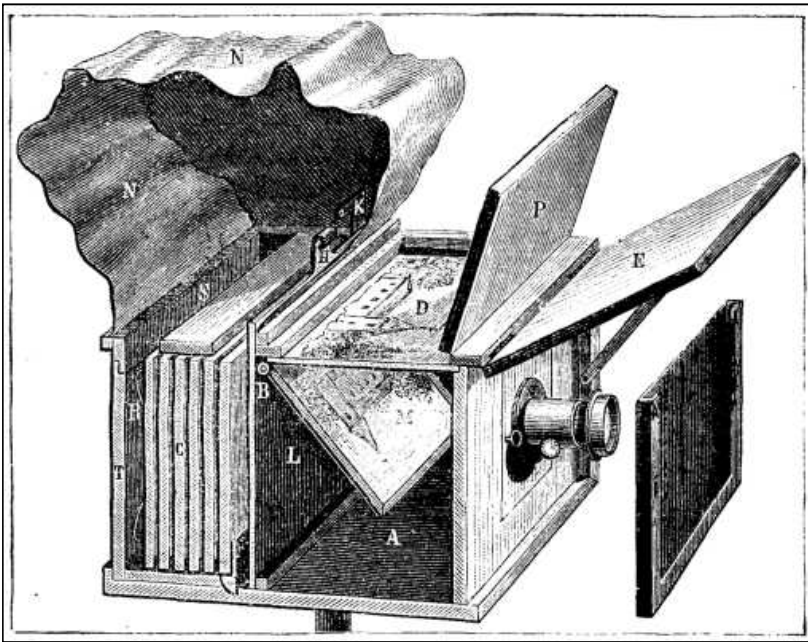


1. **Brainstorm each individually**
2. **Consolidate across the group**
3. **Prioritize and select most important**

Acquisition Activation Retention Referral Revenue

ASPIRATIONS

The Ask



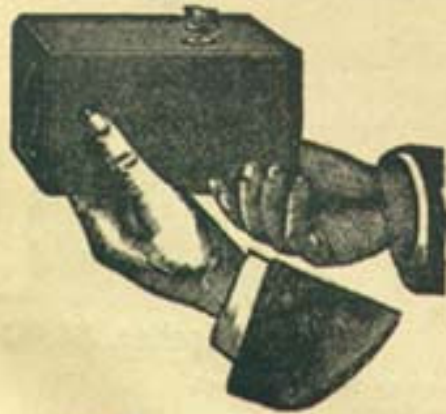
circa 1886

This apparatus consists of a box containing a camera, A, and a frame, C, containing the desired number of plates, each held in a small frame of black Bristol board. The camera contains a mirror, M, which pivots upon an axis and is maneuvered by the extreme bottom, B. This mirror stops at an angle of 45° , and sends the image coming from the objective to the horizontal plate, D, at the upper part of the camera. The image thus reflected is righted upon this plate.

As the objective is of short focus, every object situated beyond a distance of three yards from the apparatus is in focus. In exceptional cases, where the operator might be nearer the object to be photographed, the focusing would be done by means of the rack of the objective. The latter can also slide up and down, so that the apparatus need not be inclined when buildings or high trees are being photographed. The door, E, performs the role of a shade. When the apparatus has been fixed upon its tripod and properly directed, all the operator has to do is to close the door, P, and raise the mirror, M, by turning the button, B, and then expose the plate. The sensitized plates are introduced into the apparatus through the door, I, and are always brought automatically to the focus of the objective through the pressure of the springs, R. The shutter of the frame, B, opens through a hook, H, with in the pocket, N. After exposure, each plate is lifted by means of the extractor, K, into the pocket, whence it is taken by hand and introduced through a slit, S, behind the springs, R, and the other plates that the frame contains. All these operations are performed in the interior of the pocket, N, through the impermeable, triple fabric of which no light can enter.

An automatic marker shows the number of plates exposed. When the operations are finished, the objective is put back in the interior of the camera, the doors, P and E, are closed, and the pocket is rolled up. The apparatus is thus hermetically closed, and, containing all the accessories, forms one of the most practical of systems for the itinerant photographer.—*La Nature*.

THE KODAK CAMERA.



"You press the button, -
- - - we do the rest."

The only camera that anybody can use
without instructions. Send for the Primer,
free.

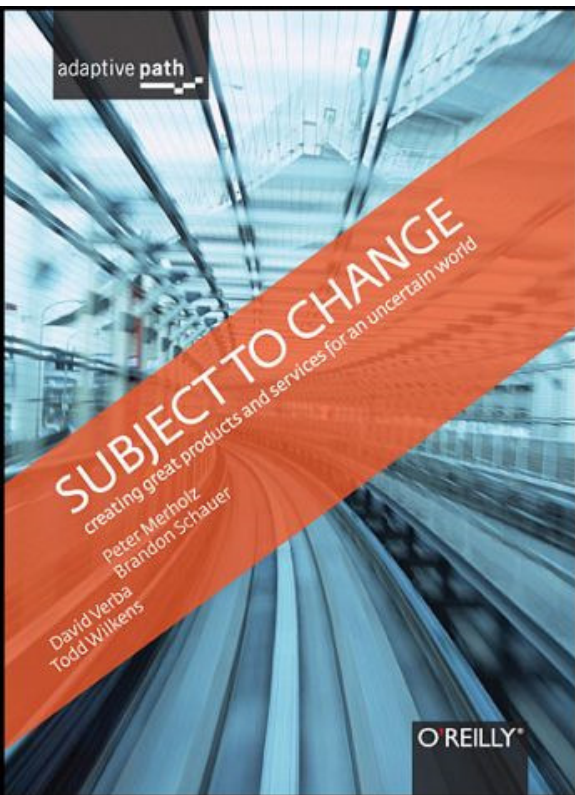
The Kodak is for sale by all Photo stock dealers.

The Eastman Dry Plate and Film Co.,

Price \$25.00—Loaded for 100 Pictures.

ROCHESTER, N. Y.

A full line Eastman's goods always in stock at LOEBER BROS., 111 Nassau
Street, New York.



[EASTMAN] recognized that his roll film could lead to a revolution if he focused on the experience he wanted to deliver, an experience captured in his advertising slogan, “You press the button, we do the rest.”



PHOTOGRAPHERS



THE ASK

Solutions that merely please, serve, meet the needs/specs, or delight customers don't go far enough. They represent yesterday's marketing and design paradigms. They misunderstand innovation's real impact – *transforming customers.*





Shop by category

All Categories

Search

Advanced

My Feed

Collections

Motors

Fashion

Electronics

Collectibles & Art

Home & Garden

Sporting Goods

Toys & Hobbies

Deals & Gifts

ebay deals

IT IS A **BIG DEAL**

Up to 60% off top brands

Free Shipping

Shop now

Deal ends in

01 15 29
hours minutes seconds



Ray Ban RB3025
\$79.99 (48% off)



1/4 Ct Round Cut
\$69.99 (81% off)



Merona Men's...
\$12.99 (24% off)



Men's Wallets
\$8.99 (74% off)

UNITED

United MileagePlus® Explorer Card
Earn 50,000 Bonus Miles

- + Free Checked Bag
- + Priority Boarding
- + No Foreign Transaction Fees



Offer ends 9/2/14

Intro Offer - First Year Free

EXPLORE NOW

Today's Top Collection

Celebrate the Working ...

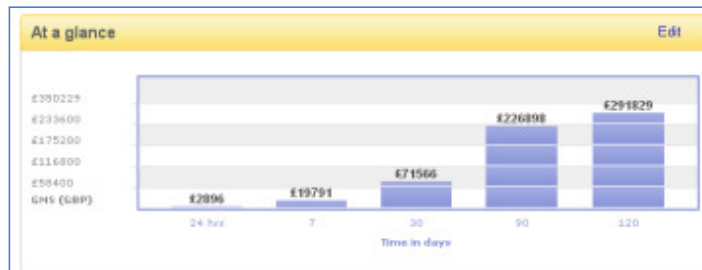
Shop for a vintage Labor Day pro-union pin, a denim mail-handlers' union apron from the 1950s, or a green steel Stanley quart thermos—plus a pair of lined yellow leather work gloves that say "Safety 1st."

20 items | \$6 - 3,200 | [Shop now](#)



Today's Deals

See all deals



Seller Dashboard Summary [Edit](#)

Status

Performance: [Top-rated](#)

PowerSeller level: [Platinum](#)

Discount: [15%](#)

Policy compliance: [High](#)

Account status: [Current](#)

[Go to your dashboard](#)

Listing activity [Edit](#)

	Sales	# of listings
Active listings	£0.00	6154
Ending within the next hour		16
Ending today		586
Listings with questions		210
Listings with bids		0

Product inventory

All
Low stock
Out of stock

Turbo Lister

File Edit View Tools Help

Now you can edit your items within the grid. To enable inline editing, go to the Tools menu and select 'Enable inline editing'. You can choose not to edit in the grid by returning to the Tools menu and de-selecting 'Enable inline editing'.

[Duplicate](#) [Change Format](#) [Add to Upload](#)

Item Title	Site	Format	Qty	Duration	Start Price	Reserve	Buy It Now Price	Shipping Type
2x Organic Cotton Wool Fill Deco Euro Throw Pillows	US	Store	1	GTC	\$148.00			Flat
2x Organic Cotton Wool Fill Deco Euro Throw Pillows	US	Store	1	GTC	\$148.00			Flat
2x QUEEN Organic Cotton Wool Fill Bed Pillows STANDARD	US	Store	1	GTC	\$152.00			Flat
Andean Imports Alpaca V Neck Sweater Peru Hand Knit M	US	Store	1	GTC	\$75.00			Calculated
Bean Products Big Bean Bag LOUNGER Chair in Hemp	US	Store	1	GTC	\$205.00			Flat
Bean Products Big Bean Bag Cotton RECLINER Chair	US	Store	1	GTC	\$129.00			Flat
Bean Products Big Bean Bag Hemp Upright RECLINER Chair	US	Store	1	GTC	\$105.00			Flat
Bean Products Big Bean Bag Upright Cotton LOUNGER Chair	US	Store	1	GTC	\$104.00			Flat
Bean Drawers Pull Handle Antique Style Art Honeymoon	US	Store	10	GTC	\$5.00			Calculated
CA King Deluxe Organic Wool Mattress Topper Cotton Cover	US	Store	1	GTC	\$425.00			Flat
CA King DELUX Organic Wool Mattress Topper Cotton Cover	US	Store	1	GTC	\$425.00			Flat
CA King Latex Rubber Mattress Organic Cotton Wool	US	Store	1	GTC	\$225.00			Flat
CA KING Organic PELLOWTOP Mattress Natural Latex Rubber	US	Store	1	GTC	\$3499.00			Flat
CA King Bag Organic Wool Mattress Topper Cotton Cover	US	Store	1	GTC	\$495.00			Flat
CA King Rubber Mattress Organic Cotton Wool - Foundation	US	Store	1	GTC	\$2775.00			Flat
CAL KING 100% ORGANIC Cotton Percale SHEET SET Coyuchi	US	Store	1	GTC	\$176.00			Calculated
CAL KING 100% ORGANIC Cotton SATEN SHEET SET Coyuchi	US	Store	1	GTC	\$221.00			Calculated
Cal King Bag Organic Wool Mattress Topper Cotton Cover	US	Store	1	GTC	\$495.00			Flat
Coyuchi Organic Cotton Bath Hand Towel Wash Cloth 2 Set	US	Store	1	GTC	\$90.00			Calculated
Coyuchi Organic Cotton Bath Hand Towel Wash Cloth 2 Set	US	Store	1	GTC	\$90.00			Calculated
Coyuchi Organic Cotton Bath Hand Towel Wash Cloth 2 Set	US	Store	1	GTC	\$90.00			Calculated
Coyuchi Organic Cotton Bath Hand Towel Wash Cloth 4 Set	US	Store	1	GTC	\$179.00			Calculated
Coyuchi Organic Cotton Bath Hand Towel Wash Cloth 4 Set	US	Store	1	GTC	\$179.00			Calculated
Coyuchi Organic Cotton Bath Hand Towel Wash Cloth 4 Set	US	Store	1	GTC	\$179.00			Calculated
Coyuchi Organic Cotton Bath Hand Towel Wash Cloth 4 Set	US	Store	1	GTC	\$179.00			Calculated

1 Item(s) Selected

[View Mode](#) [Edit Mode](#)

VitaBodies

ENTREPRENEURS

Scheduled listings

Starting within the next hour	0
Starting today	0
Format	0
Auctions	0
Fixed price	0
Ad format	0
Ended listings (Last 90 days)	3365
Sold	296
Unsold	3069
Eligible for relist fee credit	0
Unsold from multi-quantity listings	2510

Awaiting dispatch

Purchase and print postage labels

Paid and waiting to give Feedback

Paid and dispatched

Dispatched and waiting to give Feedback

Resolution Centre

Eligible for unpaid item case

Unpaid item cases requiring your response

Items not received or not as described

Return cases require your response

Eligible for final value fee credit

Listing Activity (10)

Activity Log (10)

2x Organic Cotton Wool Fill Deco Euro Throw Pillows	US	Store	1	GTC	\$148.00			Flat
2x Organic Cotton Wool Fill Deco Euro Throw Pillows	US	Store	1	GTC	\$148.00			Flat
2x QUEEN Organic Cotton Wool Fill Bed Pillows STANDARD	US	Store	1	GTC	\$152.00			Flat
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Coyuchi Organic Cotton Bath Hand Towel Wash Cloth 4 Set	US	Store	1	GTC	\$179.00			Calculated
Coyuchi Organic Cotton Bath Hand Towel Wash Cloth 4 Set	US	Store	1	GTC	\$179.00			Calculated
Coyuchi Organic Cotton Bath Hand Towel Wash Cloth 4 Set	US	Store	1	GTC	\$179.00			Calculated

The Google logo, featuring the word "Google" in its characteristic multi-colored font (blue, red, yellow, blue, green, red).A horizontal search input field with a blue border and a small microphone icon on the right side.

