UXPin

The Field Guide to UX Strategy

Turning Vision Into Action

by Robert Hoekman Jr.

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About the Author

Robert Hoekman Jr. is a product strategy expert and author of 6 UX books including “Experience Required”, “Web Anatomy” (co-author Jared Spool), “Designing the Moment”, and “Designing the Obvious”. His experience spans almost 20 years developing and executing UX strategies with companies like Rackspace, Intuit, Automattic, Dodge, Newsweek, and many more.

The Hard Truth About UX Strategy

So you're a designer. You've been one for a while now. Maybe you're young, maybe you're established. You've been doing it long enough to know it's not always as satisfying as it should be.

The root of the issue lies in the decisions that exclude you. They prioritize features and fixes that don't matter. They're reactionary, based on some data someone learned about. They make you feel like you're stagnating.

A lot of times, this is true. Most of the time, you just don't know enough about *why* those decisions are being made.

This is why you say you want to "do more strategy work." You think it's about making decisions. You think you can make better ones than the people making them now. And maybe that's true.

Before you'll ever find out, you need to accept the hard truth. Strategy doesn't work like that.

What good UX strategy actually entails is researching and recognizing the constraints and concerns from all sides and painting a big red target on the wall so that everyone involved can make decisions that serve researched, vetted, and defined objectives.

This is the truth about UX strategy. It's more complex than you might think

On the upside, that's what will make you want to keep doing it once you start.

What UX Strategy Really Looks Like

In its most tangible form, a UX strategy is a document. Ideally, it's one that's been printed and tacked to the walls around the office, preached about to everyone involved in a project (no matter the scope), and referred to every time a decision gets made.

In concept – and the concept is what drives the tangible document – it's a collection of several types of guidelines, each type tied to a different aspect of the same objective, together serving a unified purpose.

Every piece of the strategy has been researched. Every piece has been vetted. Every piece has been discussed and agreed upon by the relevant stakeholders.

Photo credit: Barrel via Minnow Park

On projects with a narrow scope – like a single feature or a minor usability improvement – you can devise and document the strategy in an afternoon.

On bigger projects – the kind critical to a company or aimed at shaping a product for the long-term – it can take weeks.

In every situation, the strategic process is evolutionary. A strategy is never written in stone. Companies change focus. New information pops up. Competitors appear on the scene and drive new customer requirements. Strategy must evolve accordingly.

When politicians change their minds, we call it flip-flopping. When we change our minds about strategy, we call it *good design*.

Without constraints, without understanding, without research, without vision and success metrics and guiding design principles, design is not design. It's decoration. With these things, however, we practice design at its very best. We design with purpose, intent, and measurable outcomes.

When politicians change their minds, it's flip-flopping. When we change our minds about strategy, it's good design.

The Intent UX Strategy Represents

Designers far and wide like to jump in. Get things done. Put pixels on the screen and make them do tricks.

Strategy doesn't work like that, either.

The point of strategy isn't to prescribe anything. It's not a document of decisions. It's a document that *drives* decisions.

The strategy document focuses on goals over actions, ideas over to-do lists. It's purpose is to show the idea, the concept, of the thing you're designing. It's to give everyone involved a unified sense of what the thing is and why it will exist. It's to enable people to make decisions that help it achieve that.

If your strategy document is prescriptive – describing specific features or assigning detail to what should still be a *notion* of a product – it's no longer strategic. It's either a badly-written spec document or an ego-driven attempt by the strategist to dictate details at a time when the focus should be on objectives.

Goals over actions. Ideas over to-do lists. This is the form of UX strategy.

The Form UX Strategy Takes

A UX strategy document always includes a few key elements. I go into these in chapter 3 of this eBook. For now, we'll focus on the vital concepts.

First, the form it takes.

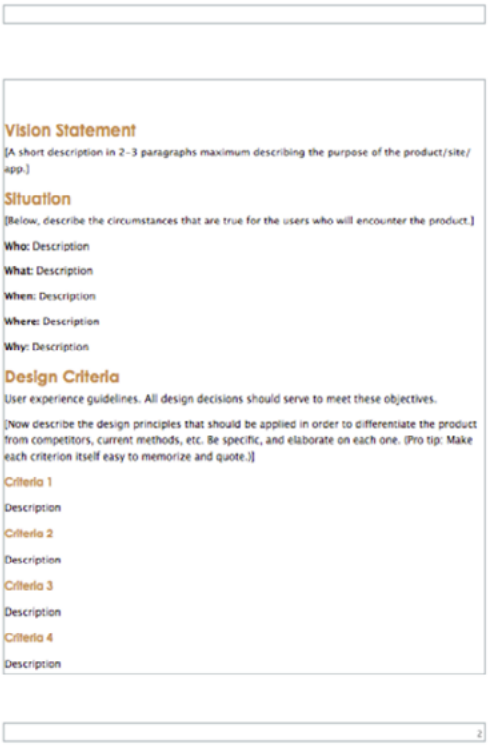
A strategy is meaningless unless it's internalized by everyone involved in the project and used to make good decisions. To this end, just like the design work from which it's based, the strategy document itself must be approachable and usable.

tweet this

Goals over actions. Ideas over to-do lists. This is the purest form of UX strategy.

I have a strict rule for my own projects that a strategy document will never require more than two sides of a single sheet of paper when printed as straight, long-form text. I keep this rule because it needs to be short enough that people will actually read it. So that you can review it in a short meeting. So that people will remember each detail of it when making design decisions. So they can *quote* it.

That said, the strategy will, in fact, be printed. And for that reason, I almost never actually *use* a single sheet of paper. A Word doc will work in a pinch, sure, especially when you're just emailing it around to people, but ideally, you'll be able to tack pieces of this thing up all around the office where the project team works.



Better to use a slide deck.

Pop open Keynote or Powerpoint or Google Slides and distribute the points across a series of slides where they can be digested one at a time.

Use the slide deck to review the strategy with the team. Showing them one piece of information at a time prevents them from reading ahead and asking premature questions.

After that, print each slide.

Then find the thumbtacks.

Posters keep the points present. Literally. Team members see them as they arrive each morning, they can point at them during conversations, and they can look them over while considering options during a decision. They create constraints, and *constraints are where design decisions are born*.

Concise. Printed. Present.

The Logic Spawned by Strategy

Finally, the strategy document, once written, becomes the source of causality for design decisions.

There are no magical leaps in the curation of feature lists or the design of task flows. These things are born from logic. *This*, therefore *that*. The strategy drives conversations wherein one thing follows another.

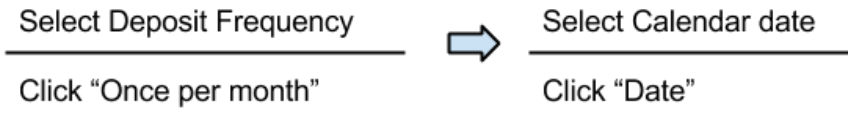


Photo credit: Marek Bowers via Ryan Singer

I spoke to UX expert Christina Wodtke recently, and she explained where designers screw up with strategy.

"They miss the *therefore*," she said. "A designer would say they spoke with a bunch of people who really liked ice cream, which lead to building some cookies."

As she elaborated, you need to unthread the logic and ensure each piece connects.

"You need a *therefore* in there.The strategy only makes sense if people like ice cream because they like sweets, but ice cream's too cold and it's not really good in the winter, so we're thinking cookies *because*..."

Strategy gives you *therefore*. It gives you the first part of the equation $A + B = C$.

And since you evangelize the strategy doc, even if you forget about it once in a while, others will be equally armed with the strategy's bullet points to remind you that $A + B = C$.

It's not enough – it's never enough – to say "I want *this thing* to exist." *This thing* cannot do what you want it to do until *this thing* has a strategy behind it. A clear concept of what *this thing* is. A clear set of guidelines for what makes *this thing* different than its competitors. A set of metrics to measure out whether or not *this thing* is working well.

Vetted ideas, based on research, must guide design logic. This is the truest practice of UX strategy.

Now we can talk about how it's done, and how to take charge of the process.

UX Strategy provides the "therefore". Otherwise, you're mindlessly following a feature list.

Taking Charge of a UX Strategy Kickoff

I once worked with a digital agency once that didn't know how to hold a kickoff.

And they didn't even know that they didn't know. They kept on getting frustrated, weeks into every project, over how they'd gotten themselves into that position of following rather than leading. Fighting to get their good ideas out the door. Ending up on the defense all the time when their clients came back screaming with arguments based on whim and vapor.

Photo credit: Wikimedia. Creative Commons.

In-house teams have the same problem. In fact, if your “clients” are internal, you can have an even harder time getting out in front of a project. You worry for your job. You worry about upsetting the people you have to work with over and over for months, maybe years to come.

Literally everything that happens after the kickoff is contingent on what you do during it.

For the wealth of information online about how to wireframe, prototype, code, and run a usability test, there’s much less out there to tell a designer how to run a useful kickoff meeting. There’s even less that focuses on the truth about them:

Kickoffs are for far more than laying out a project. They’re for putting yourself into a leadership position.

Here’s how you do it. First, the logistics, then the clincher.

Design kickoffs are more than just describing projects.
They’re for putting yourself into a leadership role.

Prepping, But Not So Much

It starts with a project inquiry. Someone comes to you and says, “We’re launching an app,” or, “We’re having trouble getting to the next level,” or even something specific, like, “We want to increase our sign-ups.”

You think you can help – it falls under the UX purview – but first you have to get a *whole bunch of information*. So you set up a phone call or in-person meeting. You check out the current website or app, if there is one. You check out other sites like it. You go where Google takes you.

Beyond that are the simple details of scheduling how and when you’ll meet, whether by phone, video, or in an office or coffee shop someplace.

This is enough for now. The first thing you’re going to do is ask a lot of questions Google can’t answer.

Asking the Right Questions

This is the secondary purpose of the kickoff, right behind establishing your leadership position.

Essential, yes; you can't design a thing without answering all these questions. But you also can't design a thing without putting yourself in charge, and you can always ask questions another time.

The gist is this: you need to know what they do, why they're doing it, what they've done, why they did it, what happened, what they hope will happen next, and who's around to do it.

1. **Raison D'être?**

   The reason for being.

   This bit, pending some research, will feed directly into your UX strategy, which in turn feeds all your design decisions.

It's not even a question, actually. You can say it outright:

So tell me about Acme Widgets.

This usually prompts a decent history of the company, as well as an intro to the product they want to create or improve. Rarely, though, in the case of startups anyway, does it answer this:

How do you make money?

This is partly because not a lot of startups have the answer just yet. It's partly because they assume you'll know when a site is ad-supported. It's partly because, as staff, they think a lot about the currency their service deals in but know next to nothing about how to get more of it. Which, let's face it, is why they called you.

The answer to this question is a major factor in your future decisions. Asking this question not only gives you something to focus on, it lets the stakeholders know you're focused on the most important of their concerns.

Don't let them get away with cursory explanations. You need to know how this product should fit into its users' lives. How it should compare to its competition. Is it different because it's cheaper? Or because it does a magic trick no one else has pulled off?

This is the heart of a good user experience vision. The "user" part is just as vital as the business' goals.

For UX strategy, the "user" part is just as important as the business goals.

2. **Where Are You Now?**

   If they haven't specified already, you'll need to ask about the current status of the site or app.

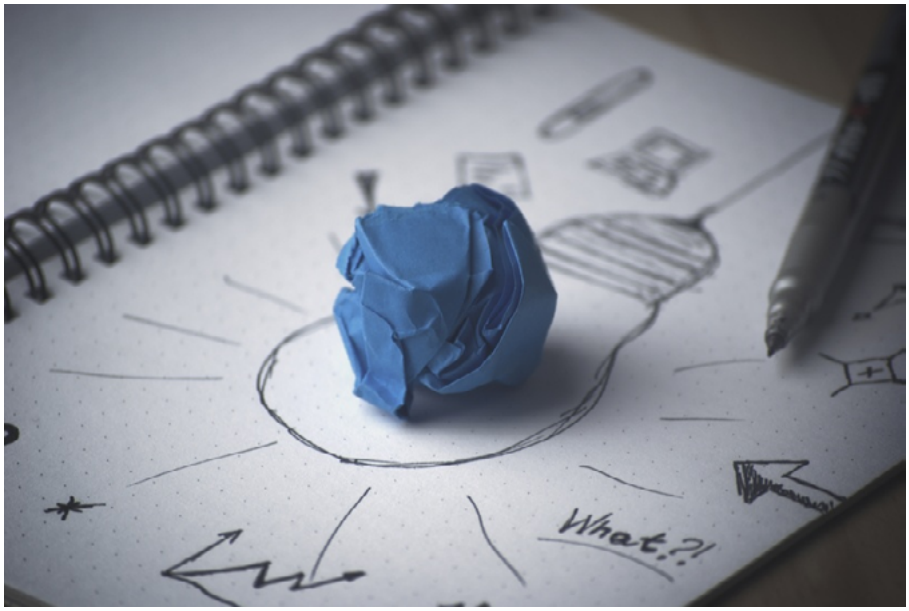
   So, is this new section of the site up now? In the works? Are we starting from scratch?

   This is where you find out about one of the two biggest constraints of every project: time and money. In answering your question, the stakeholder is likely to tell you they're three weeks behind, that they've just hired their second programmer after the previous one quit, and that they've been planning to launch at the end of the month (which rarely goes as planned).

