Tegra118

UX Strategy

A playbook towards user centred design

Introduction

A playbook towards user centred design

The Apples, Googles and even the Microsofts of the world realised that a compelling user experience could give them a competitive advantage. Despite their scale they are able to offer highly personalised experiences and innovate by being obsessed by their customers. Today a strong User Centred Design (UCD) practice is table-stakes.

This presentation looks at what Design is and what is in scope. It's important to have a shared understanding in order to be effective. It also takes a look at what is known about the current state of the union and highlights areas for change. Let it be known here that while these may come across as critical they come from a good place and assert no blame. As an organisation you are on a journey...

Chapter 1

Tegra118's UX Journey

We're at the beginning of a journey to transform Tegra118's User Centred Design (UCD) practice. This document is an initial observation of the current UCD landscape alongside suggested best practice to explore.

Please bare in mind that the observations and recommendations come from a place of conjecture and have the best interest of the organisation in mind. They are based on the belief that obsession of the customer experience leads to innovation and growth. But first some design theory...

Tegra118

Design Theory
UX Strategy

by Ty Fairclough, DesignOps @ JigsawXYZ

2020 / 08 / 27

What is Design?
Why does it matter?

Design

dēsīgnāre • Latin

(n) a design is a plan or specification for the construction of an object or system or for the implementation of an activity or process, or the result of that plan or specification in the form of a prototype, product or process.

What's is design

Design is a synonym of intent. It stems from the Latin to 'mark' and today is most commonly associated with what we see, but like a tree what you see on the surface hides the complexity that lies beneath. The mastery of that complexity is what defines good design.

What's not design

Essentially everything, according to the scientific method, in the natural world is not design. It is understood to be the outcome of the initial conditions creating infinite random outcomes.

Examples:

Is design	Is not design
A website's UI	The natural world
A Cucumber test	Evolution
A work of art	Breathing

Everyone is a Designer

-- Jared Spool

Why do we even bother?

Let's just build it!

Build it and they shall come, it's a got the world a long way. For each success there has been 9 more failures. In business today paying expensive developers and the opportunity cost of being late to market mean that this firing from the hip approach is just too risky.

Between Product, UX, and Engineering we now look at ways of reducing risk wherever possible to ensure we reach viable, feasible, and desirable solutions.

One accurate measurement is worth a thousand expert opinions.

-- Grace Hopper

The Constable Curve

Gif Constable

Source: https://giffconstable.com/2013/06/the-truth-curve/
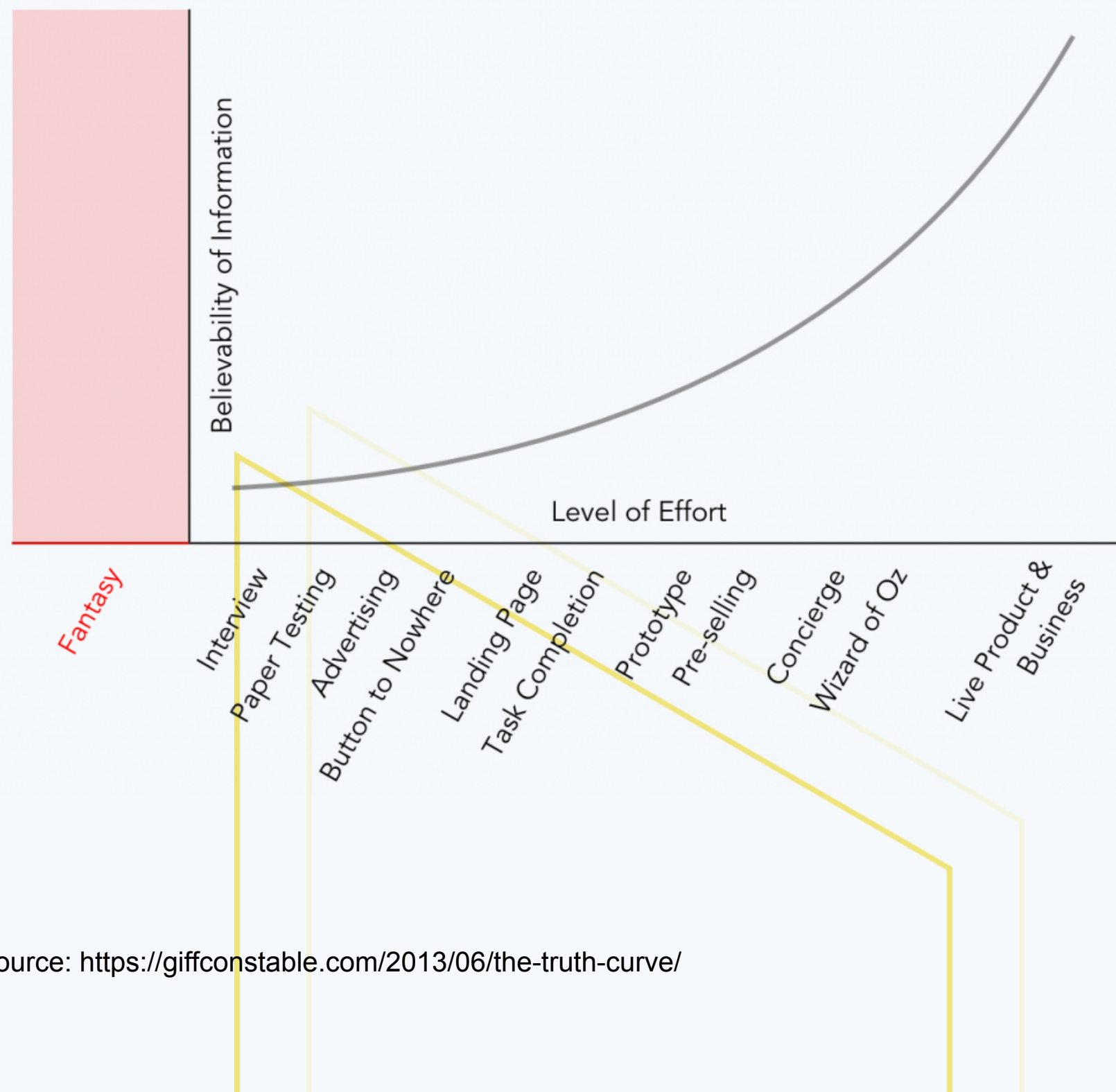
No matter where you are on the curve, you will always need to exercise judgement and rely on vision.
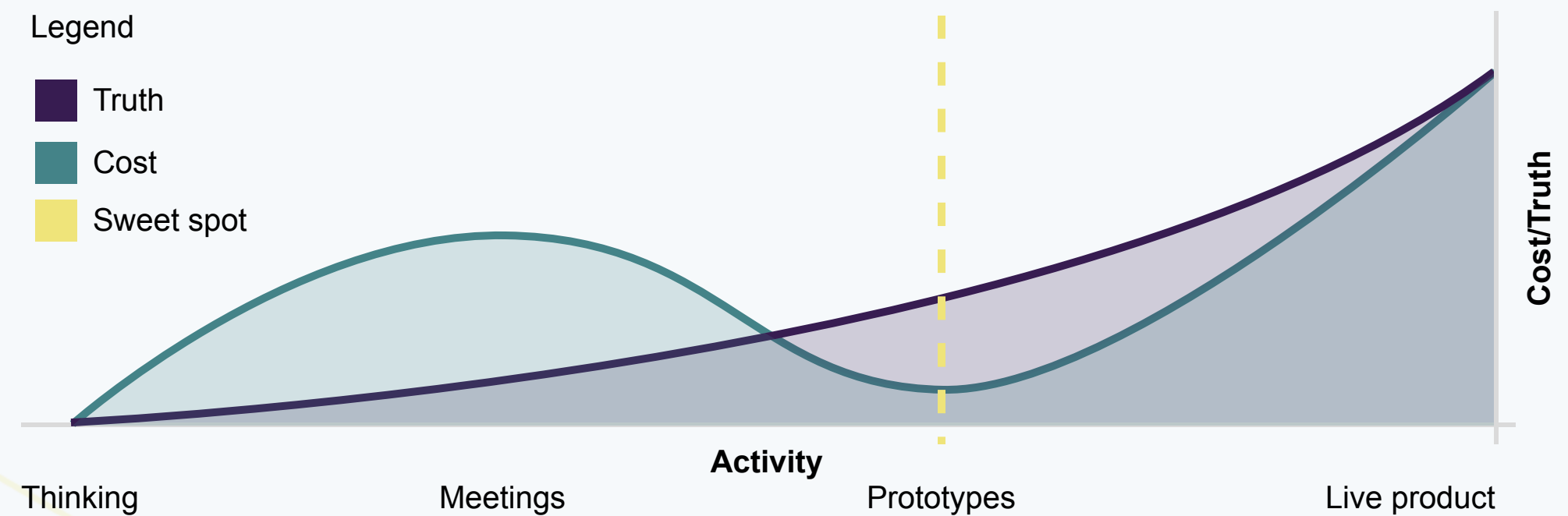
-- Gif Constable

Cost of Truth Curve
Ty Fairclough

While the Constable Curve talks to cost it neglects to illustrate that costs don't correlate equally with the methods used. Probably one of the most expensive resources in a company is time and meetings are guilty of taking a lot of people's time away, yet they don't reveal truth like a well thought out experiment.

Legend

- Truth
- Cost
- Sweet spot

Cost/Truth

UX Strategy

Activity

Thinking   Meetings   Prototypes   Live product

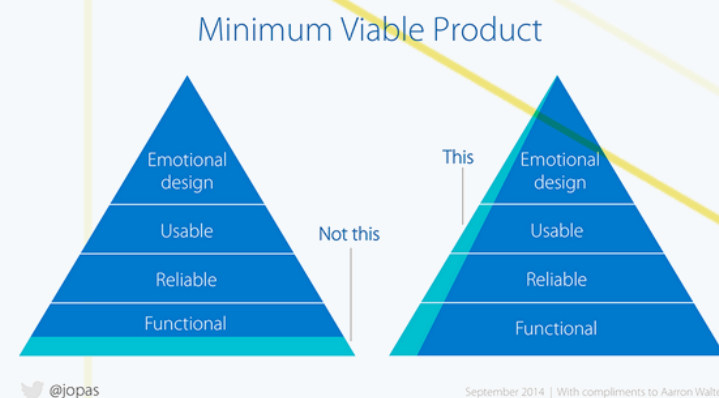https://www.ty-it.co.uk/content/articles/55-the-constable-cost-curve
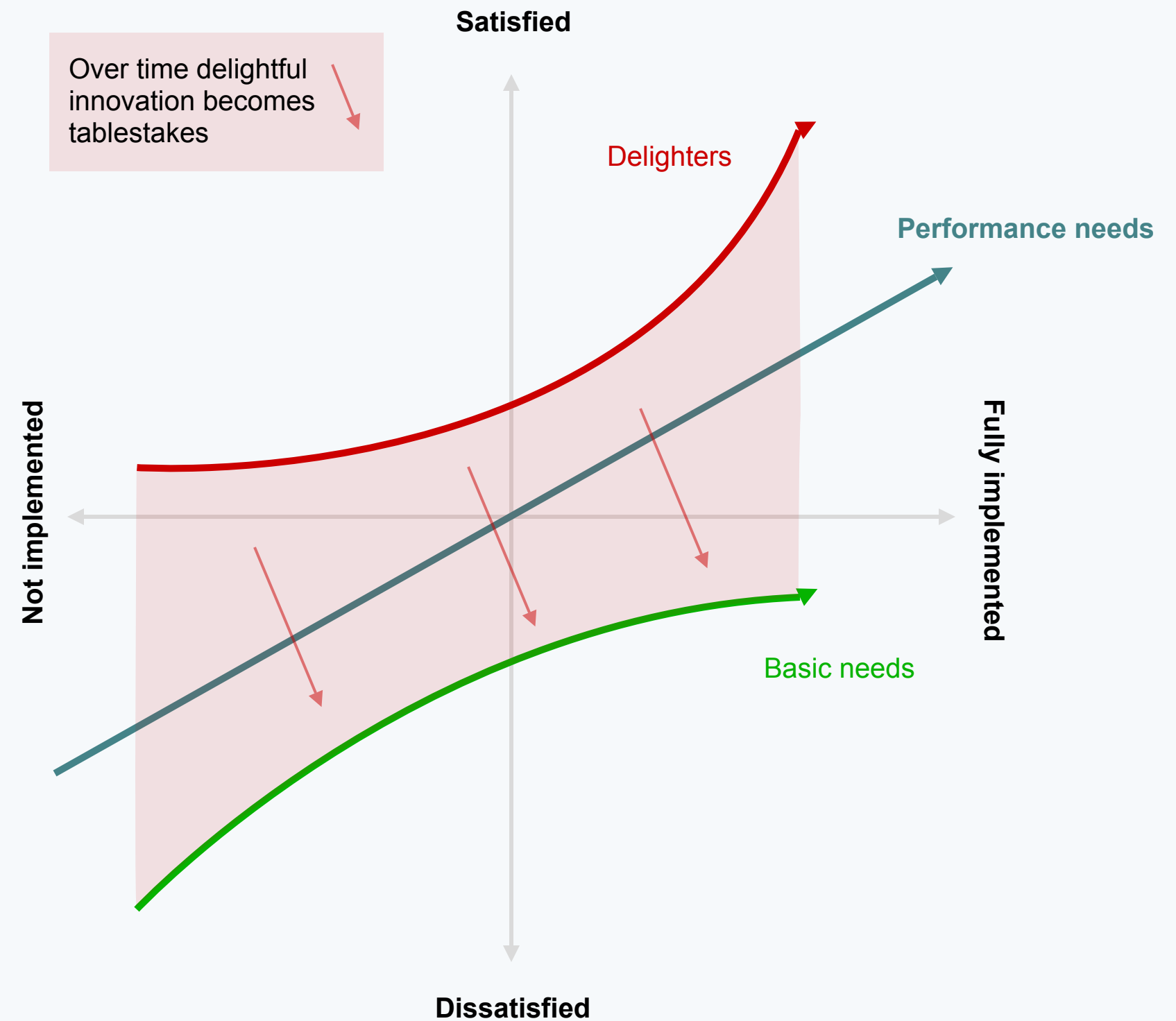
The Kano Model

Noriaki Kano

The Kano model is a theory for product development and customer satisfaction developed in the 1980s by Professor Noriaki Kano, which classifies customer preferences into five categories.

The important take away: To have a high level of customer satisfaction you need to deliver your basic needs and delights. Then over time those delighters become basic expectations of your customers and therefore you need to continually innovate and improve your product/service to maintain performance.