Google Search

I'm Feeling Lucky

Who does Google ask us to become?

Kodak	= Camera	> Photographers
eBay	= Trading Platform	> Entrepreneurs
Google	= Search Engine	> Expert Researchers





WIERDO





UNHEALTHY

**SUPER SIZE
ME**

Kodak	= Camera	> Photographers
eBay	= Trading Platform	> Entrepreneurs
Google	= Search Engine	> Expert Researchers

but...

Segway	= New Vehicle	> Weirdo on Scooter
Super Size	= Value for Money	> Unhealthy person

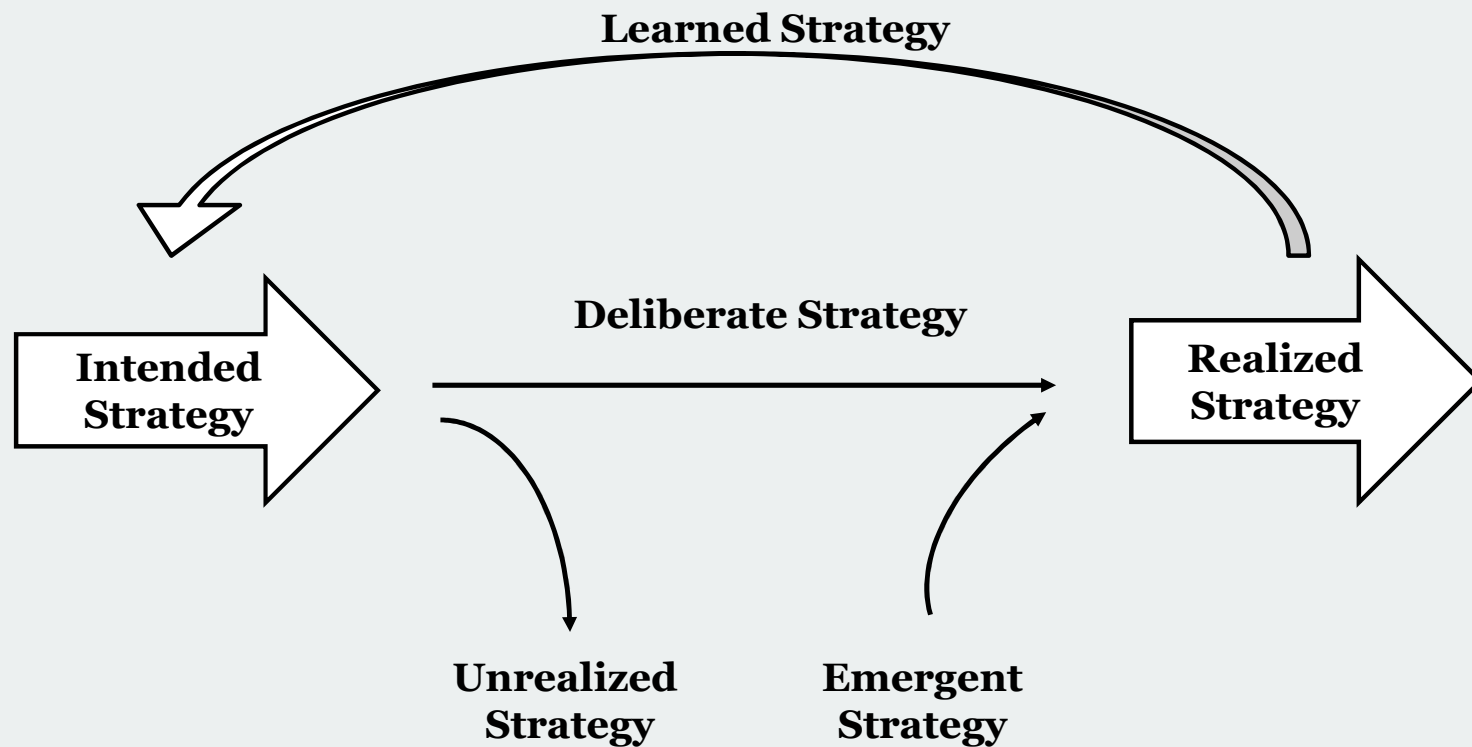
EXERCISE – FACILITATION

In groups

1. For your scenario, try to answer the question, Who do you want your customers to become?

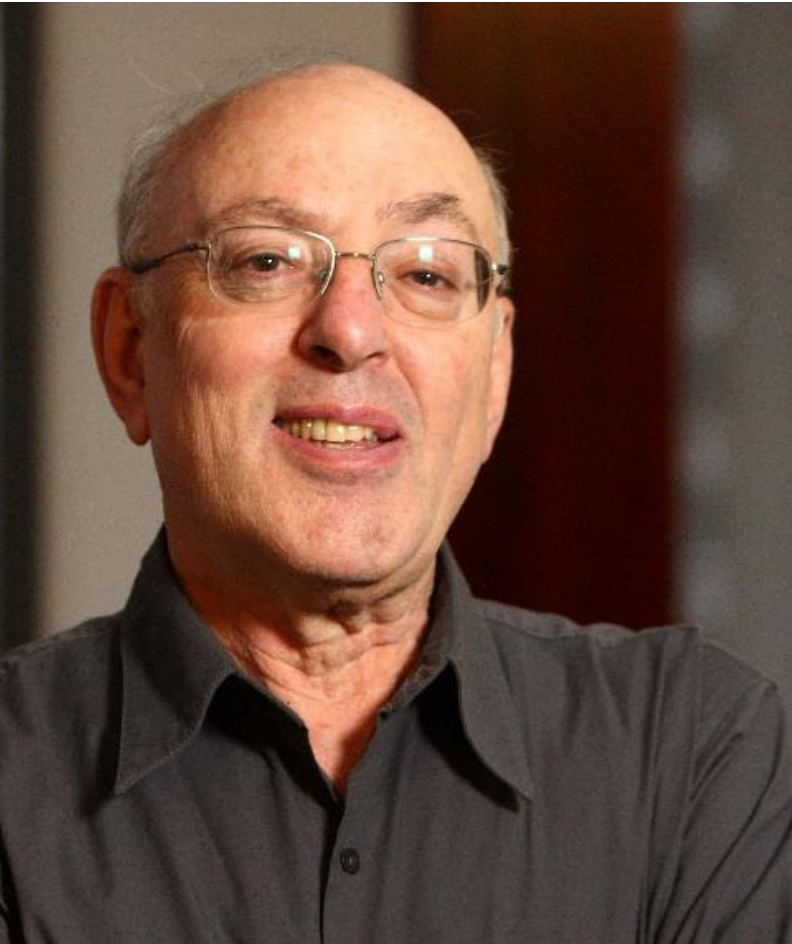
COMMUNICATING STRATEGY

DELIBERATE V EMERGENT STRATEGY



Minzberg & Waters. "Of Strategies Deliberate and Emergent" (1985)

STRATEGIC LEARNING



“Defining strategy as intended and conceiving it as deliberate, as has traditionally been done, effectively precludes the notion of strategic learning. Once the intentions have been set, attention is riveted on realizing them, not on adapting them. Messages from the environment tend to get blocked out. Adding the concept of emergent strategy...opens the process of strategy making up to the notion of learning.”

Minzberg & Waters. “Of Strategies Deliberate and Emergent” (1985)

“Everybody has a plan until they get punched in the face”.



STAYING ON TRACK

Your Name _____

1. Enter scores (0-10) and comments in the cells with colored backgrounds.

ID	UX Principles & Brand	Jim	Sue	Joe	Paul		
Z1	Integrate seamlessly.	5	4	7	5	5.3	4 to 7 = 3
Z2	Wow users.	5	6	5	4	5.0	4 to 6 = 2
Z3	Focus on the content.	6	5	7	3	5.3	3 to 7 = 4
Z4	Project a consistent, unique identity.	6	4	8	8	6.5	4 to 8 = 4
Z5	Work hard to make it simple.	7	8	9	6	7.5	6 to 9 = 3
Z6	Highlight differentiators.	7	6	7	8	7.0	6 to 8 = 2
Z7	Incorporate nuances of natural communication.	6	7	9		7.3	6 to 9 = 3
Z8	Facilitate best practice.	5	5	7		5.7	5 to 7 = 2
Z9	Reflect brand values.	7	6	7	6	6.5	6 to 7 = 1
	AVERAGE SCORE	6	6	7	6	6.2	



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www.dilbert.com



It's a dirty little secret: most executives cannot articulate the objective, scope, and advantage of their business in a simple statement. If they can't, neither can anyone else.

DAVID J. COLLIS AND MICHAEL G. RUKSTAD "Can You Say What Your Strategy Is?" *Harvard Business Review* (2008)

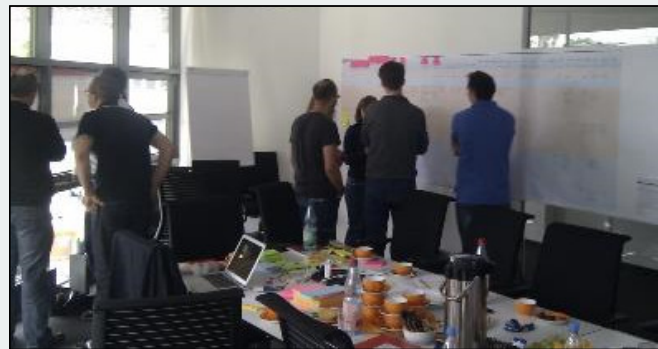
COMMUNICATING STRATEGY

- 1. Discuss**
- 2. Diagram**
- 3. Document**
- 4. Illustrate**

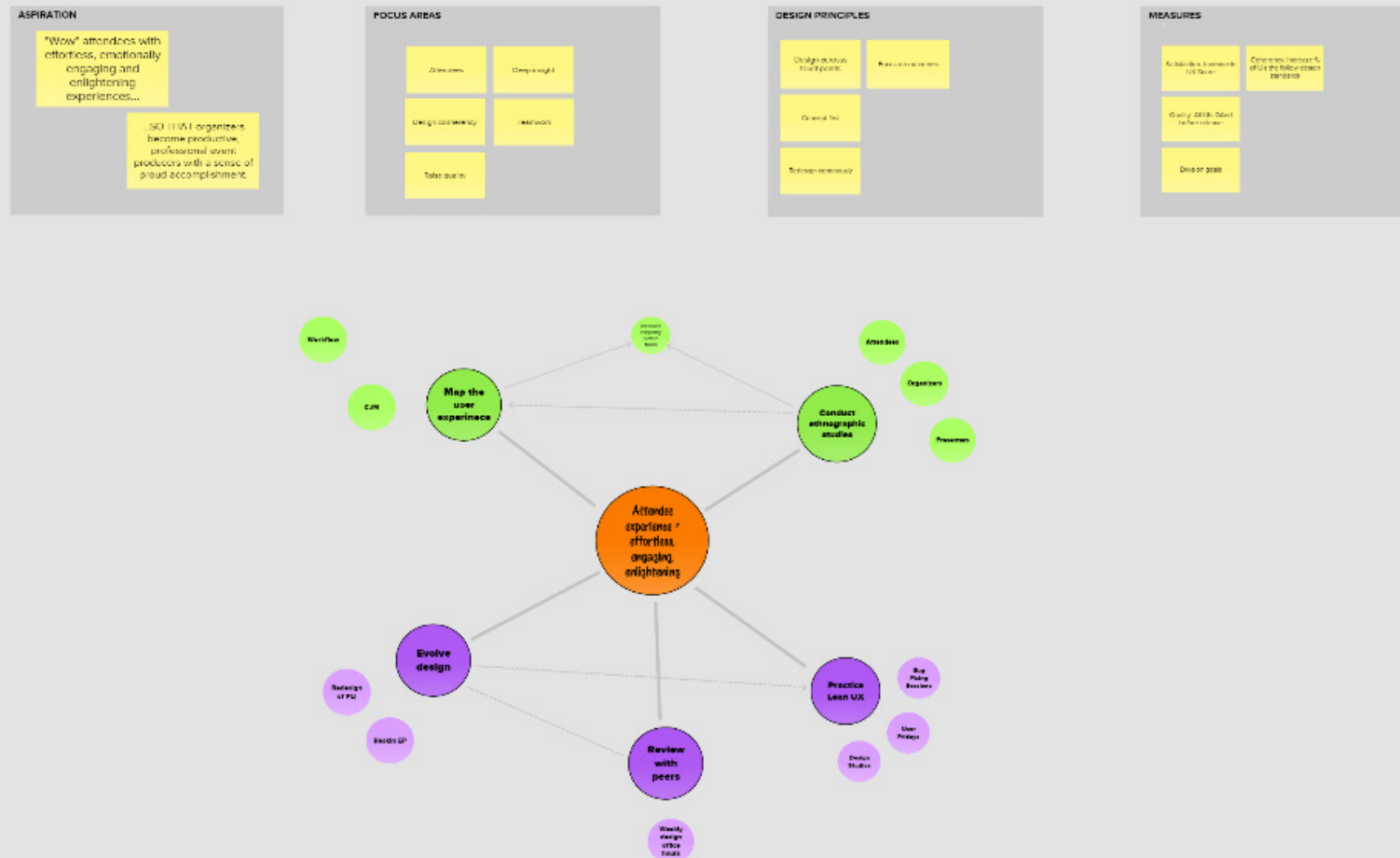
Multiple forms and repetition are essential