3. **Where Have You Been?**

   There's nothing complicated about this one. But asking this question can help put yourself several steps ahead.

What stats and interviews and other research has been done already? What do you have now that I can review to get up to speed with everything you already know?



Follow that up with questions like:

- What approaches have you taken previously?
- What has worked?
- What hasn't?
- How did you make those decisions?
- How did they turn out?
- What do you think went wrong in that case?

Not only will questions like this help you familiarize yourself with the full scope of the project and its history – likely revealing a whole bunch of politics and skills limitations you need to know about – it means you can start out by making decisions no one has made before. You will not be recommending things they've already thought up. You're past that point.

4. Where Do You Want To Be?

They've probably filled you in a bit already on where they'd like to get, but getting there means being specific. If it's an improvement project, don't rest on answers like, "We just want traffic. As much as we can get."

Put numbers on it. You can increase a conversion rate by 5%. You can decrease the bounce rate by 10%. Increase sharing. Increase unique page views. Increase completion rates. Decrease completion time. Increase the number of tasks completed per visit. Increase visit frequency. All by some percentage.

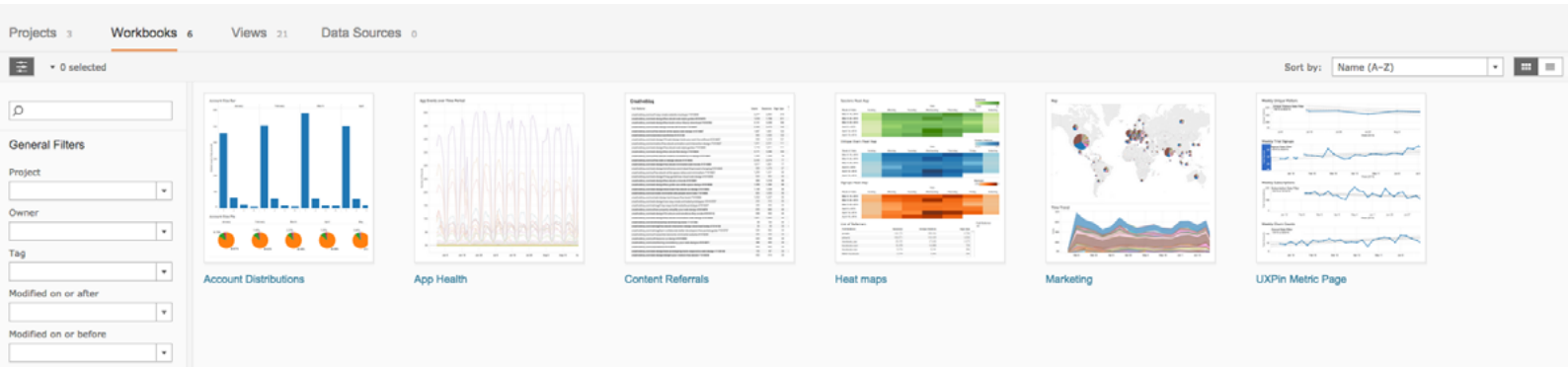


Photo credit: Tableau

Get specific about these numbers and you can have a real conversation about what will be affected, as well as the philosophical considerations. For example:

- Increasing a conversion rate can mean weakening retention rates. Getting more sign-ups is a cake walk if you don't care about keeping people around long-term. If you do, it's a more nuanced problem.
- Increasing unique page views (say, on a content site) can mean

increasing the server's workload. Distributing content across more pages is sleazy, but it works. One alternative is *better content*.

Anything you do will have an effect, and the good can bring some bad along with it. Pay attention to *all* the effects. Detailing what the company wants to achieve lets you sort out what unintended consequences might come up afterward so you can decide if you really want that or not.

5. **Who's With Me?**

   The fewer people involved, the speedier the communication. The fewer decision-makers in charge, the faster the decisions. It's time to find out who's on the team and who's an obstacle to it.

   For a typical UX project, you want as few decision makers as you can get. Ideally, it's whoever's in charge and *maybe* one other person. Determine who these people are and how you'll communicate most effectively.

Other things you want to know (and make notes about, because you'll be talking to all of them at some point, and each one can affect your decisions):

- The names of everyone on the team
- Their titles and roles on this project
- The skill level of each person
- Any constraints at all, whether time zone issues for remote teams, preferred communication and work methods, how efficient each person may or may not be, who has the most history with the company or product – anything you can find out

Set the expectation right from the start that the UX decision-makers should be 2–3 people at most, including you (or a senior-level designer, like a VP Product Design), and that this will help speed communication along. Decide how you'll communicate, how frequently, when to have check-in calls, etc, so that everyone is comfortable.

During the strategy definition phase, keep everyone else informed as needed, and not one bit more. You want their opinions and insights – that's what stakeholder interviews are for (see Kim Goodwin's take on those here) – but you do *not* want ten people chiming in on every decision you make. There's no time for that, plus you'll risk design by committee.

Establishing the decision-making crew primes your clients and stakeholders to let you lead. Which brings me to my last point.

Laying It Down

This is the clincher. The primary purpose of the meeting. The part where you get to lay out how you'll proceed, how you'll get them through the process, what your part is, what their part is, and what happens next.

Basically, that *you got this*.

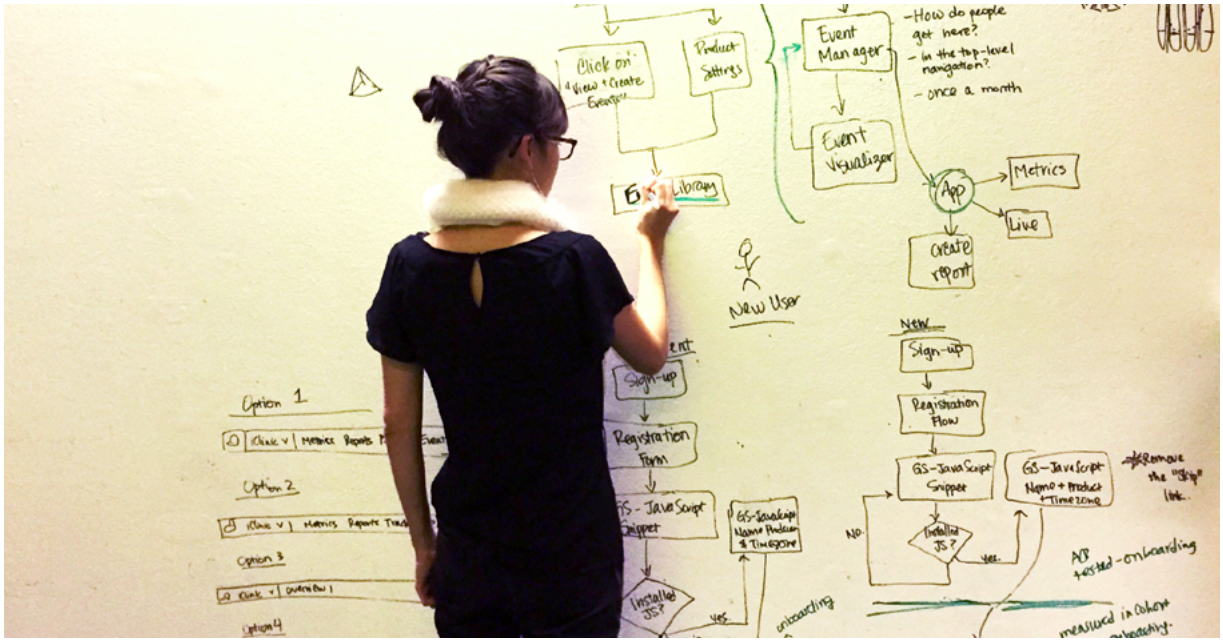


Photo credit: Kissmetrics

The key is to leave no question here that the stakeholders are in capable hands. Your relationship will be collaborative, for sure, but you are leading this thing.

What you say here depends entirely on how you've decided through the course of this conversation that you want to approach the project. You know what's been researched, what they've tried, how you can learn more – generally, where things are at. By now, you should have

a good idea how you can arrange a stack of your favorite research and design activities to get to the answer you both need, and a design you can be proud of later.

It goes something like this. Insert your own variation here.

> *Well, here's how I'd like to approach this. We already have a good amount of stats from existing users, and some interviews with power users, so I'll start by getting familiar with all that.*
>
> *Then we'll talk through which users might be good for additional information, and I'll set up interviews with them. From there, we'll talk again about any disconnects or similarities we see that could affect the overall vision for the product. I'll draft a version of a product vision statement, along with some design principles I think will be important for making you competitive, and some success metrics we can use track how the design is doing over time.*

This next part is key.

> *Next, I'll work on some initial wireframes and prototypes to get a direction going. I'll post each version of these in the project management app so we can discuss and agree on them while I start on something else. These will be low-res at first to make sure we have it right before we go further. I'll go over each one with you and explain each recommendation I make, but if you have questions beyond that, definitely let me know so we can think through it together.*

You set the expectation that you'll be making recommendations, not taking orders. You made it clear that you'll be discussing and agreeing on ideas before anything gets refined.

You are now in charge.

This little mindset difference is all it takes. From now on, demands can be fought off by referencing the kickoff meeting. And they can be prevented altogether by sticking to that last part: presenting and explaining your work rather than letting the stakeholders see it and come back on the offense when you do something they don't like.

Do this here and now – during the kickoff, when you have the best chance of establishing your leadership – and you'll be singing all the way through the project.

And Go

Finally, a quick statement to summarize the next steps

> *Here's what we'll do first. You send me the research you mentioned so I can look that over, and then I'll check in with you tomorrow about my responses to it, and to coordinate the first round of user research.*

And just like that, you're in the lead.

Digging Into the Discovery Phase

This part's always a mess. If you're an outsider, you're still getting to know everyone involved in the project at the same time you're navigating which research activities to take on. If you're an insider, it can be the same story.

Even if you already know everyone, it's a new project, and that means new approaches, new information, new documents, new everything.

Photo credit: Juhan Sonin. Creative Commons.

Sure, there's been a kickoff, but now you're into the real stuff. And like most UX projects, you have no money or time. You have to become an expert on this product as quickly as possible.

You have to figure out who to talk to, what they know, how to make the most of each resource, and how to turn it all into a sound strategy everyone will agree with.

The Well of Knowledge

The principal stakeholders on the project will have a good idea who's available to talk (and they will likely be on the list themselves). If they don't, they can point you to the people who do.

Oftentimes, for example, larger companies have a user researcher on staff who will already know plenty about any existing user base. If you're building something brand new and there is no user base just yet, your options will be far more limited. Either way, discovery involves people and data, and right now is the time you go find both.

There are a few places you can go to gain insight relevant to your product's future success. Each one has different cares and concerns.

1. **Primary stakeholders**

   These are the people in charge of the product. In a startup – especially a newer one – it's usually the CEO and/or CTO. New companies

don't often have more than one or two major stakeholders. For more established startups, you may also find a product manager.

Whatever the title, in a startup situation, odds are good that at least one of your primary stakeholders is the person authorizing your paycheck.

When you talk to one, speak to data and to revenue. In startups, primary stakeholders often have a financial stake in the business. In larger companies, their jobs depends on a product's financial success. Include questions like:

- There are a billion ways to make money. Why this one?
- What do you see as the biggest concerns with regard to the user's experience, and why?
- What do you think is working well?

- How do you believe this product compares to its competitors?
- What particular metrics would you like to see improved?

(Pro tip: Be sure to keep your questions scoped to what a particular person cares about most and knows most about. A primary stakeholder may be intensely concerned with the state of the business, but this doesn't mean he or she is a wealth of expert information outside of their own role.)

When they give you answers about the product's purpose, scope, users, competitors, and so on, these answers are driven by financial concerns. So when you make recommendations later on, be sure to couch them in discussions about what percentages of users do generally or are doing in this case, and with regard to how a decision affects the product's ability to make money.

For more on this, Kim Goodwin has a great writeup on the kinds of questions to ask.

When speaking with business stakeholders, anchor all your design decisions in data and revenue.

2. **Secondary stakeholders**

   These are people whose roles are incredibly important, but not to the level of actual ownership or financial stakes. People like development leads, marketing leads, and whoever's going to be doing the bulk of the visual design work.

Secondary stakeholders can also be people outside the company or the immediate project team, like an investor or investment group, a higher-level executive, or even someone the CEO deems worthy of decision-making power.

In interviews with secondary stakeholders, first lay out the high-level description of what you and the primary stakeholders have decided or want to achieve. From then on, focus only on the part of the project the secondaries affect. If it's a graphic designer, ask about what visual design directions might be feasible, what's been done in the past, how that person thinks the current version performs, and so on.

What you ask entirely depends on the person's role. As I've said, just stick to the person's area of interest. Anything outside of that carries high risk of misleading information and perspective.

3. Current users

If the product exists already, you can almost certainly dig up some current users who care a lot about the product and want it to succeed.

Your instinct is going to be that these people need some sort of compensation for the time you'll be taking up. It's not likely true. People love to give their opinions. They love to feel like their opinions are valuable. They love to feel like they're being listened to and respected. They will not expect anything from you unless you plan to take up a lot of their time. Keep it to a couple of phone calls and you'll get happy, talkative people who want to help in any way they can.

