

Setting Up the Foundations for a UX Strategy



Sandra Gonzalez

PRODUCT DESIGN DIRECTOR

@uxcata www.UX4Change.org



Summary



Introduction to a scalable design process

Where do ideas for a product come from

How to make sure that ideas behind a product are innovative

What are the skill sets necessary to execute a UX Strategy



A UX Strategy Story



David | UX Designer



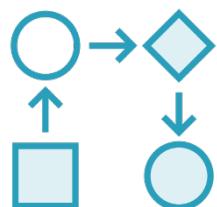
Jane | CPO



UX strategy



Proposal



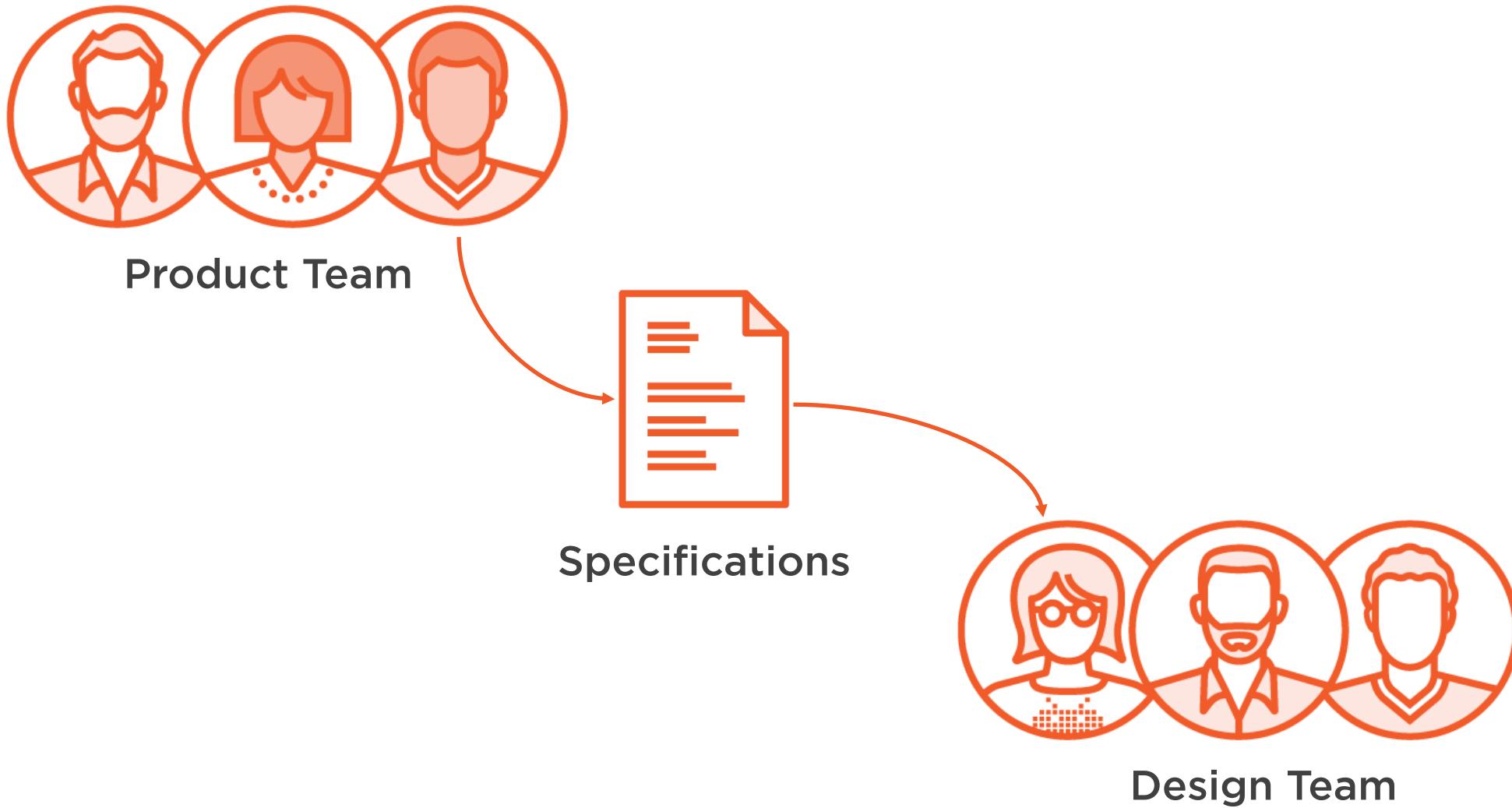
Design process



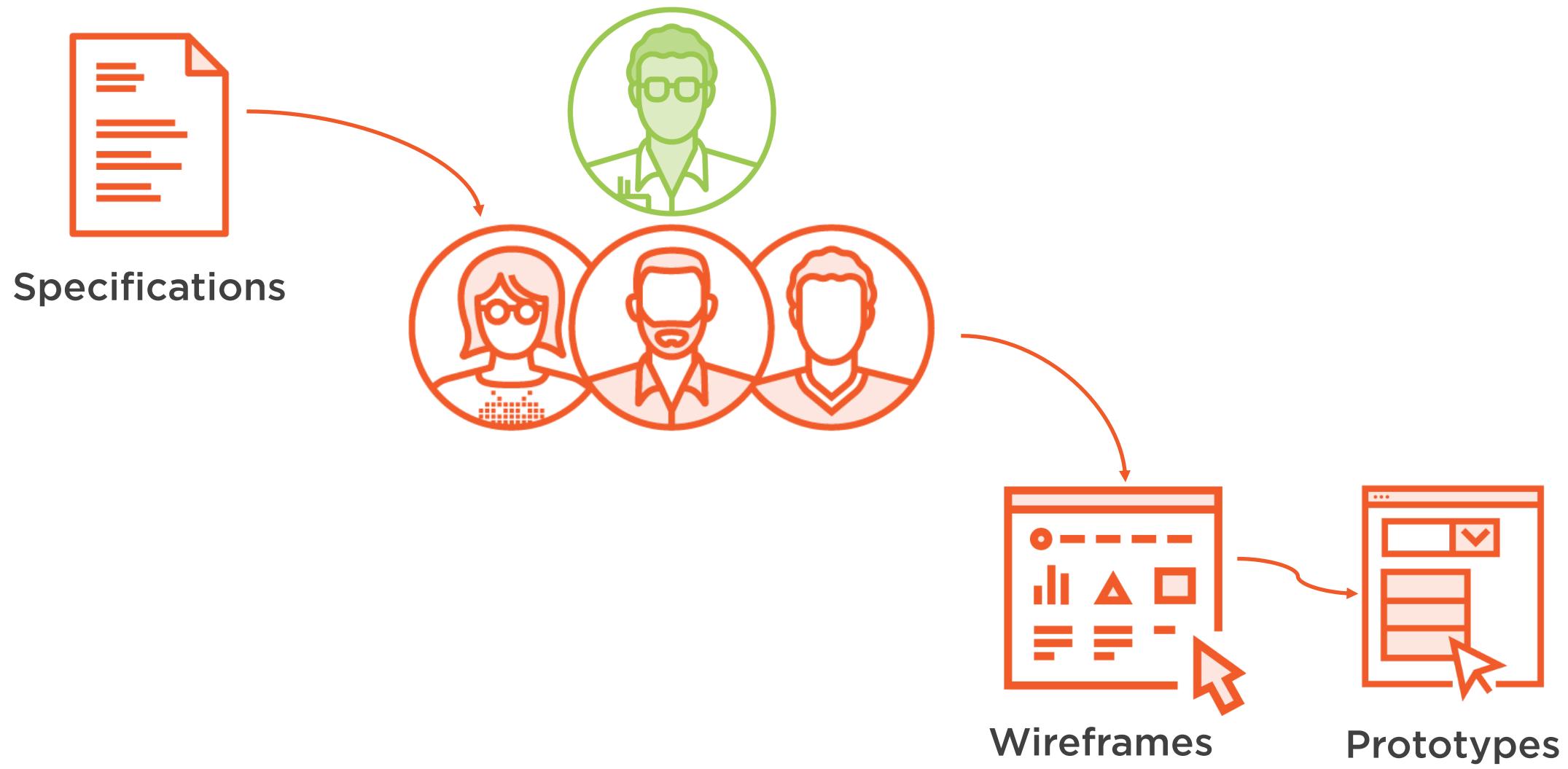
Skill set



Previous Development of a New Product



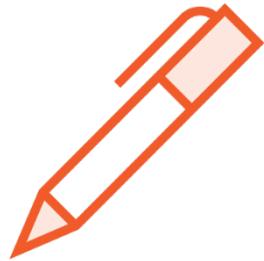