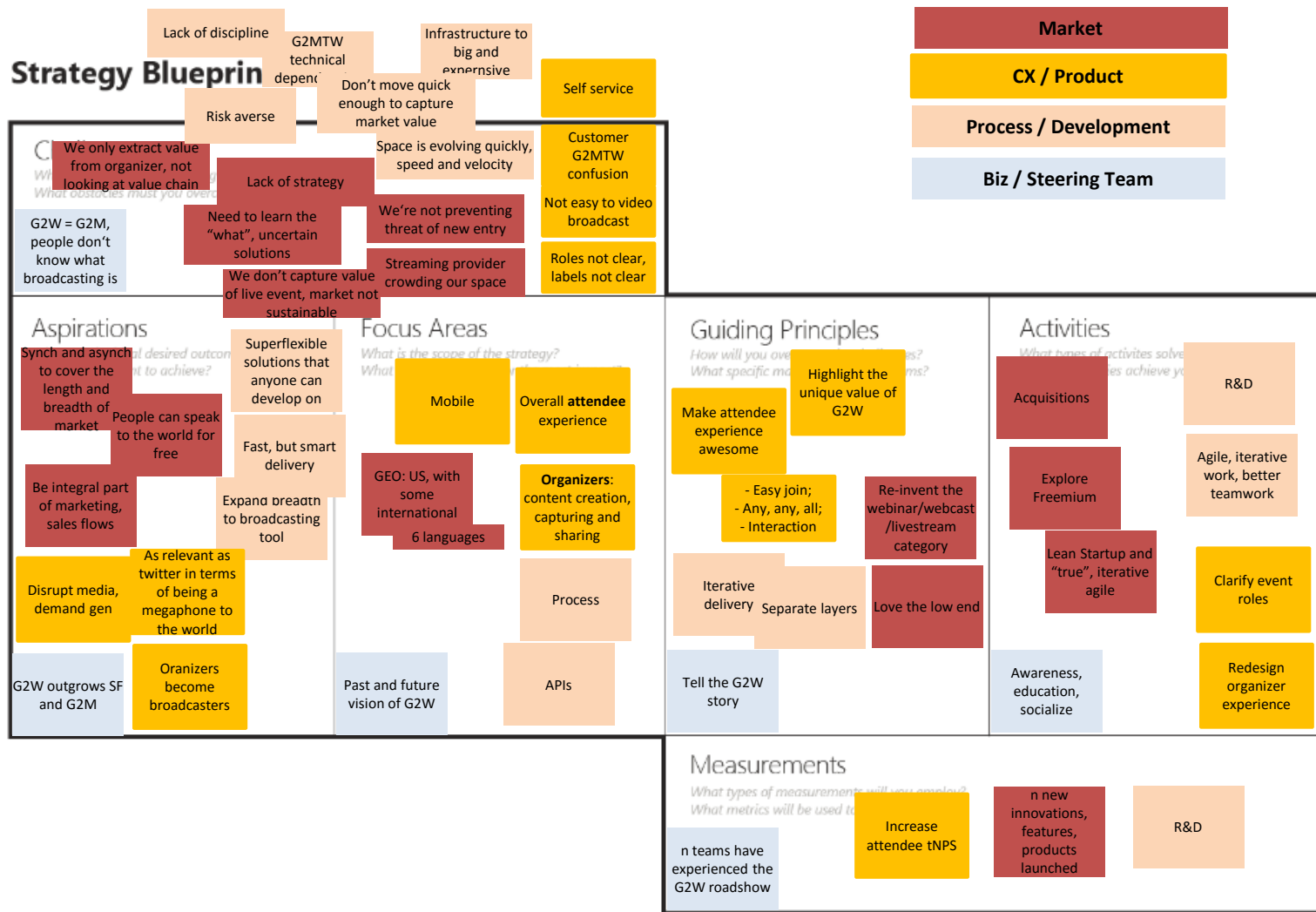
1. DISCUSS

- Workshops with mix of stakeholders
- Conduct planned exercises
- Lead discussions and make decisions



2. DIAGRAM





3. DOCUMENT

Compile and document elements (~2 pages)

Einstein Media Co. UX Strategy

EMC has consistently led the scientific publishing industry worldwide for nearly a century. In recent times, our customer base has dropped due to disruption from low-end players with social-media-driven solutions: scientists are increasingly finding and publishing information on open platforms. Leveraging its scale and authority, EMC seeks to re-invent itself through acquisition and building new capabilities.

This strategy aligns user experience design activity to support the business strategy.

Challenges

- Lack of coherency across touchpoints due to acquisitions
- Fundamental shift in the information behavior of scientists, characterized by social, open sharing

Aspirations

1. We seek to reimagine the scientific information experience by re-architecting content formats to foster not only greater usage and sharing, but to enable scientists to themselves have greater discovery and scientific breakthroughs.

Focus Areas






- The UX strategy focuses on end consumers of scientific information, both authors and researchers
- Moving from offline, print formats to digital formats
- Communities and social media sharing
- Finding scientific and publishing scientific information
- Information interaction independent of format

Guiding Principles

- "Digital first": Create modular, ubiquitous formats that feel familiar
- Design global, act local
- Create teams aligned with workflow and the customer journey, not by function or company

Activities

3. DOCUMENT

	 "Speed Bump"	 "Guard Rail"	 "Safety Net"
PURPOSE	Interrupt users and grab their attention to communicate PI changes	Remind users of PI behavioral changes, as well as support them in their tasks on the site	Catch users who miss  and  and support deeper understanding of PI
WHEN	Upfront, immediate; At the beginning of key flows for both buyers and sellers.	Constantly visible throughout flows; Associated with payment information and options	Constant, but in background; This communication call also appear contextually at relevant moments
HOW	Loud and clear, full page messages (or a majority of the page width), interstitials	Consistent, repetitive and embedded near call to action, in particular near payment information and interaction	Varies; examples include "Learn more" hubs and tips in M2M
WHAT	Announcement of a change, instructions as to actions to take, and the benefits of PI	Direct instructions to the user and confirmation of correct actions, as well as some benefits	Detailed descriptions of the PI process or specific aspects of it; Can also include contextual instructions and FAQs



CUSTOMER SUCCESS

It's everybody's business

We inspire creative teams to become confident problem solving experts from wherever they are.

FOCUS AREAS

- **Onboarding** experience for new customers
- **Engagement** with existing customers
- **Expanding** existing customers

GUIDING PRINCIPLES

- Anticipate JTBD
- Be authentic
- Educate
- Connect the dots
- Tell stories
- Find opportunities

KEY ACTIVITY TYPES

- Create content & events
- Demo & train
- Monitor & report
- Build relationships
- Respond to requests

↑ Increase usage

↑ Improve satisfaction



GoToWebinar

“Wow” attendees with **effortless**, emotionally **engaging** and **enlightening** experiences *so that* organizers become **productive**, **professional** event producers with a sense of **proud** accomplishment.

UX Aspiration

Focus Areas

- Attendees
- Coherency
- Quality
- Insight
- Teamwork

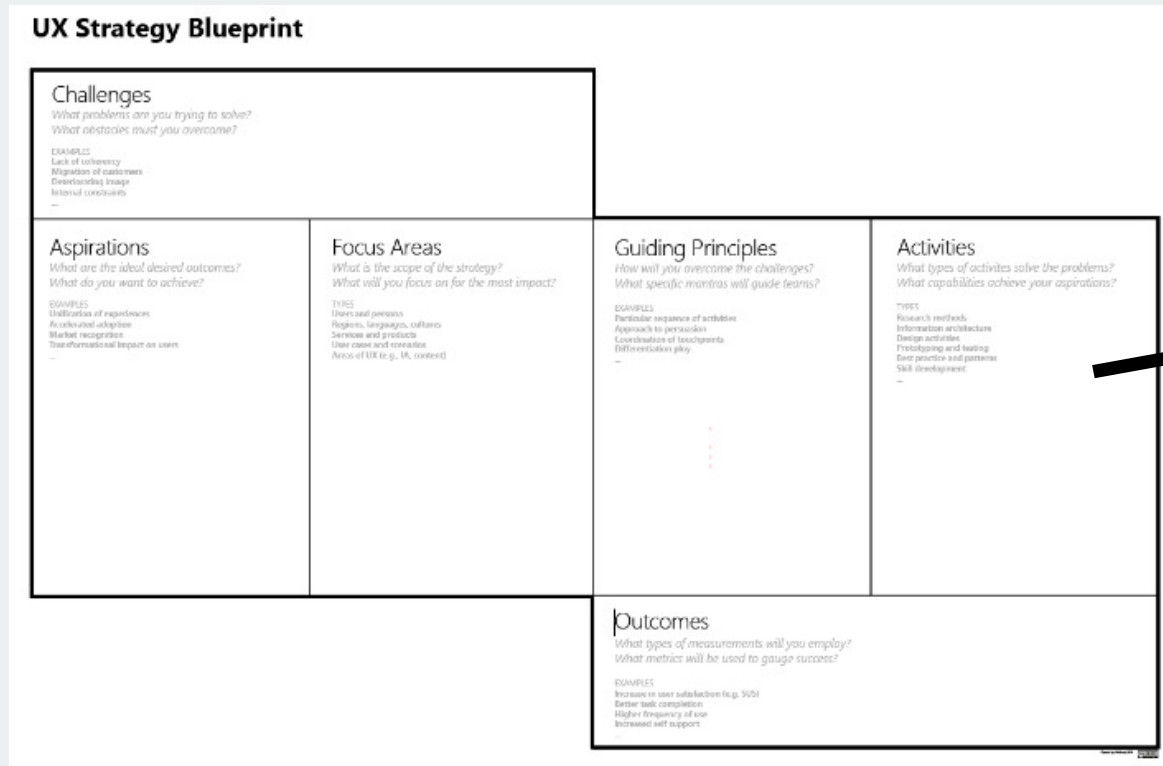
Design Principles

- Design across touchpoints
- Concept first
- (Re)design continuously
- Be outcome driven

UX Activities

- Mapping
- Ethnography
- Peer review
- Lean UX + Cadences
- Design evolution

PLAYBOOK



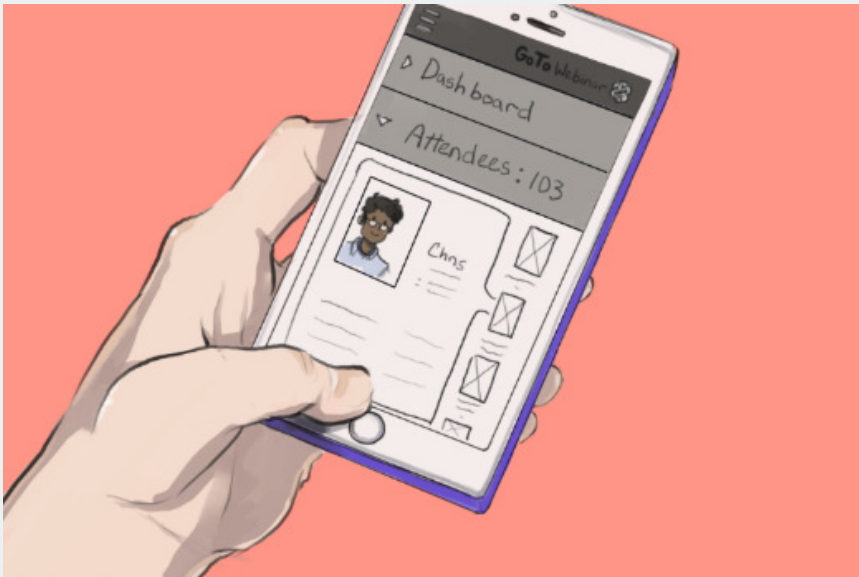
Detail each one of the activities in a playbook for repeating, consistent action.

4. ILLUSTRATE

Create artifacts that embody key elements of your strategy

- **Prototypes**
- **Scenarios**
- **Storyboards**
- **Videos**

EXAMPLE STORYBOARD



EXAMPLE STORYBOARD



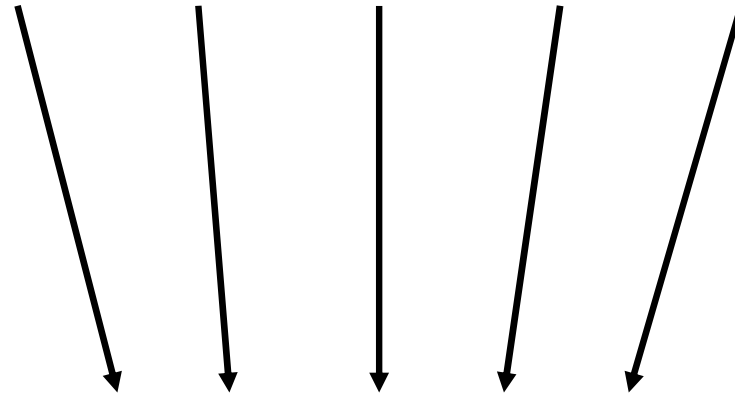
EXERCISE 6: COMMUNICATING

On a single piece of paper, summarize your strategy so far in a diagram to be able to communicate it to others.

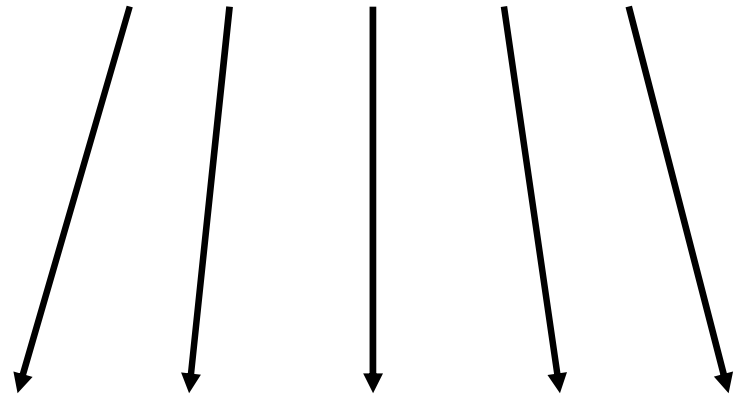


ANALYSIS & PLANNING

Analysis



Planning



EXERCISE 4: STRATEGIC ANALYSIS

What are some types of activities you might perform for strategic analysis?