Photo credit: Barrel via Minnow Park

The stakeholders will know who the most active users are and how to reach them. Simply email the users to set up a meeting (phone, Skype, in-person, whatever is convenient). Introduce yourself,

explain your role, explain that the company is researching ways to improve the product, and ask if they'd be willing to answer a few questions. Do this in as few sentences as possible; it shows you plan to respect their time and stay on point.

- Try to set up meetings with at least three users. More can be better, but not always. After five or so, you'll start to hear all the same things the first four said.

- Try to invite other team members. For example, another designer or researcher can help take notes while you focus on follow-up questions. Marketers and developers can also benefit from a firsthand understanding of the user's background and behaviors.

- User interviews are often a lot of fun. You can build rapport with them by asking about their lives, their hometowns, how they became so attached to the product you're asking about.

- Instead of asking only about feelings and preferences, ask about behaviors. For example, "What do you do when…" instead of "How do you feel when…". Also try asking more open-ended questions since you'll have more room to explore compared to binary yes/no questions.

- Prepare a list of questions beforehand. Treat this as a guideline rather than a script, since the interview will likely deviate somewhat from what's on paper. But that's alright because it gives you room to investigate user characteristics that you might have overlooked during preparation.

- Be sure to ask lots of follow-up questions when you get into the stuff about the product itself. No answer is cut and dry. If a complaint starts but then goes nowhere, chase it. Find out what's causing the grief. Do this for anything that piques your curiosity.
- Before you get off the call, ask if you can get back in touch once you have some design ideas worked out. You want to make sure you've interpreted their concerns and needs correctly and are able to address them in the product.

To learn more about user interviews, Erika Hall has written up an excellent piece on the topic for A List Apart.

4. **Beta testers**

   If the product is brand new, the stakeholders may have a relatively functioning prototype hanging around online already.

   They'll refer to this as "the current site" or "current app". You'll more likely think of it as concept art. "The existing site" rarely resembles the thing the stakeholders really want to achieve. But sure enough, they'll have a few beta testers on the case.

   Get in touch with beta testers. Again, at least three.

   Usually, by the time you talk to all of them, there's not much left of "the existing site." The beta testers, you'll discover, really need something else entirely. "The existing site" won't live long.

(In rare cases, “the existing site” is actually pretty solid. When that happens, your job is mostly to validate what’s good, tweak what’s not, and move on to a project that really needs you. Be sure to do some back-slapping before you go. They deserve the confidence-booster.)

Beta testers are often less invested in a product than users of more developed products. They’re also often more frustrated, since “the existing site” is usually heavy on bugs, light on features, and little more than proof of a weak concept still in need of good ol’ fashioned UX work.

Be empathetic. Ask about their usage cases so far. Their problems. Their disappointments. Their biggest wishes. Stress that your purpose is to improve the thing, and you can’t do it without them.

5. **Subject matter experts**

   Once in a great while, you work on a project tied to a deep field of knowledge, like say, accounting, or environmental planning, or architecture. When you do, you should absolutely talk to whomever the stakeholders have identify as their resident subject matter experts (SME).

   You probably won’t want to talk to them every day; they can easily overload you with facts and opinions that, while crazy fun to learn, will only slow you down and possibly send you off course.

But in appropriate doses, these people can be your biggest assets. They frequently know things the stakeholders don't and are happy to tell you how the stakeholders misinterpreted their expertise on prior occasions.

Often, the primary stakeholder for a product *is* the subject matter expert.

I've worked with a number of companies over the years started up by former professionals who saw the chance to turn an infuriating problem into a business. When this is the case, you and the primary stakeholder are going to become pretty close for the duration of the project. You'll be talking a lot.

Never assume you understand something completely when talking to a SME. Any person with a reasonable amount of expertise is going to be offended by this, and odds are, you really don't know as much as you think. Spend nearly 100% of your time asking questions and listening and restating to make sure you've heard

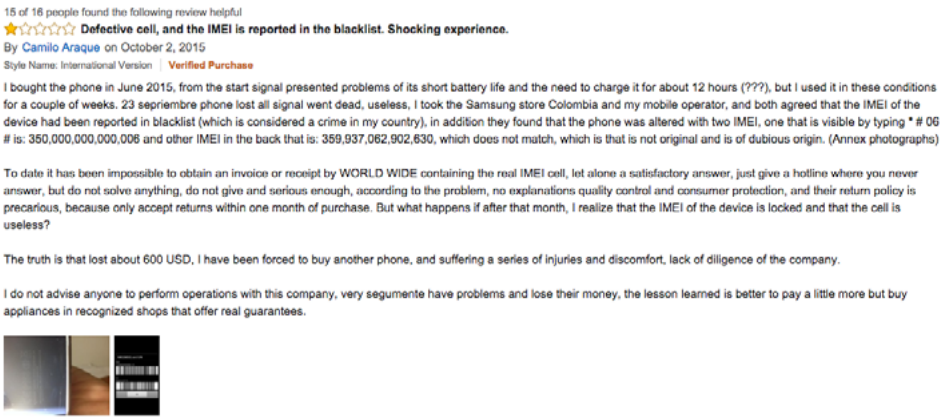
them correctly. When you come back to them with design ideas later on, you can map your ideas to their previous input.

Even if you've done your job well, they'll have things to nitpick. But eventually, you'll get to something they agree with.

6. **Users of competing products**

   Besides using competing products yourself, you can see what those products' other users have to say about it. Not necessarily by stalking them online and trying to either poach them or get them to say inflammatory things, but by reading their reviews.

   Buried inside their comments online are usually all kinds of hints about what they really have trouble with. Read between the lines.


15 of 16 people found the following review helpful

Defective cell, and the IMEI is reported in the blacklist. Shocking experience.

By Camilo Araque on October 2, 2015

Style Name: International Version | Verified Purchase

I bought the phone in June 2015, from the start signal presented problems of its short battery life and the need to charge it for about 12 hours (???), but I used it in these conditions for a couple of weeks. 23 septiembre phone lost all signal went dead, useless, I took the Samsung store Colombia and my mobile operator, and both agreed that the IMEI of the device had been reported in blacklist (which is considered a crime in my country), in addition they found that the phone was altered with two IMEI, one that is visible by typing * # 06 # is: 350,000,000,000,006 and other IMEI in the back that is: 359,937,062,902,630, which does not match, which is that is not original and is of dubious origin. (Annex photographs)

To date it has been impossible to obtain an invoice or receipt by WORLD WIDE containing the real IMEI cell, let alone a satisfactory answer, just give a hotline where you never answer, but do not solve anything, do not give and serious enough, according to the problem, no explanations quality control and consumer protection, and their return policy is precarious, because only accept returns within one month of purchase. But what happens if after that month, I realize that the IMEI of the device is locked and that the cell is useless?

The truth is that lost about 600 USD, I have been forced to buy another phone, and suffering a series of injuries and discomfort, lack of diligence of the company.

I do not advise anyone to perform operations with this company, very segumente have problems and lose their money, the lesson learned is better to pay a little more but buy appliances in recognized shops that offer real guarantees.

Photo credit: Amazon

7. **Data**

   If there's data to be had, it's time to do a little dance of joy.

   In person, people can lie. They'll give you all sorts of false self-assessments about their dealings with a product, including how they

supposedly do things, how easy or hard a task *supposedly* is to complete, and what they would *supposedly* do in a given situation. While informative and better than not talking to users at all, take their answers with a grain of salt.

Data gives you something to compare their answers to. If anything has been tracked on "the existing site," pore over it and learn what you can. You could see that users tend to stay on a particular screen for what seems like a very long time. You could discover that only a small percentage of users are getting through the sign-up process.

People can lie. Data allows you to better triangulate the truth.

Find out what's available, and compare the insights to other sources to create a clearer picture of the behavior of any existing users. Event-tracking tools like KISSMetrics and predictive behavior tools like MadKudu all help you arrive at the real version of the truth.

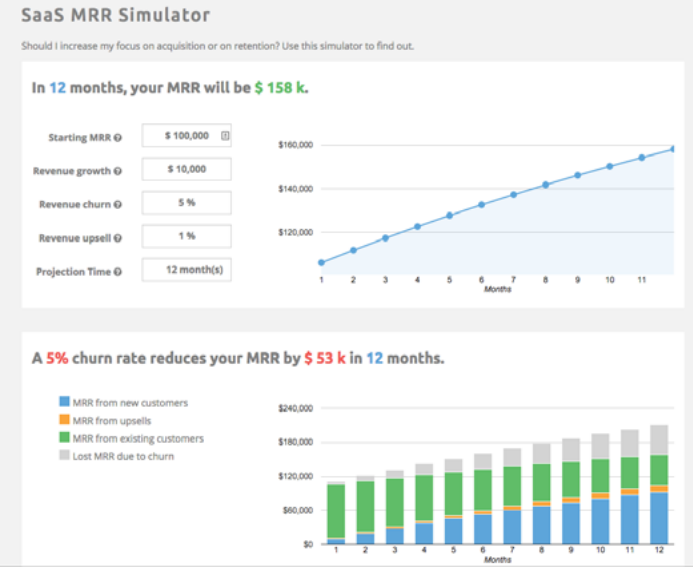


Photo credit: MadKudu

UXPin, for example, uses MadKudu to map out the behavior of users leading up to a purchase. Throughout the onboarding experience (and well afterwards), individual product events (like "Create a Prototype" or "Commented on Prototype") are also logged in KISSMetrics. The UX team can then combine the in-app data with user interviews and usability test results to triangulate where improvements are required for onboarding and post-purchase.

Putting It To Work: The UX Strategy Document

I've talked many times about what goes into a UX strategy document.

Just about everything you learn in the discovery phase here will feed into that one-page document (described in full detail in the next chapter):

- The product vision laid out by the primary stakeholders melds together with the thinking of most of these interviews to turn into a coherent vision statement for the long-term product design.
- The user interviews and research will help you define the situations in which the product is used (Who, What, When, Where, Why).
- Through all these stakeholder and user interviews, you'll also identify design aspirations that will help you improve the product compared to its competitors, compared to now, compared to what the stakeholders think is working well and what isn't.

- You'll also be able to identify specific data you can track over time to see how well the app is performing (also described in the book linked to above). Based on the existing data, you can project realistic success metrics for the design.

The important part is that you apply the information when creating the strategy document. No matter how much or as little as you get.

If there are no beta testers, no existing users, no existing site, no subject matter experts, and no data, it's going to be up to you to find competing products – relevant or related products – and talk with the primary stakeholders to form a strategy without all that. This happens a lot. It's nothing to panic about.

Conclusion

Invention doesn't always have a lot of evidence behind it. In these cases, the discovery phase can take as little as a day.

In other cases, you can have several weeks to do all this research. You can spend three or four weeks on a project before you write a single line of the strategy document.

But at the end, you'll have a UX strategy. And with that comes the guiding light for the rest of your project.

Defining the UX Strategy: Why, How, and What's Next

User experience is a strategic exercise. As in, a *planning* exercise. A strategy is a plan. You can't *design* how a person reacts to a product, what baggage they bring along with them on a given day, their biases, but you can plan for what you'd like to have happen.

You can *influence*.

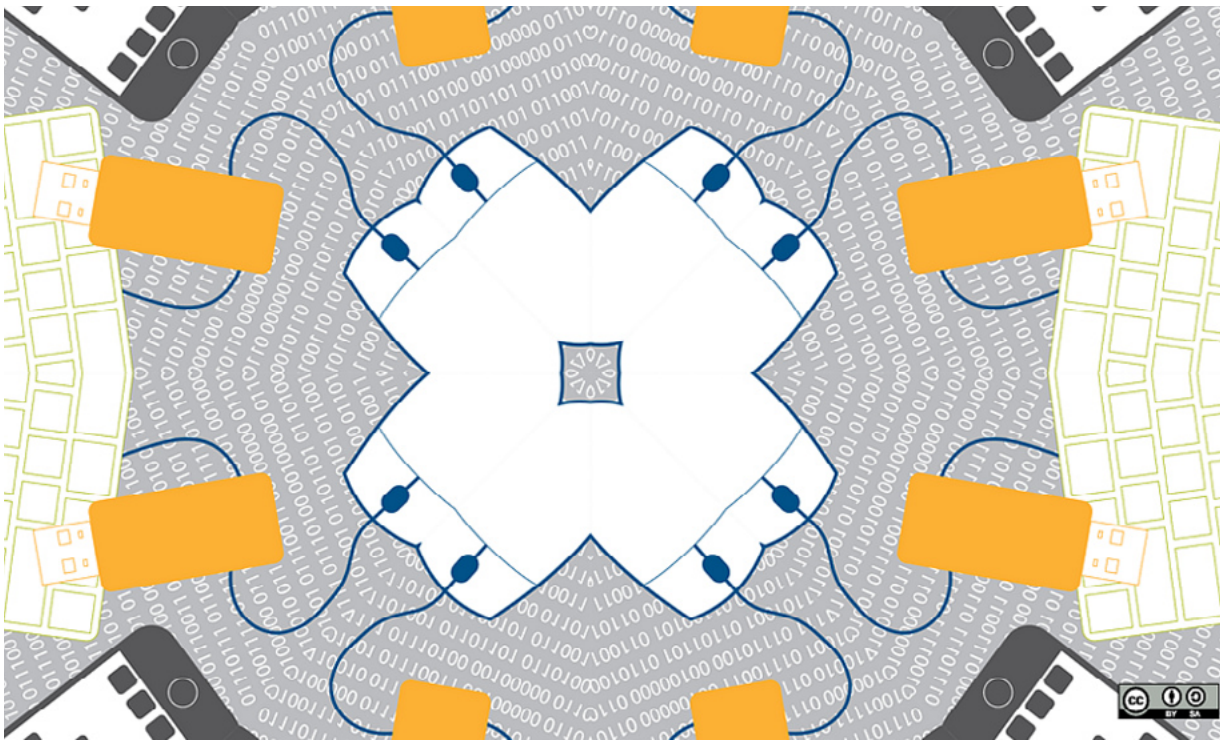


Photo credit: Open Source. Creative Commons.

