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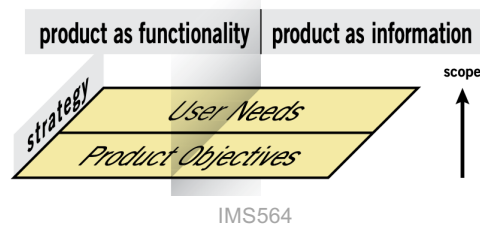
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## Defining the Strategy

- The most common reason for the failure of a Web site is not technology. It's not user experience either.
- Web sites most often fail because—before the first line of code was written, the first pixel was pushed, or the first server was installed—nobody bothered to answer two very basic questions:
  - What do we want to get out of this product?
  - What do our users want to get out of it?



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## Defining the Strategy

- What do we want to get out of this product?
  - Answer : describe the **product objectives** coming from inside the organization
- What do our users want to get out of it?
  - Answer : addresses **user needs**
- Remember : objectives imposed on the product from outside!
- **Product objectives** and **user needs** form the strategy plane.

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## Defining the Strategy

- The foundation for every decision in the process as you design the user experience.
- Many user experience projects do not begin with a clear, **explicit** understanding of the underlying strategy.
- The more clearly you can articulate exactly what you want, and exactly what others want from you, the more precisely you can adjust your choices to meet these goals.

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## Product Objectives

- Product objectives exist only as an unspoken understanding among those building the product, i.e., application.
- When that understanding remains unspoken, different people often have different ideas about what the product is supposed to accomplish.
  - Business Goals
  - Brand Identity
  - Success Metrics

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# Product Objectives

## Business Goals

- Most people start out describing objectives for their products in very general terms.
- In the case of Web sites, they fundamentally serve one of two purposes:
  - to make the company money or
  - to save the company money.
  - Sometimes it's both.
- But exactly how these sites are supposed to do that is not always clear.

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# Product Objectives

## Business Goals

- Objectives that are too specific don't adequately describe the strategic concerns at issue.
- For example, stating that one of your objectives is "to provide users with a real-time text communications tool"
  - doesn't explain how such a tool helps advance the objectives of your organization, or
  - how it helps meet the needs of your users.

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# Product Objectives

## Business Goals

- To strike a balance between being too specific and being too general: avoid jumping ahead to identify solutions when you don't yet fully understand the problems.
- To create a successful user experience: you have to make sure that every decision you make is rooted in a firm understanding of its consequences.
- Clearly defining the conditions for success—without defining the path to get there—assures that you don't get ahead of yourselves.

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# Product Objectives

## Brand Identity

- When most of us see the word branding, we think of things like logos, color palettes, and typography.
- All these visual aspects of brand are important, the concept of brand extends far beyond the visual.
- Brand identity—a set of conceptual associations or emotional reactions—is important because it's inescapable.
- In the minds of your users, an impression about your organization is inevitably created by their interactions with your product.

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# Product Objectives

## Brand Identity

- Colors and typography play a significant role in shaping user perceptions and emotions.
- Utilize color psychology to evoke the desired emotions and choose fonts that enhance readability and align with your brand's identity.



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# Product Objectives

## Brand Identity

- Most organizations choose to exert some control over the perception of their brand, which is why communicating brand identity is a very common product objective.
- Branding isn't just for commercial entities either—every organization with a Web site, from non-profit foundations to government agencies to individuals, creates an impression through user experience.
- By codifying the specific qualities of that impression as an explicit objective, you increase your chances that it will be a positive impression.

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# Product Objectives

## Success Metrics

- Success metrics: indicators you can track after the product has been launched to see whether it is meeting your own objectives and your users' needs.
- Defining good success metrics not only influences decisions made over the course of the project; achieving them provides concrete evidence of the value of user experience efforts if you find yourself facing a skeptical audience when seeking budget approval for your next user experience project.
- Success metrics are concrete indicators of how effectively the user experience is meeting strategic goals.
- In this example, measuring the number of visits per registered user per month indicates how valuable the site is to its core audience.

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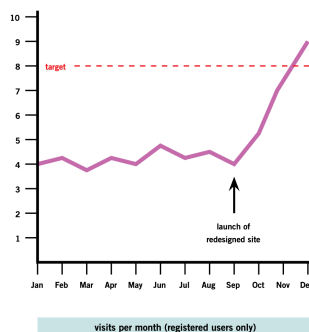
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# Product Objectives

## Success Metrics

- In this example, measuring the number of visits per registered user per month indicates how valuable the site is to its core audience.



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# Product Objectives

## Success Metrics

- For sites that depend on advertising revenue,
  - impressions—the number of times each day an ad is served to a user—is an incredibly important metric.
- But you have to be careful to balance your objectives and the needs of your users.
- Adding several layers of navigational pages between the home page and the content users want will definitely increase your ad impressions, but is it serving user needs? Probably not.
- And in the long run, it will show: As your users get frustrated and decide not to come back, your impressions will drop from that initial high and will probably end up lower than they were when you started.

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# Product Objectives

## Success Metrics

- Not all success metrics have to be derived directly from your site.
- You can measure the indirect effects of the site as well.
- If your site provides solutions to common problems people encounter with your product, the number of phone calls coming into your customer support lines should go down.
- An effective intranet can provide ready access to tools and resources that can cut down on the time it takes for your salespeople to close a sale—which, in turn, translates directly into increased revenue.