TOOLS

1. Ansoff Matrix
2. Business Model Canvas
3. Experience Mapping
4. Strategy Canvas
5. Concept Diagrams
6. Activity Maps
7. Others

1. TYPES OF GROWTH

		OFFERING	
		EXISTING	NEW
MARKET	EXISTING	Penetration	Innovation
	NEW	Expansion	Diversification

Ansoff Matrix

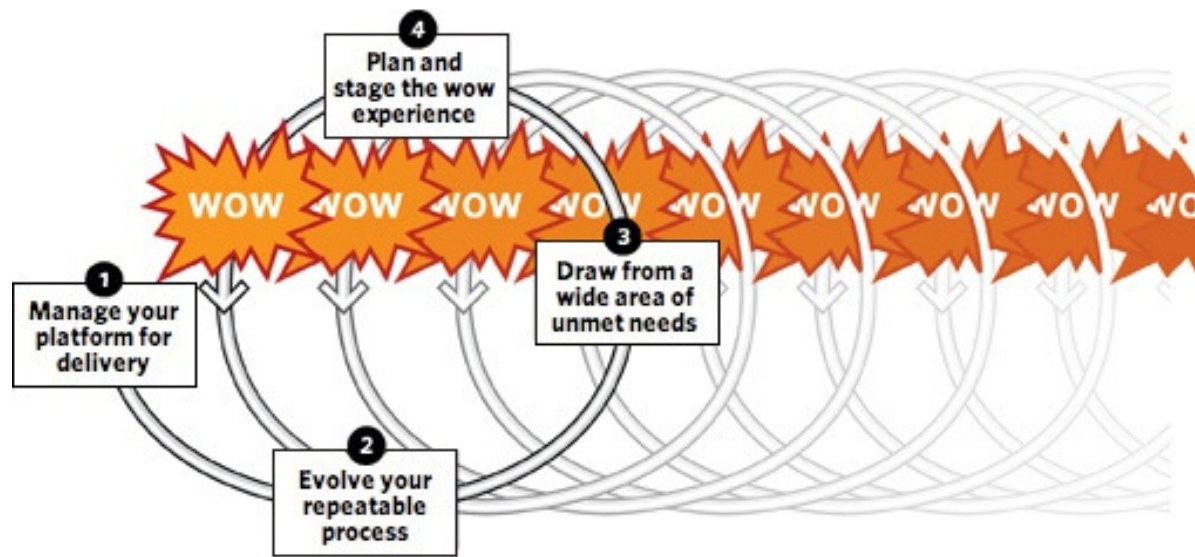
TYPES OF UX STRATEGY

		User Experience	
		EXISTING	NEW
Target Users	EXISTING	Optimization (penetration)	Migration (innovation)
	NEW	Adaptation (expansion)	Introduction (diversification)

TYPES OF UX STRATEGY

	1. Challenges	2 Aspiration	3. Focus Areas	4. Principles	5. Activities	6. Outcomes
Optimization						
Migration						
Adaptation						
Innovation						

THE LONG WOW



BRANDON SCHAUER "The Long Wow" *Adaptive Path Blog* (2007)

2. BUSINESS MODEL CANVAS

The Business Model Canvas

Designed for:

Designed by:

Date:

Version:

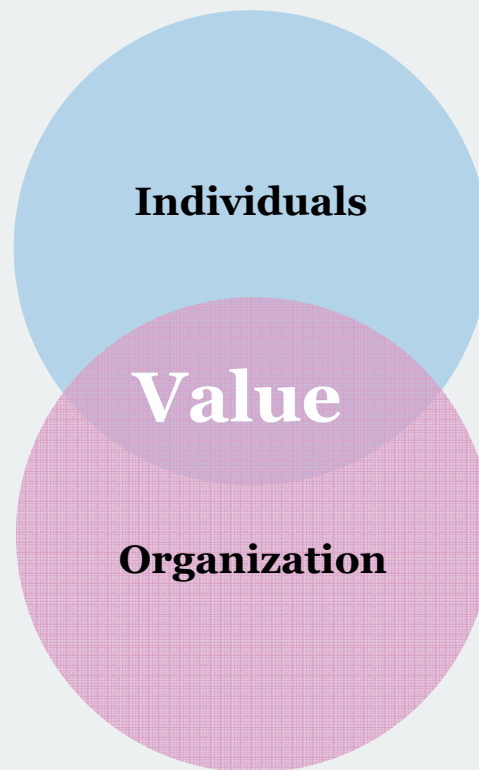
<h3>Key Partners</h3> <p>Who are our key partners? Who are our key suppliers? Which key resources are we sourcing from outside? Which key activities do we leave to others?</p> <p>KEY PARTNERS FOR CUSTOMERS Who are our key partners? Which key resources are we sourcing from outside? Which key activities do we leave to others?</p>	<h3>Key Activities</h3> <p>What key activities must our business model execute well? What are the key activities? What are the key activities? What are the key activities?</p> <p>KEY ACTIVITIES FOR CUSTOMERS What are the key activities? What are the key activities? What are the key activities?</p>	<h3>Value Propositions</h3> <p>What value do we create for the customer? What are the key value propositions? What are the key value propositions? What are the key value propositions?</p> <p>VALUE PROPOSITIONS FOR CUSTOMERS What are the key value propositions? What are the key value propositions? What are the key value propositions?</p>	<h3>Customer Relationships</h3> <p>What type of relationship does each of our customer segments expect? What are the key relationships? What are the key relationships? What are the key relationships?</p> <p>CUSTOMER RELATIONSHIPS FOR CUSTOMERS What are the key relationships? What are the key relationships? What are the key relationships?</p>	<h3>Customer Segments</h3> <p>For whom are we creating value? What are the key customer segments? What are the key customer segments? What are the key customer segments?</p> <p>CUSTOMER SEGMENTS FOR CUSTOMERS What are the key customer segments? What are the key customer segments? What are the key customer segments?</p>
<h3>Key Resources</h3> <p>What key resources do our business model require? What are the key resources? What are the key resources? What are the key resources?</p> <p>KEY RESOURCES FOR CUSTOMERS What are the key resources? What are the key resources? What are the key resources?</p>		<h3>Channels</h3> <p>Through which channels do our customers expect to be reached? What are the key channels? What are the key channels? What are the key channels?</p> <p>CHANNELS FOR CUSTOMERS What are the key channels? What are the key channels? What are the key channels?</p>		
<h3>Cost Structure</h3> <p>What are the most important costs in our business model? What are the key costs? What are the key costs? What are the key costs?</p> <p>COST STRUCTURE FOR CUSTOMERS What are the key costs? What are the key costs? What are the key costs?</p>		<h3>Revenue Streams</h3> <p>For what value are our customers really willing to pay? What are the key revenue streams? What are the key revenue streams? What are the key revenue streams?</p> <p>REVENUE STREAMS FOR CUSTOMERS What are the key revenue streams? What are the key revenue streams? What are the key revenue streams?</p>		

DESIGNED BY: Business Model Foundry AG
(The rest of the canvas is a trademark of Strategyzer AG)

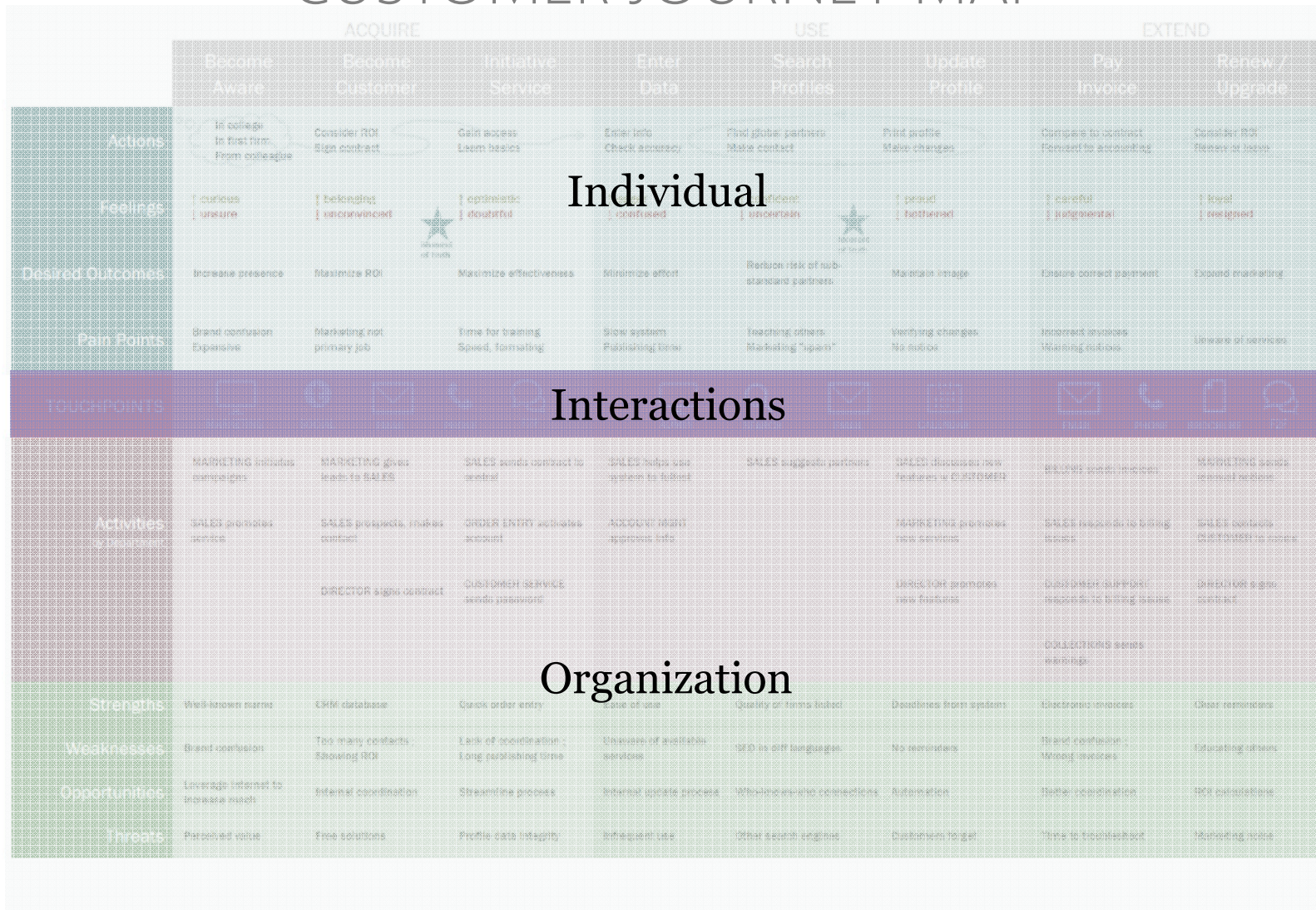
Strategyzer
strategyzer.com

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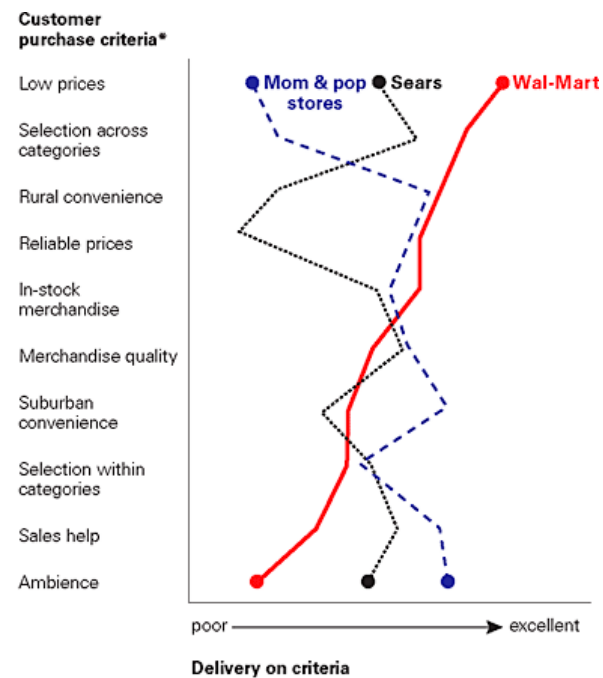
3. MAPPING EXPERIENCES