Another analogy for this is derived from Maslow's hierarchy of needs however this is model implies usable is not essential.

Minimum Viable Product

Source: https://www.uie.com/kano/

Over time delightful innovation becomes tablestakes

Satisfied

Delighters

Performance needs

Not implemented

Fully implemented
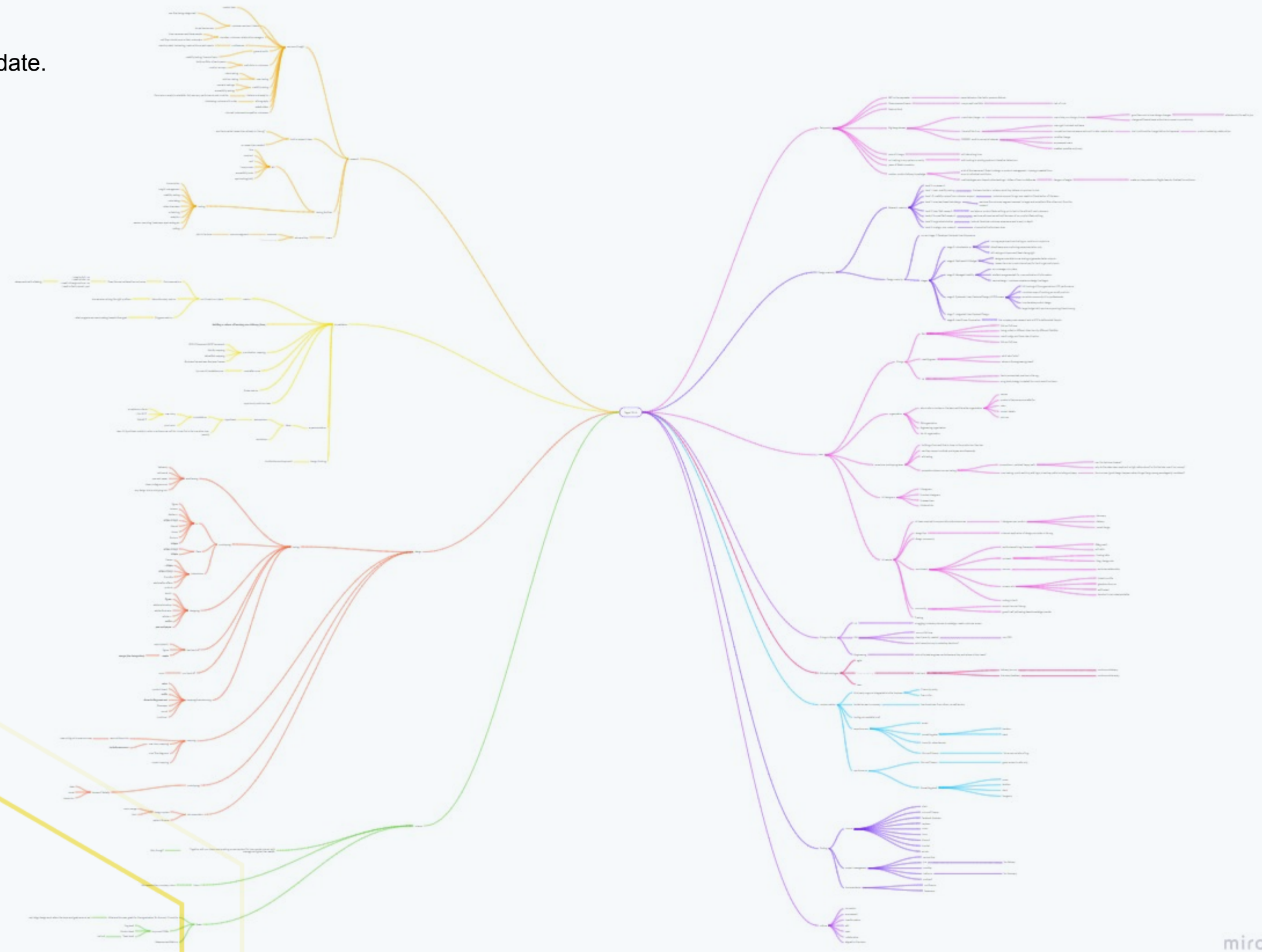
Basic needs

Dissatisfied

Current state

UX Strategy

Mind mapping

I begun the process with a mind map of what I understood to date.
The following pages unpack the key themes.

Benchmarking

UX Design Maturity

Referencing Nielsen Norman Group's stages of design maturity I believe Tegra118 is at stage 2: Developer-Centered User Experience

The determination is made by aligning how the majority of the organisation practices UCD, some areas may perform above or below the threshold of some stages.

STAGE 1
Hostility Toward Usability

STAGE 2
Developer-Centered User Experience

STAGE 3
Skunkworks User Experience

STAGE 4
Dedicated UX Budget

STAGE 5
Managed Usability

STAGE 6
Systematic User-Centered Design (UCD) Process

STAGE 7
Integrated User-Centered Design

STAGE 8
User-Driven Corporation

SOURCE

https://www.nngroup.com/articles/ux-maturity-stages-1-4/

Benchmarking
Research maturity

Referencing UIE's research integration stages I believe Tegra118 is at stage 1: Basic usability testing

The determination is made by aligning how the majority of the organisation practices UCD, some areas may perform above or below the threshold of some stages.

STAGE 1
Basic usability testing

STAGE 1.5
Usability test tasks come from support

STAGE 2
Interview-based task design

STAGE 3
Basic field research

STAGE 4
Focused field research

STAGE 5
Longitudinal studies

STAGE 6
Strategic user research

SOURCE

https://articles.uie.com/how-a-team-matures-its-user-research-integration/

UX Strategy

Benchmarking

Product management

I don't have a reference or method to benchmark product management formally but collaboration between the '3 kings'/'product trifecta' means that the relationship between product and design directly impacts the capability of the design function.

Practices such as Design Thinking, Lean, Jobs To Be Done, and Agile are popular belief systems employed by modern cross-functional product teams. These systems work best with collaborative, empowered teams who all have a shared understanding of the problem and how they will set out to achieve it.
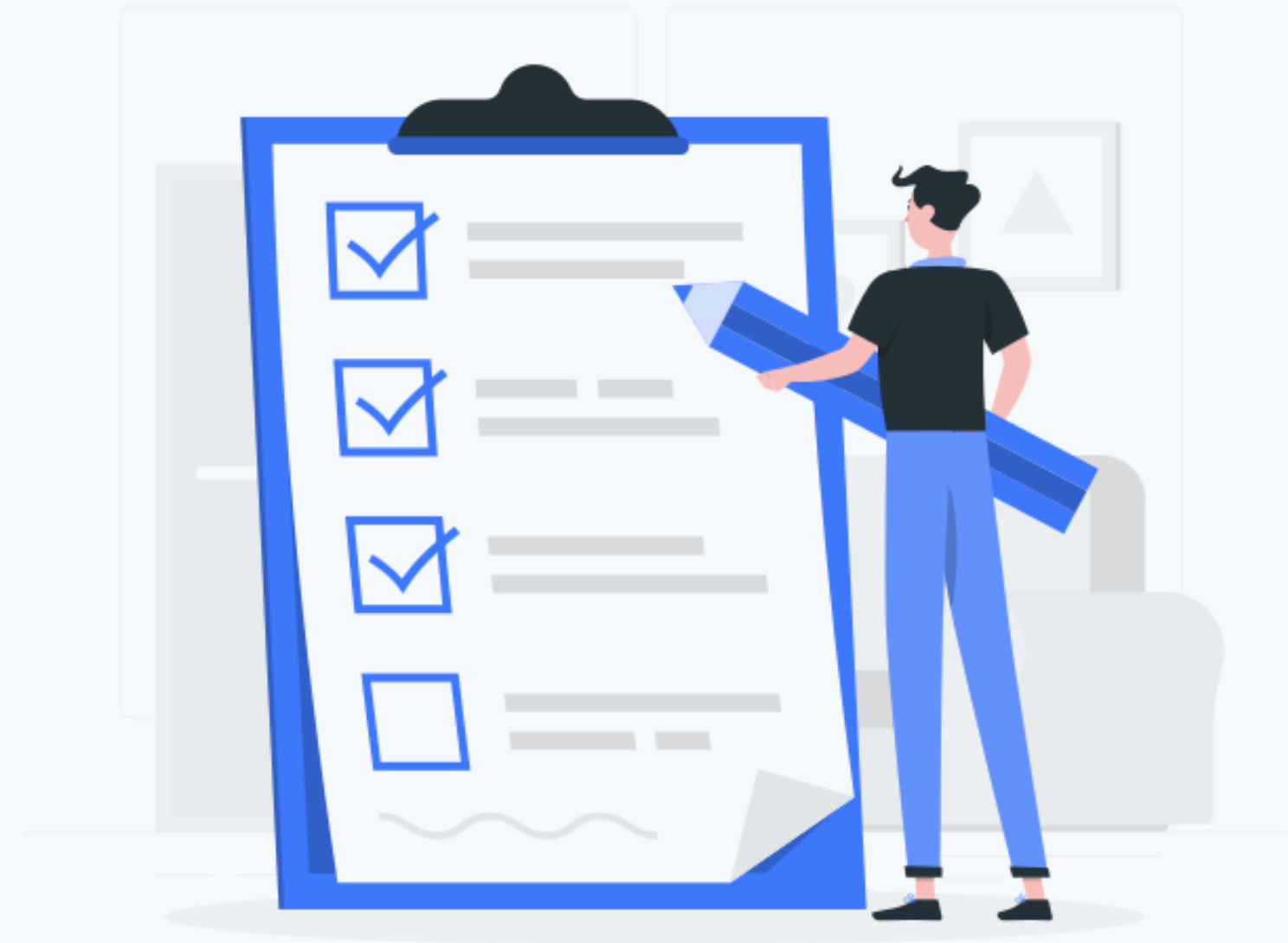
Pain Points
Current state

Item	Issue	Action
RBC has funded current development	Product team will be forced to align to a single customer's need	Retrospective
Replatforming instead of iterating	Replacing entire systems carries with it huge risk	Consider a user embraced change programme
Track record of releases	Previous iterations have not been widely accepted (unix systems still in use)	Release quietly, pull don't push users to adopt
Shared understanding	Team's don't align to the same goals or ways of working	Align, and train where necessary
Low UX maturity scale score	Processes not in place to utilise customer insight, too much work based on conjecture	Deliver a strong mandate to improve across the org
IT SecOps	Blocking collaboration between Tegra118 users and external consultants	Expediate issue to IT, then to ExCo
Empowered teams	Bottle necks will occur whereby very few people are mandated to make key decisions	Write a team manifesto, have it signed by leadership
"You are not the user"	Feedback by proxy is not user led, it relies on assumptions and 'expert review'.	Only test with your users
Lack of tooling	Teams are not equipped with all the necessary tooling to deliver optimum outcomes	Align needs and make recommendations
PM availability	A PM at this stage in it's life-cycle, needs to be full time	Re-org/Empower teams

Future Risk

If we stay still

Item	Issue
Ability to innovate	Lack of insight will lead to competing against luck
Retention of talent	Poor working practices pushes the best talent out
Customer churn	Customers leave as their developing needs change
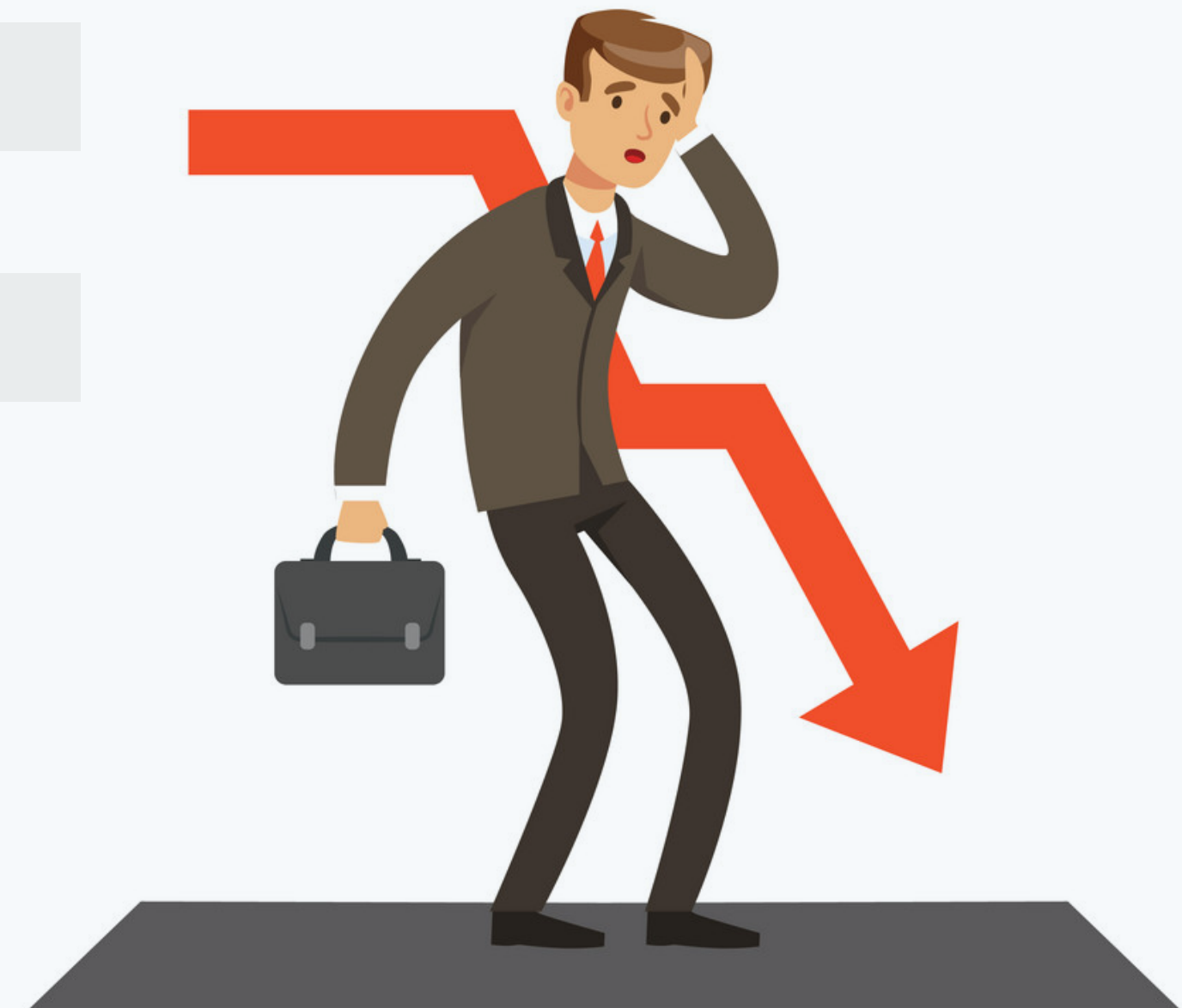
Source: The innovator's dilemma, Clayton Christensen

Questions

In no particular order

Item	Issue	Action
What are the objectives	Need outcome driven objectives	Define with leadership...cascade down
Who owns user research	Not clear who, or what the plan is both holistically and tactically	Make a plan
Budget for UR	What worth has been put on UR, what ROI is expected	Draw up a plan for future spend
Tracking	Can we get tracking in place for the existing systems + existing reports	Create stories to implement tracking
What is the view for the wider org	We're focussed on a single product, but what is the remit for us to work across the org	Align to answer.
What happens when you kill off features	All the silod products have features users believe they need (do we have data to inform?)	Collect: interviews, behavioural data

Professional practice

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by Ty Fairclough, DesignOps @ JigsawXYZ

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Product Goals

Goals/Metrics/Measures

UX goals are intrinsically linked to the products goals. It is vital that the organisations mission, vision, objectives, goals and metrics are clear so Design can align to them.