Doing even that much is no small art. It requires taking the reins from the first phone call and becoming a person who leads the process rather than one who bends and breaks and does whatever the stakeholders demand. It requires doing your research. And then it requires developing a strategy (based on all the research you did at the beginning of the project). And making design decisions based on it. And making sure everyone sticks to it.

UX is a strategic exercise. Every strategic exercise is a planning exercise.

The best way to get there is to document it.

The one-page strategy doc is the most useful tool of all time. If you're not taking the time to create them, odds are, you're having a tough time getting your best work out the door.

Here's how to create one, why you do so before you lay down a single pixel, and what you do with it when you're done.

The Elements of UX Strategy

The first step is to take out your notepad and pencil.

Yes, a notepad, because the second you go digital, everyone's a critic. And yes, a pencil, because here will be multiple drafts.

Also, writing by hand makes you think differently. It slows you down, makes the words matter more (because you don't want the effort of writing them to be wasted), and makes the things you write more memorable for you. And if you need anything during a design process, it's an intensely held view of your strategy.

But don't worry. You won't be writing much. Strategy docs should be kept as short as you can make them (while still as long as they need to be to make the points clear). Hand over a 70-page strategy doc and you'll be the only person who ever reads it. To make the ideas spread, keep them short. Mine are rarely longer than what would fit on two sides of a single sheet of paper.

You can't design a person's reaction to a product. You can only influence.

Here's the sections you put on the paper.

1. **Vision**

   It's not a mission statement. It's a *vision* statement. It's a few overarching sentences about what you want the product to be.
   Here's a modified version of a vision statement from a project I worked on recently:

   Acme teaches site visitors about health insurance, encourages them to provide the information we need to give them a quote, and then helps those users through the screening process. The website's goal is to not only get the attention of potential customers, but to also earn their trust. Once they apply, one of Acme's agents guides them through the process.

   Note that this defines the scope and purpose of the product without getting specific about how the purpose will be achieved. This is what you want from a good vision statement. It describes the *intent* rather than the execution.

2. **Circumstances of Use**

   Next up is the who, what, when, where, and why of the product.

   I've never been a fan of traditional personas because they're heavy on fluff and light on action. The thing is, it doesn't matter so much who the users are as what they're doing.

A library staff, for example, can be composed of several very different kinds of people at different levels of tech comfort, all of whom need to be able to use the same information systems. Rather than focus on conditions specific to each type of person, focus on the situation instead.

Rather than tell a nice story about Jenny and her 2.5 kids and her nursing career, lay out on what circumstances hold true when a user encounters your product.

Photo credit: Oscar Insurance

Here's what it would look like for the same insurance site I just discussed:

- **Who:** Generally, people under 30–50 years of age who make over $50k/year, are in good health, and have low-risk occupations.
- **What:** Health insurance facts, policy quote, application, and agent assistance.
- **When:** Most likely as a result of seeing an ad, reading an article, or when someone in proximity to the user (friend, family mem-

ber, peer, friend of a friend, etc) suffers a disability (though, we hope to broaden the opportunities for education and promotion).

- **Where:** Online, on sites and in apps which appeal to high-income, high-education sectors of the American population.
- **Why:** A person learns that this type of health insurance exists and becomes curious about whether or not he needs it, how much it might cost, when it might benefit him, etc. Or, a person who does not yet know about disability insurance begins to wonder how to protect himself in such an event.

You can make tangible design decisions based on every point in this list. It's all action.

3. Design Criteria

Every part of a strategy doc is useful. But this is my favorite part.

When people say a website or app needs to be "fast, easy, and intuitive," my first reaction is usually something like, "And tell me how, exactly, you'll do that."

A company does not spend thousands of dollars in research time because it wants useless platitudes. Do not tell them the product needs to be fast. They all should be fast. Do not say it should be easy. They all should be easy. Do not say it should be intuitive.

Be specific.

Write design principles that are specific to your product. Then elaborate on them. Like these (also modified from another project, which was for the analytics section of a procurement app that needed to reveal purchasing trends over time):

"**Carve it up:** Let users slice available statistics in any way that might be helpful, so that analysis can be done in a timely manner.

Make it meaningful: Use color and graphs to create quick understandability and meaning.

Call out both trends and edges: Draw attention to both the outliers and trends so that stakeholders can discern what's average, what's best, what's worst, what's most extreme, etc."

Photo credit: Wikimedia. Creative Commons.

Useful design criteria are based on the research you've done for the project, and are written with the goal of differentiating the

product from the others, of improving upon what's already been done, and of setting a high bar.

Companies don't spend money on designers for platitudes. Be specific in your design recommendations.

For a another example of design criteria, we can look at the UXPin redesign process. In this case, the overall goal of the redesign was to reduce the learning curve for designers and non-designers. The UX design lead elaborated on details including design consistency, useful sources of inspiration, as well as the design architecture.

Here's what their design criteria looks like:

1. **No distractions** – Every redundant piece of the interface (lines, buttons, shadows, animations) is a source of distraction. As such, eliminate any redundancies to empower users' creativity with a well-architected and inspiring design tool.
2. **Design-centric** – The user's designs lie at the center of UXPin. Our interface must be unobtrusive to the point of transparency.
3. **Adaptive interface** – The interface should act according to the context of use. All the 'inactive' features should remain completely hidden until the user can use them (no inactive buttons and links!)
4. **Space** – The interface should create a peaceful atmosphere triggering user creativity. To shape this ambiance, we can leave generous space around every piece of interface. A clut-

tered interface is the source of stress that produces cortisol and adrenaline - both blocks our creative powers.

5. **Inspiration** – The design should inspire. As such, it shouldn't just be a derivative of design of other SaaS apps. We should strive for an original aesthetic inspired by the best products ever created (some of the sources of my inspiration: Fountain Pen Pilot Vanishing Point Matte Black, Harman Kardon Sound Stick speakers, Pro-ject record player, speakers DALI Zensor).

6. **Interactive consistency** – Interface components, icons, fonts should all be consistent to create predictable experience. Predictability improves learnability.

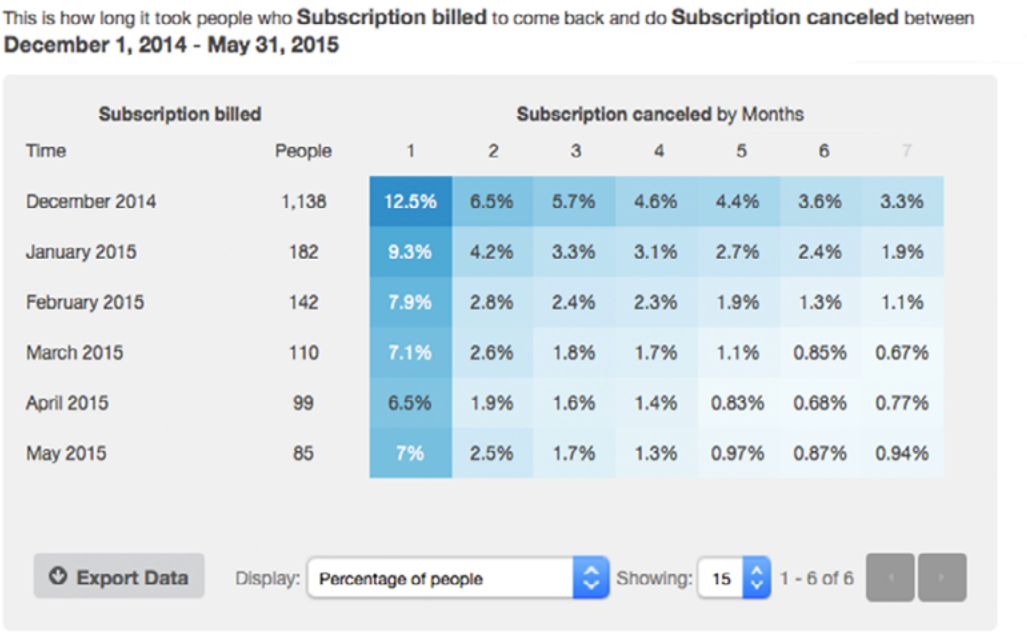
7. **Predictable architecture** – Architecture must be predictable and natural. Features should be placed in the right context to be easy to discover by new users. Example of predictable architecture: settings of canvas should be placed next to the canvas.

4. **Success Metrics**

At the tail end of all this note-writing, sharpen your pencil and put together a list of numbers you can change as a result of your design efforts.

Don't write down, "Get more traffic." Ask how much traffic. Ask what you want that traffic to do while it's hanging around on your website. Ask what percentage of people you want to sign up for your app three months from now as compared to today.

As Google Ventures suggests, all UX metrics fall into the 5 categories summarized with the acronym HEART: happiness, engagement, adoption, retention, and task success.



This is how long it took people who **Subscription billed** to come back and do **Subscription canceled** between **December 1, 2014 - May 31, 2015**

Subscription billed		Subscription canceled by Months						
Time	People	1	2	3	4	5	6	7
December 2014	1,138	12.5%	6.5%	5.7%	4.6%	4.4%	3.6%	3.3%
January 2015	182	9.3%	4.2%	3.3%	3.1%	2.7%	2.4%	1.9%
February 2015	142	7.9%	2.8%	2.4%	2.3%	1.9%	1.3%	1.1%
March 2015	110	7.1%	2.6%	1.8%	1.7%	1.1%	0.85%	0.67%
April 2015	99	6.5%	1.9%	1.6%	1.4%	0.83%	0.68%	0.77%
May 2015	85	7%	2.5%	1.7%	1.3%	0.97%	0.87%	0.94%

Export Data Display: Percentage of people Showing: 15 1 - 6 of 6

Photo credit: KISS Metrics

Focus on a small set of core metrics, then be as specific as possible. (Pro tip: Since numbers can only be either increased or decreased, you can group them like I have here).

Increase

- ***Traffic**: The number of people who access the site to decide whether or not to move into the screening process in the first place. With regard to disability insurance, education equals promotion; earning more customers requires making more people aware of its existence.*

- ***Pursuable leads**: The percentage of people who make it through the website screening who are in fact strong candidates for ap-*

proval. (This will lead to a higher percentage of policy conversions, which is the ultimate business goal.)

Decrease

- ***Knockouts**: The number of ways a potential customer is shut out of the process due to an exception which might otherwise not disqualify them from approval. (We can reduce this by doing more to educate the right people in the first place, so that more of the people who go through the screening questions are in fact people who might be good candidates.)*

This list is what all your design efforts come down to. All the research, all the pixel-pushing, all the negotiating, all the politicking, all the development work – none of it matters unless your design succeeds in affecting these numbers.

These are the numbers the stakeholders care about. Without these constraints, you're not doing real design work.

Now What?

When you're happy with your own first draft – and that may take a few tries – type it up in digital form and cloud it over to your stakeholders.

Do not just hand it off for review. Call them up, pull them into the room, whatever, and present it to them. This gives you the chance to guide rather than defend.

As you do, tell them you want their feedback. Tell them you've based all this on the research, which they've all heard about and read by now, but that you want to be sure you've covered all the thinking. You want their input on anything you've missed. While it's possible for an individual to be better than a team, even the best individual needs sanity checks along the way.

You'll make a few tweaks during this process. It's okay. That's what makes the strategy good.

tweet this

Without constraints, you aren't designing. You're decorating.

When you're done and you've all agreed, print that thing up on posters and put it into the project management system and email it to everyone and talk about it every single day.

Share it. Everywhere. All the time. Every single person on the team needs to live and die by the strategy document.

Here's why:

- It empowers the whole team: When every person knows the goals, every person can make decisions that serve those goals.
- It distributes the UX workload: When everyone on the team can make good decisions, you don't have to. They'll start coming to you with answers instead of questions.
- It produces good ideas: You'll be amazed at the inspiration a good strategy document generates. Good ideas will come flying at you from all directions. All you have to do then is make sure the ideas serve the strategy. (Ask questions until you're sure they do.)
- It kills bad ideas: When debates kick up (and they always do), you can point to the strategy document. If an idea doesn't hold up, the debate is over. If it's questionable, you can hold off.

Occasionally, you'll learn new information during the course of the project, and you'll need to revise the strategy document a bit. Like when a competitor announces a new feature that renders one of your brilliant design criterion useless.

Let it evolve. It's meant to. Strategy isn't a stone carving. Things change too quickly and too often on the web for that to be true. Let it evolve. Revise it, share it again, keep evangelizing it in every room you walk into.

The good ideas will come. The bad ideas will fade. The whole team will become UX advocates.