CUSTOMER JOURNEY MAP



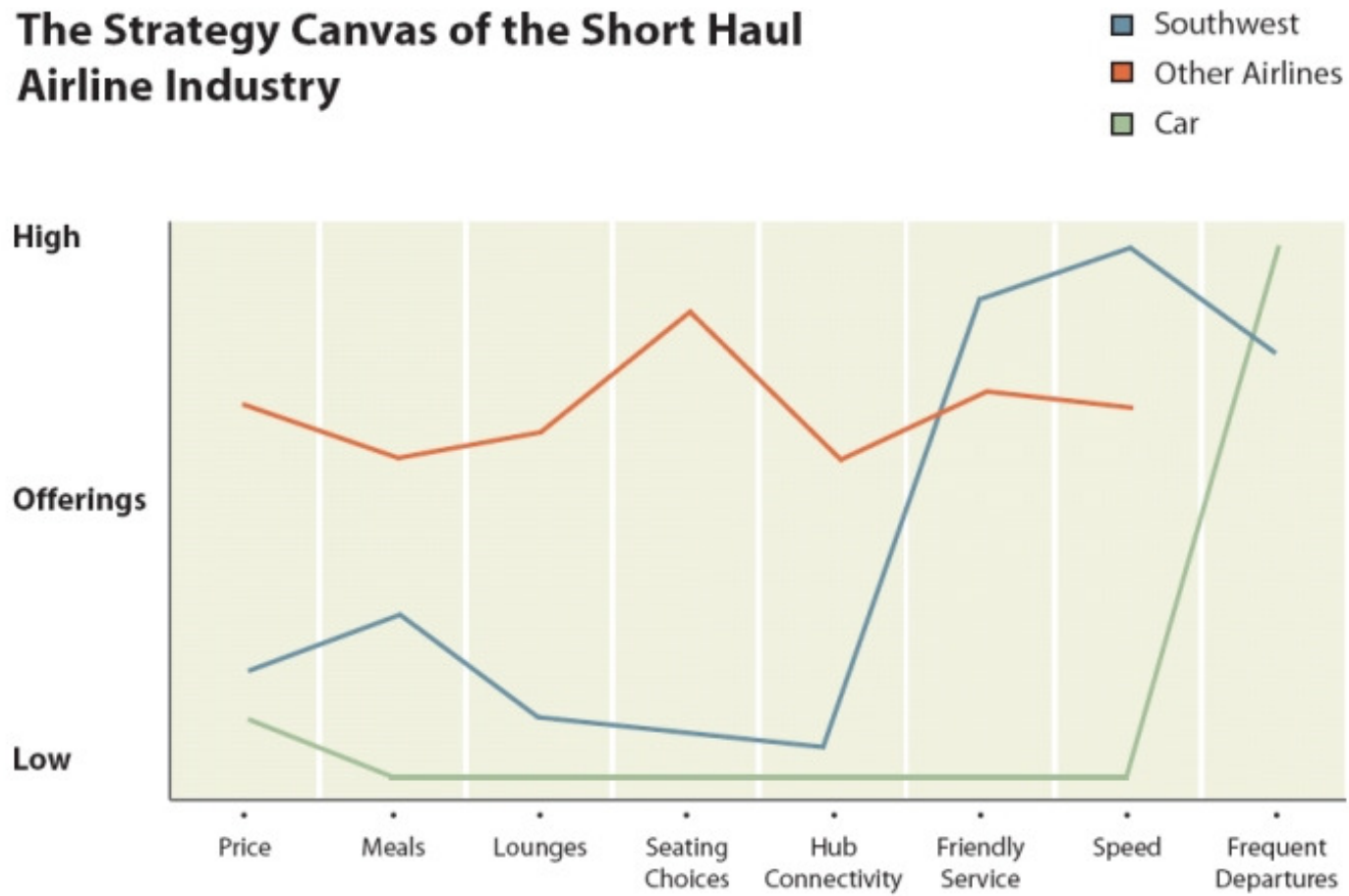
4. STRATEGY CANVAS



* in approximate order of importance to Wal-Mart's target customer group

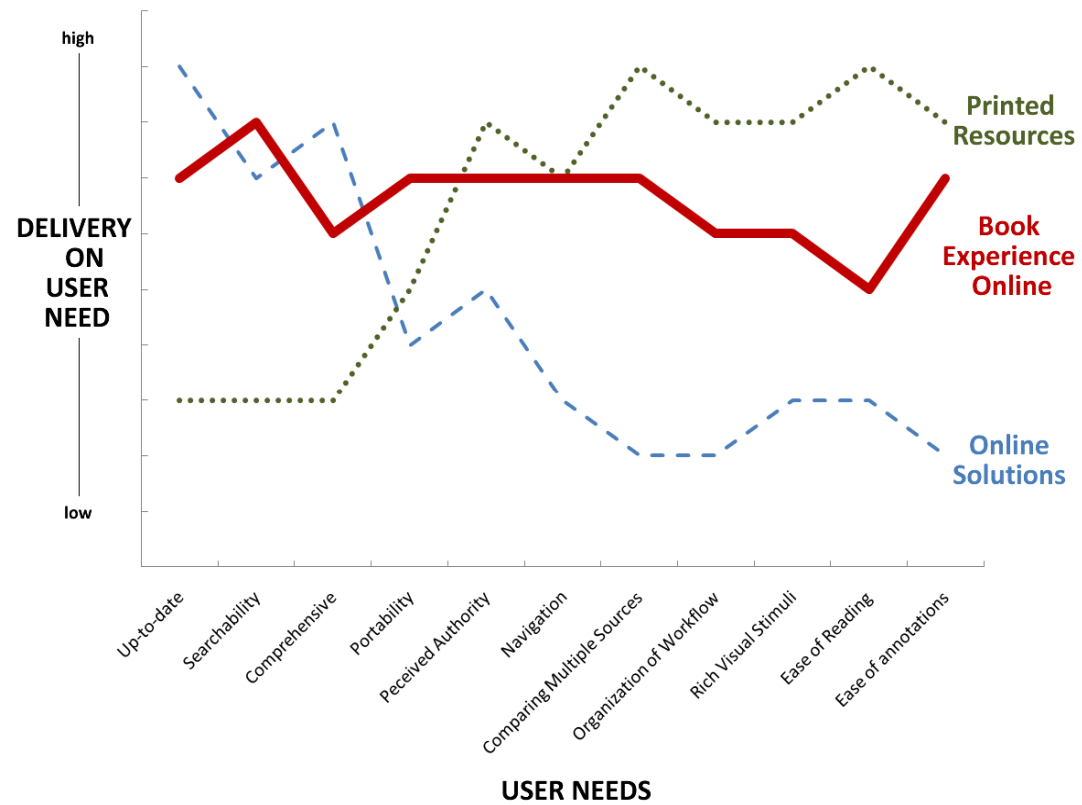
Source: Jan Rivkin, Harvard Business School

