A UX Stratega –
A Fictitious but Realistic Example of a UX Strategy

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ABSTRACT

This article presents a UX Stratega, which is a scenario with an associated example of a fictitious but realistic UX strategy – just as a persona is an example of a fictitious but realistic user. The article also presents a simple UX maturity model, because an understanding of the UX maturity of an organization is essential for devising a successful UX strategy. Further, the article presents a general UX strategy which forms the basis for the UX Stratega.

CCS CONCEPTS

• User cantered design   • Project management techniques

KEYWORDS

UX strategy, business goal, business strategy, usability maturity

1 Introduction

A good UX strategy is helpful to ensure the success of UX in an organization. While there is lots of great advice about UX strategies [3], few examples of actionable UX strategies are currently publicly available. It is hard for people who want to create a good UX strategy to move forward if there are no published examples of good UX strategies available.

At the German Mensch und Computer UX conference in September 2018, the author attended an inspiring talk about how to boost UX maturity in an organization. The presenter suggested that one of the best ways to increase UX maturity and awareness in an organization is to develop a UX strategy. During the Q&A period, the author asked the presenter if he had a good example of a UX Strategy that he could share. He admitted that he didn't. He also acknowledged that the request was reasonable.

A month later, the author asked for good examples of UX strategies in Tharon Howard's Utest discussion forum [9]. Several people said that they had written UX Strategies and provided good advice on what should and what should not be in

a UX strategy. However, no one was willing to share an example, not even in an anonymized form.

In order to provide great examples of UX strategies, the author decided to suggest a public UX Strategy challenge. The challenge was inspired by the success of the Comparative Usability Evaluation studies (CUE), where usability professionals simultaneously and independently evaluated websites in order to help the UX community understand the usability testing process better [6], [7].

To get examples of UX strategies from practitioners, the author approached UXPA Boston. UXPA Boston is always on the lookout for ways to engage mid- and senior-level members of the UX-community. This challenge seemed like a good chance to engage people with those levels of expertise.

2 The UX Strategy Challenge

In connection with the annual UXPA Boston Conference in May 2019, UXPA Boston and the author's company DialogDesign sponsored the UX Strategy Challenge:

Help Alice write a good UX Strategy for Bob, the CEO of Gamma Airlines, based on the following scenario:

Alice is an experienced UX professional who has worked successfully for two major airlines for more than 8 years.

Alice was headhunted 3 months ago by Gamma Airlines (a fictitious company), which is a small regional airline that has about 900 employees. Alice is the airline's first and until now only UX specialist. Alice was hired by direct request from Bob, the CEO, but Alice has had little to do with the CEO since. Alice's colleagues are friendly towards her, but they mainly expect Alice to make product interfaces look cool. They say that they know their users well and that their products are usable and loved by many users. Information from support and informal studies that Alice has done of the booking section of Gamma Airline's website and Gamma Airline's staff allocation system indicate that this is definitely not the case.

Bob just sent a brief email to Alice, asking her for a UX strategy. It seems that Bob has just attended a seminar by a UX management guru, who recommended a UX strategy as a starting point for successful UX work in an organization.

The Challenge was: *What should Alice write in her UX strategy?*

The challenge, which was open to everyone, is described in more detail in [10].

Thirteen teams participated in the challenge.

As expected, the Evaluation Committee learned a lot about practical approaches to UX strategies from the submissions. The Evaluation Committee nevertheless decided not to name any winners, because none of the submissions fully lived up to what the judges expected from an exemplary UX strategy, such as

o   The need for Alice to first do her homework: Get an in-depth knowledge of Gamma, the management, the employees and the customers;
o   "Selling" the importance of UX to Gamma Airlines, Bob and the Board;
o   The need to explicitly mention business goals;
o   Relating any UX goal to one or more business goals;
o   Separating business strategies, UX strategies and UX tactics;
o   The need to consider UX maturity; none of the 13 submissions mentioned UX maturity.

Some of the participating teams were apparently not aware that creating personas and user journey maps; implementing a HCD-lifecycle; and running usability tests are UX tactics rather than UX strategies.