And that's why you do it.

UX strategy isn't stone carving. Let it evolve, share it again, and keep evangelizing.

Validating the UX Strategy

It's a step a lot of people miss. You may have painstakingly done the research and developed a fine strategy document, but that doesn't mean you can just run off and start putting it to work. You need feedback as much as anyone.

And also, the people who contributed to your research would love to know you've been paying attention. They'd love to know you're going to make a solid attempt at solving their problems.

Photo credit: Quantcast

The way to do this is to pull the crumpled strategy doc back out of your pocket and bring it to the people you interviewed previously.

That, and to test out a few ideas to make sure they live up to your ambitions. That, and to see how the subject matter experts who know more than you feel about it.

You've been in charge since the beginning. Now's the time to capitalize on that and go prove your strategy is up to snuff while, at the same time, leading everyone down your path once more.

Finding The Right Time

The best time to validate your strategy is the second you finish a solid enough draft to show to people without a disclaimer attached. You don't want to say, "It's a work in progress." You want to say, "We crafted this based on a lot of different factors, including the input you gave us."

There's a reason. Bear with me.

When you present design deliverables, one of the advantages of lo-fi work is that it elicits better feedback. When people see rough sketches, they think you're not so invested in what you're showing them. It's just a sketch. This helps them feel like they can have opinions and speak freely.

Conversely, the higher the fidelity, the more constrained people tend to feel. They think you've invested a lot of time and are nearly done, and therefore are less likely to offer sweeping insights. Instead, they'll

nitpick. (This is, of course, assuming you agreed on the design direction prior to this point.) You'll get minor tweaks, not bold reactions.

Photo credit: Fairhead Creative

For wireframes and prototypes, this is great. At least for a while – until agreement builds and you can refine the work.

For strategy documents, you don't want strong reactions. Your strategy doc is based on a lot more than a single person's input. It's derived from data, stakeholder vision, competitive analysis, and from your *own* vision. And all of that has had the benefit of your experience, knowledge, skill, and talent as a UX professional to translate it into a strong strategy.

In other words, you didn't just make it all up.

And here's the part where I make a drumming metaphor. I used to be part of a group that played a song in which one particular note, in an unusual place, was a rest. It was silent. As in, not a single person was supposed to make a sound during that note. During performances, maybe half the time, *someone* would hit a drum during that rest. When it happened, everyone else in the group could tell whether or not the person meant to hit it. We could tell by the strength of the hit.

Photo credit: Uzume Taiko. Creative Commons.

A solid, sharp hit meant the person very much intended to hit the drum. He was absolutely sure he was supposed to hit that note, and he was going to beat the life out of that drum and shove that sound out into the audience and across the street where it belonged.

A weak hit meant the drummer was unsure. It meant he'd swung half-heartedly, or tried to stop himself at the last second. He'd held back. "Well," we'd say, "if you're going to make a mistake, hit it like you mean it."

When you're presenting a strategy document, you'd better mean it.

Remember, a big part of your job as the UX person is to lead. An unsure, hesitant UX professional is no leader. You want people to know you've heard them, but also walk away with the confidence that you are taking charge. *We will be making a better product. Rest assured.*

A politician doesn't ask questions from the stump. She lays out policy. She qualifies herself. She tells anecdotes to make a point. She crescendoes to a swell of applause.

If your strategy contained a horrible mistake, you'd have found about it before now. You presented your findings to the stakeholders, and they collaborated on and approved the strategy right along with you. There's no mistake. And if there is, you made it together. You have a team standing behind you.

When it's time to go back to the people you talked to during the research phase, bring them a structured, well-written, coherent strategy that lays out the product vision, its design criteria, and its success metrics, and step through it with confidence.

Hit it like you mean it.

Back To the Users

When you go back to share your strategy with the users who initially gave you input, bring your notes from those initial interviews with you.

- Thank them again for the time they generously provided.
- Confidently review your strategy document. *This is what the product will be. These are the principles we will live by to achieve that. And this is a list of metrics we'll use to demonstrate it. What do you think*?
- Take notes, or invite another researcher or designer along to act as the scribe.
- Then, one by one, remind them of a principle concern they had in your prior discussion, and show them something in the design that either deals with it or eliminates it altogether.
- If you have some, show them a few of your other favorite highlights, speaking exclusively to how the ideas will improve the product. Ask for their reactions. Let them react.
- Take more notes.

This process is not about "building consensus," which ends up being a fancy phrase for "compromise" after you start bending to everyone's demands. No. This is about making sure you heard everyone correctly and that your ideas will make their product experiences better.

Photo credit: GD Steam. Creative Commons.

You want their input. You want their reactions. You want to know that what you're doing is something they can get behind. But you also need for them to believe in you. After you go live, you can tweak and rethink things all you want. You'll do that based on data – actual numbers reflecting actual usage behavior. That's later. For now, you want to focus on leading a pack of people behind a unified vision everyone supports and wants to subscribe to.

Do this well and the users you interviewed will become advocates. Hold back and they'll become mutants on the attack.

Hit it like you mean it.

Inviting Scrutiny From SMEs

Remember the subject matter experts you spoke to during the research and discovery phase?

You'll want to let them take a look at the strategy as well. And any early designs that show it off. The SMEs, by definition, know more about the subject matter at hand than you do, or probably ever will. If anyone can poke holes in a design strategy meant to improve upon age-old processes or disrupt a status quo industry, it's them.

Your SMEs could be lawyers, accountants, power users, or someone else. Whoever they are, asking them to scrutinize your strategy and designs will accomplish two big things for you:

1. It will let you vet your strategy through one of the strongest resources you have.
2. It will keep your SMEs talking, and feeling respected, and feeling involved in the process, which will later turn *them* into advocates as well.

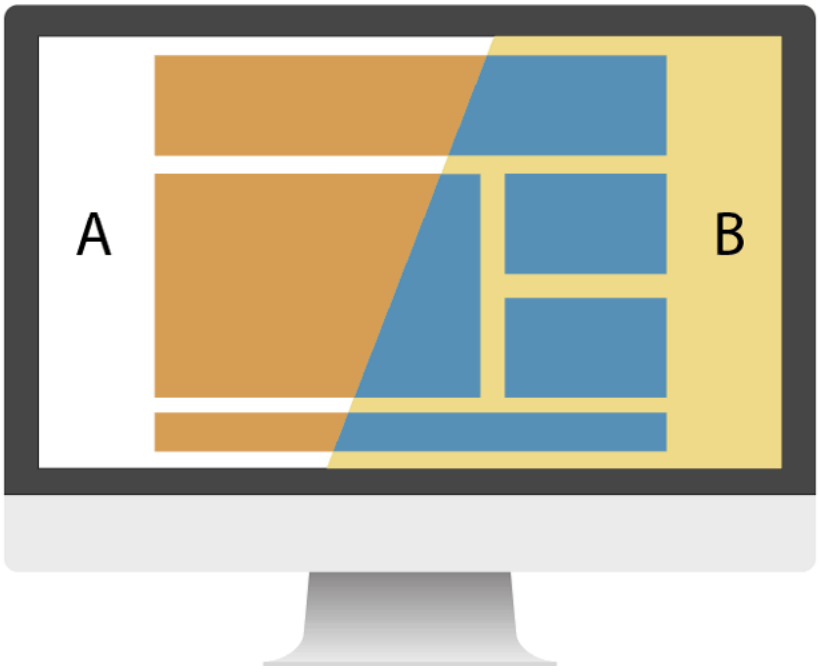
The Truth Is Out There

There is one major alternative to consider in all this. Namely, when your product is already live and running.

You still can't forego the strategy doc. You should still do the research and define the strategy – for every overhaul, for every feature. Your improvements should be based on a lot more than the data that comes from a functioning website.

But if you do have a live, functioning site, you can validate ideas in the same way: live.

Assuming you have a decent amount of traffic, you can run A/B tests. You can track usage patterns and analyze the data. You can learn how your strategy actually pans out once it's gone beyond throwaway design deliverables.



And of course, you can do this on purpose. You can stop dealing in hypotheticals and start getting very real about whether or not your strategy is the right one. You can flip the switch on a new feature, or a design aesthetic, or an entire app. And you can get real numbers back.

Increased risk, for sure, but there is arguably no better way to validate a strategy than to test it out on real people in real situations by launching the design based on it. Yes, you should mitigate that risk as much as you reasonably can beforehand, by doing all the things I've mentioned already, but don't get yourself stuck in analysis. Launch the thing. If it doesn't work, revise.

Don't marry yourself to any one idea. It's all an experiment. Until you get real data out of it, it's all hypothetical.

Launch it. If it doesn't work, revise it. Don't get married to one idea.

Designing UX for Momentum

With a strong UX strategy document in place, it's time to start designing the core experience.

At the very beginning of literally every project, two things set a major constraint on what will happen throughout the rest of the UX lifecycle: time and money.

These two variables change for nearly every project. Sometimes you get one. Sometimes you get the other. You rarely get very much of either.

If you like to have three weeks of lead time for kickoff and discovery, time constraints will test you. If you like thorough usability testing

sessions, money constraints will leave you hopeless. If you're addicted to process, both time *and* money are your nightmare.

Consistently good designers are not those who stick to a repeatable process. Time and money beat them down every time.

Good designers are the ones who value tools over process, and know how to pick which ones to use to keep things moving. They're also the ones who know to work with stakeholders rather than against them. They stay in constant communication, never producing a document that won't go to good use.

Good designers, in other words, are the ones who know how to adapt to the situation.

Collaboration: All Day, Every Day

Before we get into this, consider how frequently to review your work with stakeholders.

It used to be common for a design team to do its work in a mysterious vacuum:

1. The designers would go off into a cave for three weeks at a stretch and produce a bunch of work, then pitch a collection of concepts to the client, who would like elements of each one.

2. The designers would then go hide away again to combine those elements and present a new, singular version. This version would invariably highlight all that's terrible about combining different concepts into one.

3. For some ungodly reason, the clients would like many things about the new version. They'd also point out tons of problems with it, and say, "I think we just need to tweak a few things and we'll have it!"

4. The designers would go off and improve on all the problems until the design became something acceptable to the client.

Only it wouldn't be anywhere near acceptable. It would be a Frankendesign. It would suck for users, it would make the design team look bad, and it would fail to do what the client needed the design to achieve.

Photo credit: Jim Pennucci. Creative Commons.

When you're up against time and money – and you always are – the key is to keep talking:

- Post every version of every document and design you create. Talk through it with the stakeholders, then let them think about it while you make progress on another document or design.
- If it's a minor revision containing only things you've already discussed, you may not need to talk it over. Instead, include a description of what's changed with your posted file. But err on the side of explaining your design decisions.

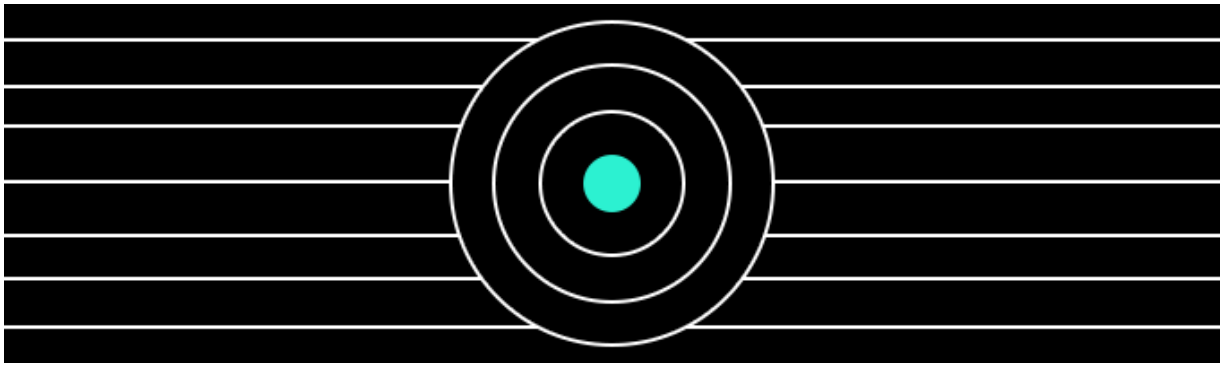
Do this because it means only creating documents you'll use. Do it because it means only making revisions that count. Do this because it means keeping everyone in agreement so you never end up with a stack of revisions at the end of the project when you have the least time to complete them.

Good designers aren't slaves to tools or process. They adapt depending on constraints.

Designing the Core

No matter what you're working on, whether an entire app born from scratch or a single feature added to a mature product, start with the strategy document we described in the previous chapter. It always sounds like a waste of time and effort on fast projects, but when you skip it, you *always* find yourself remembering why you should have created one.

Here's why: With a strategy doc in place, other people can make decisions that support it. Which means you don't have to design every detail.



You, then, can design the *core* of the product.

You can focus on perfecting the most complicated and essential task flows, and the ones that spell out the interaction language for everything else. Other people – other designers on the team, future hires, pure visual designers, etc. – can design more of the details as needed. As long as the core is established, all kinds of people can base new decisions on it. This includes developers, who can simply mimic the design standards you've laid out to implement new features.

Focus on the core of the product, and let your strategy document guide the way for other people to fill in the blanks.

Designing At High Speed

There's endless information out there about design deliverables.