The Strategy Canvas of the Short Haul Airline Industry

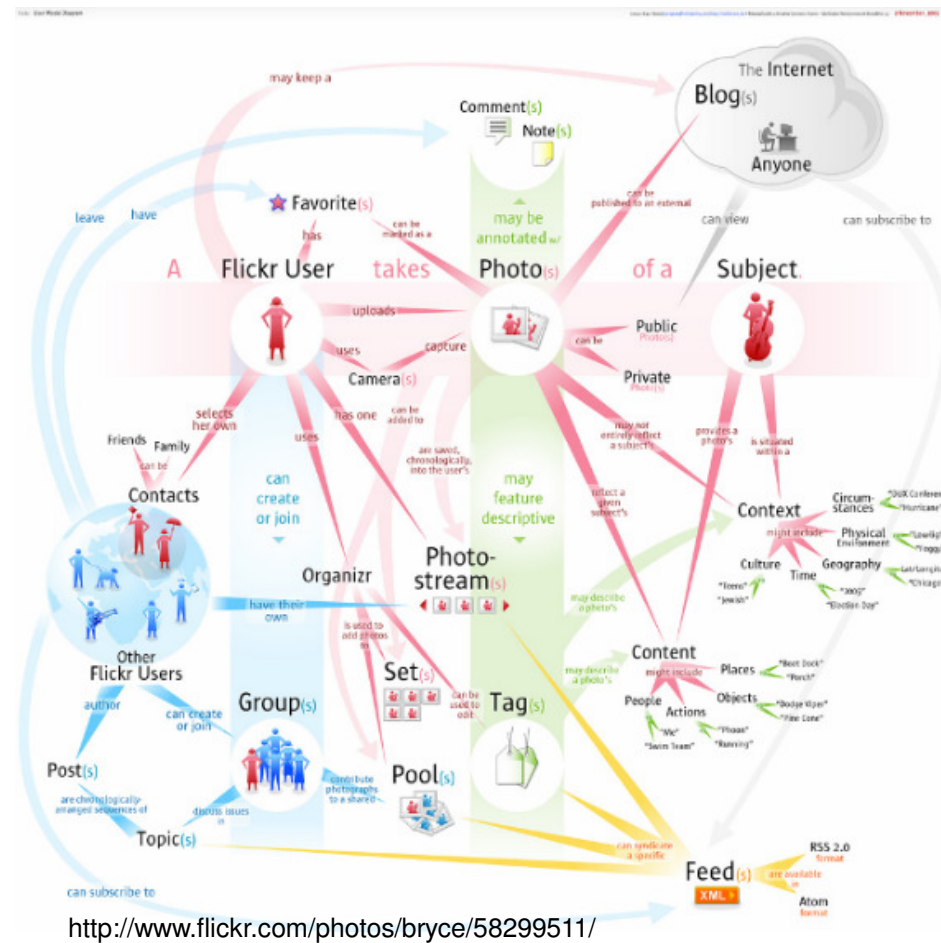


W. CHAN KIM & RENEE MAUBORGNE *Blue Ocean Strategy* (2005)

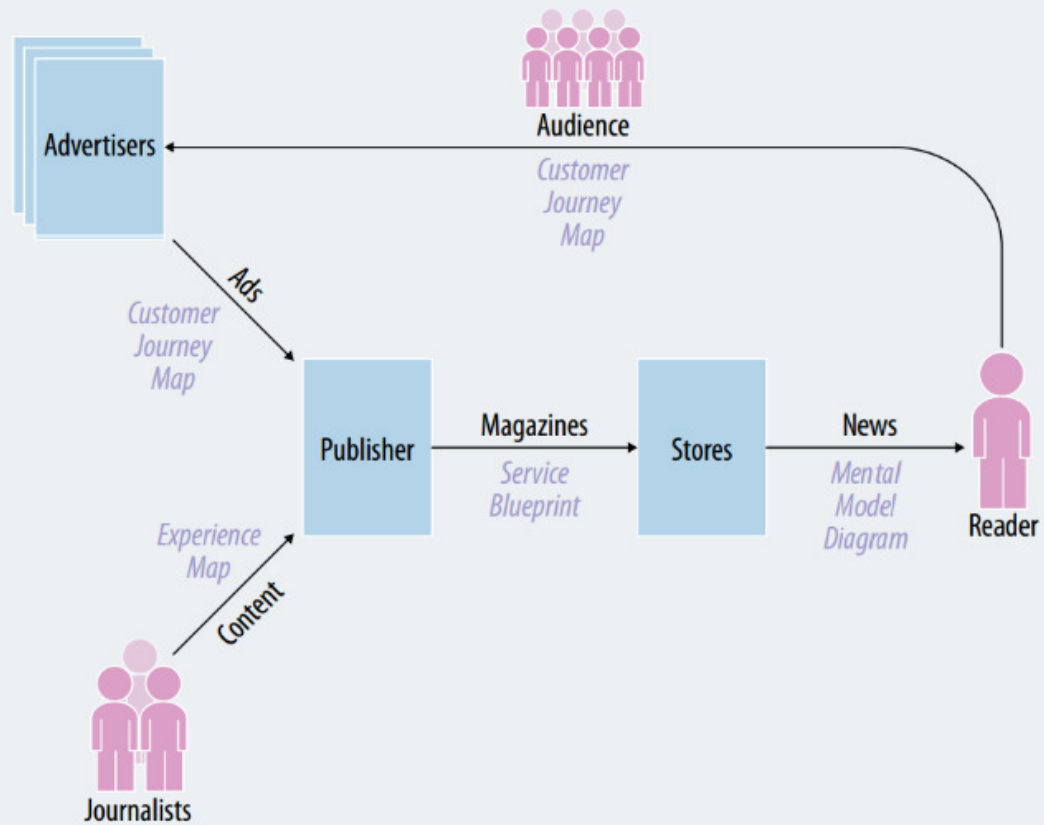
STRATEGY CANVAS FOR UX



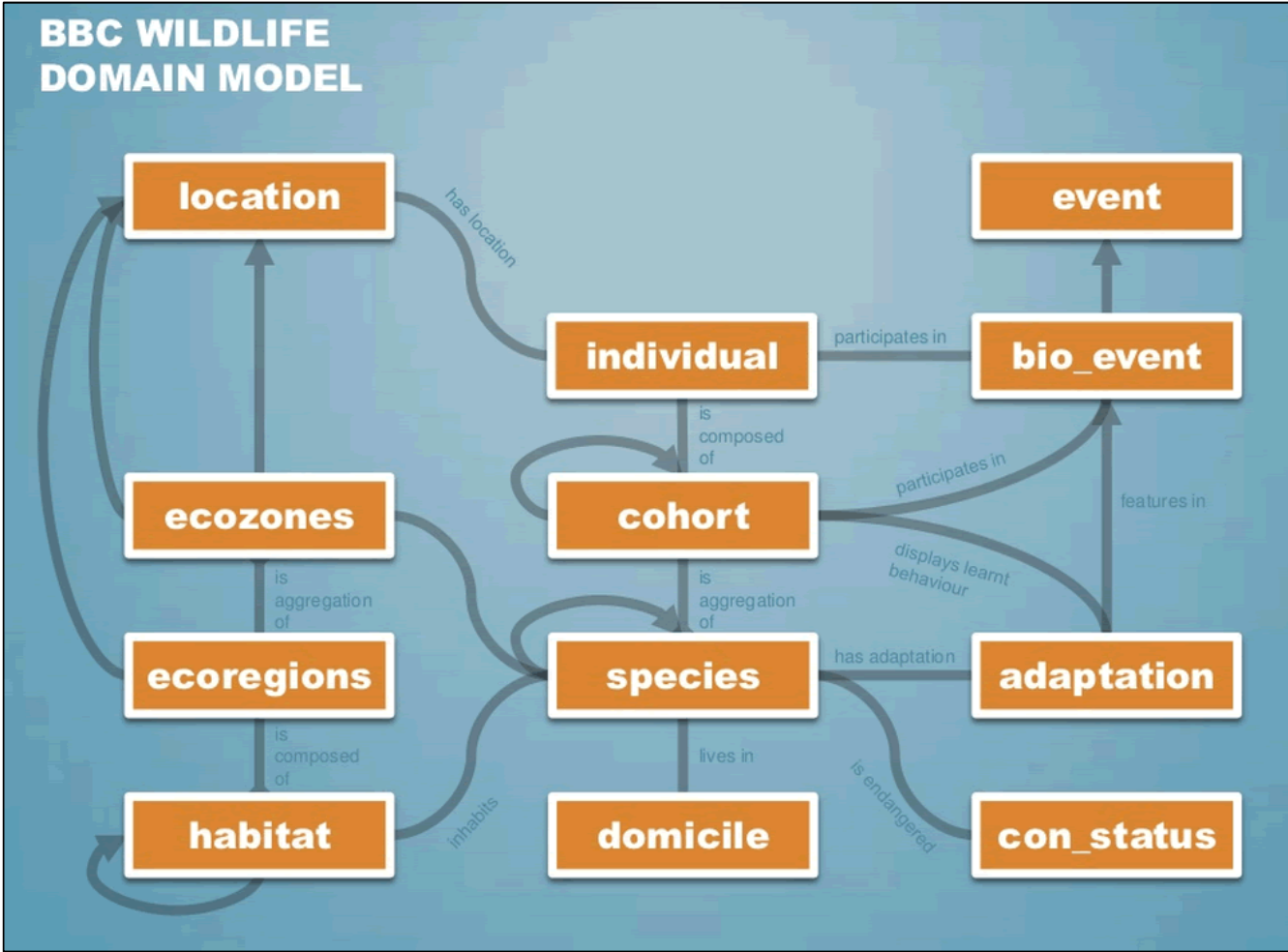
5. CONCEPT DIAGRAMS



CUSTOMER VALUE CHAIN

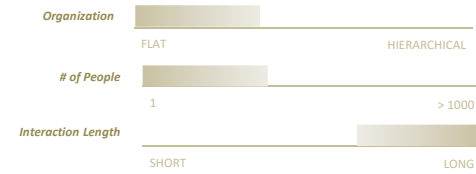
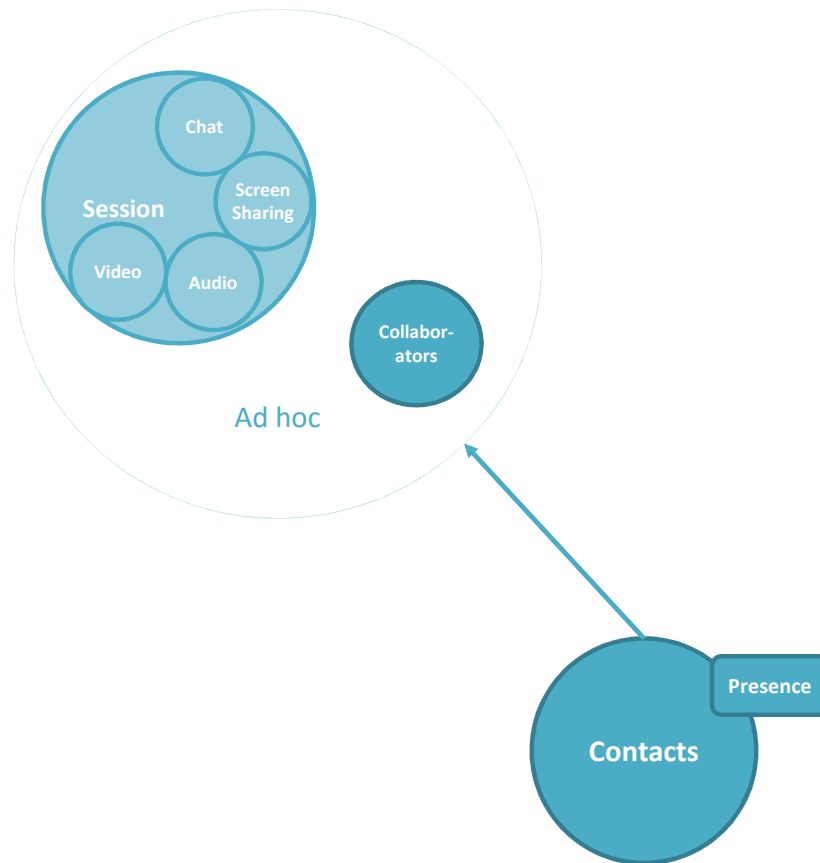


FOCUS AREAS: Domain Model - BBC Wildlife

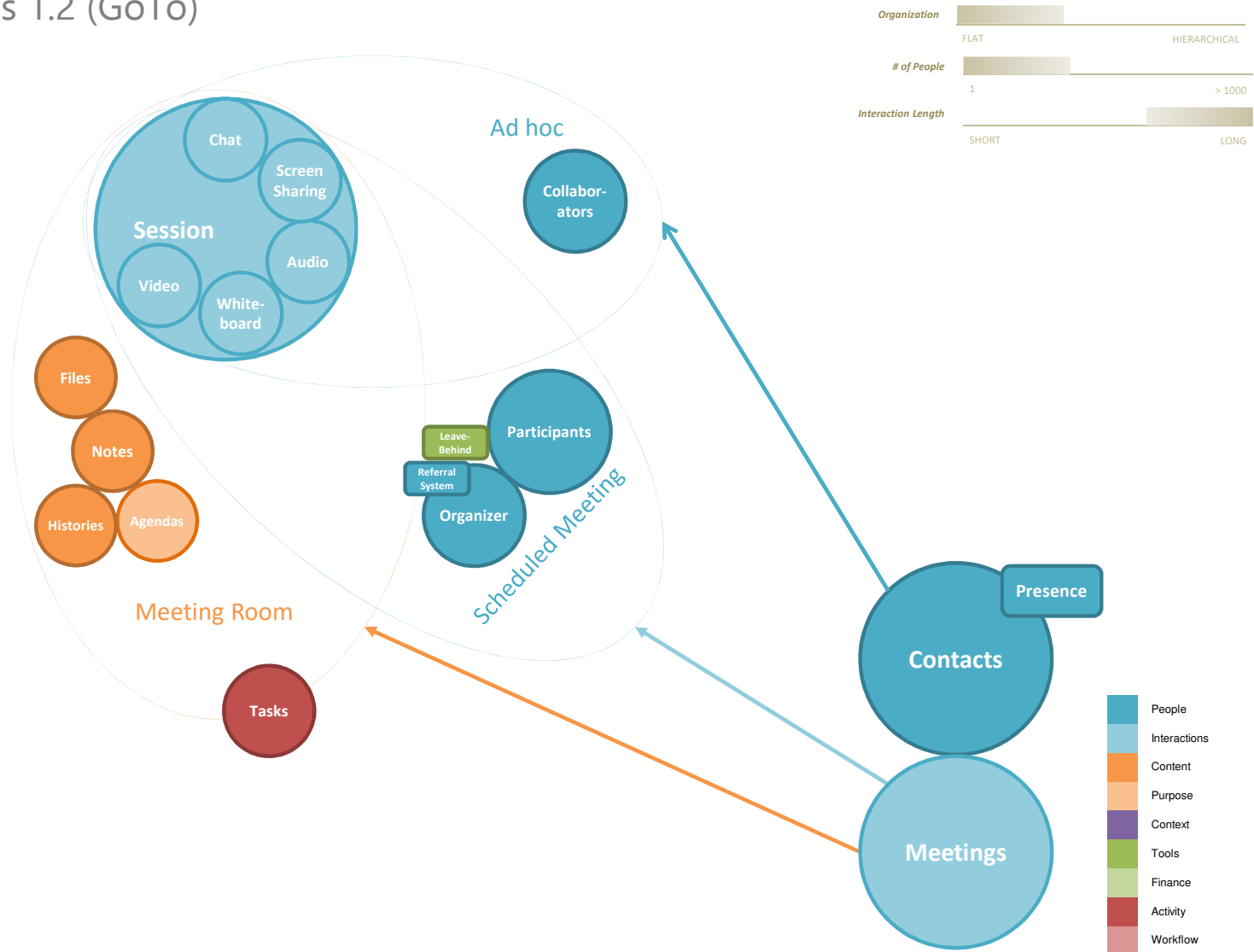


MIKE ATHERTON, "Beyond the Polar Bear." <http://www.slideshare.net/reduxd/beyond-the-polar-bear>

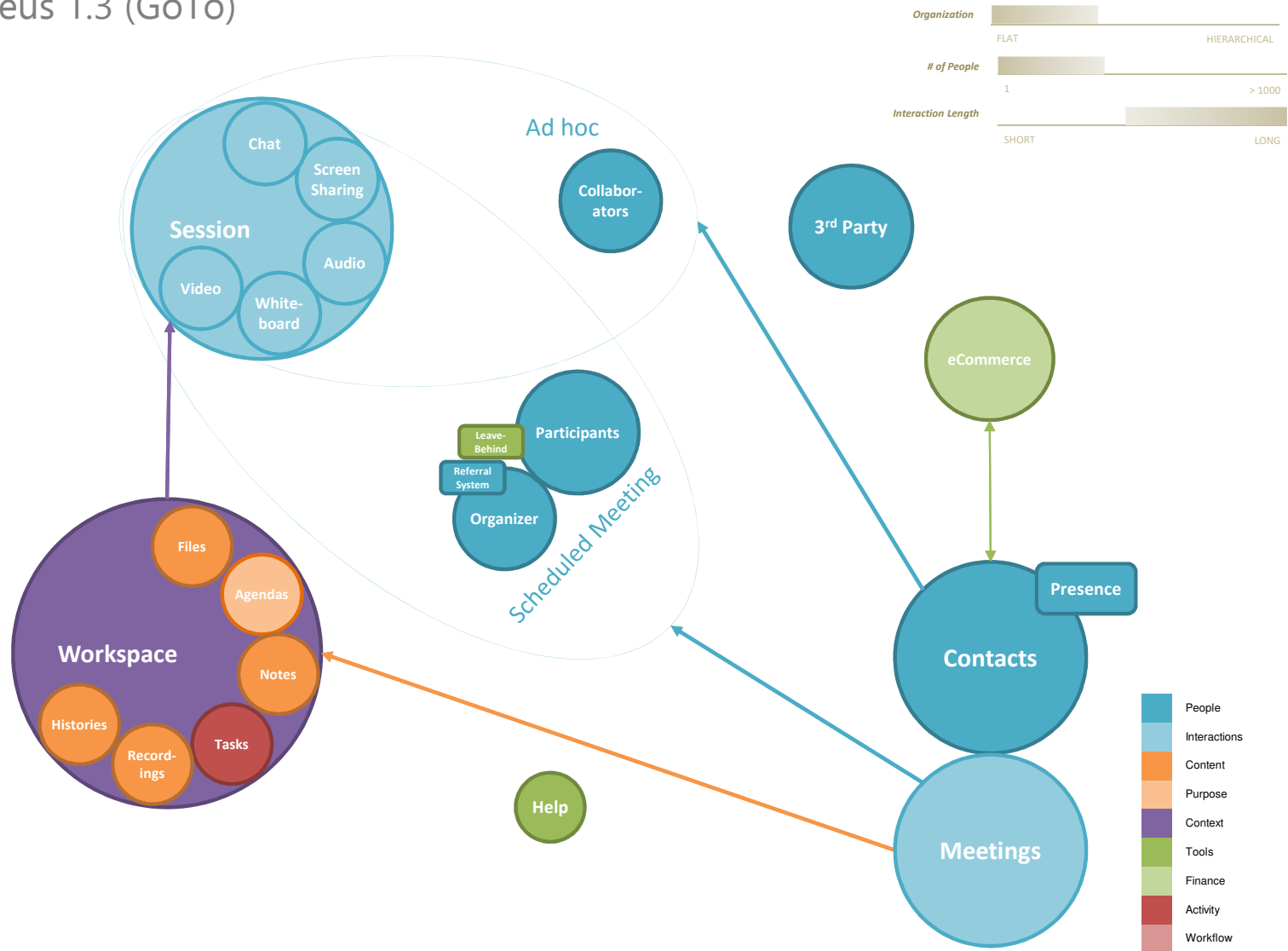
Zeus 1.1 (GoTo)



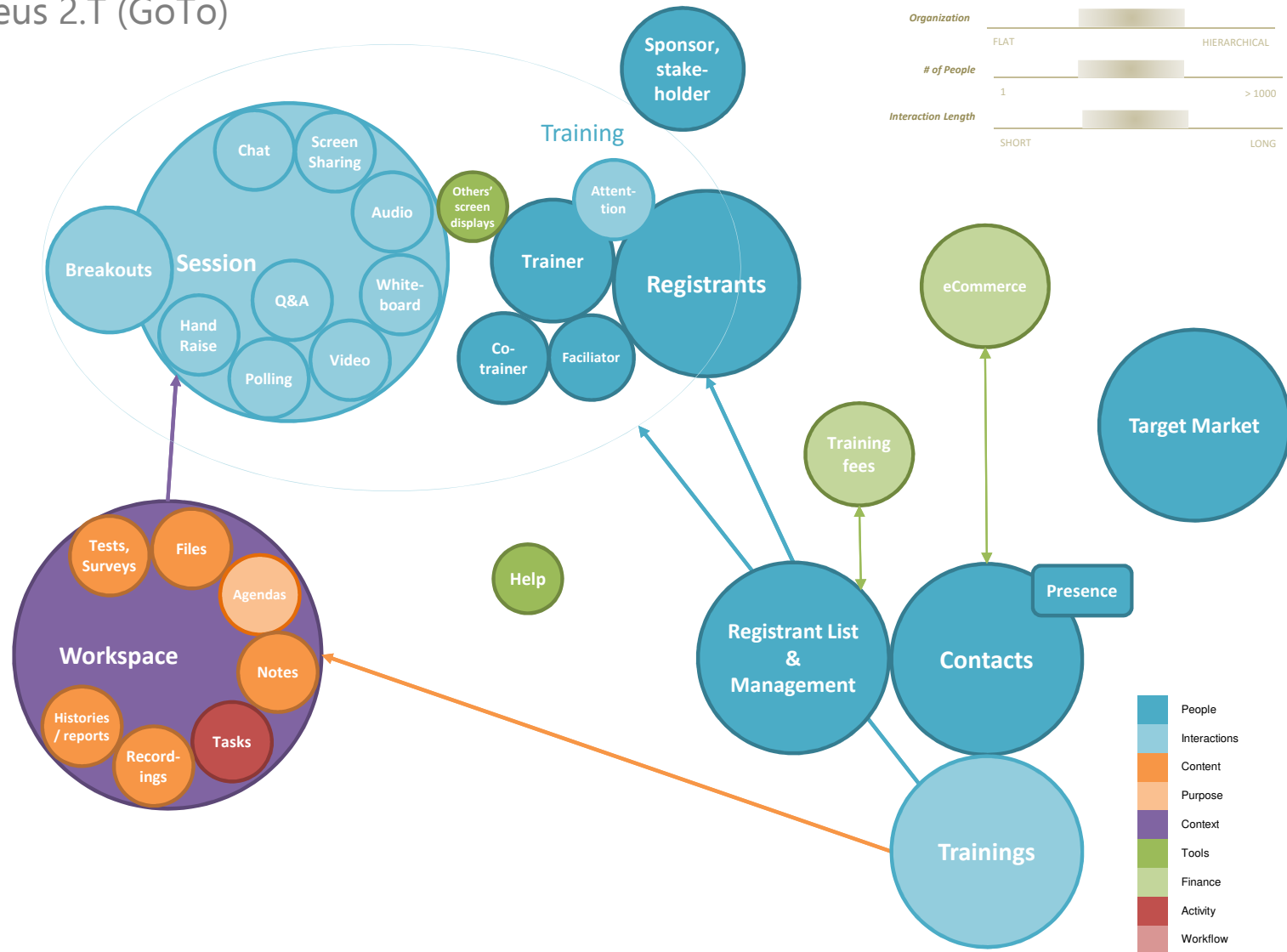
Zeus 1.2 (GoTo)