The Evaluation Committee awarded 5 of the participating teams with cash prizes of $1,000 (one team) and $500 (four teams). The strategies suggested by the awarded teams are available from [10].

2.1   Critique of the scenario

Even though the UX strategy challenge was reviewed carefully by about 10 experienced professionals, constructive critique of the scenario was raised after the Challenge from one participant in the Challenge and from people attending presentations of the Challenge given by the author at the UXPA Boston conference and at other, later conferences for UX professionals. This critique has helped improve the current article considerably.

The points that were raised included:

o   The entire strategy is going to be shaped by things that aren't in the provided description. For example, the scenario talks about the airline's "products" but provides no clue what those are. As a small airline does it handle its own booking? Does it contract with a third-party provider such as Expedia or a major airline?
o   The scenario doesn't indicate any difference between internal products and external ones - it just says "products". How does the company handle shifts and maintenance, for example?
o   The scenario provides no indication of who the strategy should target. The strategy for an airline that provides mass-market consumer flights is going to be wildly different from the strategy for an airline that provides business charters.

The author's intention, which is not sufficiently apparent from the scenario, was that Gamma provides mass-market consumer flights and that it sells tickets directly to consumers. The size of Gamma (900 employees) is unrealistic. A more realistic figure would be 20,000 employees (think Alaska Airlines, easyjet).

3   Definitions

Business strategy can be understood as the course of action or set of decisions which assist the entrepreneurs in achieving specific business goals. It is the master plan that the management uses to secure a competitive position in the market, carry on its operations, please customers and achieve the desired ends of the business [1].

Business goal describes what a company expects to accomplish over a specific period of time. Businesses outline their goals in their business strategies. Goals might pertain to the company as a whole, departments, employees, customers, etc. For examples of business goals, see section 5.

UX strategy is a long-range plan for helping the business achieve specific business goals through UX activities. A UX strategy can be about how to position UX within the organization, for example increase usability maturity, or a strategy specific for the company's products and services.

The core of any strategy is:

A.   Where are we now?
B.   Where do we want to be in 3 years?
C.   What are the right tactics to get from A to B?
D.   Once we have reached B, how will we prove it to our colleagues?

Tactics are the actual means used to gain an objective. Examples of UX tactics: Create personas; create user journey maps; implement HCD-lifecycle; run usability tests.

Usability maturity is the level of understanding and implementation of a systematic human-centred design process within an organisation or a development team [11].

4   UX maturity

An understanding of the UX maturity of an organization is essential for devising a successful UX strategy for the organization. A UX strategy for an organization at maturity level "Incomplete" differs fundamentally from a UX strategy for an organization at maturity level "Managed"

Table 1 shows a simple UX maturity model [11]. Other, more extensive UX maturity models exist, for example [2], [5], [8].

Usability maturity level	Key characteristic	Other characteristics
Innovating	UX is not dependent on any specific person. Cross-organizational UX is a natural part of development.	The human-centred design process is continuously improved to respond to change aligned with business goals. The organization only releases products that meet UX goals.
Managed	The UX process is planned, monitored and adjusted.	Executives invest in UX. There is a budget for UX. The human-centred design process is implemented in a managed fashion, and its work products are appropriately established, controlled and maintained. Usability tests and field visits are used by many development teams
Performed	Usability is achieved by enthusiastic individuals using ad-hoc processes.	A few usability tests are conducted
Incomplete	Usability is fine if it comes for free, but no one is committed to delivering it.	Product managers may say that they care about usability, but when it comes to spending budgets or making otherwise inconvenient decisions to achieve usability, for example, delaying a release, nothing happens.

Table 1: A simple usability maturity model.

5   Business goals and UX strategies

Table 2 shows examples of business goals for Gamma Airlines and examples of corresponding UX strategies or tactics.