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# Product Objectives



## Success Metrics

- Any metric viewed in isolation can be misleading;
    - be sure to take a step back and
    - look at what's going on beyond the Web site
- this to make sure you're getting the whole story.


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# User Needs

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- You aren't designing for yourselves; you are designing for other people, and if those other people are going to like and use what you create, you need to understand who they are and what they need.
  - By spending time researching those needs, you can break out of your own limited perspective and see the site from the point of view of the users.
  - Identifying user needs is complicated because users can be quite diverse.

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# User Needs

- To get to the bottom of those needs, you have to define just who your users are.
- Once you know whom you are trying to reach, you can conduct research with them—ask them questions and observe their behavior.
- That research can help you define and prioritize what people need when they use the product.
  - User Segmentation
  - Usability and User Research
  - Creating Personas

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# User Needs

## User Segmentation

- User segmentation helps you understand user needs better by dividing the entire audience into smaller groups of people with shared needs.
- Divide your audience into smaller groups (or segments) consisting of users with certain key characteristics in common.

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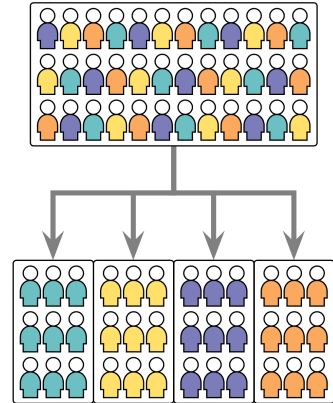
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# User Needs

## User Segmentation

- Here are a couple of the most common approaches:
- Market researchers commonly create audience segments criteria:
  - gender,
  - age,
  - education level,
  - marital status,
  - income, and
  - so on.
- These **demographic profiles** can be quite general (men 18–49) or very specific (unmarried, college-educated women 25–34 making over \$50,000 a year).



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# User Needs

## User Segmentation

- **Psychographic profiles** describe the attitudes and perceptions that your users have about the world or about the subject matter of your site in particular.
- Psychographics often correlate strongly with demographics: People in the same
  - age group,
  - location, and
  - income level
 often have similar attitudes.
- Demographically identical people have very different ways of seeing and interacting with the world. That's why uncovering the psychographics of your users can give you insights you can't get from demographics.

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# User Needs

## User Segmentation

- There's another very important set of attitudes to consider: the **users' attitudes** toward the Web and technology itself.
  - How much time do your users spend using the Web every week?
  - Is technology a part of their daily lives?
  - Do they like working with technology products?
  - Do they always have the latest and greatest products, or do they only upgrade when they have to?
- Technophobes and power users approach Web sites in very different ways, and your designs need to accommodate them.
- Answers to questions like these can help you.

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# User Needs

## User Segmentation

- To understand your users' familiarity and comfort level with technology, you need to understand what and how much they know about the subject matter of your site.
- These differences in experience or expertise can form the basis for segmenting your audience.
- Creating user segments is just a means to the end of uncovering user needs.
- You really only need as many different segments as you have different sets of user needs.

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# User Needs

## User Segmentation

- There's another important reason to create user segments: Not only will different groups of users have different needs, but sometimes those needs will be in direct opposition.
- You can't meet both sets of user needs with a single solution.
- Your options at this point are to focus on one user segment to the exclusion of the other, or to provide two separate ways for users to approach the same task.
- Whichever course you choose, this strategic decision will have consequences for every additional choice you make about the user experience.

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# User Needs

## Usability and User Research

- Refer to Topic 3

## Creating Personas

- Refer to Topic 4

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## Team Roles and Process

- Strategists will talk to many people throughout the organization to get as many perspectives as possible on the questions of product objectives and user needs.
- Stakeholders are senior decision-makers who are responsible for parts of the organization that will be affected by the ultimate strategic direction of the product.
- For example, in the case of a Web site designed to provide customers with access to product support information, stakeholders might include representatives from marketing communications and customer service as well as product managers. It depends on the formal decision-making structure (and the informal political realities) of the organization.

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## Team Roles and Process

- Product objectives and user needs are often defined in a formal strategy document or vision document.
- This document isn't just a list of objectives—it provides an analysis of the relationships among the various objectives and of how those objectives fit into the larger context of the organization.
- The **objectives** and **analysis** are often supported by direct quotes from
  - stakeholders,
  - rank-and-file employees, and
  - users themselves.
- These quotes vividly illustrate the strategic issues involved in the project.
- User needs are sometimes documented in a separate user research report (though there are certain advantages to having all your information in one place).

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## Team Roles and Process

- You don't have to include every data point and every supporting quote to get your idea across. Keep it concise and to the point.
- An effective strategy document not only serves as a touchstone for the user experience development team; it can also be used to build support for the project in other parts of the organization.
- The worst thing you can do with your strategy document is limit your team's access to it.
- All participants—designers, developers, project managers—need the strategy document to make informed decisions about their work.
- Strategy documents often contain sensitive material.

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## Conclusion

- Strategy should be the beginning of your user experience design process, but that doesn't mean your strategy must be set in stone before the project can move forward.
- Although trying to hit a moving target can be a tremendous waste of time and resources (not to mention a huge source of internal frustration), strategies can and should evolve and be refined.
- When revised and refined systematically, strategy work can be a continuing source of inspiration throughout the user experience design process.

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