Previous Development of a New Product



New Approach to Design



David | UX Designer



Sketch Together

+



Co-design

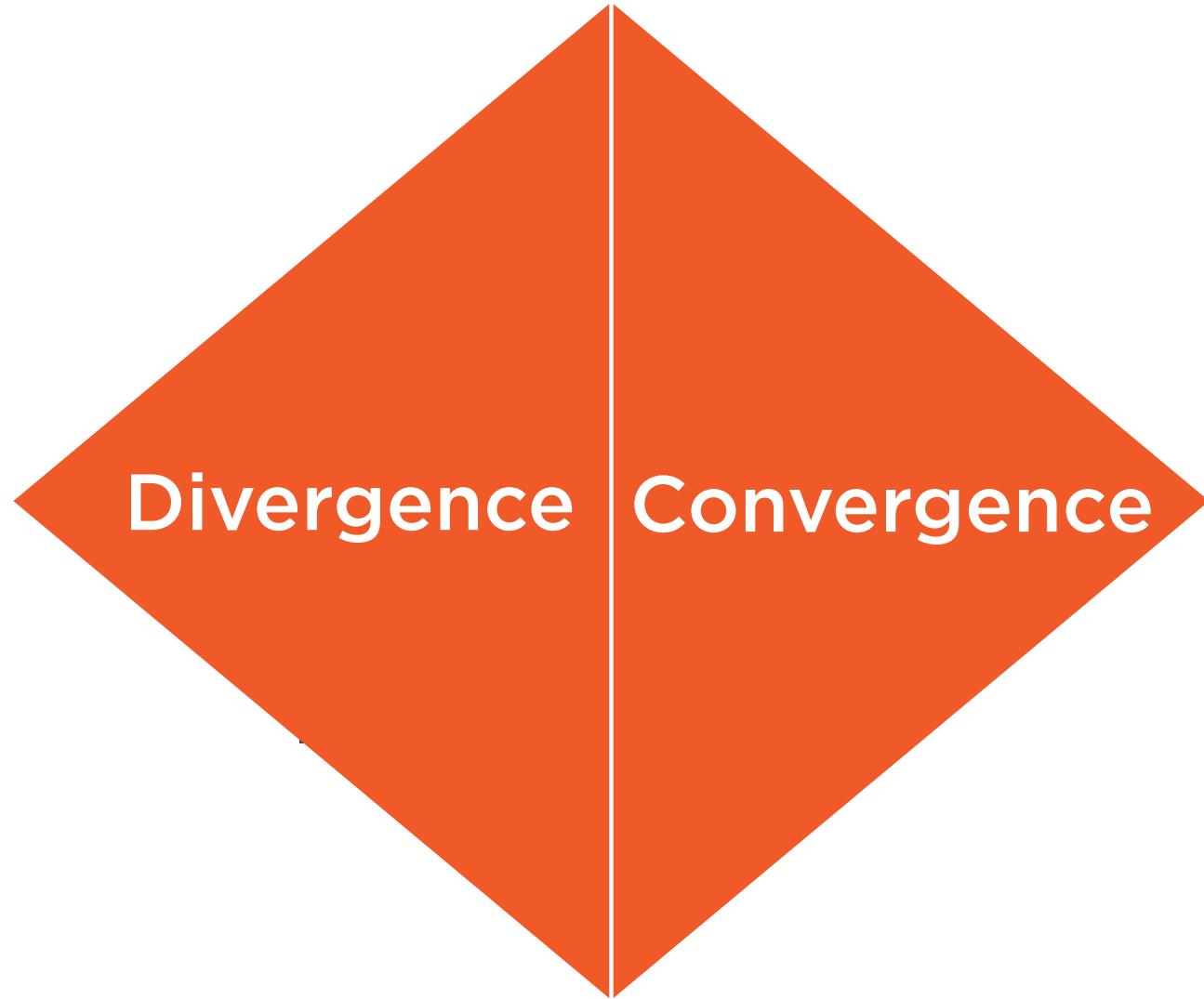
=



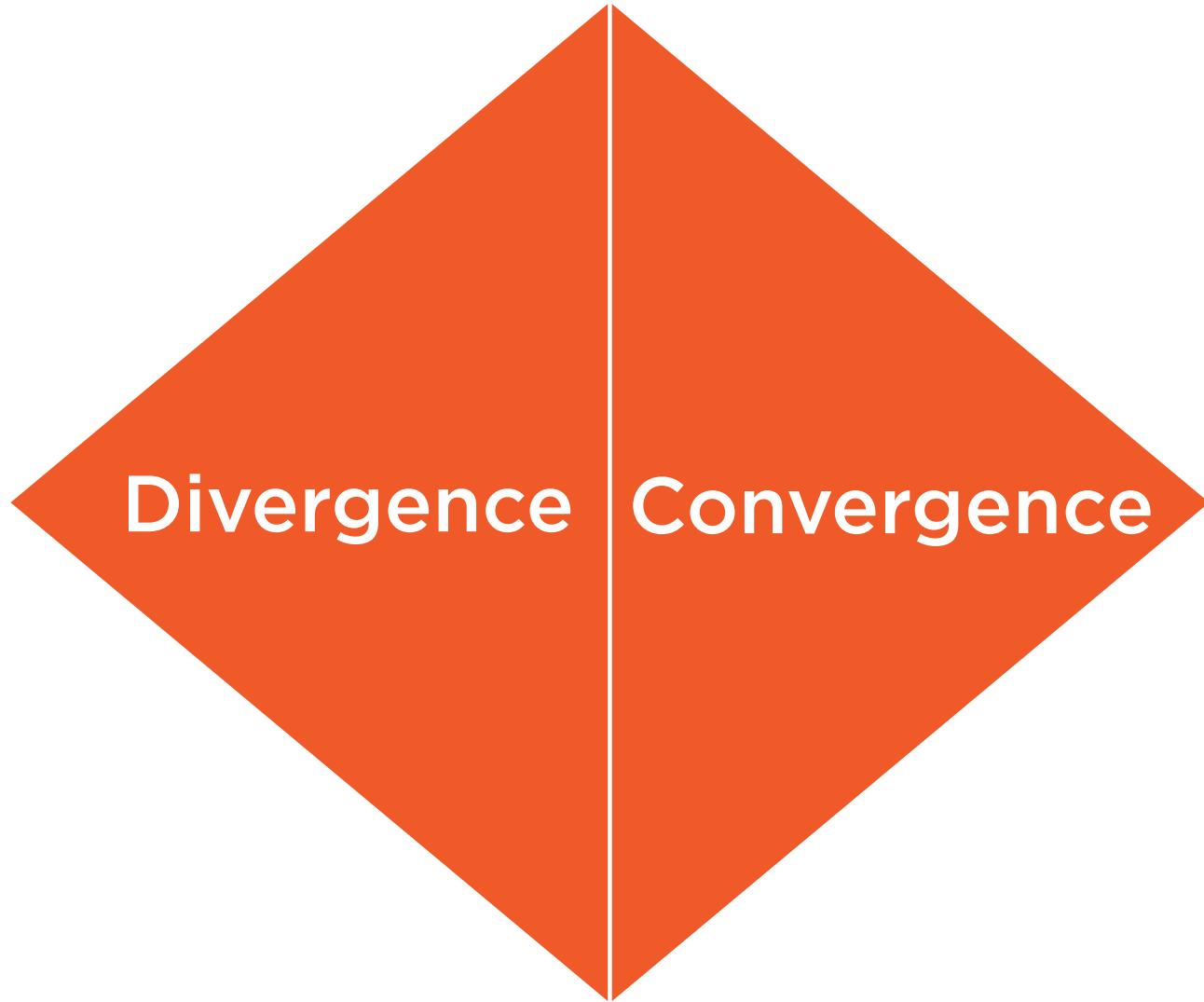
Many ideas

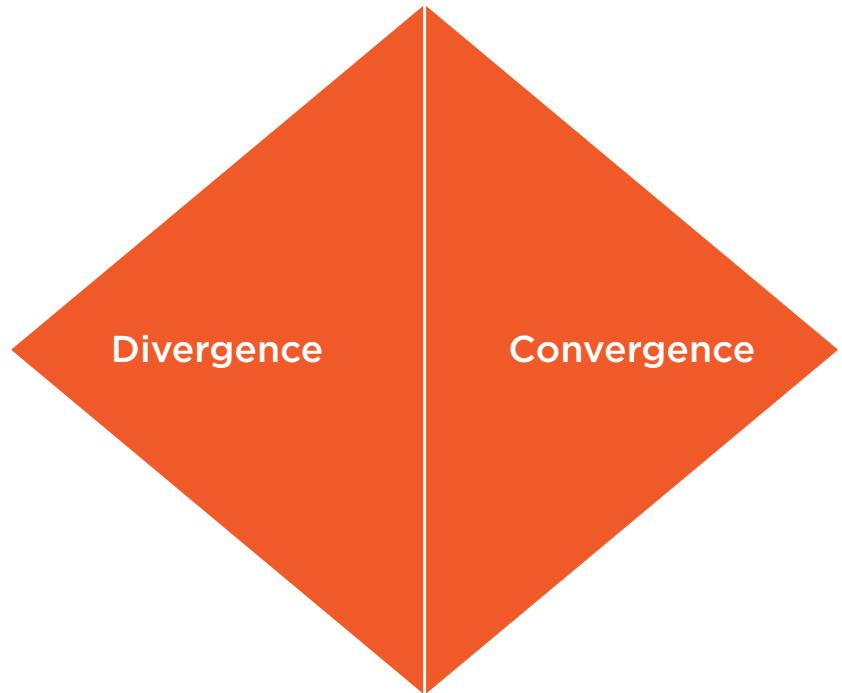


New Approach to Design



New Approach to Design





Designing things right