Most have purpose. A few appear to be nothing more than ways for freelancers to make more money. Others are simply great ways to get work on the page without spending a lot of time and money.

Try them all. Over time, you'll decide for yourself which ones help the project and which don't.

1. **Sketches**

   By far the quickest and cheapest version of a design is the one you do on a whiteboard, a piece of paper, a napkin. It's the throwaway sketch you can erase and redo in two minutes flat, and which shows the least amount of detail.

   This is a great way to start.

   It lets you sit next to someone with decision-making power and input, and draw something rough that sets a basic direction. The designs can get increasingly complicated and refined from there, but sketches get you agreement with hardly any investment.

Anytime you can, get the decision-making team in front of a white-board.

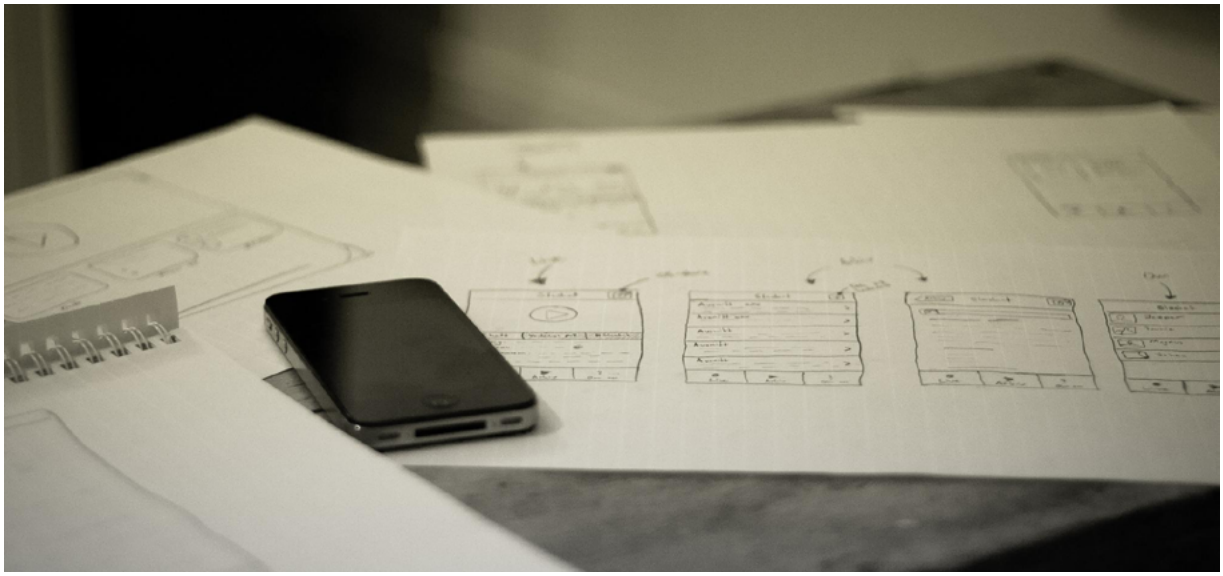


Photo credit: John Keane. Creative Commons.

If you're working remotely (or a stakeholder is out of the office), you can sketch your ideas, photograph them, and send them over so you can still get agreement before you go any further. If you can get a hold of a USB camera, you could even run a remote sketching exercise.

2. Lo-fi wireframes

Lo-fi wireframes are a solid option when you want a bit more detail than a sketch, but still want to work quickly to lay out a basic direction. Use your usual wireframing tools, but stick to the rudimentary – things like prefab stencils, basic shapes and notes.

The key is to do as little as possible. If you have to show what a dropdown menu will include, do so. But if the actual copy can be staved off for a minute, all the better.

- Focus on the layout, the hierarchy, and the basic purpose of the page. Leave out the details.

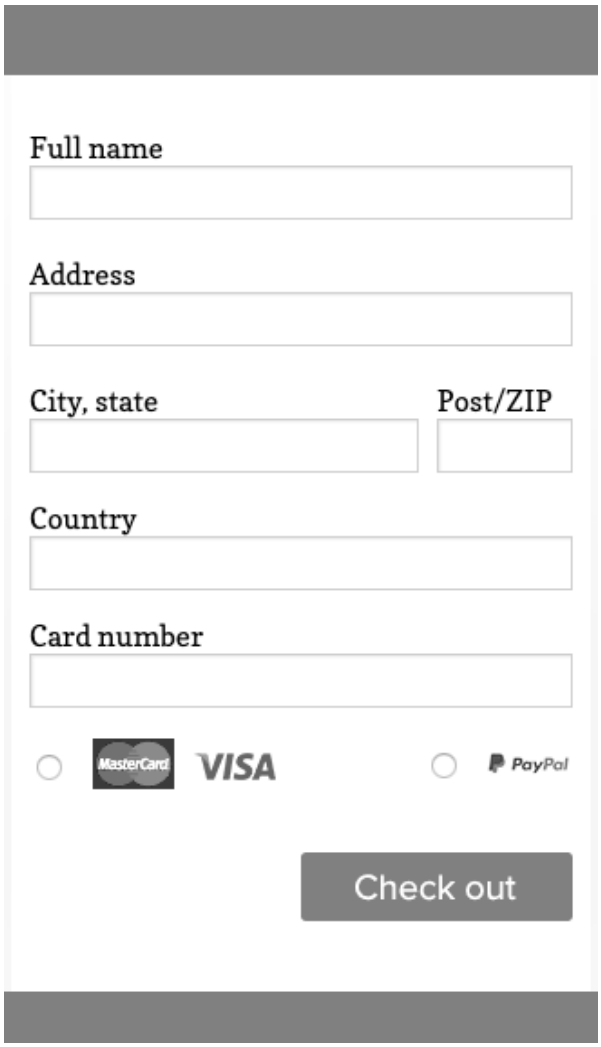


Photo credit: Designed by Ben Gremillion of UXPin

- Only use color and proportion in your lo-fi designs to show a UI or visual designer where you want to draw the user's eye, and where visual emphasis needs to be placed. For example, if the main objective of a screen ends with clicking the button at the bottom of it, emphasize the button.

Later on, you'll explain the purpose of this emphasis to the designer, who will then sort out the best way to bring it to life.

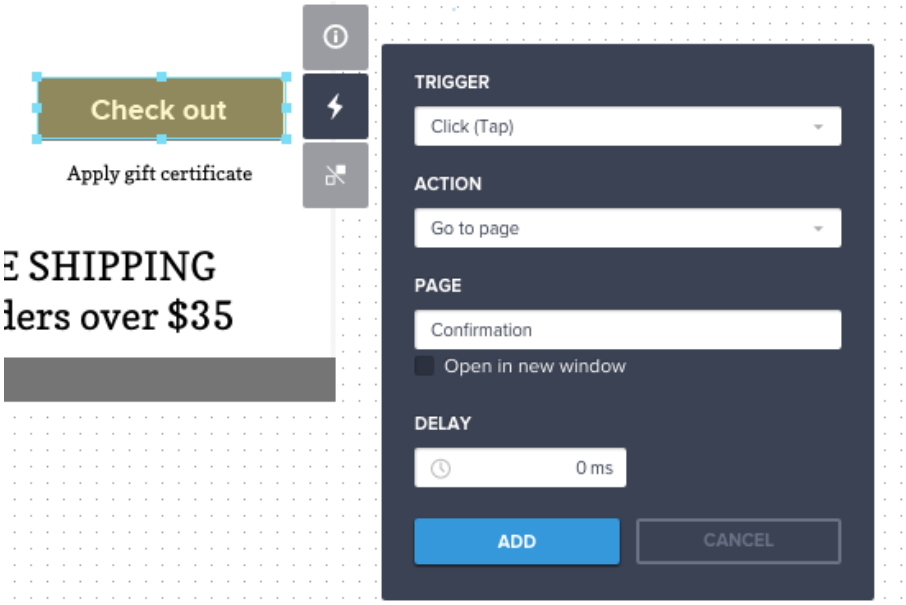
3. Click-through Prototypes

The absolute best way to make sure you're thinking through the design, and to show someone else how it might work, is to prototype it. Problem is, you don't want to spend a lot of time on throwaway documents.

The solution, then, is to turn your lo-fi wireframe into a clickable prototype. Only prototype the essentials. The beating heart of the app. The parts every user must be able to understand and use and feel good about in order for your team to call itself successful.

Most wireframing tools (including UXPin) offer the option to assign click actions to elements on the screen. And most stencil kits offer some kind of mouse-hand graphic. Put both of these to work.

For example, select the "Check out button" you just designed, then assign a click action to it that links to the payment confirmation page.



Then add a hand icon next to each action you assign and make it clickable as well. When stakeholders go through the prototype, the hand icons will indicate to them what you want them to click. Just instruct the person to follow the hand icons to see how the thing will work.

For usability tests, *remove* the hand icons to see what participants choose to click when they have no guidance.

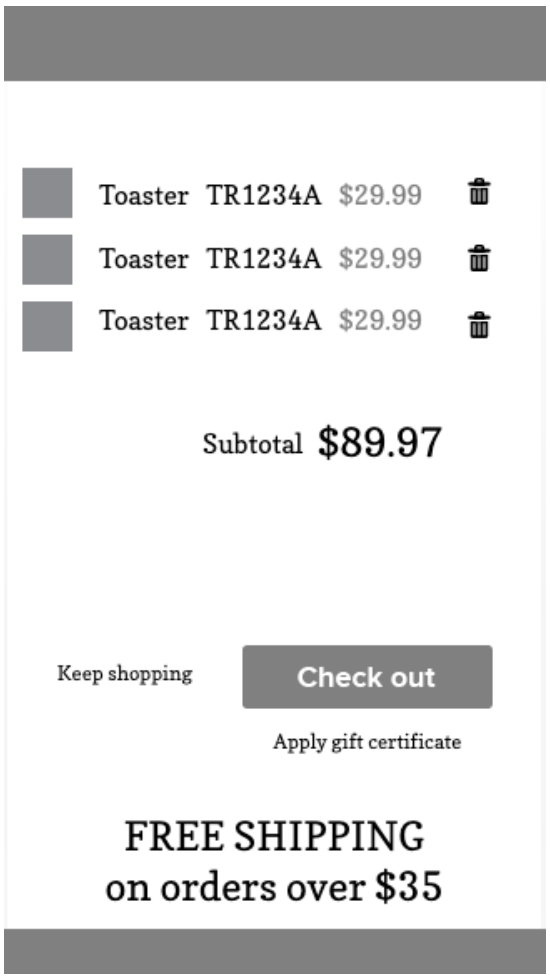


Photo credit: Designed by Ben Gremillion of UXPin

4. **(Unusable) Code**

   I don't recommend this when time is tight unless you're a *really fast* front-end coder.

If you do prefer to prototype in code, and can do it quickly (and I mean *quickly*), expect to rewrite the code later on. Prototype code is usually hard to scale and filled with problems. Don't use it. Prototype code is throwaway code.

All that said, it's certainly an option. But code will almost invariably be slower than a click-through prototype.

Just In Time Discussions

With your strategy document thoroughly circulated to the team, it's safer to post designs to everyone who needs to see them, but you still shouldn't do this until after your decision-making team is in agreement.

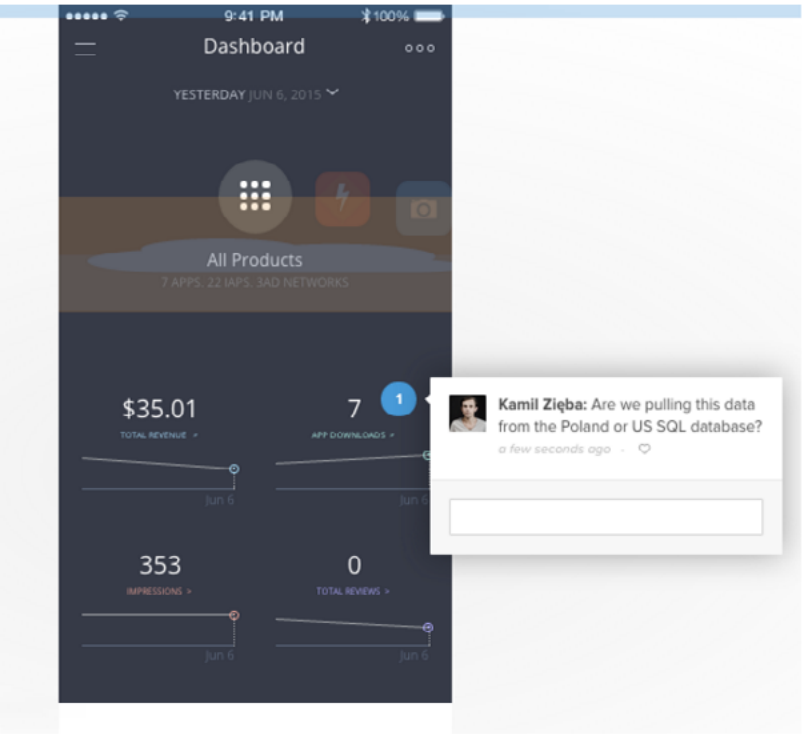


Photo credit: UXPin

Post one version of one click-through prototype at a time until the core set of decision-makers agrees, then show the designs to anyone else who can affect the design. A programmer, for example, will need to chime in about any technical constraints.