Business goal	Corresponding UX strategy or tactic
Offer the best service among competing airlines; the competing airlines are Alpha Airlines and Beta Airlines	Measure the user experience of Alpha, Beta and Gamma Airlines. Identify pain points for Gamma Airlines and how they can be relieved
Increase profits by cutting costs	Participate in the conception, design and implementation of the UX of the required automation tools to ensure that they are usable for the target groups.
Win young travellers Increase the market share among 18-28 year old people from 25% to 50%	Make the UX for 18-28 year old people particularly usable and attractive
Win frequent travellers	Make the UX for frequent travellers very efficient
Create efficient and sustainable operating platforms	Regularly measure the time-on-task for key tasks in each operating platform. Where needed, suggest improvements
Secure the right capabilities Our employees are an important prerequisite for Gamma Airlines future — we share our customers' passion and interest for travel, which also drives our efforts to strengthen our offering.	Increase the UX maturity of Gamma Airlines from Incomplete to Organized to ensure that Gamma Airlines can attract highly qualified developers and UX professionals

Table 2: Examples of business goals for Gamma Airlines and corresponding UX strategies or tactics

6 A General UX Strategy

The following general UX strategy is adapted from the business strategy described in [4]:

Step	Description
1. Understand the stakeholders and the business goals	Interview stakeholders to obtain a deep understanding of the business goals. Relate current and planned products to the company's business goals.
2. Create a sense of urgency	Run usability tests and user experience tests of one or two products that are critical for the organization to identify problems in representative key products and user journeys.
3. Produce short-term wins	Implement the recommendations from the usability tests and user experience tests. Measure and document progress. Communicate the successes.
4. Align UX with appropriate business goals	For each relevant business goal, describe the specific user problems it addresses. Align UX goals with business goals
5. Pull together the guiding team	Nominate a small, powerful UX Committee that oversees all UX activities. Give the UX Committee a budget for appropriate UX training and pilot activities
6. Develop a 3-year vision for the user experience	Create a series of prototypes and future user journey maps that illustrate what the user experience could look like in 3 years. Involve all stakeholders. Define a limited number of KPIs (Key Performance Indicators) that enable the organization to track the vision.
7. Communi-cate for understanding and buy-in	Ensure the entire organization regularly and consistently hears about the 3-year vision from senior leadership.
8. Empower others to act	Make suitable tools available, in particular standards for products and processes. Ensure that the tools are usable. Communicate information about the tools in a usable way. Ensure that UX workers have the required skills.
9. Regularly update the UX strategy	Measure KPIs every 3-6 months. Update the UX strategy every 3-6 months. Communicate the results and the changes.
10. Be persistent	It takes time to change the course of a super tanker – even when the Captain is willing to do so. Document and communicate failures and successes.

Table 3: A general UX strategy. This strategy is described in more detail in section 9.

7 A UX Stratega for Gamma Airlines

The UX stratega for Gamma Airlines is based on the general UX strategy outlined in section 6. It has the following components:

o UX Goals – described in section 5;
o The strategy for reaching the UX goals that Alice presents to Bob and the Board – described in section 8;
o The detailed strategy for reaching the UX goals – described in section 9.

Alice's thoughts in connection with the UX strategy are

o Gamma is at maturity level "Incomplete" as evidenced for example by the following statement in the scenario:
[Alice's colleagues] say that they know their users well and that their products are usable and loved by many users. Information from support and informal studies that Alice has done of the booking section of Gamma Airline's website and Gamma Airline's staff allocation system indicate that this is definitely not the case
o Alice's overriding goal is to increase the maturity level of Gamma from "incomplete" to "managed" by demonstrating and communicating measurable benefits of good UX work.

Alice knows that as a UX professional she must know her users. She knows that her key users are top management, and that they are very different from her. She must start by finding out which are the tender buttons. Otherwise she might find herself selling UX as a sort of snake oil which cures all ills, and a sceptical mind will quickly zero in on that.

8 The UX Strategy that Alice Presented to Bob and the Board

Alice decides that her presentation to the Board must be usable – that is, it must be completed in 15 minutes including time for questions. If the Board members continue to discuss and ask questions after 15 minutes, Alice feels that she has scored a small victory.