Divergence

- Ideation
- Evaluation

Convergence

- Prototype
- Test
- Iterate



Why Some Features Succeeded, and Others Don't



The original brief or specifications given to the team plays a big role on this



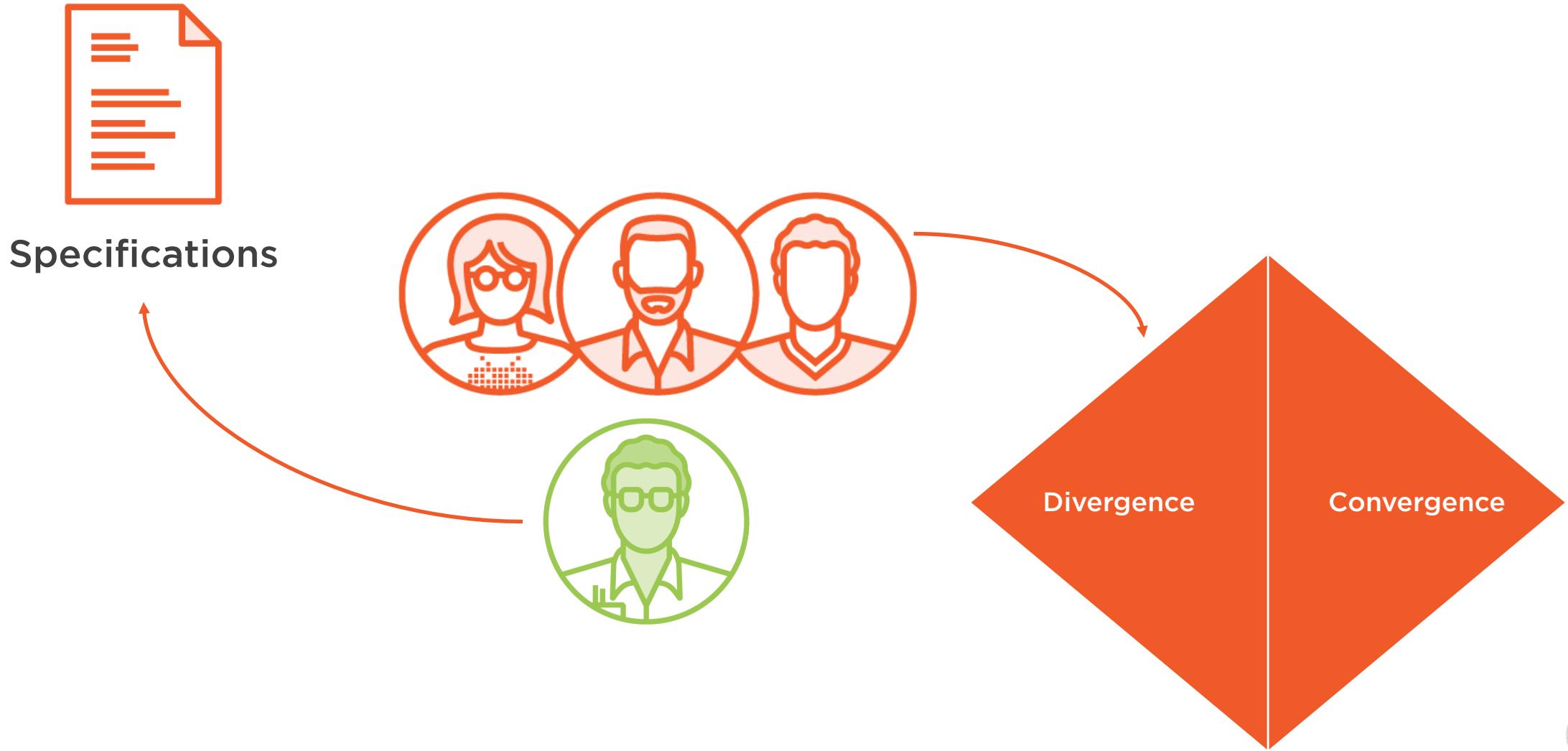
Some briefs were dictating a solution instead of defining a problem