This is the other major advantage of quick, lo-fi design work: it means you can revise it without burning up hours.

Post, Discuss, Revise

After posting each version of design, walk through the changes with whoever is reviewing it, then work on something else while they absorb it and come back with questions or comments.

Revise it, post a new version, wait. Over and over.

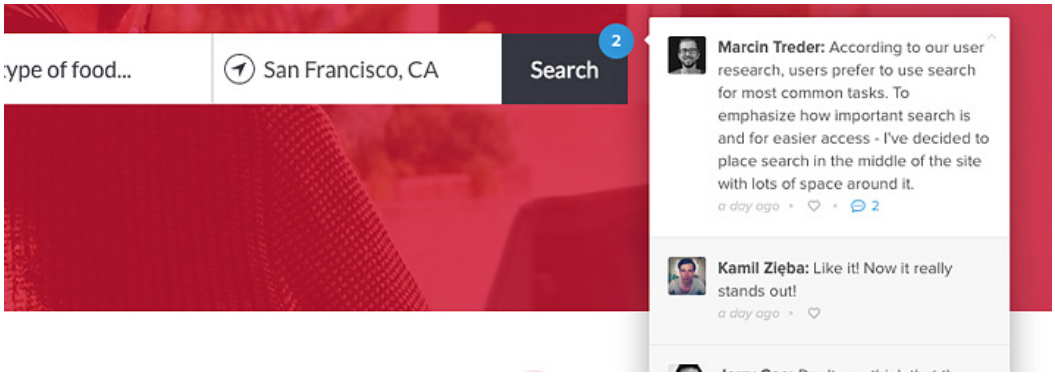


Photo credit: UXPin

This lets you work quickly, iteratively, and collaboratively. It also keeps your stakeholders involved at every step, so you're able to get from beginning to end in one move. (Leave them *out* of the process and you end up with a stack of revision notes.)

A Revised Definition of Usability Testing

Once you've vetted your prototype, it's time to test your core design concepts. This will help you iron out the actual pixels-on-screen details of how your strategy will be implemented.

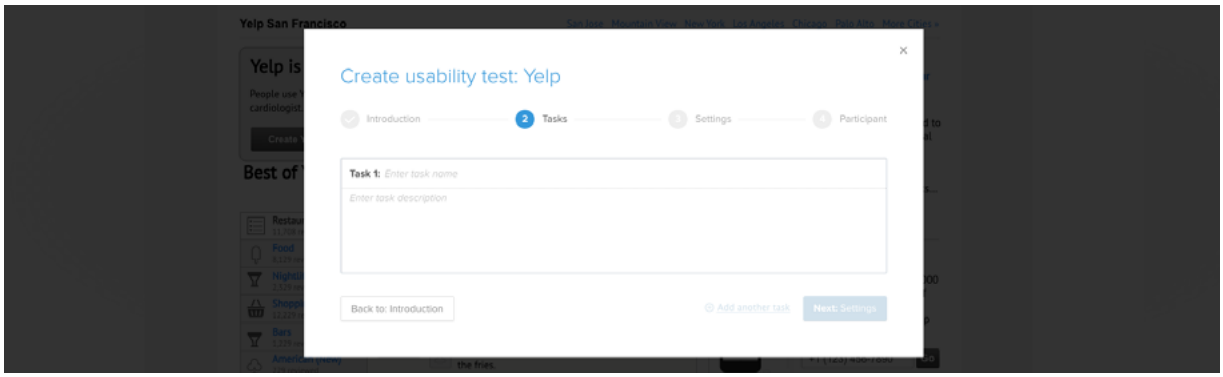
Just don't do it like you've done it before – in that expensive lab, testing the same design on five people, writing a lengthy report, all that. Don't do that. Save your breath.

Instead, invite five participants to meet you someplace for some quick usability testing. (And remember, users who are invested in the product will persevere far more than users who couldn't care less about it.)

- Bring the clickable lo-fi prototype and source files with you to the test sessions.
- Leave 30 minutes between the first and second sessions, as well as the second and third.
- Leave 15 minutes between the third and fourth, and fourth and fifth.
- In the time between each session, *revise the design*.

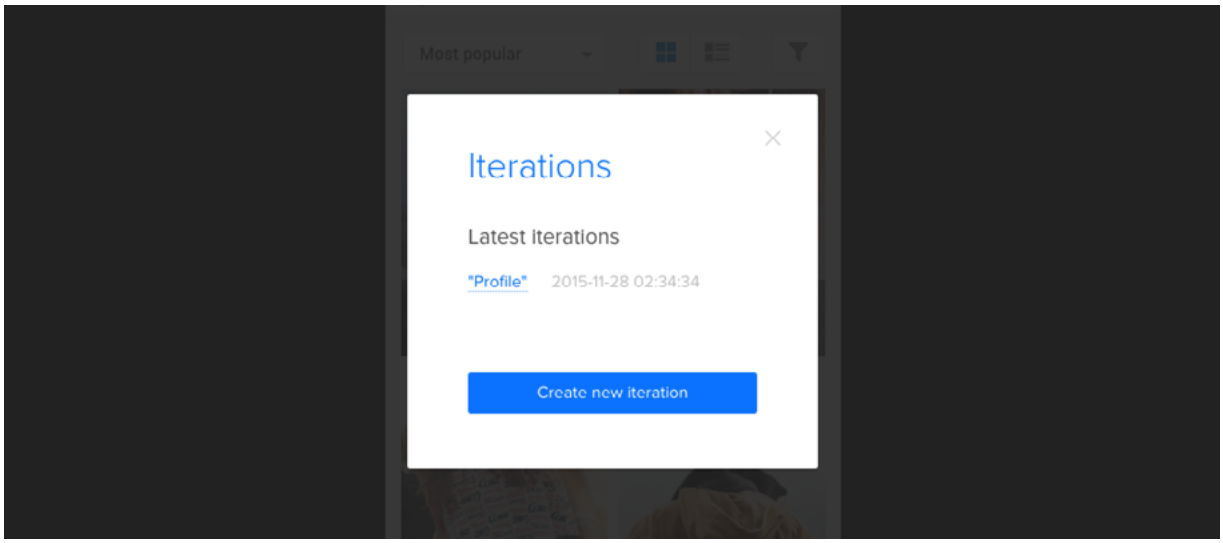
Don't revise every detail. Revise what you know obviously should be designed based on the session. Things the person pointed out that made you hit your head for not noticing them already. Things you suddenly think could be way better if only you did *this*. A tweak you want to try out on the off-chance it's a better solution.

If you're using a specialized prototyping tool, you'll find it's quite simple to test and iterate your designs. For example, if you happen to use UXPin, you can start a usability testing session, set the core tasks, then record the session. To iterate between sessions, just click "Create New Iteration".



By the end of the day, you won't need any more testing.

This isn't usability testing, so much. It's iterative design driven by participant feedback. But that doesn't roll off the tongue so well.



I call it "Iterative Usability Testing."

This is how you improve and validate a design.

Going Graphic

Once you've validated the rough prototype and the UX decision makers and lead developer(s) agree with findings, you can pull in the UI or visual designer (unless you're the one doing that job). Highlight the following:

- You didn't design the wireframes to dictate anything. You designed them to communicate priority, relevance, purpose, hierarchy, and so on.
- When first working with a visual designer, review the 1-page strategy document (especially the Design Criteria section). The discussion will provide the right balance between direction and creative freedom.
- The visual designer has liberty to vastly improve on the interaction model as he or she sees fit. This person can choose the styles, the color palette, the fonts, and anything else that will bring your concept to a boil.
- As the visual designer posts refined versions of the work, you'll review them to ensure they meet the objectives of the page. If there are potential usability issues, you'll talk through ways to improve on it.

If you are also the visual designer, find someone else to play this role for you. Someone who can be objective and ask questions.

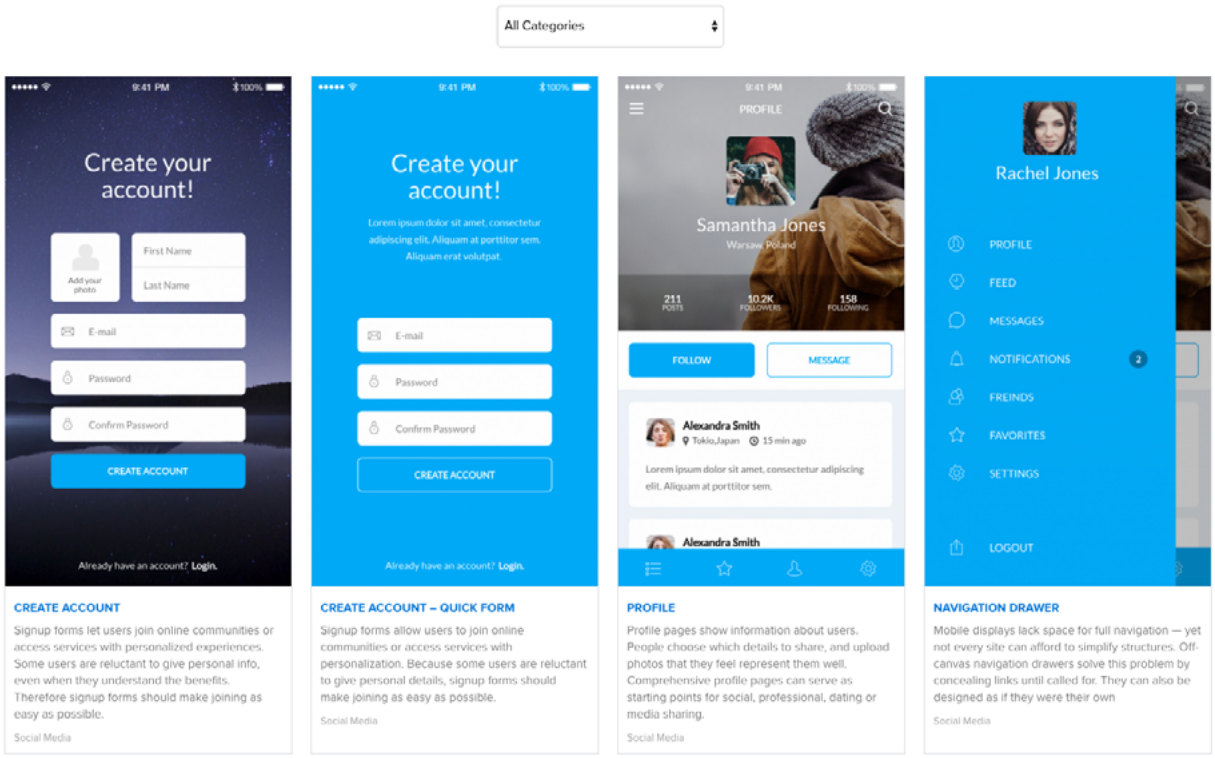


Photo credit: Patterns

If you aren't, *let the designer be the designer*. Your job is UX – as in, the scope, purpose, desirability, function, layout, meaning, and all that. This is a complicated enough job and hard enough to do quickly without also trying to be an objective visual designer.

Use these tools to adapt to the constraints of the day, and you'll put yourself in a prime position to generate great work in a timely manner every time.

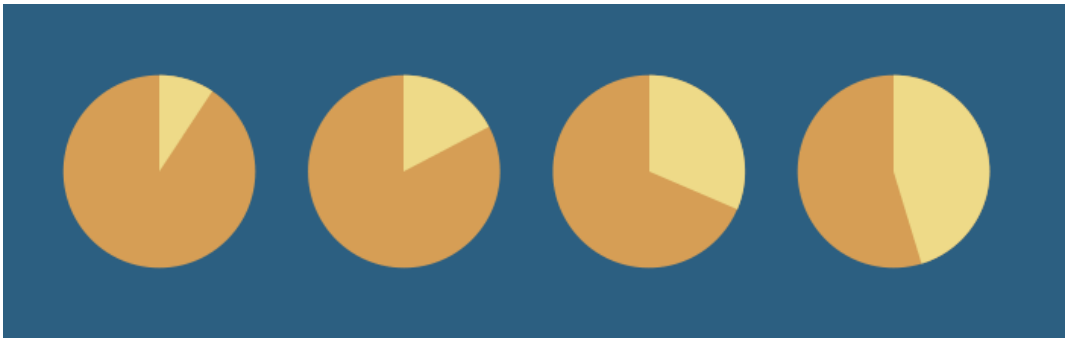
Informing UX Strategy With Data

Executives live by the idea that data will help them understand, and predict, and plan. Data will help them see how decisions map to outcomes, and how outcomes can be influenced by this change or that.

For designers, data may seem like a non-issue. Our jobs are to care about people and design and to stand on a tightrope between the two.

Of course, the executives are right.

Numbers demonstrate truth. They give us evidence to form arguments. They help us spot the giant gap between what we think we've put on to those screens and what we've actually put on those screens. They help us know whether or not our intention is translating into results.



We need data to ward off bad ideas, to influence decisions, to show people, one way or the other, that it doesn't matter what we think or say or believe, there is evidence to either prove or deny all of that.

Big Brother is an ugly idea and always has been. But to improve a product, we need numbers to know how people are acting. What decisions they're making while using the product. Where they get stuck. Where they leap ahead with false understanding or misinformation. There's an upside to being Big Brother.

Data demonstrates truth. It provides evidence for your design decisions.