It is important to include UX outcomes at every level. They should be core to the business mission and measured tactically in each team.

Actions

- We need to establish high impactful macro goals and cascade these down to tactical goals at the micro level
- Define UX targets at a macro level and cascade down to teams
- Make these highly visible at each level

Source: https://articles.uie.com/why-ux-outcomes-make-better-goals-than-business-outcomes/

Team manifesto

Ensuring a mandate to go about our business

A Team manifesto is a document written by a cross-functional team and blessed by leadership. It sets out how the team will work, why they chose to work in that way and finally that leadership fully support them.

Sometimes change in an organisation is met with resistance especially in the external teams/people you interface with. By having this document you can approach other people and teams you interact with in confidence. They know what is being asked of them has been mandated by leadership and become more willing to collaborate.

Actions

- Get together as a team to agree on the content of your manifesto
- Use the manifesto check list to ensure all the key points are covered
- Take it to leadership for sign-off
- Stick it on the wall/communicate it to the wider org

https://www.ty-it.co.uk/content/articles/162-writing-a-team-manifesto

UX Manifesto

Ensuring a mandate to go about our business

A UX manifesto is more about principles than practice as the individuals will be embedded within teams who have their own ways of working. Here is a sample UX manifesto, a great list of 3rd party equivalents can be found on Princples.Design

Design principles

- Speed over Accuracy
- Hypothesis over assumptions
- Small over large
- Collaboration over Specification
- Learning over Delivery
- Share early and often
- Everyone does design
- Test the riskiest assumptions first
- Conversations are expensive, keep them short, do them often
- Remotely co-locate
- Research, Content, Interaction and Visual design are all first class citizens
- (in)validated learning is our primary measure of success
- Simplicity is the mastery of complexity
- Love the problem not your solution

https://principles.design/

About Examples Contribute

Design Principles

An open source collection of Design Principles and methods.

The collection contains:

195	1448	167
Examples	Design Principles	Creators

What are Design Principles?

Design Principles are a set of considerations that form the basis of any good product.

Why use them?

Design Principles help teams with decision making. A few simple principles or constructive questions will guide your team towards making appropriate decisions.

Who uses them?

Organisations, individuals and product teams have

UX Metrics

Goals/Metrics/Measures

UX Metrics are the user centred measures we deem important to understanding how well a customer is being served.

Discovery value metrics
These metrics tell us we are solving the right problem. The problem is likely to shift over time and it is important we maintain a deep insight into the problems we are solving for the user.

Outcome metrics
These are *lagging* metrics that tell us if we are delivering a viable solution to our value proposition.

Progress metrics
These are *leading* metrics that tell us how well we are doing along the user journey.

Actions

We need to define what our UX metrics are at a product level and at a organisational level. Once these measures are agreed they then need to be implemented and measured.

1 Are we solving the right problem?

2 What does good look like?

3 How good is our funnel from problem to solution?
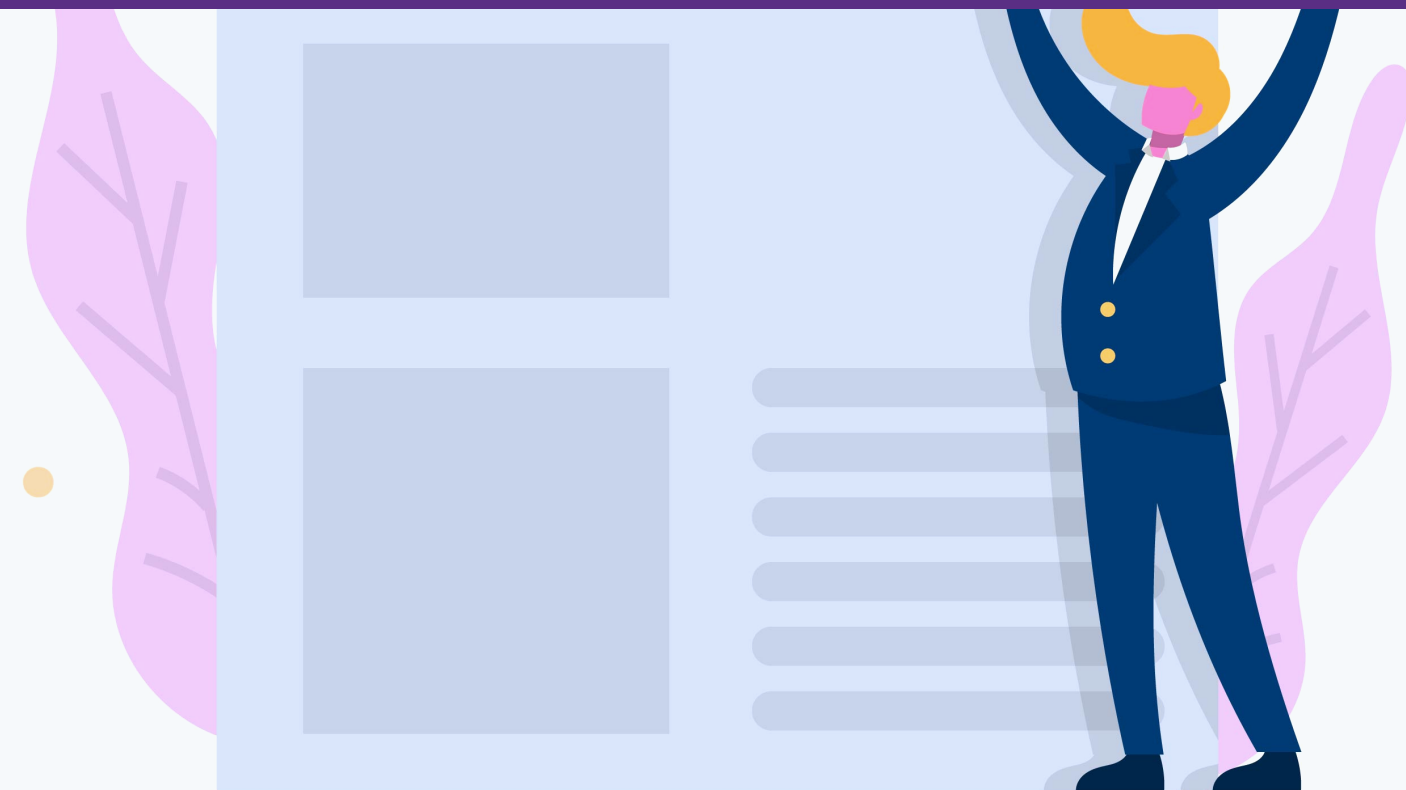
Defining UX metrics

1. **Success** metrics (Have we achieved our UX *outcome*)
2. **Progress** metrics (Are users making progress to their goals)
3. **Problem value** metric (What is the value/cost of the problem being solved)
4. **Value Discovery** metrics (The data we uncover through the use of our products)
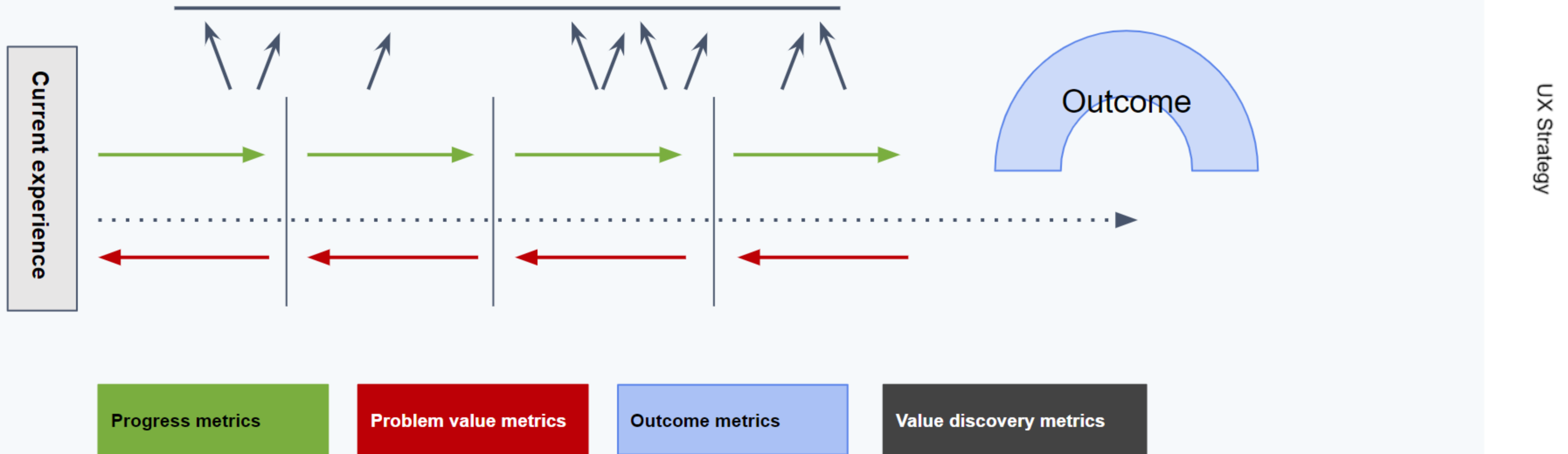
Lean UX / Design Thinking

UCD Methodologies

Agile, Lean UX, and Design Thinking are popular frameworks for solving UCD challenges. They are similar, with the same core beliefs and lots of overlap between tactical exercises.

Agile

Has a focus on: helping us deliver work in regular cadences

Lean UX

Has a focus on: Helping us us determine what to focus on

Design Thinking

Has a focus on: Helping us understand the value of what we build

The bottom line

At the end of the day, your customers don't care whether you practice Agile, Lean, or Design Thinking. They care about great products and services that solve meaningful problems for them in effective ways. The more you can focus your teams on satisfying customer needs, collaborating to create compelling experiences, and incentivizing them to continuously improve, it won't matter which methodology they employ. Their process will simply be better.

-- Jeff Gothelf

Learning Milestones
Insight reports

Learning milestones are insight reports based on a theme or body of work undertaken by a team. They collate various avenues of research and synthesise the outcomes into digestible reports others can consume and apply to their work.

Source: https://sb-bh-ux.herokuapp.com/research/learning-milestones/1

Personal	Business	Intermediaries

Login   Contact Us

Prototypes ⌄   Content ⌄   Design ⌄   Research ⌄

Initial broker feedback

Reaching out to brokers for the first time to start the first phase of a design thinking loop - building empathy.

Main method	Interview
Users	18 face to face 2 remote
Author	Ty Fairclough (Equal Experts)
Last updated on	09 September 2018

Highlight positive feedback →

What we set out to do

- Understand the basics of commercial property at Shawbrook
- Prepare to gather user insights
- Capture our first user insights
- Synthesise those insights

Talk to a person

Impact mapping
Service Design

Impact mapping is a visual and collaborative strategic planning tool that helps organisations ensure alignment of business and delivery while being adaptable to change.

SEMI AUTOMATED INVITES
CHIPS
INCENTIVES
RECOGNITION FOR INVITING LOTS OF FRIENDS
MY TOURNAMENTS
MY TABLE — PERSONALISATION — INVITING FRIENDS
MY EVENTS
REBRANDING GAMES
WEBSITE OPTIMIZED FOR NEW USERS — MORE COMPELLING PRODUCT
VIRAL CONTENT
PLAYERS
BOOKMARKING — RECOMMENDING
LEVELS
ACHIEVEMENTS
WEEKLY COMPETITIONS — CONTENT TO POST ABOUT — POSTING
TOURNAMENT ENDING
1M PLAYERS
INVITES — ORGANISE PR EVENT — INTERNAL
ENGAGING OUR NETWORK
BULK INVITATIONS — ADVERTISERS
PUBLISHING OUR BANNERS

Source: https://www.impactmapping.org/

Service Blueprint

Service Design

Service Blueprints are conceptual maps of the customer journey through the layers of the organisation. They reflect both the product and the underlying services systems to help identify pain points in both the user experience and the operating model of the organisation.