Designers should understand the problem they are trying to solve



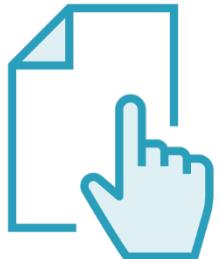
New Approach to Briefs



New Approach to Briefs



David | UX Designer



Rip the brief

+



Research

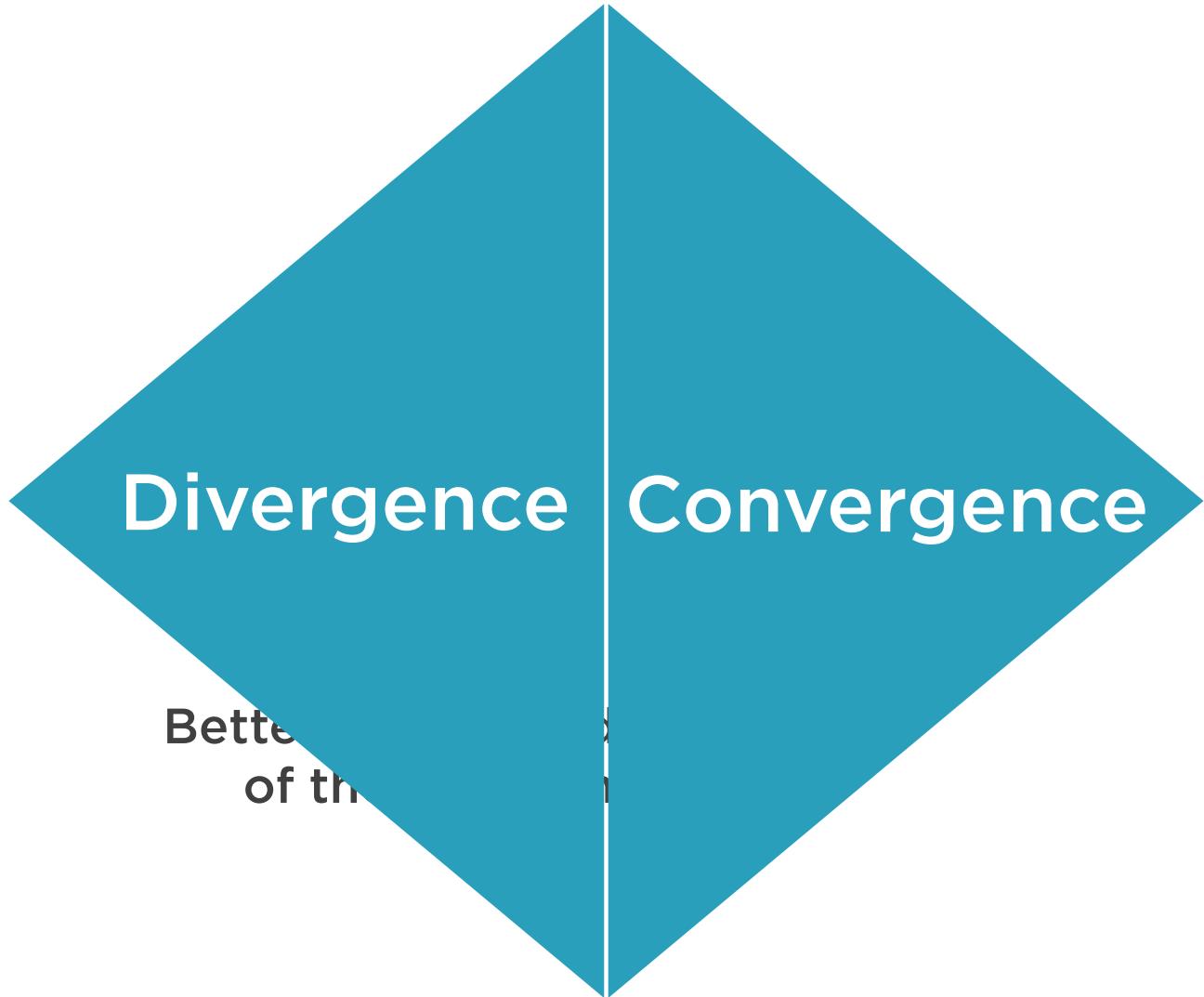
=