What to Track

As I've said, I add a list of success metrics to every strategy document I create. Hopefully, you do too.

Start there.

Every trackable number can either be increased or decreased:

- We can increase the percentage of people who complete a signup form.
- We can decrease the percentage of people who abandon the form halfway through, during that weird step where we ask for their phone number for no apparent reason.

- We can increase the percentage of people who share a page through social media.
- We can decrease the percentage of people who offer negative feedback in the optional survey you send out later on.

Refocus on the core metrics you initially defined, and don't add any new ones that won't help you make decisions.

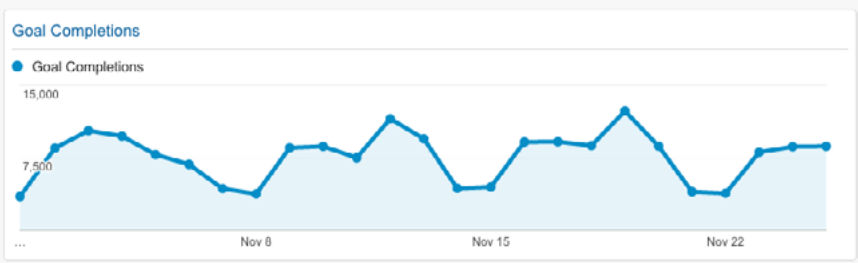


Photo credit: Google Analytics

(Note my repeated use of the word "percentage." The number of people doesn't matter so much as the percentage of the whole audience. It doesn't mean anything when 42,589 people stop using the product after three days. It means something when 42,589 people make up 37% of the audience.)

You have Google Analytics, Kissmetrics, Crazy Egg, Optimizely, and many other tools to pick up for this purpose. Each has their own benefits, their distinct focuses.

Google Analytics excels in presenting exhaustive aggregated data in any segment and dimension possible, but also has the steepest learning curve. Kissmetrics specializes in event tracking and distilling data into quick dashboards and reports, but might lack power if you prefer

"driving manual". Crazy Egg is great for tracking click locations on a screen, and Optimizely is fantastic for A/B testing.

Do the research and choose which will serve you best. Each one will help you see when the numbers go up, and when they go down.

Analyzing the Right Numbers

This is not to say it's that simple. Metrics only hold meaning in context of other metrics.

When traffic's all you want, page views are how you measure it. But what good is a page view if it fails to lead to loyalty? Sure, you get your ad dollar, but you have to keep earning it every single day with a constant stream of new tactics. You become the Sisyphus of content creation and marketing.

A number alone is a number without meaning.

To make meaning, you pit one metric against the other. You triangulate.

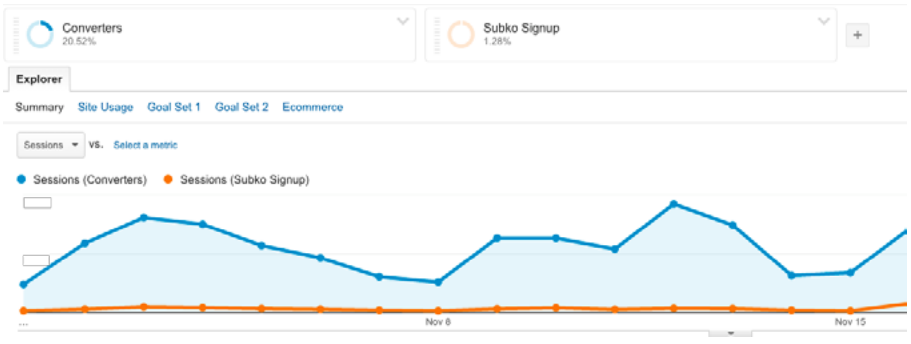


Photo credit: Google Analytics

When your percentage of signups increases, something else happens as a result. Maybe you're grabbing more conversions but getting less *qualified* conversions – the kind who are more likely to leave tomorrow. Maybe you're getting more people past that sticky abandonment point, but you're getting less applicable information from them during registration and now you have to find another way to coax it out of them or else they don't spend as much money.

If all you want is more traffic, a week-long marketing campaign full of link-bait and prizes will get you that much. For the traffic to help you keep your doors open, it has to turn into something more purposeful.

Numbers don't stand alone. Look at them together, over time, as a unit, as a complete data set that form a large picture of how people really behave when they discover your site, become regular users, leave after two minutes, visit infrequently, tell their friends, never return, or become die-hard loyalists.

A number alone means nothing. Triangulate your metrics before making design decisions.

When to Revise

I used to work for this big software company that liked to update its homepage on a regular basis for no real reason (which is to say it was run by the marketing department). When they did, they'd gather in a room together and watch a real-time graph roll by showing how various aspects of the page were performing as compared to the version they'd just replaced.

When the numbers dropped – and this happened a lot – they would panic and roll the changes back. The homepage, as you might guess, didn't get updated as often as they would have liked.

Photo credit: Ryan Ritchie. Creative Commons.

This is the wrong way to use data as validation for revision.

One of my favorite stories to tell is about a time I worked with Automattic on the WordPress.com homepage, suggesting they revise the layout to reduce the number of conversion points and to strengthen them instead.

They launched an A/B test which ran for a week. The first day was dicey. The numbers went a little up, then a little down. At the end of the week, the new customer conversion rate increased to 25%. This is significantly higher than it is for most other sites, even the great ones. If Automattic had reverted the design changes based on the dodgy performance of the first day, they'd have never seen the effect they earned a week later and kept for months afterward.

- When you can, run A/B tests to validate design decisions rather than an all-at-once update.
- After you roll out a design change, let the dust settle for a minute. See what happens to the numbers over at least the next 7 days. Not every negative effect demands reactionary change.

Conversion funnels, for example, are made up of multiple points. The "Sign Up" button. The part where you ask for the user's email address. The part where you have them create a username and password. The part where they check their email to confirm registration (not great, but common). Any other step you cram into the process.

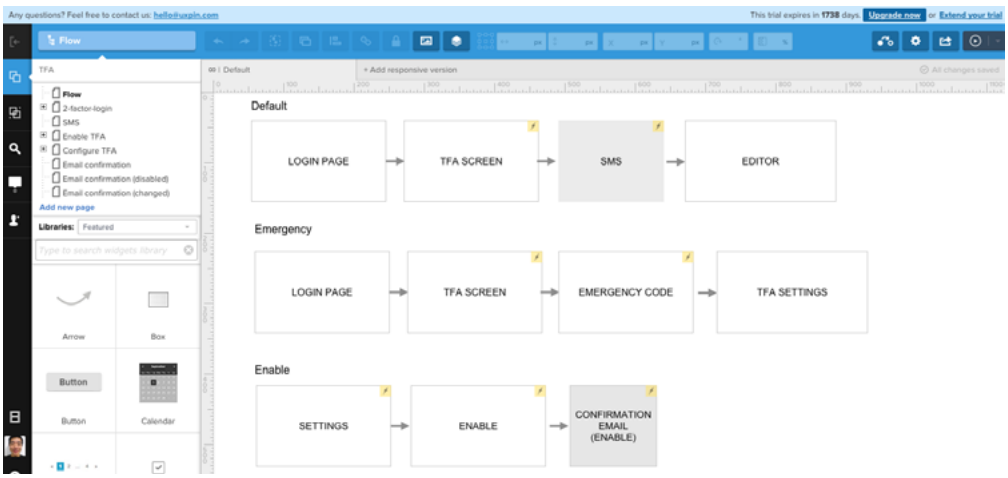


Photo credit: UXPin

A decrease in one metric is not a sign of total disaster. For example, a combination of decreased time on page, decreased bounce rate, and neutral conversions might signal that the new design is starting to help people to find relevant content faster. It means retention may go up. It means subscriptions may increase. It means revenue may rise.

Design Manager Alastair Simpson tells a relevant story of the value of patience and context. When he ran a design experiment at Atlassian, his design team released a new onboarding experiment. At first, they saw an initial 12% decrease in engagement and 0% increase in conversion.

Sounds like a failure, right? But instead of accepting the data at face value, the team verified the results against user research and learned their decisions were mostly correct. They iterated a few tweaks, and when they released again, saw a 22% increase in conversions at the same engagement level.

Remember that the goal is data-informed design. Not data-driven design.

Not every negative metric demands reactionary redesign. Be patient and evaluate.

Evidence Versus Politics

I mentioned forming good arguments.

Data helps you there, too. Metrics help you point to truth. It doesn't matter what you think is happening. The numbers will tell you how users really behave.

Sort of.

They tell you when people spend a long time on a page, but not why. They tell you when people bounce from the site, but not where they went and what drove them away. They tell you when people just stop coming back, but not what you did wrong.

Avoid data-driven design. Practice data-informed design.

Combine these numbers with your instincts. With user conversations. With forum posts and customer complaints and blog posts and reviews and anything else that hints at the why behind the what. Data can help you form good arguments, but only when its triangulated against qualitative research and your own brain cells. Intelligence is the best thing you can bring to a knife fight.

When you go to the knife fight, bring it all – the data, the intelligence, the narrative. Executives, most of the time, are receptive to arguments that speak to their primary concerns, which are other numbers

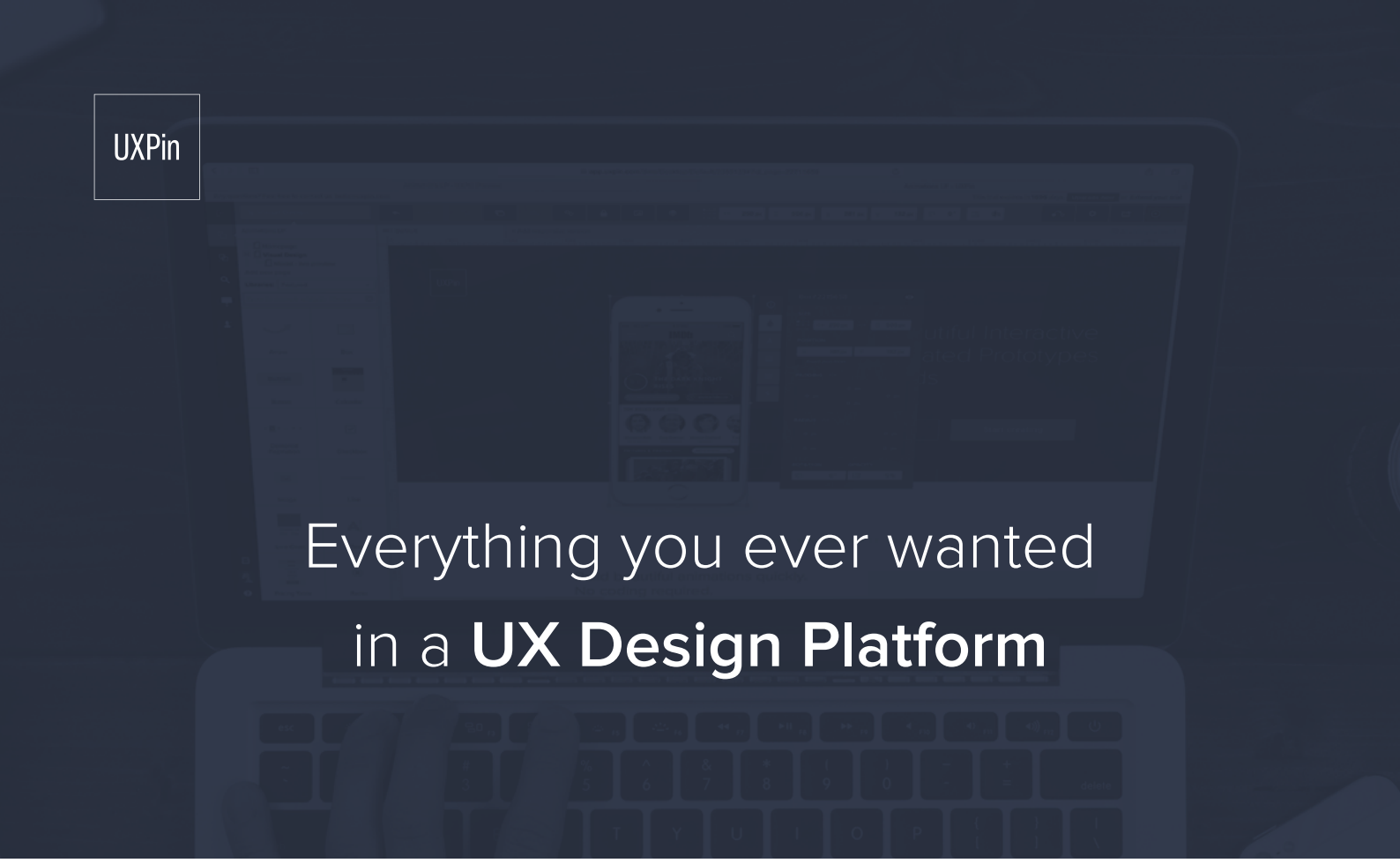
(revenue, audience size, monthly churn, etc). When you can point at digits and the explanations that lead to them, executive stakeholders start to recognize themselves in you.

You'll be the one who knows design is a problem-solving exercise, a planning exercise, a profession of results. And that anything else is art or mindless decoration.

You've become the designer who maps decisions to outcomes. The designer who's researched, presented, implemented, and tested a viable UX strategy to impact the bottom line.

The designer who matters.

UXPin



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