SERVICE BLUEPRINT *Example*

TIME	5-25 mins	·········· 20-50 mins ··········		5-12 days	35 seconds	20-32 mins	
EVIDENCE	Website	Retail location Store signage Appliance signage	Employee's name tag Product description Price tag	Credit card Store reciept		Appliance Delivery reciept	

CUSTOMER JOURNEY
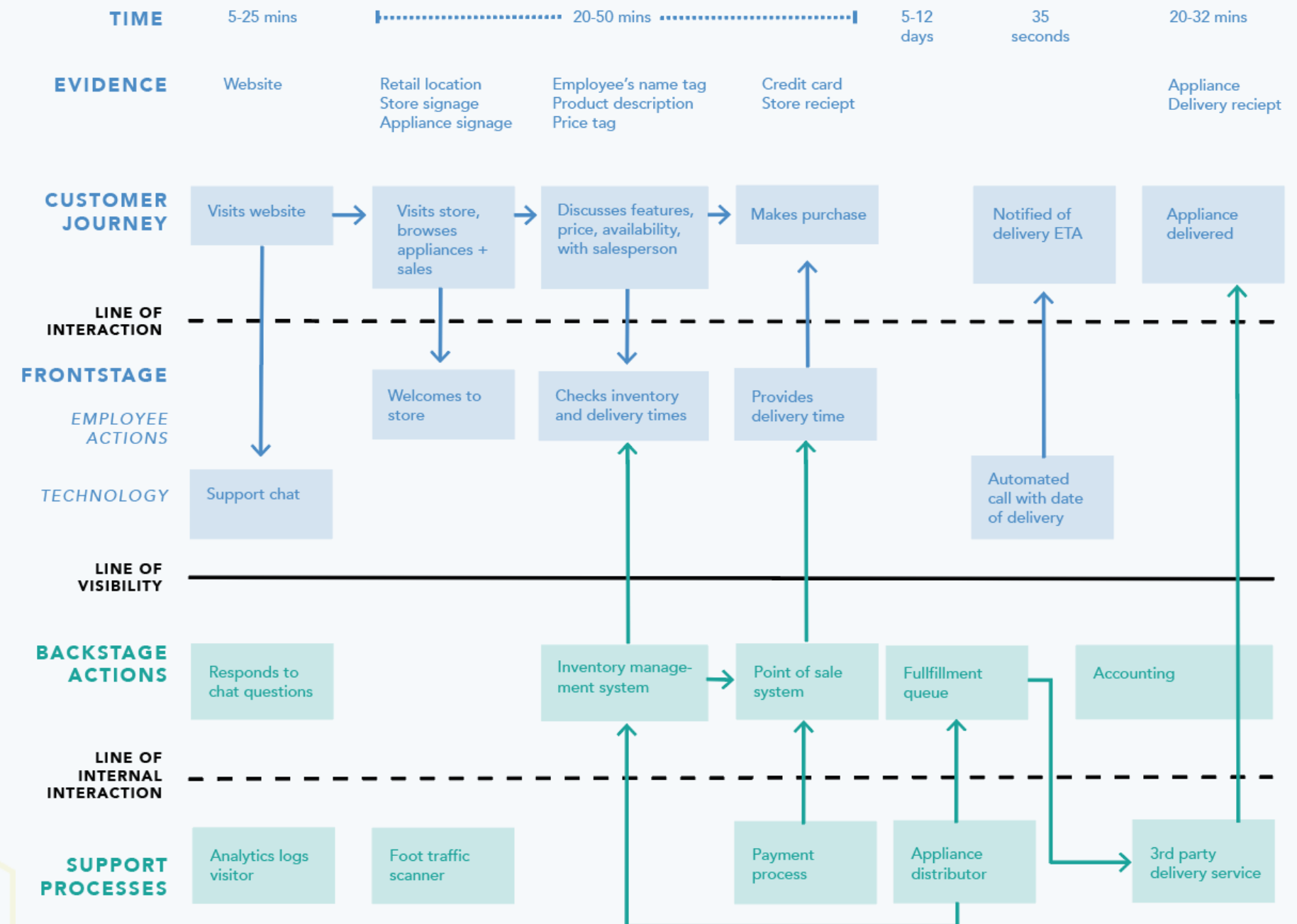- Visits website
- Visits store, browses appliances + sales
- Discusses features, price, availability, with salesperson
- Makes purchase
- Notified of delivery ETA
- Appliance delivered

LINE OF INTERACTION

FRONTSTAGE

EMPLOYEE ACTIONS
- Welcomes to store
- Checks inventory and delivery times
- Provides delivery time

TECHNOLOGY
- Support chat
- Automated call with date of delivery

LINE OF VISIBILITY

BACKSTAGE ACTIONS
- Responds to chat questions
- Inventory management system
- Point of sale system
- Fullfillment queue
- Accounting

LINE OF INTERNAL INTERACTION

SUPPORT PROCESSES
- Analytics logs visitor
- Foot traffic scanner
- Payment process
- Appliance distributor
- 3rd party delivery service

NNGROUP.COM NN/g

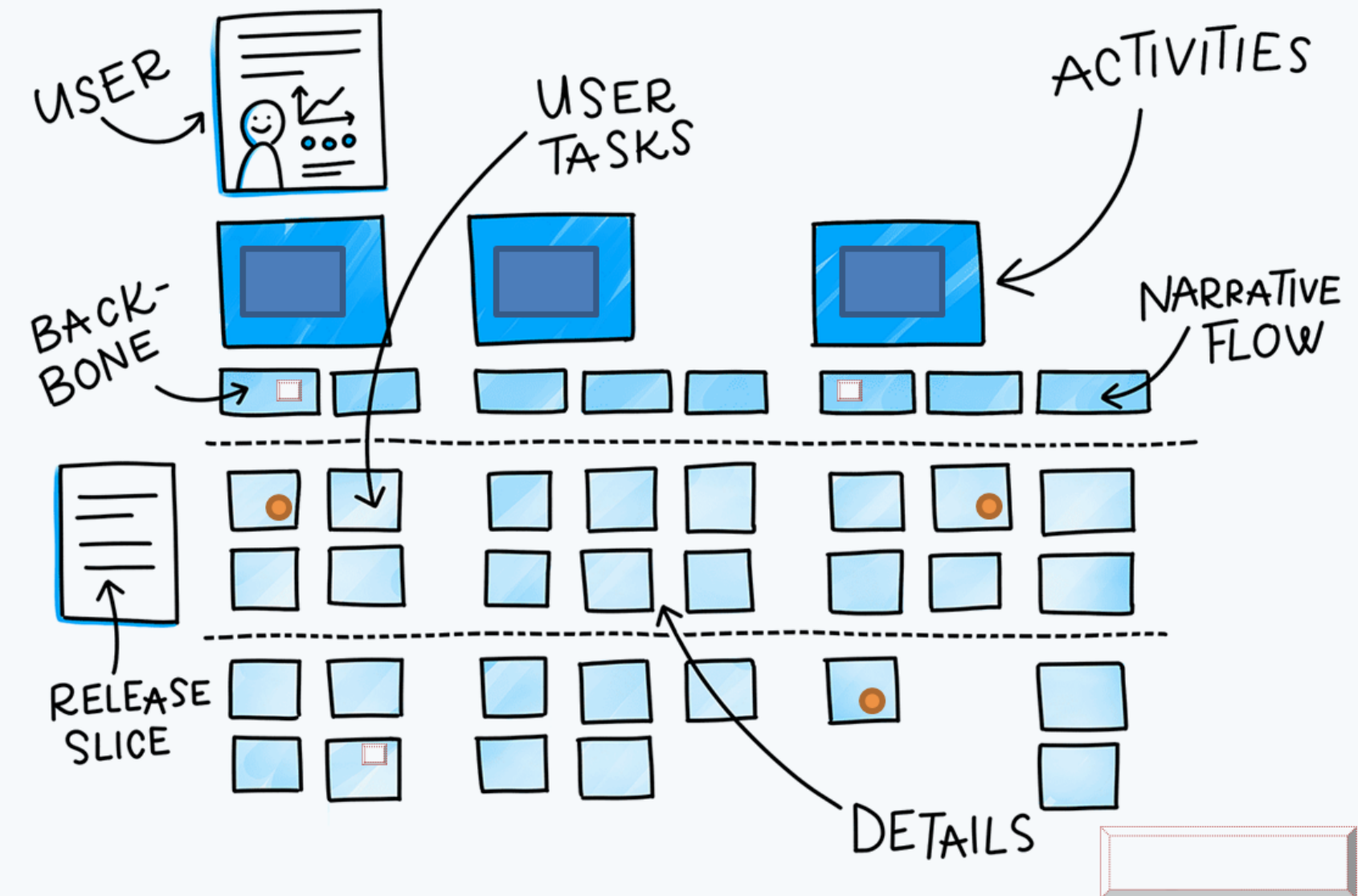Source: https://www.nngroup.com/articles/service-blueprints-definition/

User Story Mapping

Product Design

User Story Mapping popularised by Jeff Patton is a simple, linear, method for planning a user journey and its constituent user stories. It allows the product trifecta and other stakeholders to collaborate, problem solve, and plan.

UX Strategy

Design Systems

UX at scale

Design systems are a form of documentation used to align disperse contributors. They typically involve documentation of the front-end, visual design, content design, and interaction design. Atlassian have a good example of a Design System. They typically incorporate brand guidelines and art direction. They are also made public when the use case of an external contractor/agency needs to work on the brand. They also act as a shop window for your design vision and there for prospective new hires.

These Design systems are what has been popularised as the "Shop front". The "shopfront/workshop" analogy is used to describe the difference between polished end product and the messy in progress development.
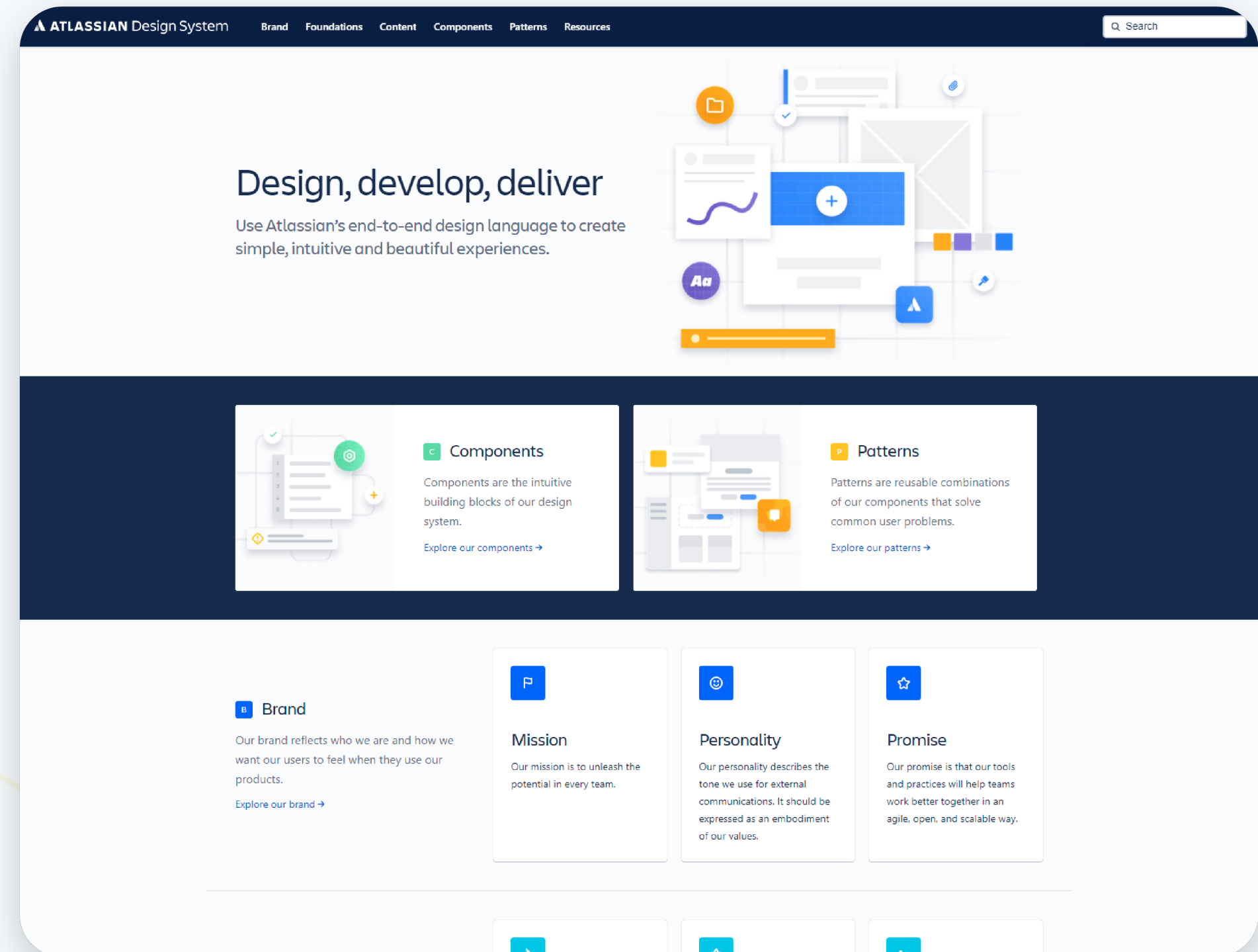
ResearchOps

UX at scale

Maximising company insight is a constant challenge for an organisation. Often a body of research or a finding from customer services will be captured but then not shared, or recalled when it is needed after the original ad-hoc moment.