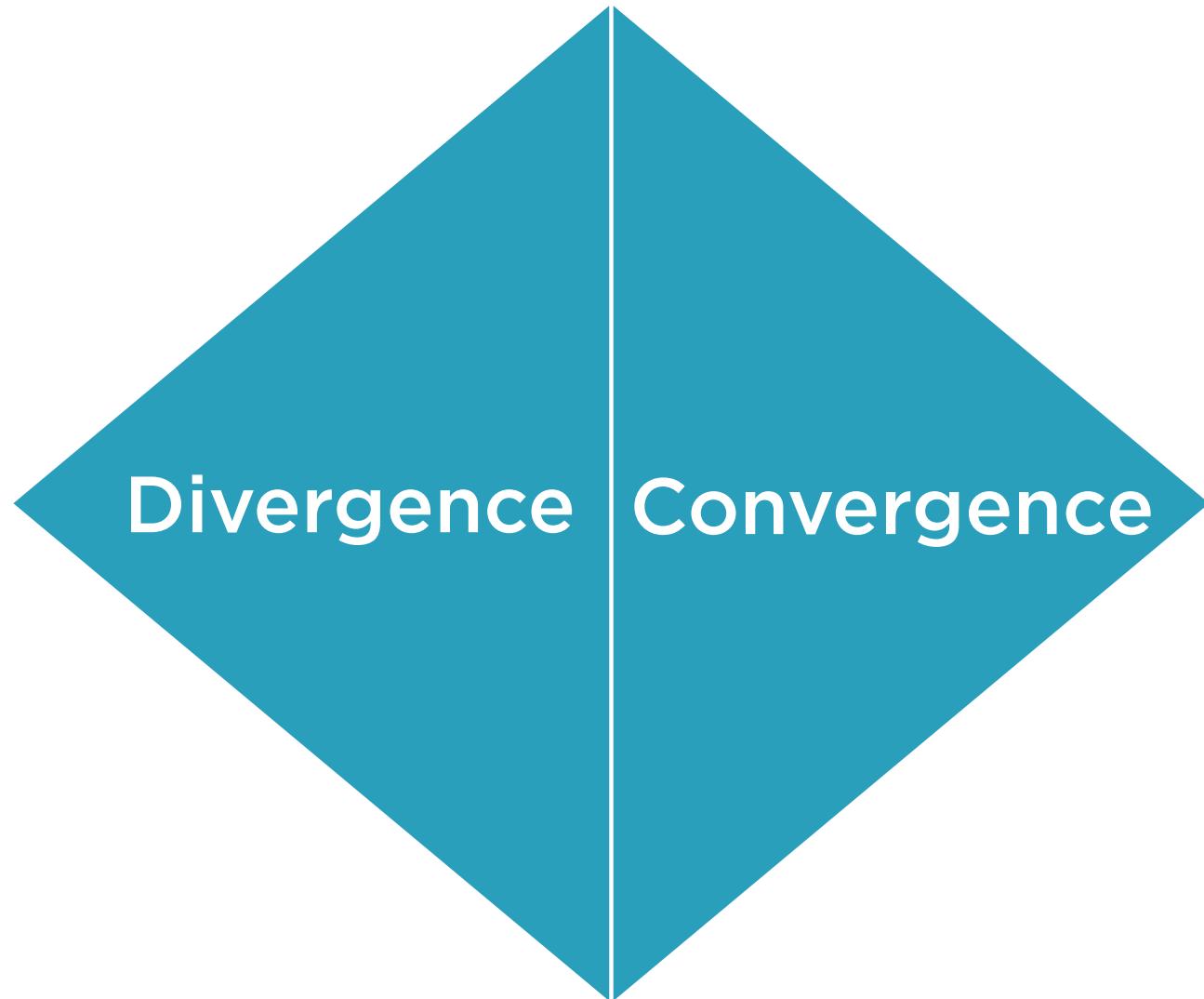
Better understanding
of the problem

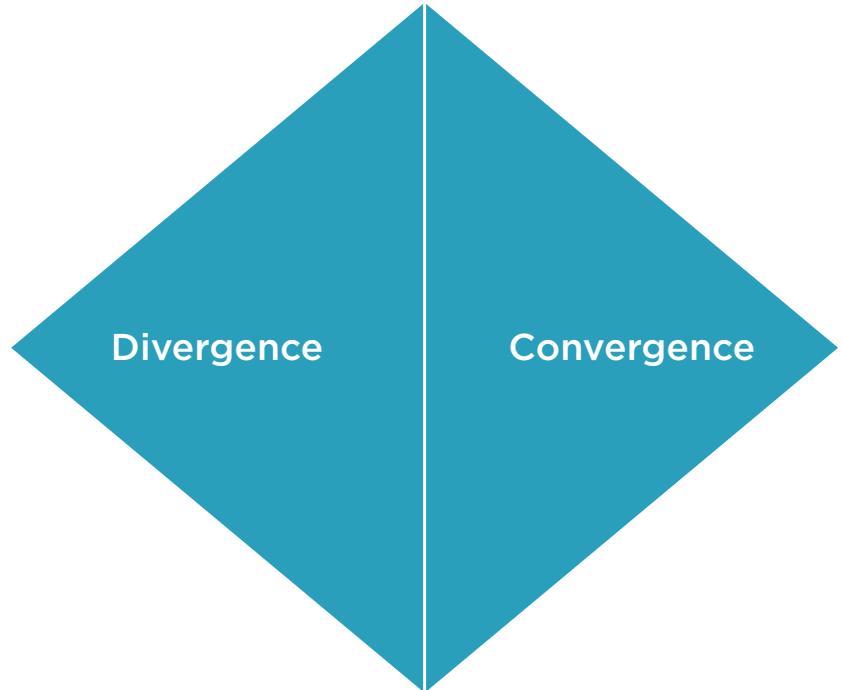


New Approach to Briefs



New Approach to Briefs





Designing the right things

Divergence

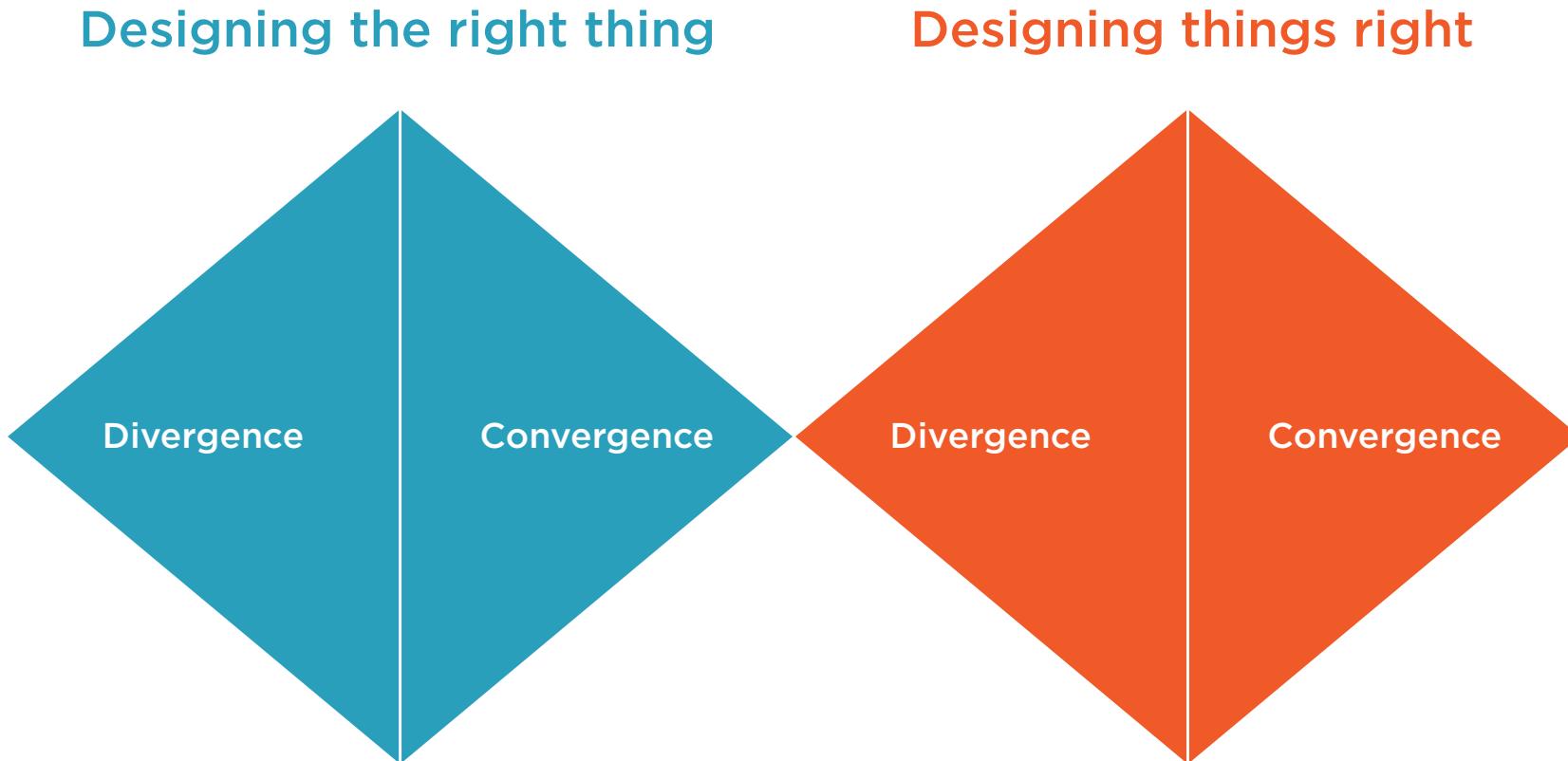
- Rip the brief