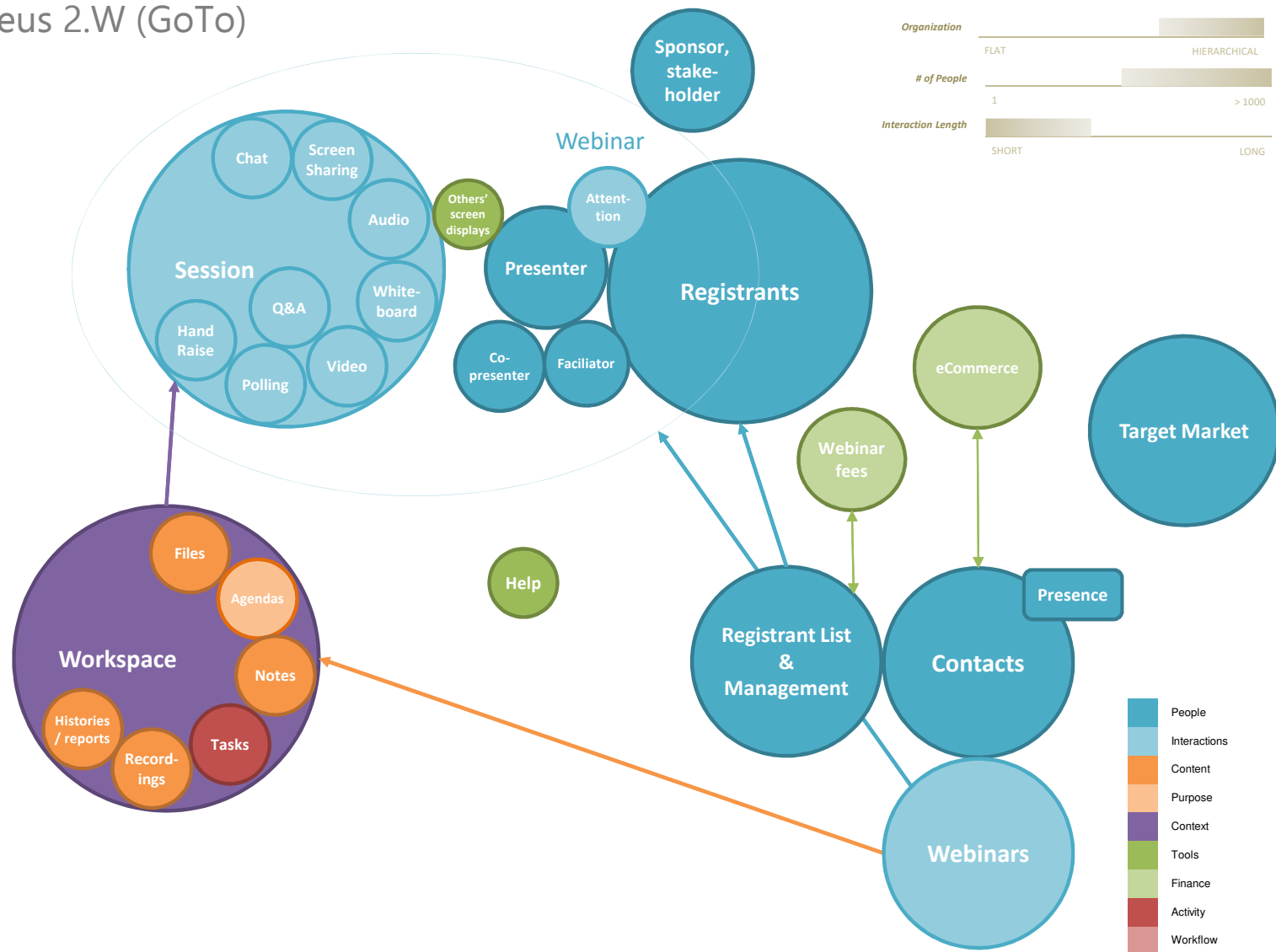
Zeus 1.3 (GoTo)



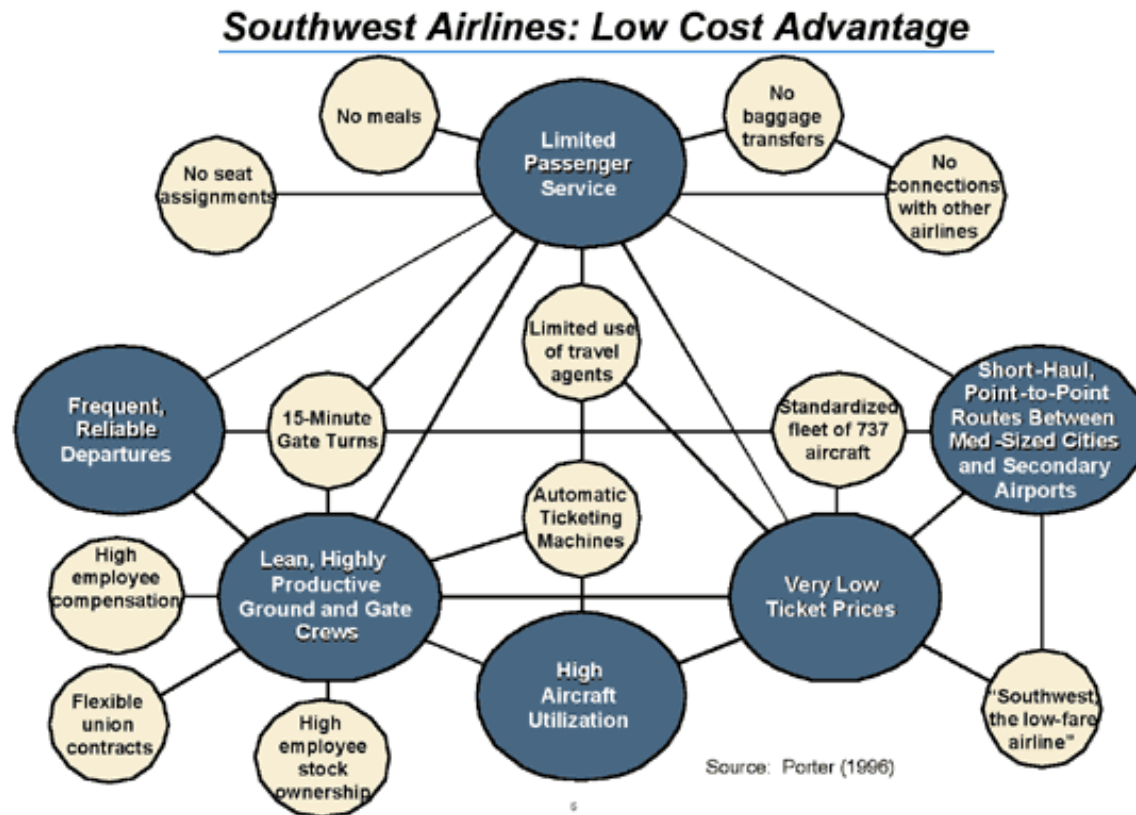
Zeus 2.T (GoTo)



Zeus 2.W (GoTo)

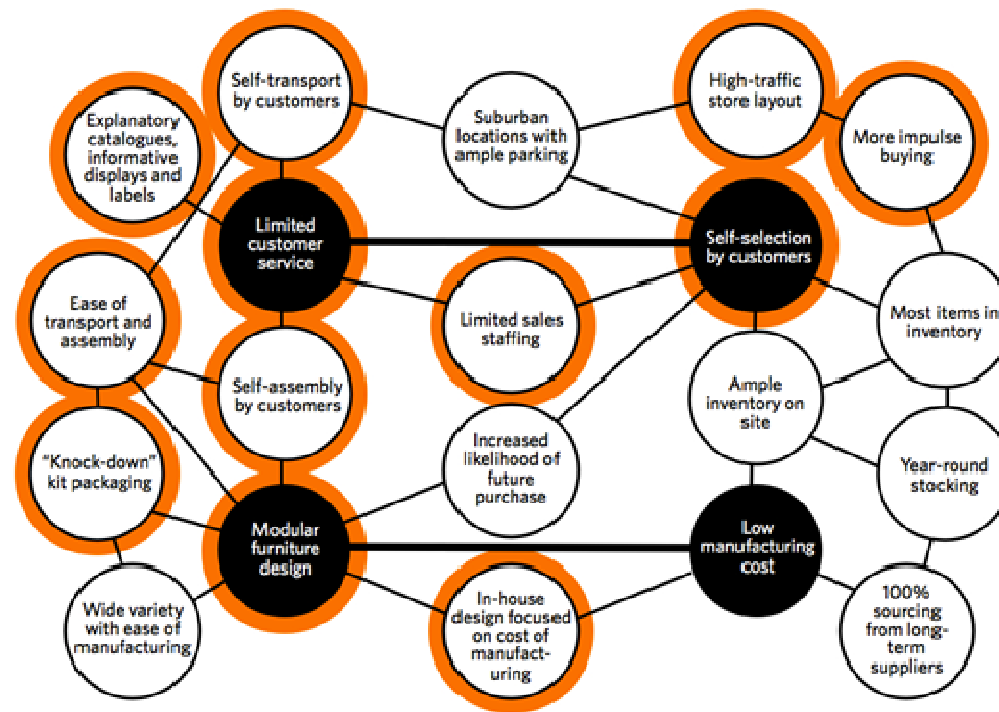


6. ACTIVITY MAP

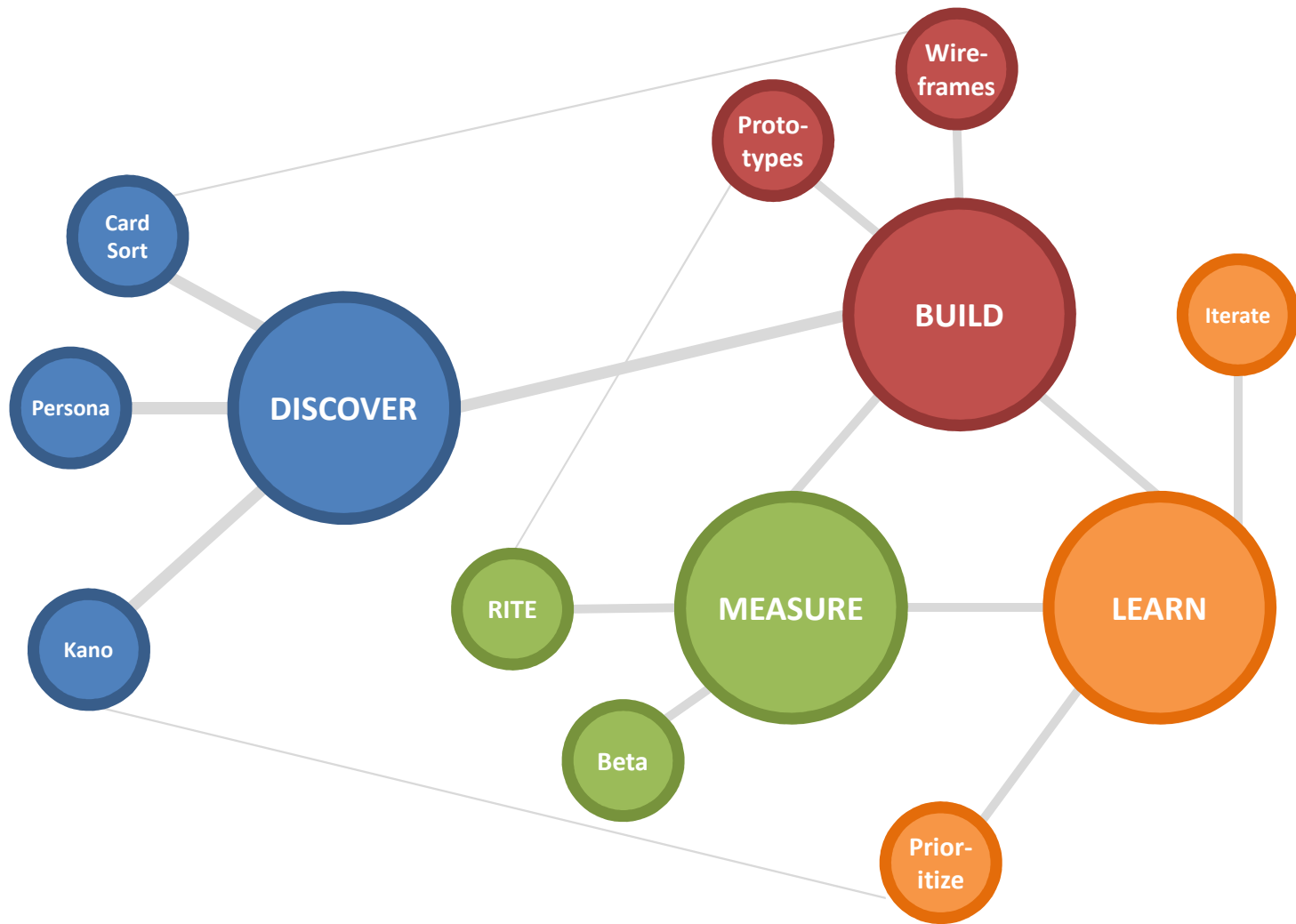


MICHAEL PORTER "What Is Strategy" *Harvard Business Review* (1996)