Having people responsible for empowering the organisation to optimise how they collect, synthesis, and disseminate insight means less of that insight is lost.
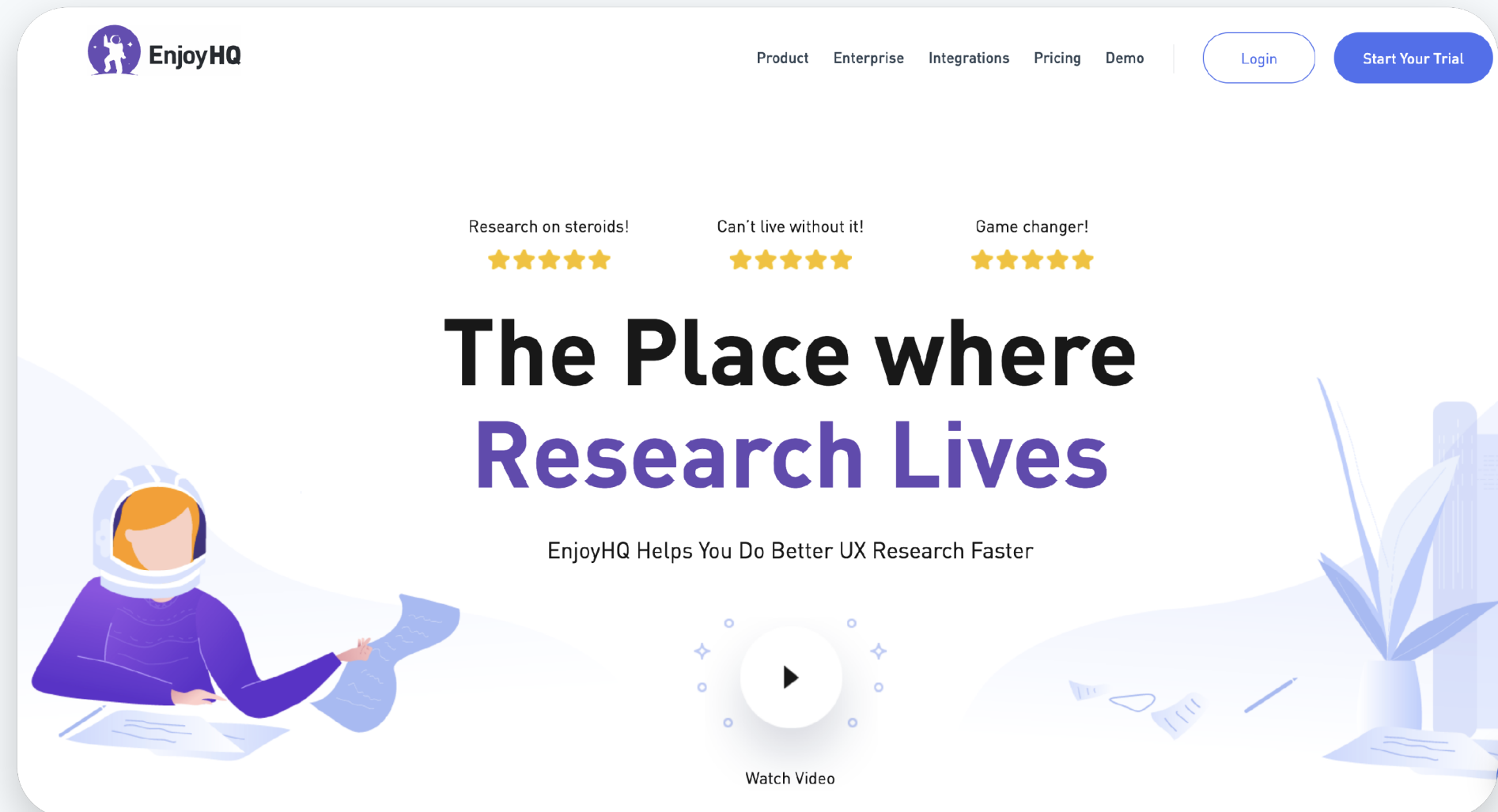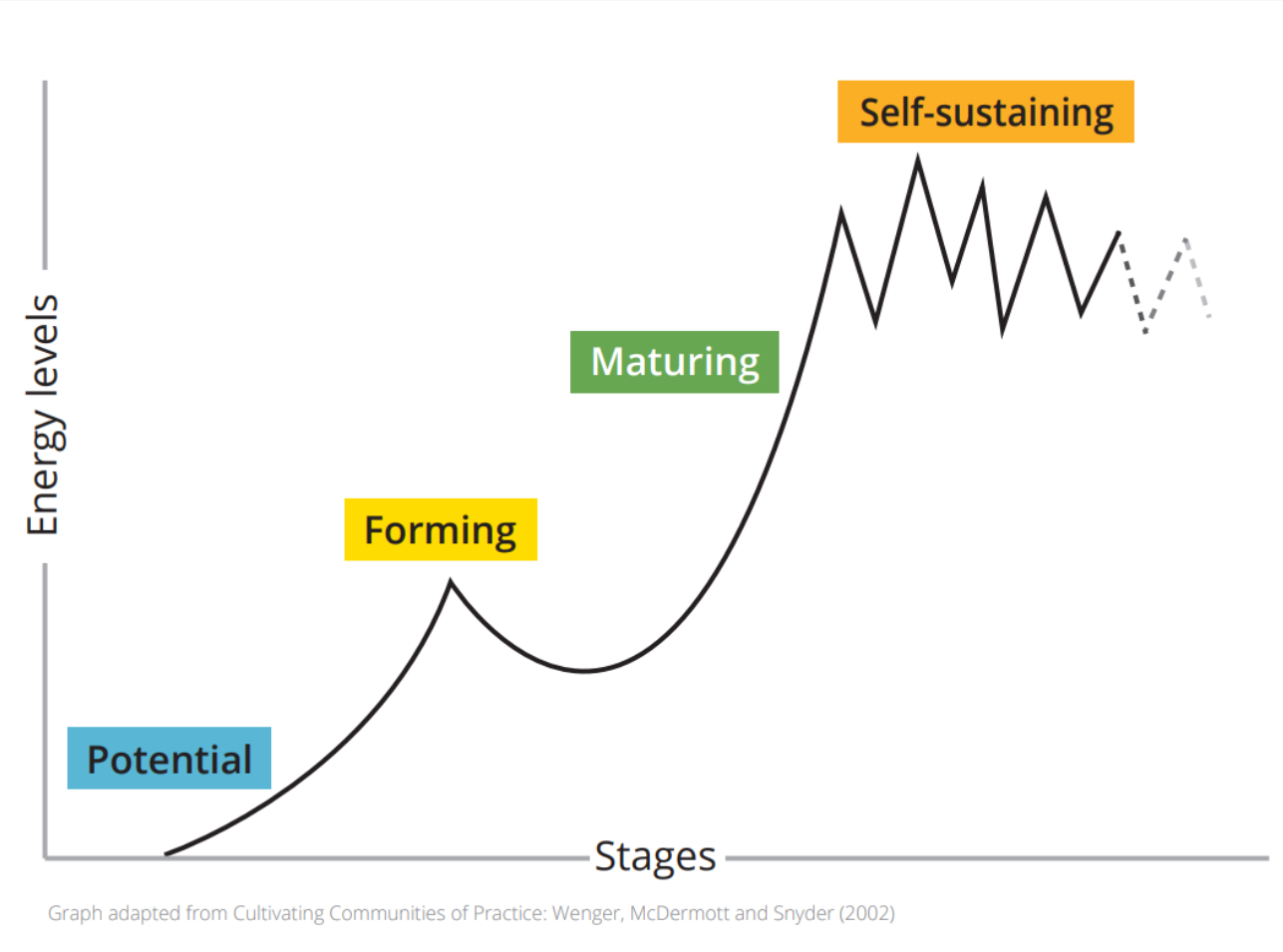
Community
UX at scale

As the organisation grows you'll need to build a community to sustain the growth and innovation at scale. Communities of practice (UX in this case) help achieve the following:

- Provide viability and support to each other
- Help develop one another's skills through skill sharing
- Knowledge transfer of the users and the product
- Feeling and belonging, a level of psychological safety
- Able to align collectively together

Graph adapted from Cultivating Communities of Practice: Wenger, McDermott and Snyder (2002)

Potential / Forming table

	Potential			Forming						
LEADERSHIP	Someone has identified a need and wants to create the community	Leader(s) have time to dedicate to forming the community	Leader(s) have an initial vision and/or goals for the community	Leader(s) are engaging and motivating members to take part	Leader(s) are setting the standards for what "good" looks like	Leader(s) are beginning to represent members outside of the community				
MEMBERSHIP	There is an initial criteria for membership	There is an initial list of potential members	Potential members have been approached to join the community	Members are meeting often and regularly	Membership only currently extends to the network of the leader(s)	Members understand the criteria for being a member	Members have agreed ways of working together and collaboration tools	Members have closed-door (members-only) meetings	Members' initial needs have been identified	Members are beginning to build trust with each other
KNOWLEDGE & PRACTICES	Knowledge or practice gaps may have been identified and reflected in the goals			Members share through stories of their daily work and challenges	Members are beginning to identify their knowledge and practice gaps					
SKILLS DEVELOPMENT	Skill gaps may have been identified and reflected in the goals			Members are beginning to identify their skill gaps						
VISIBILITY & SUPPORT	There is some organisational support for the community	Visibility has not extended past those that have been told about it yet		There is visibility that a community is forming	There is an increase in participation and energy among members	Members make time to dedicate to the community				

Maturing / Self-sustaining table

	Maturing						Self-sustaining			
LEADERSHIP	Leadership is shared among a core group; roles and responsibilities are understood	There are clear and understood vision and goals agreed by members	Members are able to influence community direction and activities				Leadership responsibilities are distributed throughout the community	The vision and goals are regularly updated by the community		
MEMBERSHIP	Membership has reached further than the leader's network, people ask to join	There are open-door activities with people outside of the community	There are smaller knowledge-sharing groups within the community	Members have a safe and respectful environment, and deal with bad behaviour	Members actively advocate for the community	Members' needs are being met by the community	Members are engaged; the community is part of their normal routine	The community is responsible for hiring into the role and / or community	The community is able to measure and share its successes	The community on-boards new members
KNOWLEDGE & PRACTICES	Tools are in place for members to share knowledge	Members are regularly reflecting and adapting community activities	Members create new practices and shares them outside of the community	The community has a shared backlog of work	Interactions are varied and build trust, solve problems create learning and share knowledge	Members bring in external knowledge on a regular basis	The wider organisation looks to the community to answer questions	Members actively share standards and practices with the organisation	The community manages its explicit and tacit knowledge	
SKILLS DEVELOPMENT	The community create or agree with the job description for the role	The community seeks out skills development from within and outside of the community	Members' professional development is supported by the community				The community is responsible for its members' professional development			
VISIBILITY & SUPPORT	The community and its outputs are very visible to the organisation						The community is an established part of the organisation	People outside of the community advocate for it		

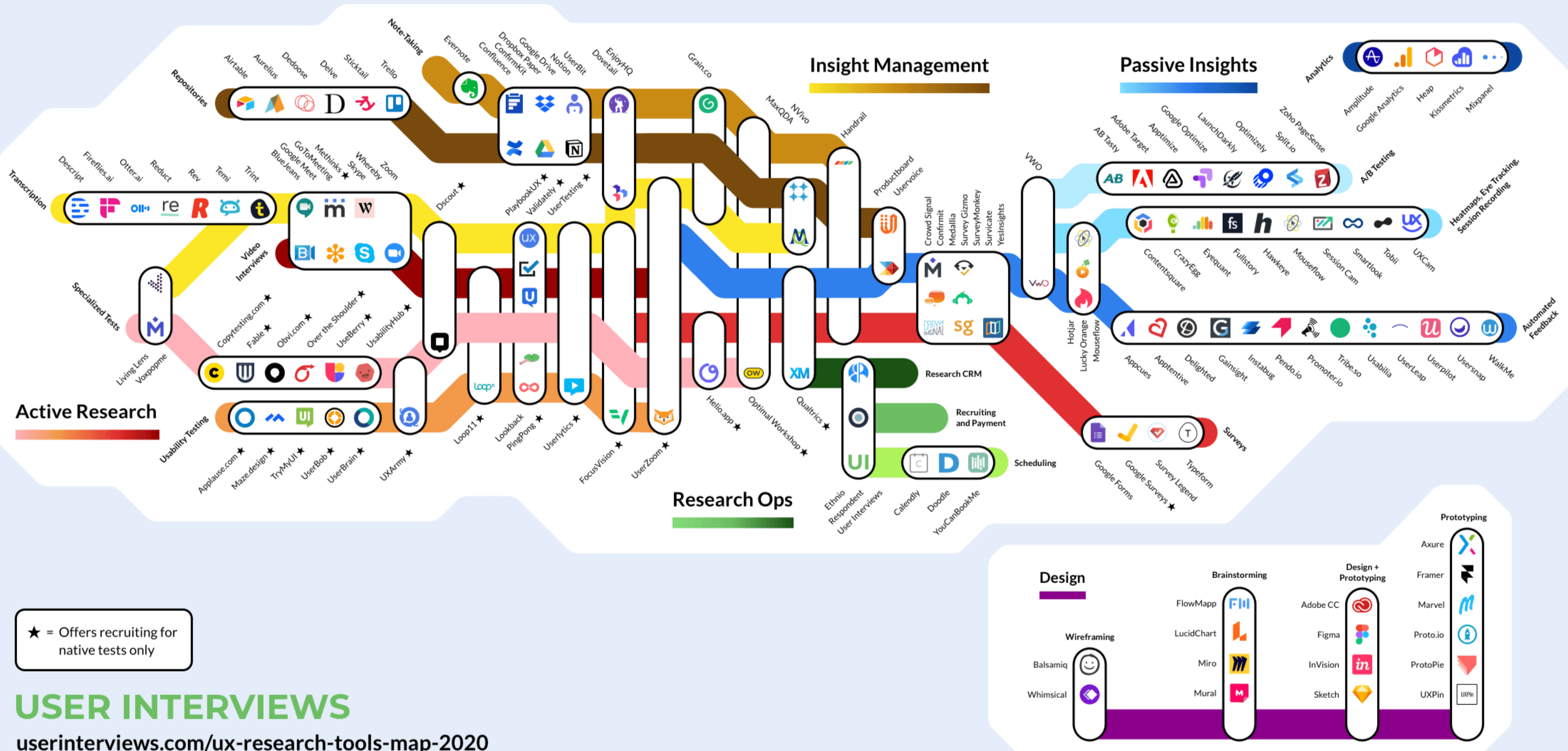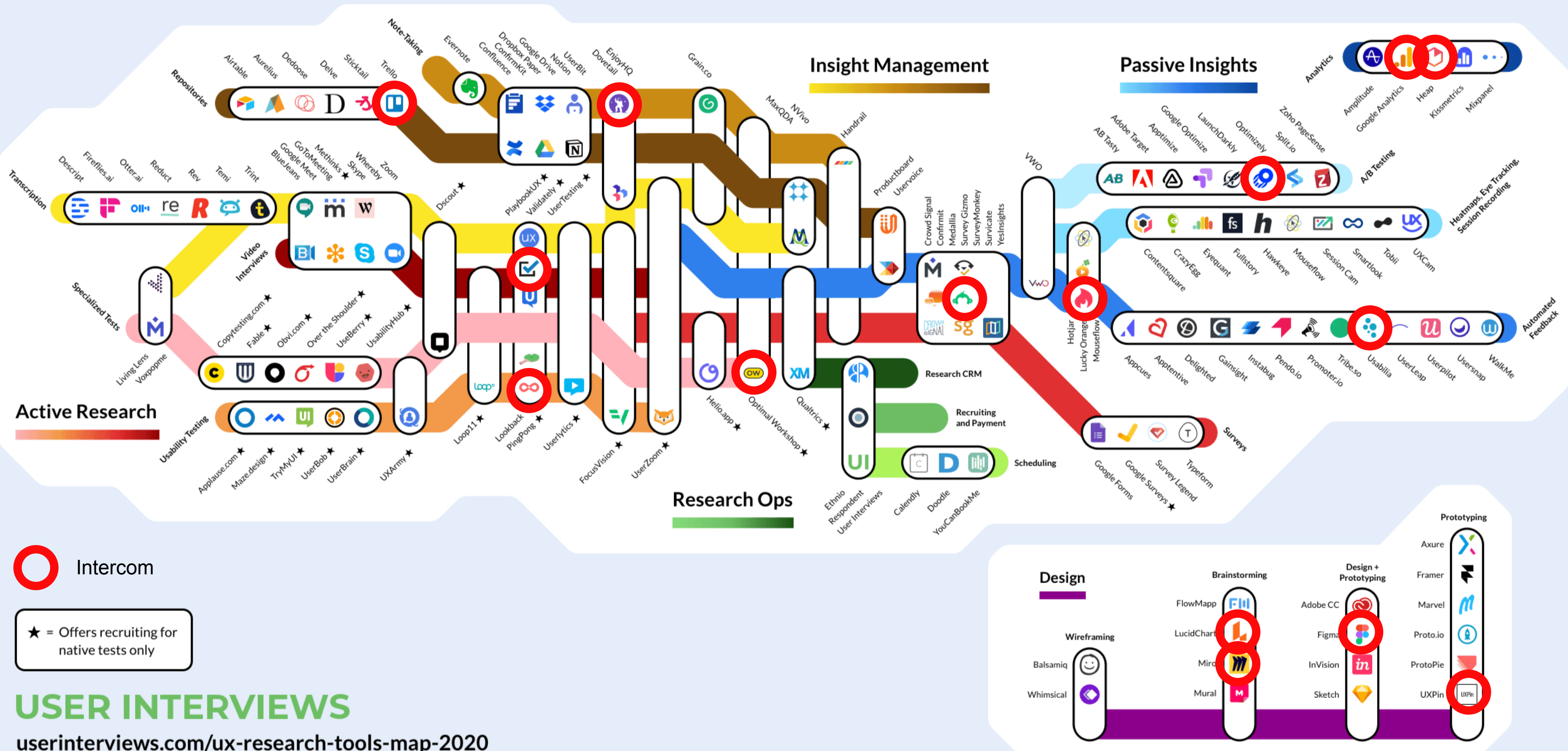Source: https://emilywebber.co.uk/building-successful-communities-of-practice/

Tegra118

UX Strategy

Tooling

Tooling market

userinterviews.com/ux-research-tools-map-2020

Initial toolset

userinterviews.com/ux-research-tools-map-2020

Types of tools

Tools considered here include hardware, software, and methods.