Alice limits herself to 11 slides:

1. Presentation of Alice
2. Examples of business goals for Gamma Airlines
3. How UX can help achieve these business goals
4. Overview of the UX strategy
5. Step 1: Understand the stakeholders and the business goals

9   A Detailed Strategy for Reaching the UX Goals

Alice's short-term strategy (step 9.1 to 9.5) is to gather irrefutable data about the state of UX at Gamma Airlines. Alice plans to use this data to create a UX strategy that aligns with business goals and improves profit. Finally, Alice will "sell" the UX strategy that is based on data to top management.

Alice's long-term goal is to earn a seat at the table where important business decisions are made.

9.1   Understand the stakeholders and the business goals

Alice interviews

o   Bob, the CEO;
o   Oscar, the COO;
o   Fred, the CFO; and
o   Irina, the CIO,
to better understand Gamma's business goals and strategies.

Alice's interview checklist among other items contains

o   Tell me about current and planned products and relate them to Gamma's business goals;
o   Tell me about Gamma's strategy and roadmap plans;
o   Where do you see Gamma in three years?
o   What are the biggest obstacles to getting there?
o   What is your bonus based on? How can I help you achieve it?
o   What keeps you up at night? Can I help you solve it?
o   Alice pays attention to the language her interviewees use so she can learn to speak their language.

Alice asks Bob and Oscar to identify an experienced employee who knows Gamma and the product suite and can be Alice's go-to person for detailed questions. Bob suggests that Alice should talk to Susan, who is a senior strategist. Susan has been with Gamma from the very beginning 18 years ago.

9.2   Create a sense of urgency – Sell the Importance of UX

9.2.1   Field studies

To learn about user needs and current pain points, Alice interviews nine Gamma employees and twelve users (travellers):

o   Three employees from customer support;
o   Three employees from check-in;
o   Three stewardesses.
o   Six people who travel frequently with Gamma – that is, 15 times or more per year
o   Six people who travel with Gamma once or twice a year

Alice makes three journeys on Gamma Airlines to observe the user experience and talk to fellow travellers about their user experience. To see what the competitors are up to, she also books and makes two journeys on Alpha Airlines and two on Beta Airlines. Afterwards, she documents her experience in a short report.

9.2.2   Examples of insights from field studies

Some of the insights that Alice got from her field studies are:

1.   As part of planning her trip on Beta Airlines, Alice talks to Bianca in Beta Airlines support and learns by coincidence that Beta Airlines is about to roll out a slick mobile app and is poised to steal valuable young high-spending customers with this app. Beta Airlines is Gamma's nearest competitor.
     >> Alice writes a UX strategy that details how to create a competitive app in a short time by hiring an outside agency.

2.   Alice finds out that usability defects in Gamma's booking system are causing people to miss high-margin "flight extras". This aligns with the current cross-sell/up-sell strategy.
     >> Alice proposes a series of studies with representative customers based on her personas to identify and remove specific obstacles to profit here.

3.   Alice determines that Gamma's app is hard to configure and slow to respond, resulting in Gamma not showing potential flyers all the trip options they might want.
     >> Alice proposes sunsetting the bespoke app in favour of a highly rated third-party inventory management tool that can be whitelabeled to look like a new Gamma product. Alice shows how increased availability of flights reduces abandoned visits to the website and results in more full and profitable flights.

9.2.3   Usability tests to increase awareness of UX

Alice uses the pain points identified from the interviews and her journeys as a basis for focused usability tests of the relevant key products to illustrate problems in representative key products and user journeys.

Alice conducts ten usability test sessions of Gamma's website with particular focus on the booking system. Alice defines KPIs for the booking system and measures them before the usability tests start. Alice decides to use the following KPIs:

o   Time to book a flight for a user who has booked 0-2 flights before
o   Time to book a flight for a frequent traveller – that is, a traveller who flies 15 times or more per year
o   Time for users to find and understand the correct answer to a question about hand baggage;
o   User satisfaction with the booking procedure.