- Research

Convergence

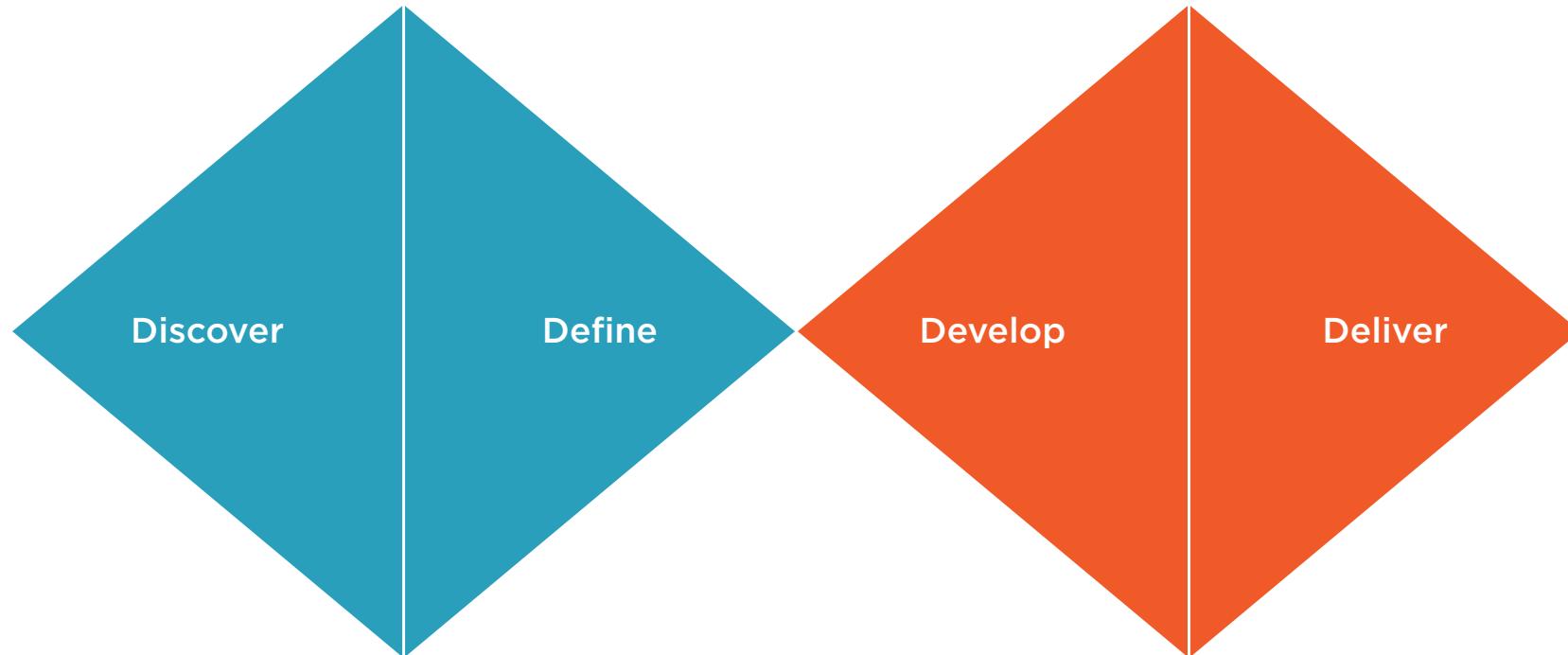
- Summarizing & share findings
- Cluster into themes
- Write “How Might We” questions



Diamonds Shaped Design Process



British Design Council's Double Diamond



Let's Talk About the “Big Idea”