Conceptual mapping

Tools that allow us to develop a shared understanding by visualising our ideas.

User story mapping   Miro   Lucid chart   MoSCoW

DesignOps

Platforms that allow designers to collaborate with engineers, product managers, and each other at scale

Design Systems   Design Crits   Pattern Libraries

Product/Project Management

A tool that can, ideally, manage both tracks of work (discovery and delivery).

Whiteboard   Trello   Jira   Paired Design   Dual Track Agile

Active testing

Tools and platforms that facilitate research that is captured by users direct input to the tools.

Lookback.io   Interviews   Guerilla testing   Validate.ly   Surveys

Design / Prototyping

Tools that allow us to build prototypes that are used for (in)validation of ideas and as plans for delivery

Pen + Paper   Rapid Prototyping   UXpin   Wizard of Oz   HTML/CSS/JS

ResearchOps

Tools that allow us to facilitate research such as; appointment booking systems, participant recruitment and facilities

Calendar   Doodle   UserTesting.com

Research Management

A tool that can bring in the different sources of insight, synthesis them, and output meaningful insights

Spreadsheet   DoveTail   Notepad   EnjoyHQ   Transcriptions

Passive testing

Tools and platforms that capture data about users real behaviours in our products.

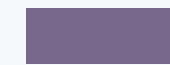Server logs   HeapMetrics   Split Testing   VWO   Conversion funnels

Lenses of fidelity

Prototypes

Legend

	Low fidelity		Medium fidelity		High fidelity

Visual

How does the prototype look, does it delight, is it accessible?

Sketches
Wireframes/Mockups
Production visuals

Interaction

How responsive is the prototype to user input? Does it behave in a way similar to the real product?

Flat screens
Simple inputs
Full input/output response

Data

How true to life does the data reflect what the user expects to see or should be shown?
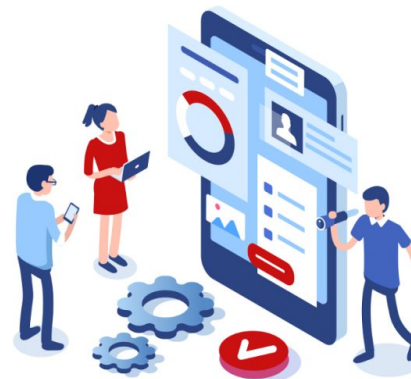
Placeholders
Stubbed data
User's own data

Journey

How accurately are the user journeys represented in the prototype?

Happy path only
Happy path + free roam
All journeys

Content

Is the content representative of the final copy?

Lorem ipsum
Functional copy
Finessed copy

Tools

Prototypes & UI Design

The design tool space is a saturated market with many different flavours of a design tool for different needs.
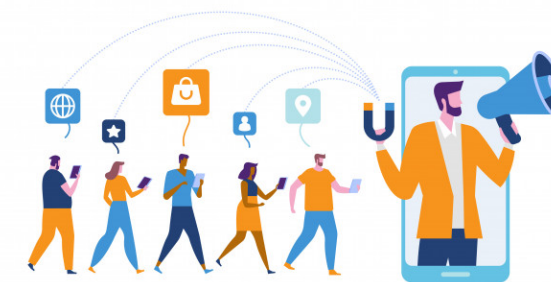
My personal toolset is a combination of UXpin and HTML/CSS/JS, it's quite niche. The broadest cohort of designers will use Figma. Figma is a powerful visual design tool but falls short in the prototyping space.

Don't commit to a single tool

- Tools come and go, the market is fast moving.
- Don't shrink your addressable talent pool because you use a certain tool
- External partners may use other tools
- Build documentation (design systems) to be tool agnostic.

Item	Visual	Interaction	Data	Content	Value*	Collaboration	Adoption
Figma	3	1	1	2	3	3	3
UXpin	2	2	2	2	2	3	1
HTML/CSS/JS	2	3	3	1	3	2	1
Adobe XD	2	1	2	2	2	2	2
Sketch + Zeplin + Plugins	3	1	1	1	3	1	2
Pen + Paper	1	0	0	0	1	0	3

*Value is a Frankenstein of the following:
- does it provide good insight
- is it cheap to buy
- is it cheap to use

Measuring
Tooling

The tools we use to measure things are broadly split into qualitative and quantitative, some tools cover both. My recommendation is to cover the following:

Item	Thing we're measuring	Tools
User value testing	Do we understand the problem and are we solving it	Diary studies, User interviews, Focus Groups*, Field studies, Personas (proto)
Behavioural tracking	What users do (Behaviours)	Analytics suites, MI reports, Marketing funnels
Customer sentiment and feedback	What users hear and say (Sentiment)	Help Desk data, Market reports, Sentiment Analysis on social media, Surveys
Usability/Accessibility testing	Can users use it (Viable)	Click through tests, usability studies, Card sorting
Something to manage all the data	N/A	DoveTail, EnjoyHQ, Evernote, Notion, Trello

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UX Strategy

People

UX skillsets

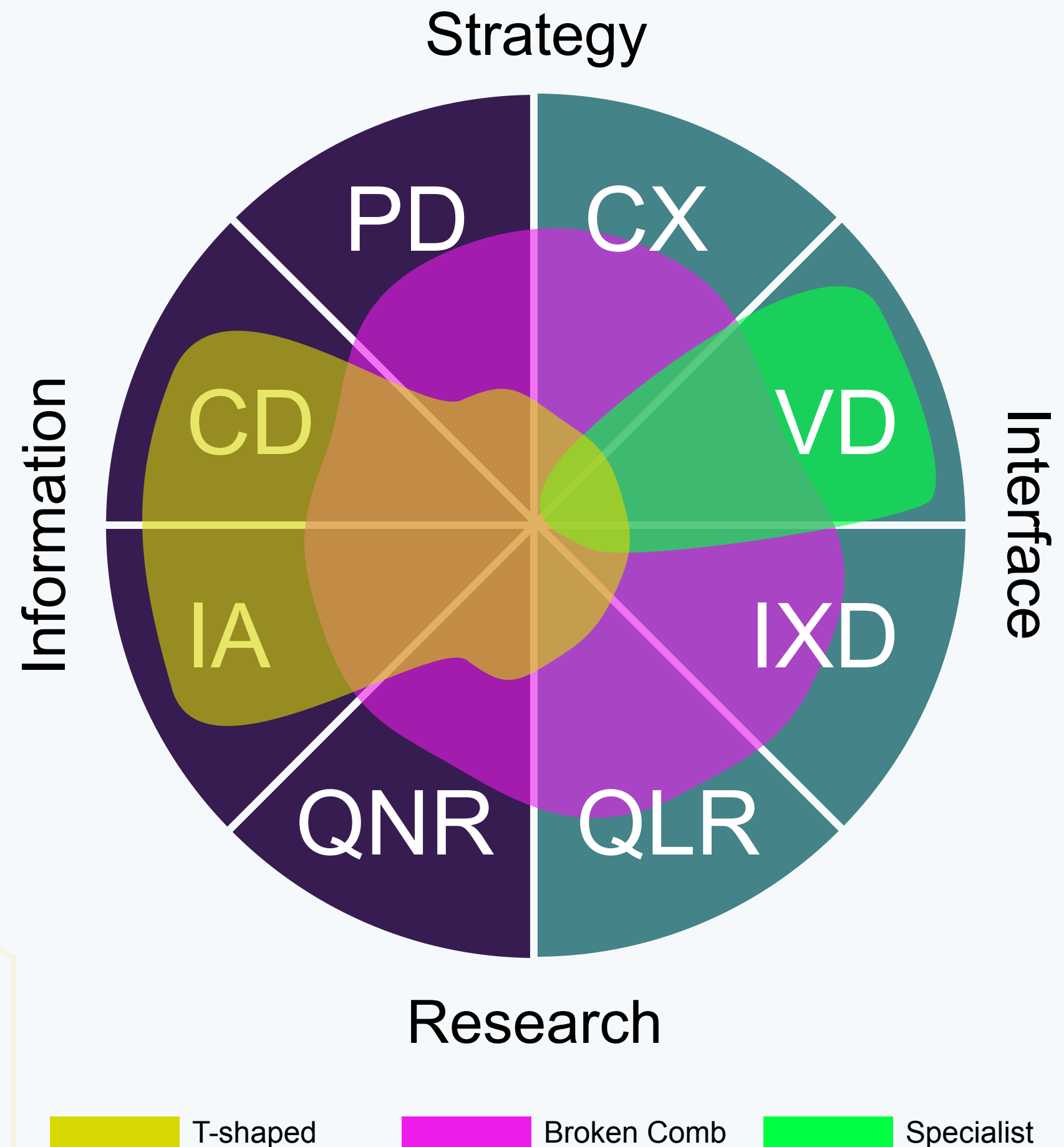UX includes a very broad range of skills as the Experience touches on every aspect of the product. As a result it is unlikely to find 'unicorns' that can cover all areas.

UX can broadly be sliced into 4 areas of responsibility:
- Strategy
- Information
- Research
- Interface

The chart illustrates how UX professionals present with 3 different 'shapes' of skills.

T-shaped   Broken Comb   Specialist

Skill Shapes

UX includes a very broad range of skills as the Experience touches on almost every aspect of the product. For this reason we see UX professionals present with 3 different 'shapes' of skills

Range of skills

Depth of knowlegde

UX Strategy

Broken Comb   Specialist   T-shaped

Organisational structures
Central Design Team (Headless)

Central design team with Peer to Peer like relationship between the designers and people in the various product teams.

Unregulated requirements lead to uneven distributed of work and poor oversight without additional process in place.
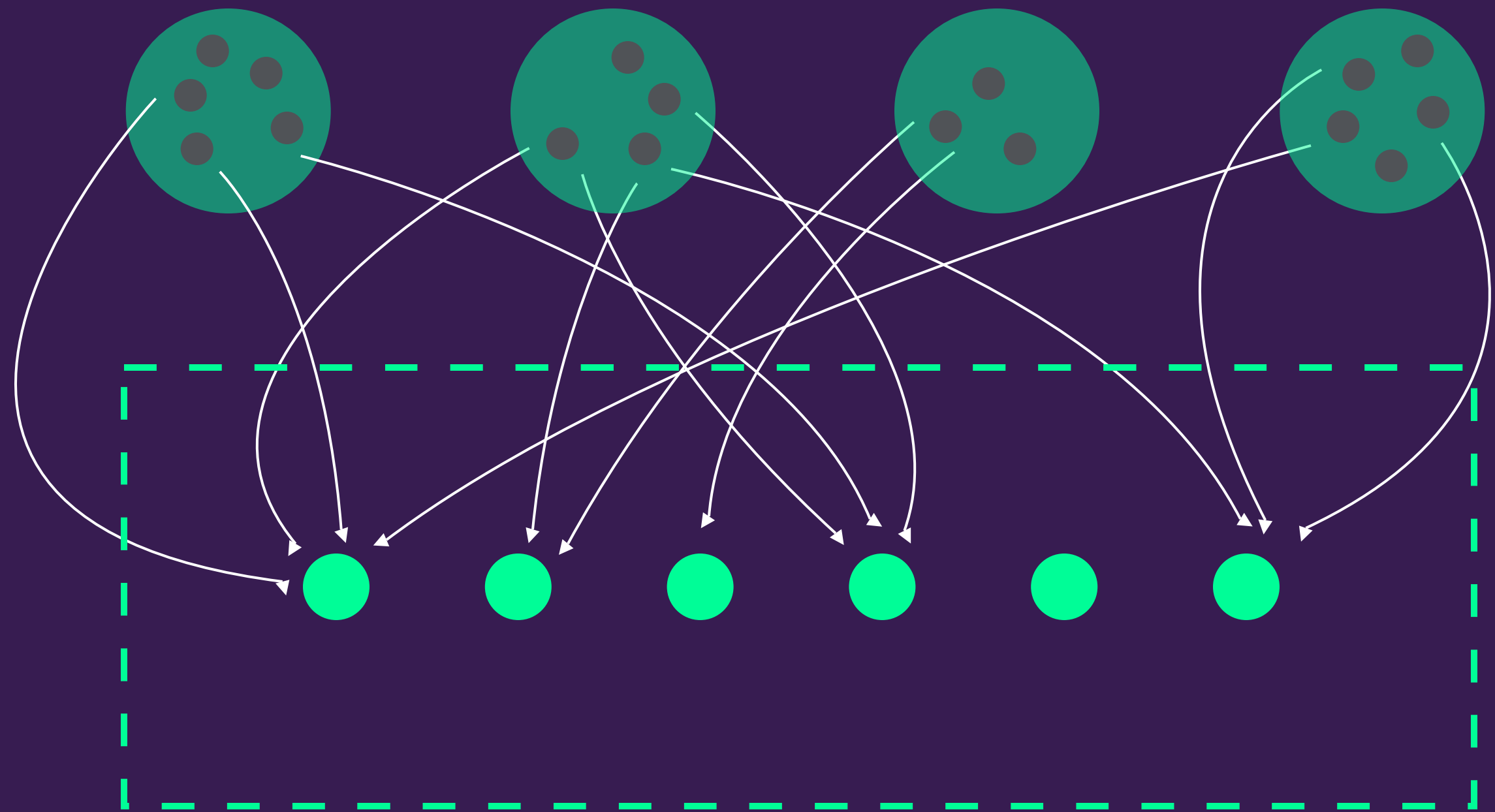
Organisational structures

Central Design Team

A central manager for a dedicated design team provides better oversight. However we develop a key person dependency and it has been noted that individuals from the product teams will often go straight to a designer for a design need.