Alice and Susan invite top management, in particular Bob and Oscar, as well as involved developers to participate in the planning of the usability tests. They invite relevant stakeholders to observe the usability test sessions. Relevant stakeholders are

Board members, senior management, marketing, developers, and more. Alice ensures that it is simple and convenient for stakeholders to observe live test sessions. For example, test sessions can be scheduled on Friday afternoons and announced as a social activity.

Alice invites everyone who has attended at least one usability test session to a one-hour workshop where participants discuss the results. Based on the discussion, Alice writes a usable usability test report.

9.3   Produce short-term wins

Alice

o   Implements the recommendations from the usability test.
o   Measures the KPIs after the changes have been implemented and documents progress.
o   Communicates the successes.

9.4   Align UX with appropriate business goals

For each relevant business goal, Alice describes the specific user problems it addresses. In other words, Alice aligns UX goals, UX strategies and UX tactics with Gamma Airlines business goals. See the examples of business goals in section 5.

9.5   Pull together the guiding team

Alice uses the short-term wins and the UX strategy that is in alignment with the business goals to argue for more resources.

Alice suggests that Bob should:

o   Nominate a small, powerful UX Committee that oversees all UX activities.
o   Give the UX Committee a budget for appropriate UX training and pilot activities, for example $500,000 for a three-year period, for appropriate UX training and pilot activities as well as support for first-time project-based UX activities, such as conducting a series of contextual interviews or running a usability test.
o   Alice may be able to handle steps 1 to 5 on her own but she will hardly be able to handle the following steps 6 to 10 alone. The UX Committee should consider hiring additional UX professionals for the following steps.
o   The UX Committee monitors return on investment and tracks KPIs (Key Performance Indicators) for the money they spend as well as UX related KPIs in general.

9.6   Develop a 3-year vision for the user experience

Alice and her team

o   Create a series of prototypes and future user journey maps that illustrate what the user experience could look like in 3 years. Alice advertises the project widely and invites all stakeholders to participate.
o   Suggest that top management or the Board discuss and provide input to the vision in a one-day workshop.
o   Ask the Board to comment on and approve the vision.

9.7   Communicate for understanding and buy-in

Alice and her team encourages senior leadership to

o   Ensure the entire organization regularly and consistently hears about the 3-year vision.
o   Regularly bring up the vision when talking about new projects, features and requirements.

Alice and her team

o   Communicate documented UX successes to management, developers and staff.
o   Advertise regularly in Gamma Airlines internal newsletter that it's OK for people outside the IT-department to report usability problems and suggest improvements.

9.8   Empower others to act

Alice and her team

o   Make suitable tools available, for example
  • UX style guide;
  • Interaction standard;
  • UI coding toolkit;
  • Procedural standards for usability testing, interviews, etc.
o   Ensure the tools are usable.
o   Communicate information about the tools in a usable way
o   Follow up on the use of the tools

9.9   Regularly update the UX strategy

Alice and her team

o   Update the UX strategy regularly, for example every 3-6 months
o   Measure regularly, for example every 3-6 months
o   Document and communicate failures and successes.
o   Advertise the fact that they update the UX strategy regularly and that they measure regularly

9.10 Be persistent

Alice knows from previous employments that it takes time and hard work to increase usability maturity in an organization. On the other hand, Alice feels that life is too short to wait in vain for positive signs, so she quietly decides to wait two years for Good Things to happen. Examples of Good Things are:

o   Development teams start doing field research
o   Measurements show that the usability and user experience of key internal and external Gamma products starts to improve significantly;
o   Bob and the Board nominate an appropriate guiding team as suggested in Step 4.

Practitioners' Takeaways

The UX Strategy Challenge showed that even the practitioners who were courageous enough to participate in the challenge lacked important information about UX strategies.

In order to write a good UX strategy you must

o Know the stakeholders – they are your users. Knowing the stakeholders well is more important than knowing the users
o Familiarize yourself with business goals;
o Relate any UX goal to one or more business goals;
o Separate UX goals and UX tactics, for example, personas are not a UX goal;
o "Sell" the importance of UX to your stakeholders.

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