EXAMPLE ACTIVITY MAP



IKEA Activity Map: UX Overlay



7. OTHER TECHNIQUES

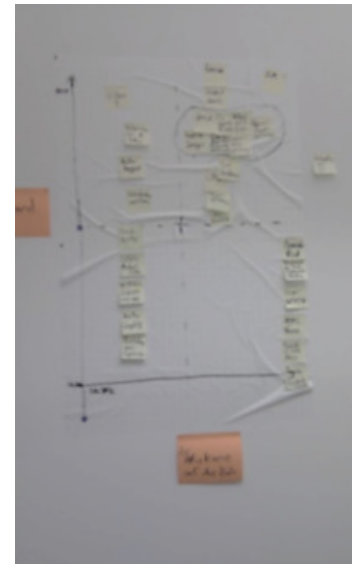
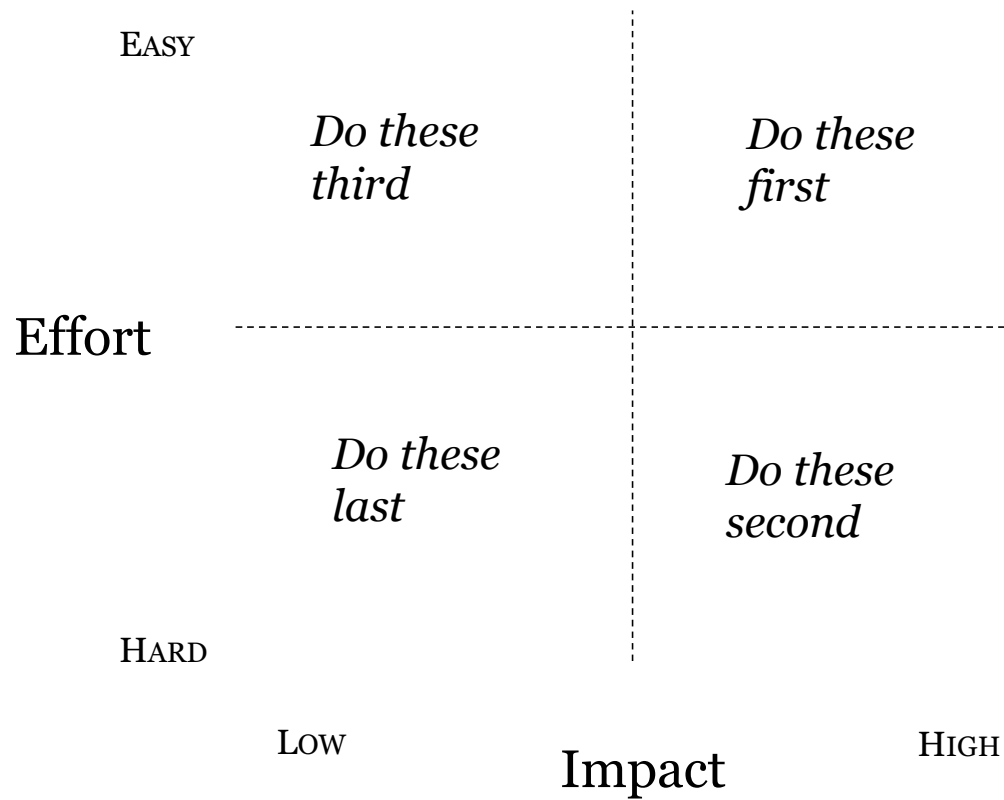
1. Competitor review
2. Metric analysis
3. Resource assessment
4. Budget review
- ...

EXERCISE 5: PLANNING

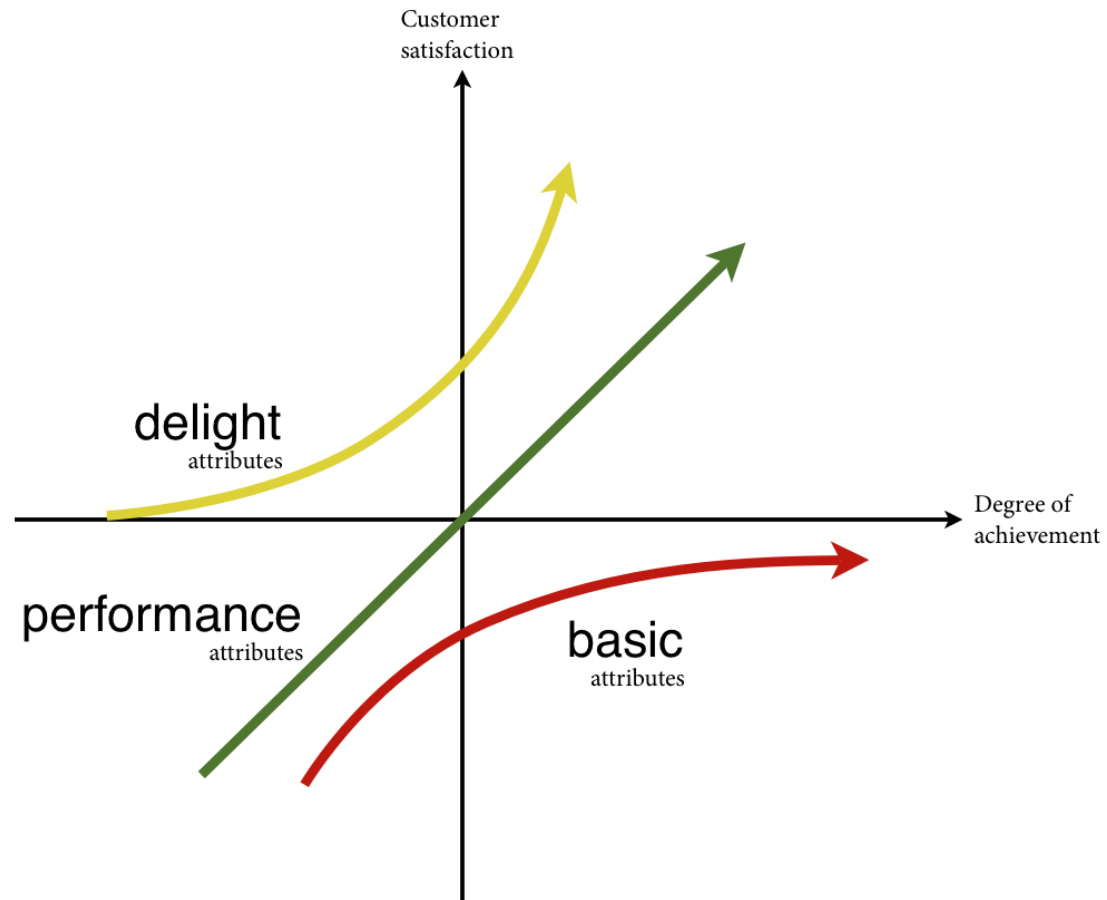
What are some types of planning you might perform as output of a UX strategy?

What are some specific examples of each?

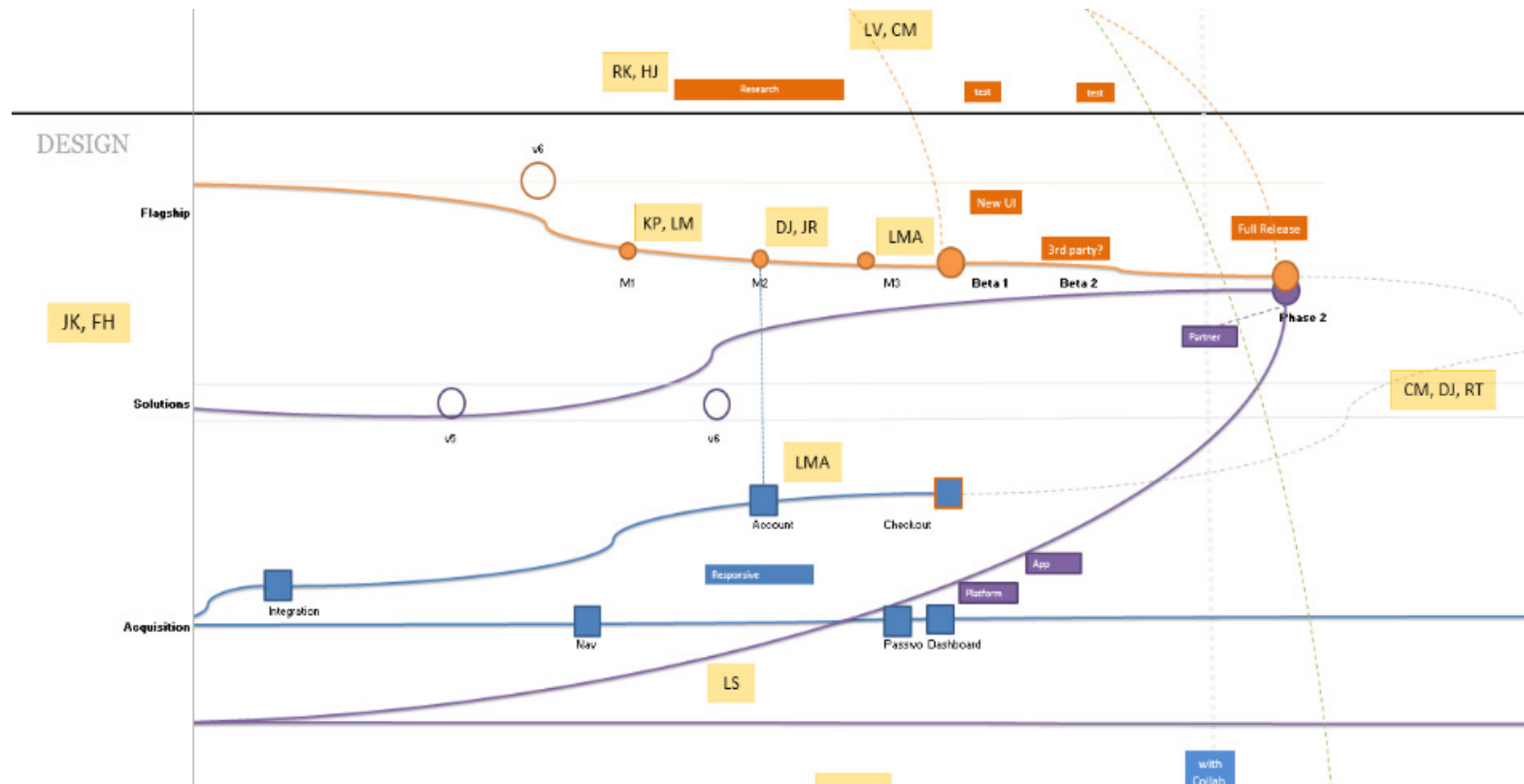
PRIORITIZATION



PRIORITIZATION: KANO

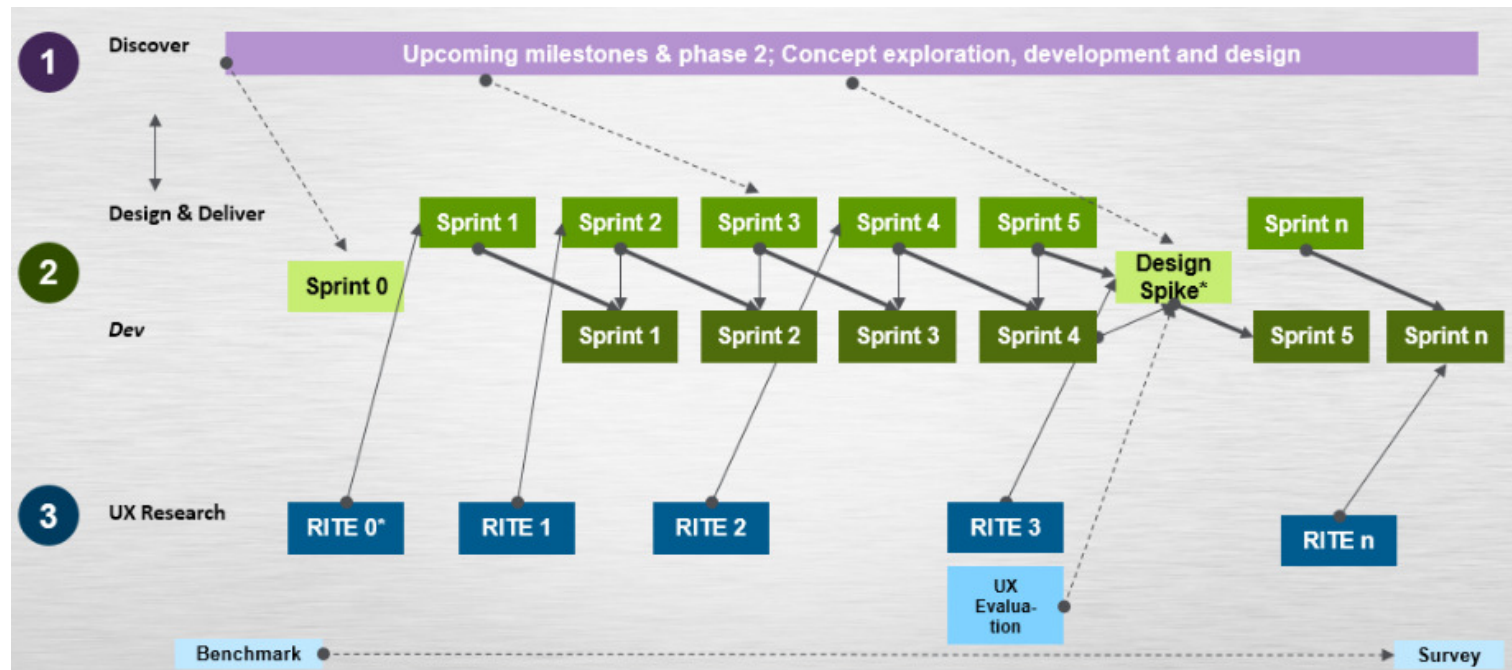


RIVER DIAGRAM



Sequence of event, not a project plan.

PROCESS



Not a project plan (yet)

Danke schön

@JimKalbach