Organisational structures

Embedded Designers
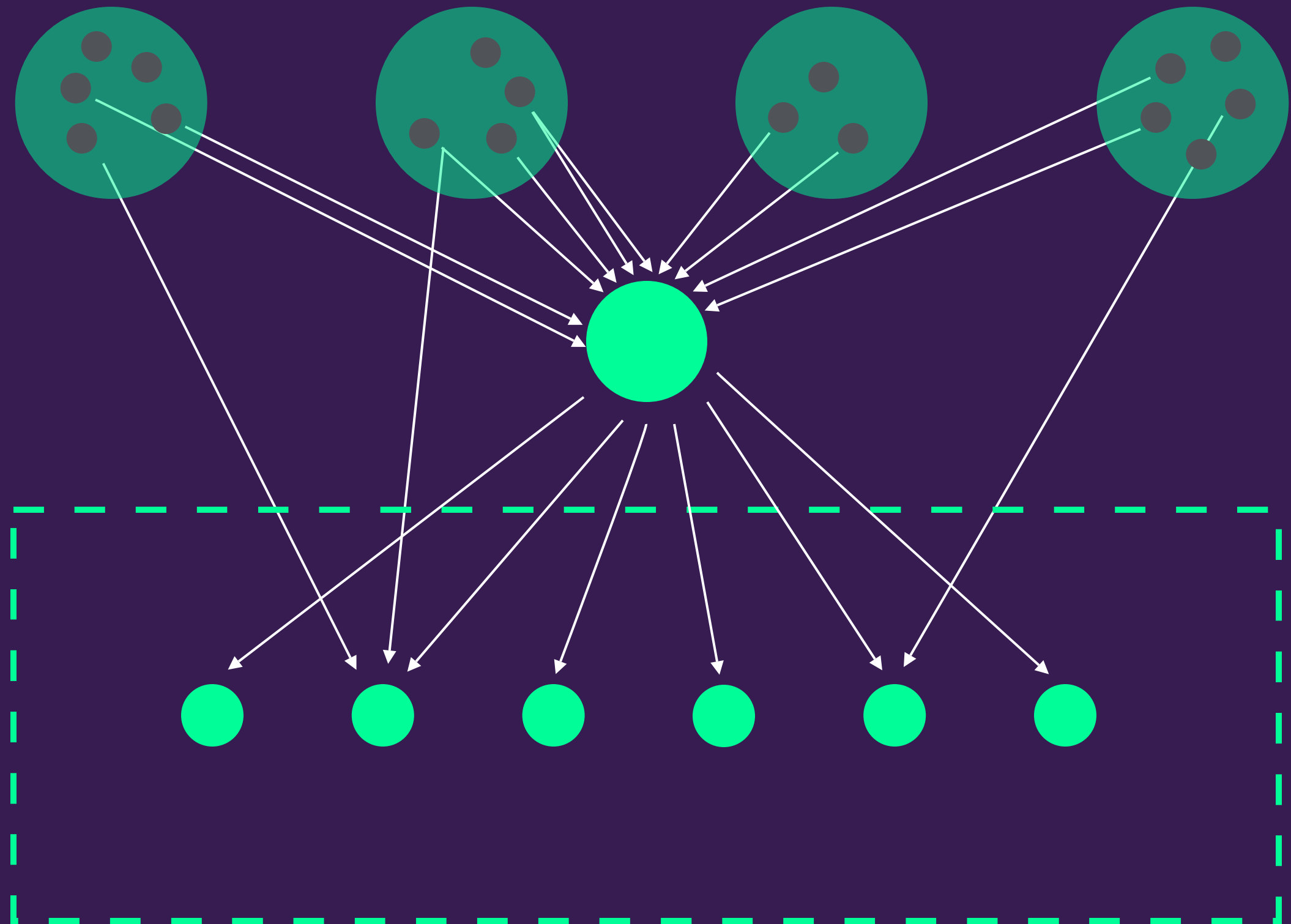
Embedding every designer in a product team would allow
each team to have a dedicated designer for their needs.
However the spectrum of design is broad and not all
designers are strong in every discipline. Further more the
demand in one team may be greater than another. Laslty
there is no macro view of the work being carried out.
In cases where the need is not able to be met by the
embedded designer there is no one immeadiatately available
to fulfil the request.
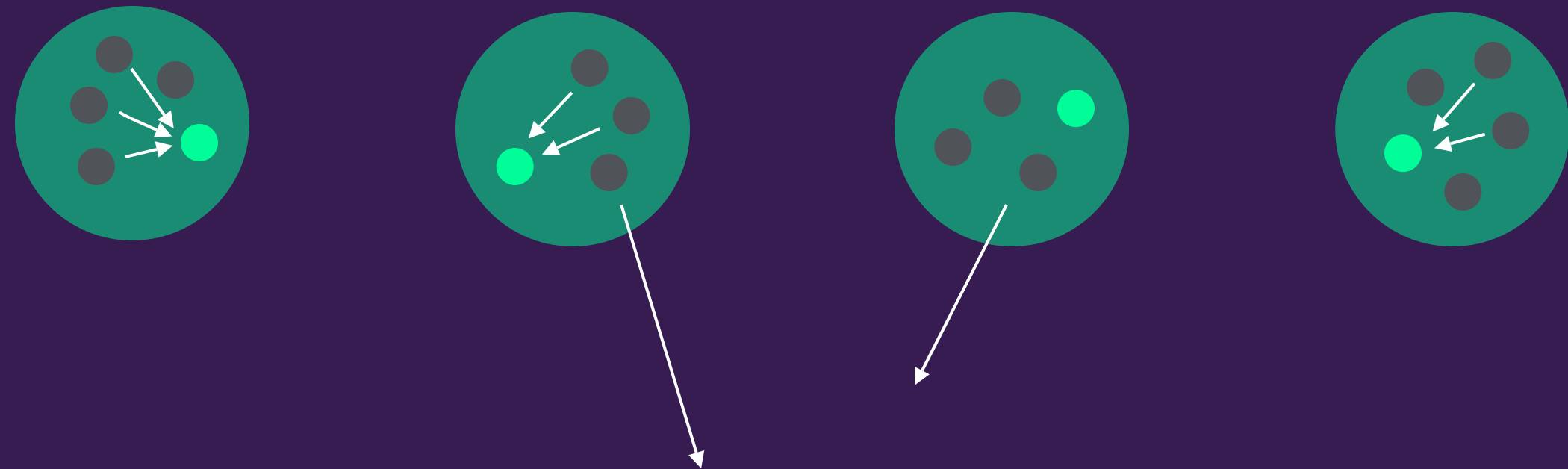
Organisational structures

Hybrid Teams

Hybrid Embedded and Design Serivce:
In this system each team is desingated a designer.
Skills fit the typical needs of the team and all
design needs are serviced by or through the
designer.
In cases where the central designers are needed,
the embedded designers santise and forward the
requests to those teams.
By having readily available designers (co-located)
we expect to reduce the frequency of requests
circumvented the control and oversight needed to
run a tight ship.
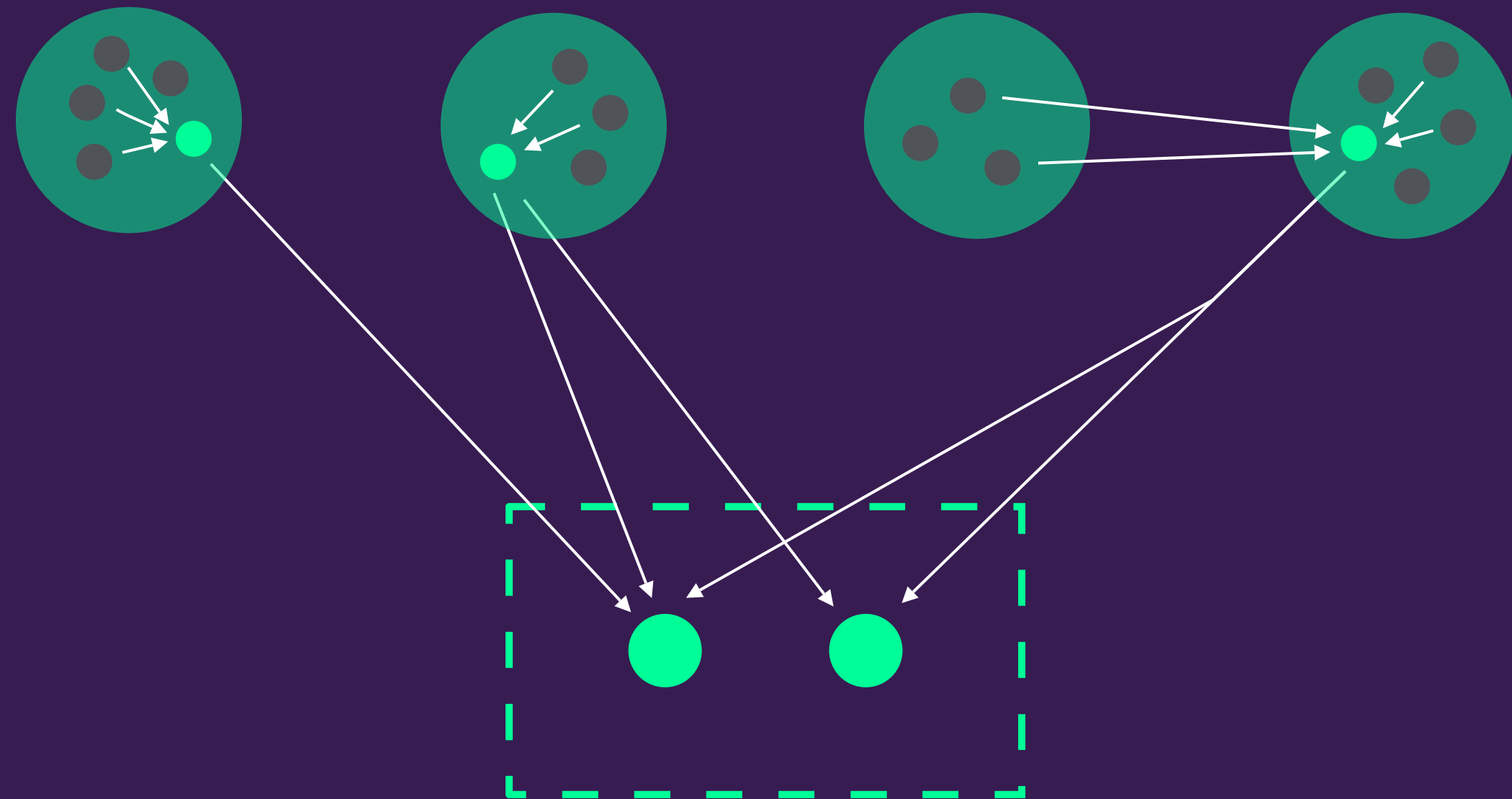
Roles

There are a range of roles that are encompassed in User Experience Design,
they can be conducted by a specialist or multiple roles by a generalist.

Role	Responsibility
User Interface Designers	Someone who develops the 'look' of the product being built. Focused on the visual aesthetic, but aware of accessibility and other experience factors when designing
Interaction Designers	People who create the 'feel' in the form of prototypes that explore the user journeys in a tactile manor. From high level to micro-interactions
UX Strategists	Someone capable of leading the design organisation and setting strategy to be most effective
Content and UX writing	Able to write content suitable for the web that is engaging, straight forward and in-tune with their user base
Information Architects	People who understand the conceptual data models and their relationship to the mental models of users
Motion designers	Skilled in understanding and being able to implement/design meaningful motion into a products micro interactions
Data artists	Well versed in modern visualisation libraries and can tell a narrative through data visualisation

Role	Responsibility
UX researchers	Can source, conduct and synthesise User Research both qual and quant (sometimes these are separate roles again)
CX/Service Designer	Someone who looks at the end to end experience, all the touch points and the macro design of the business systems
Illustrators/Animators/Typographers	Folks trained in Semiotics and graphic and motion able to create assets for engaging experiences
Graphic Design/Art Directors	People skilled in defining the aesthetic, photography, colour, brand

Plan

Macro level strategy

Scaling a team typically follows this kind of pattern where senior generalists are hired early on to cover all aspects of the experience and then as the organisation grows specialists and juniors begin to emerge, eventually whole sub divisions like research and content emerge.
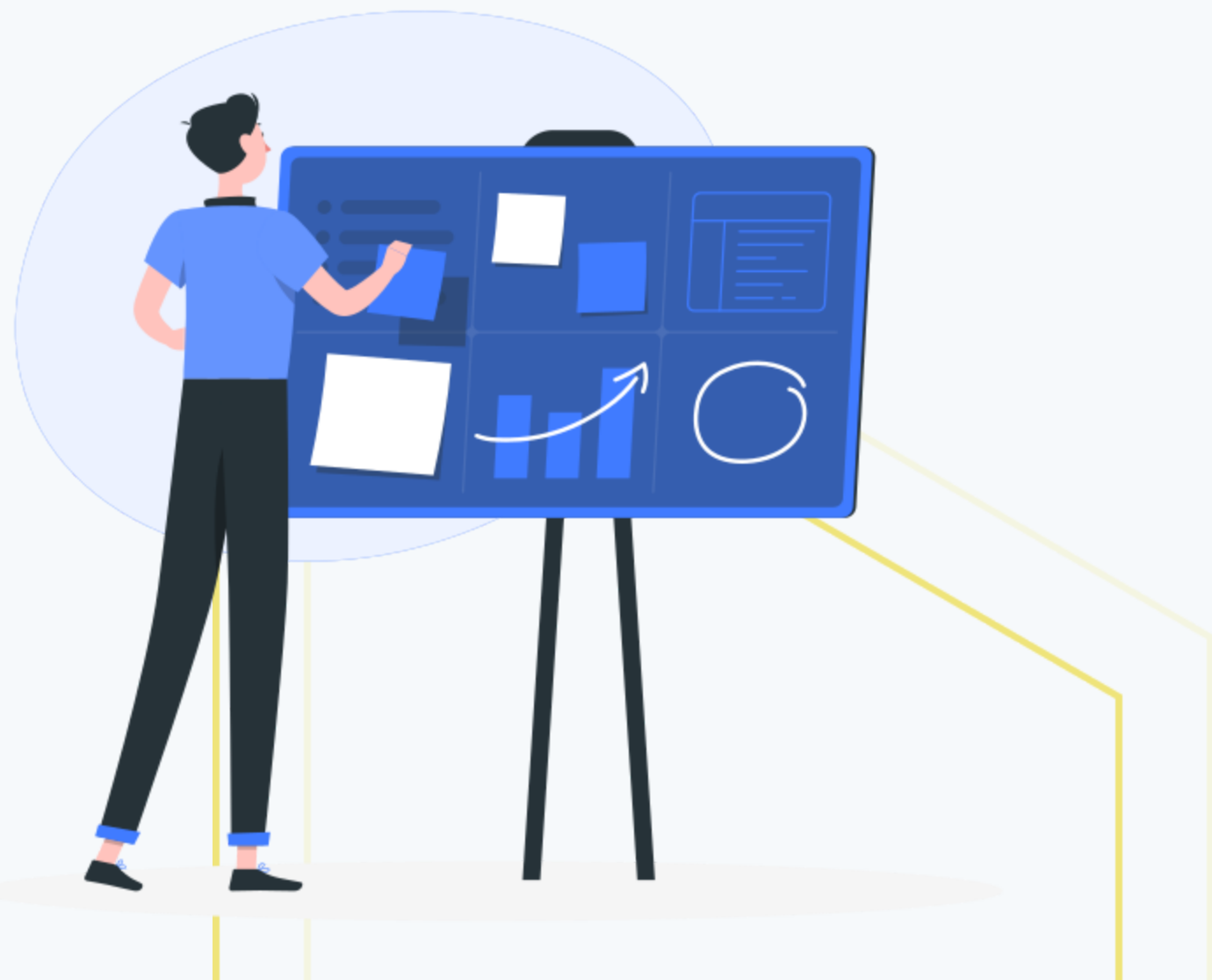
Start with generalists

Outsource:
- well solved problems
- things outside of the proficiency of the person

Embed them in each team

It's important to have 1:1 relationship of designers and teams

Add specialisms

Develop a hybrid capability of specialisms who work primarily on a single project but can support multiple projects where the need is less frequent. Those specialists monitor the

Add a second generalist

Maintaining discovery and delivery is difficult for single person. Adding another allows for:
- a clearer distinction of discovery and delivery work
- mentorship of juniors
- easier transfer of people and knowledge across the teams
- more capacity
- paired design

Core practices emerge

Core practices in your organisation emerge as their own sub-divisions of the User Experience Team. These groups will establish their own communities of practice.

UX Strategy

UX Roadmap

UX Strategy Roadmap
Treat UX Strategy like a Product

When we're building Lean and Agile products we do two main things. We prioritise our learning over our delivery and we act on the things we learn, even late in the delivery stream.

If we treat the UX roadmap like an iterative learning and agile product we benefit from:

- reducing the risk of sunk money
- being able to pivot when the insight tells us we're wrong
- prioritising the most valuable activities with the least risk
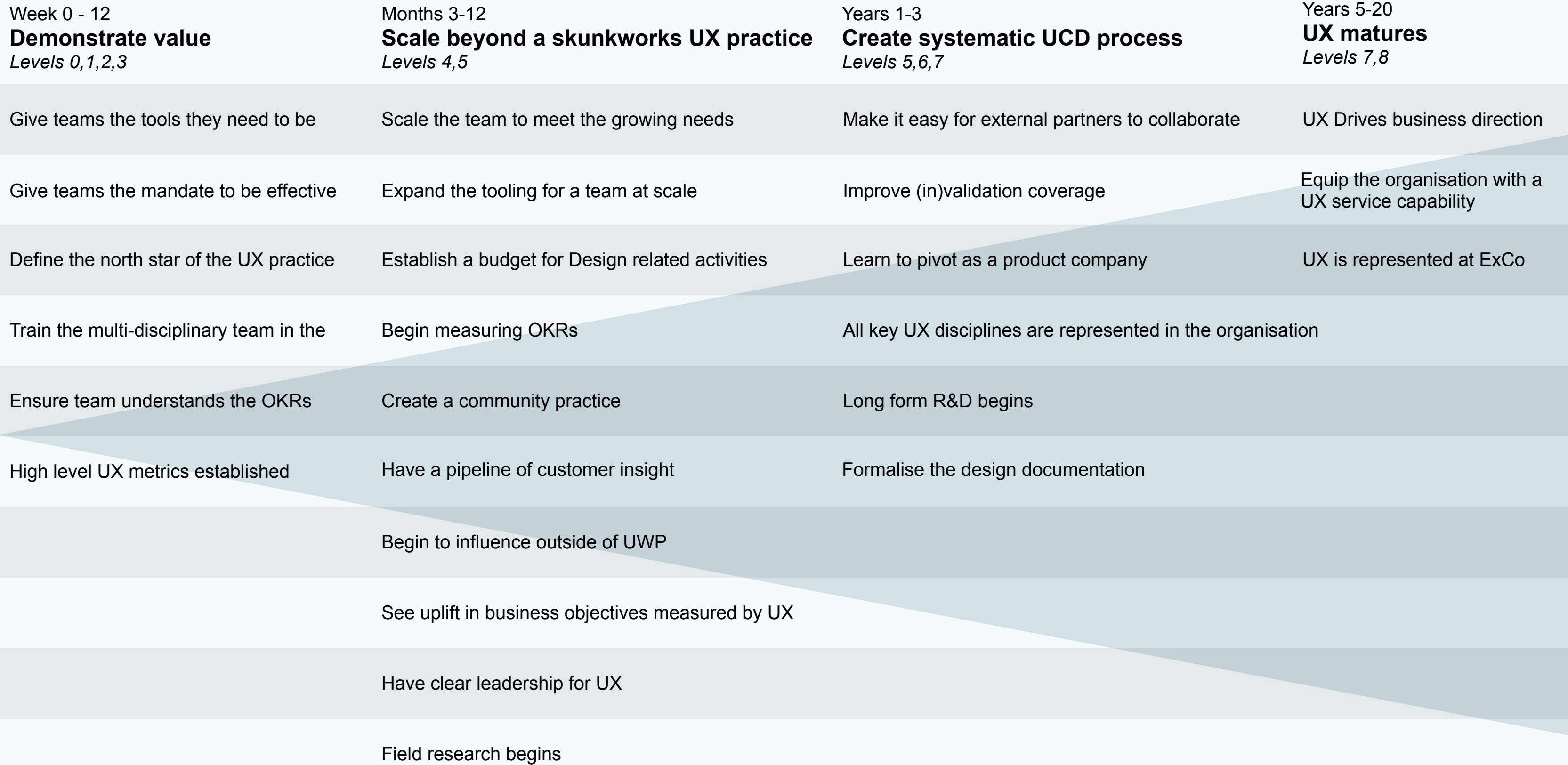- extract value from the first sprint/milestone onward

In short we reduce risk and delivery value earlier.

Actions

Create an opportunity backlog, refine the stories and prioritise them. Deliver the stories and establish a velocity and iterate.

UX Strategy Roadmap

| Week 0 - 12 **Demonstrate value** *Levels 0,1,2,3*	Months 3-12 **Scale beyond a skunkworks UX practice** *Levels 4,5*	Years 1-3 **Create systematic UCD process** *Levels 5,6,7*	Years 5-20 **UX matures** *Levels 7,8*
Give teams the tools they need to be	Scale the team to meet the growing needs	Make it easy for external partners to collaborate	UX Drives business direction
Give teams the mandate to be effective	Expand the tooling for a team at scale	Improve (in)validation coverage	Equip the organisation with a UX service capability
Define the north star of the UX practice	Establish a budget for Design related activities	Learn to pivot as a product company	UX is represented at ExCo
Train the multi-disciplinary team in the	Begin measuring OKRs	All key UX disciplines are represented in the organisation	
Ensure team understands the OKRs	Create a community practice	Long form R&D begins	
High level UX metrics established	Have a pipeline of customer insight	Formalise the design documentation	
	Begin to influence outside of UWP		
	See uplift in business objectives measured by UX		
	Have clear leadership for UX		
	Field research begins		

UX Strategy

Split the team
Maintenance and Innovation

Your big bets (SaaS, new platform etc) are experiencing capacity drain by maintenance of the existing platform. If discipline can't be found within a single team then I suggest a strategy where an innovation team is ring-fenced and develops a new product that is designed to cannibalise the existing one. This play was employed by Intuit when they launched Turbo Tax and I believe can work here.

The existing product life cycle is taking massive efforts in product extension to stave off decline, sacrificing the rapid growth of the vision. The cannibal play creates clear distinction between innovation and maintenance.
The users choose if/when to switch and they'll be leaving your product not your business, which is what they might have done should your product decline occur.

Sales / Time

Legend: Do nothing · Product extension · New product
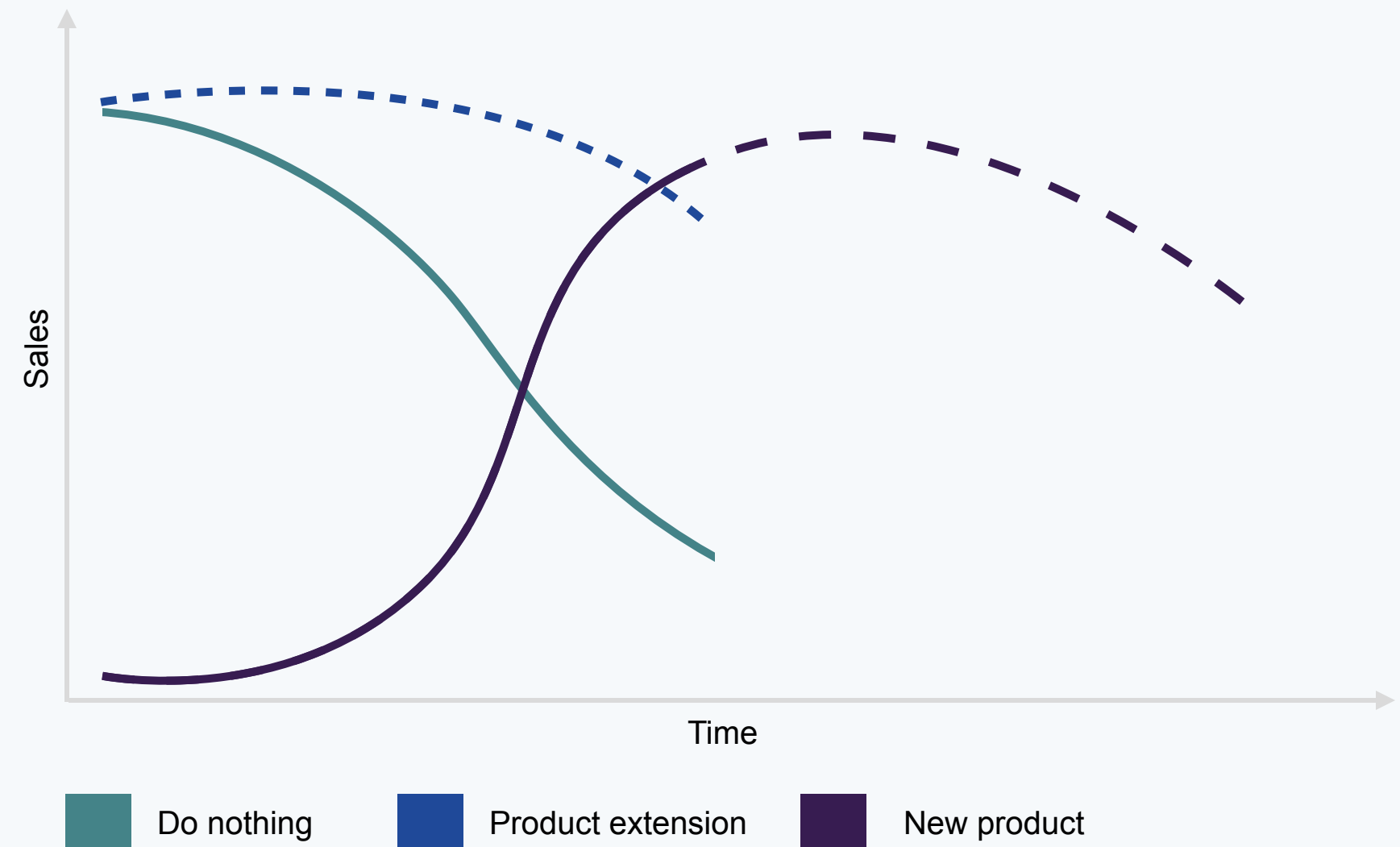
Actions

Debate the cost benefit of this alternative strategy
What stake does each bet have?

Activites

Opportunity backlog

Here is a high level list of activities I would place into a backlog. This list
however should be a collaborative effort along with engineering and product.

Item
Set OKRs
Define UX metrics
Declare manifestos
Spike around tracking in existing platforms
Draw up tooling short list
Plan series of field studies and interviews with users
Proto-Persona generation (current 'personas' are segments)
Declare manifestos

Item
Plan October conference sessions
-- Discussion guides
-- Prepare necessary artefacts/software/hardware
-- Recruit/Assign users to sessions
-- Permissions slips (create, sign-off, distribute)
-- Synthesise results
-- Document results and publish
Conduct Service blueprint and impact mapping workshops with stakeholders

Glossary
User Centred Design Vernacular

Item	Description
Design	The outcome of intent. Anything that was intended can be considered design. For example: Natural Selection (not design), Selective Breeding (design)
UX	UX or User Experience, is the broad term to describe the interaction and their outcomes between a person and a thing. These are often referred to as Journeys or Jobs
UCD	User Centered Design refers to the process of placing the user at the center of the development process. It places the user needs above the business needs
Design Thinking	A collection of tactics popularised by IDEO to solve business problems using a UCD led approach
Discovery	A type of requirements gathering that is driven primarily by user research
Design System	A collection of UI elements that are documented for consumption by Engineers, Designers, and Product Managers
*.Ops	A role in an organisation that organises and empowers others in the organisation to maximise the outcomes of the discipline. For example: ResearchOps would organise research sessions and documentation of insights
Metrics	Metrics are measures that are deemed important by the organisation and are managed.

Links

Design

- https://www.uie.com/ - Jared Spool's UX site
- https://www.nngroup.com/ - Don Norman et al UX organisation
- https://www.senseandrespondpress.com/lean-vs-agile-vs-design-thinking
- https://leaders.centercentre.com/ <- live course on design leadership

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END.
Thanks for watching

by Ty Fairclough, DesignOps @ JigsawXYZ