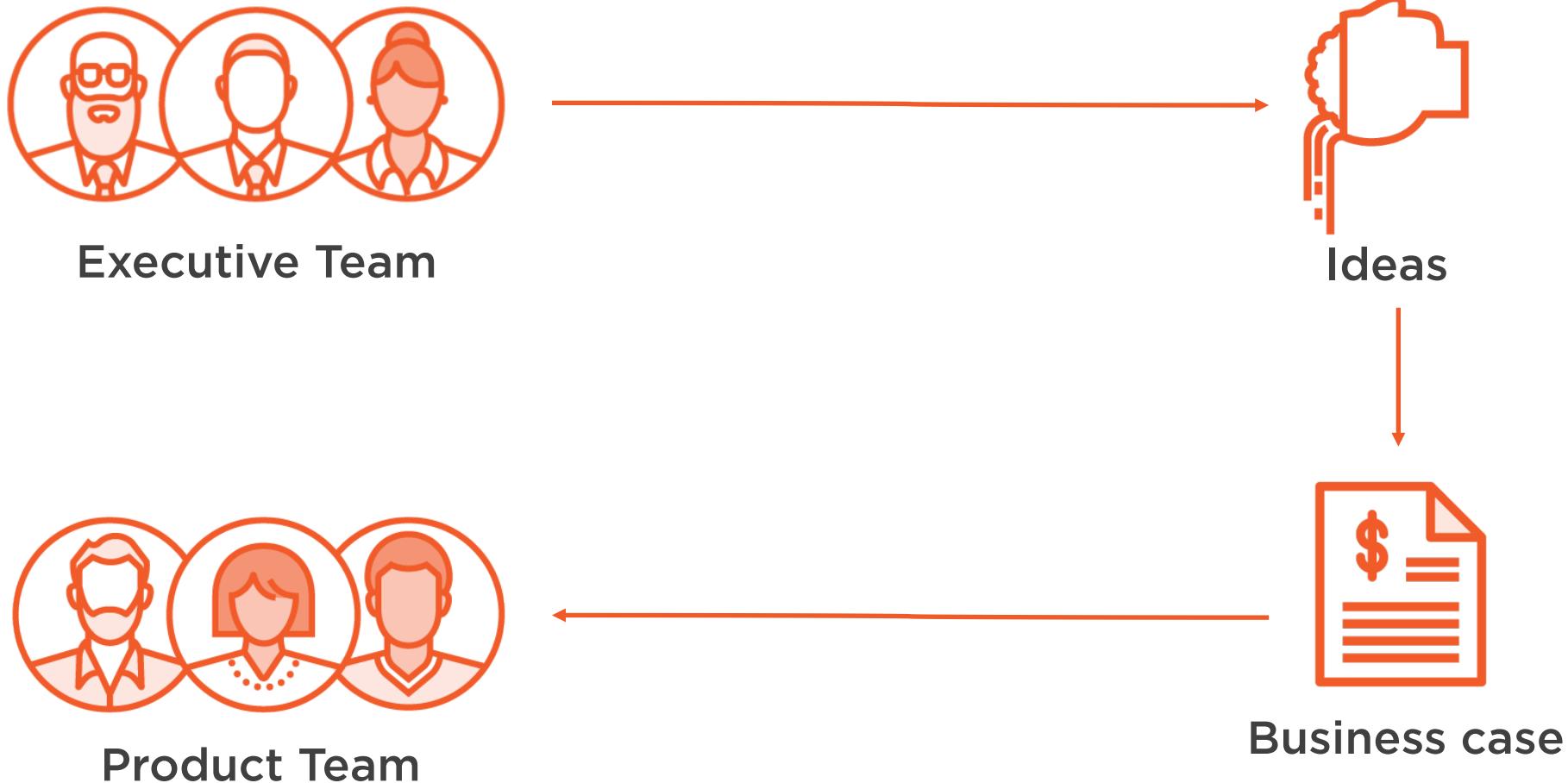


Innovation

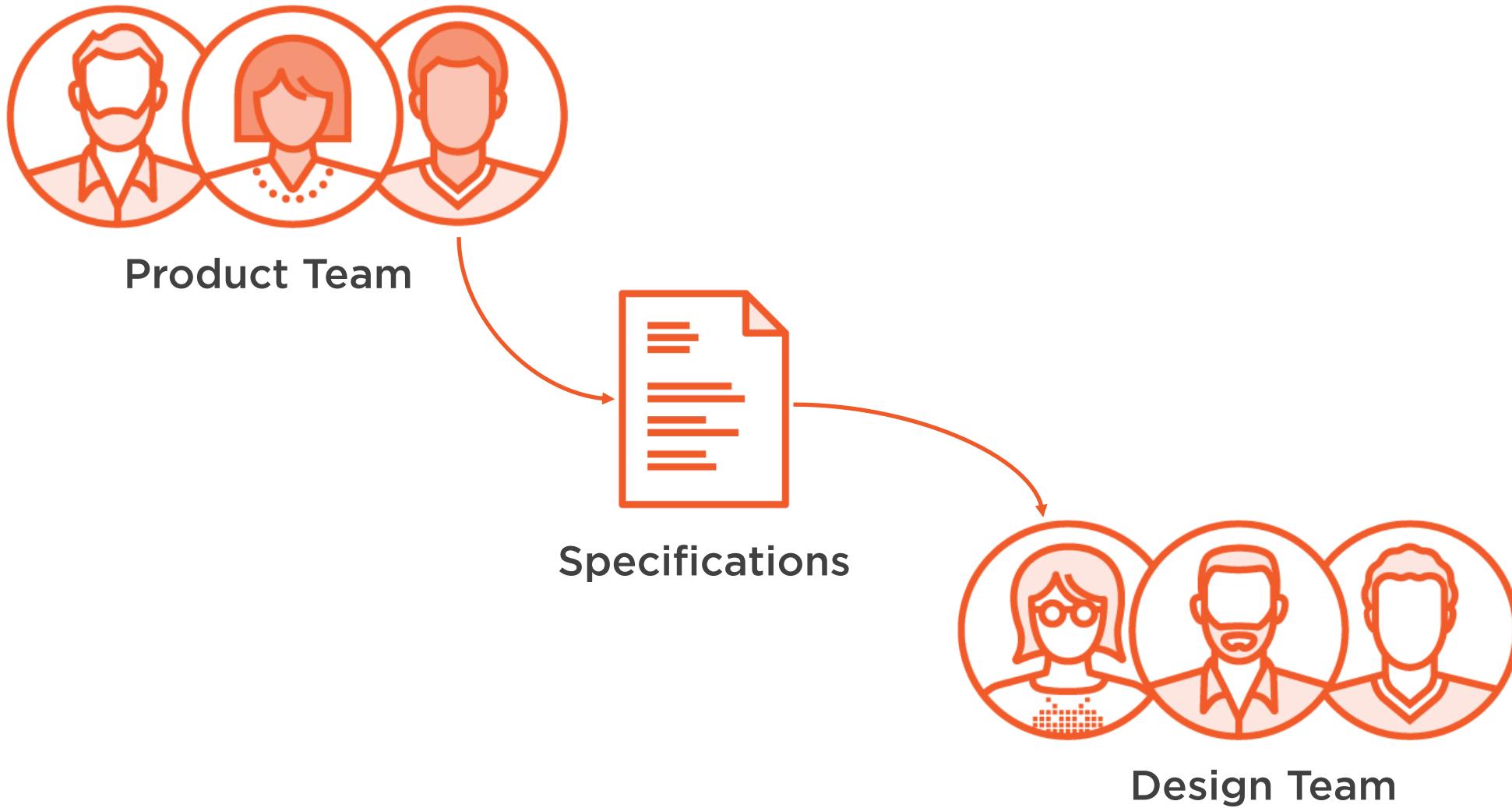
The successful exploitation of new ideas



Previous Development of a New Product



Previous Development of a New Product



Continuous Learning



David

“Hi Alex, do you have any recommendation on how to avoid product failure?”



Alex

“Yes! Marty Cagan from Silicon Valley Product Group has some great advice on the subject”

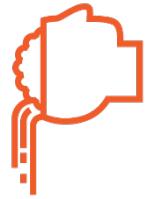


“In the vast majority of companies that I first meet, large and small, this is essentially how they work, and have worked, for many years. Yet these same companies consistently complain about the lack of innovation and the very long time it takes to make it from idea to customer’s hands.”

Marty Cagan



Top Ten Reasons Why New Products Fail



The source of ideas



Business cases for new products with prescribed solutions and profit margins set the wrong expectation



Two inconvenient truths: At least half of the ideas won't perform like we hope and even if it works it will need several iterations



“One of the most important things about product that I’ve learned is that there is simply no escaping these truths, no matter how smart you might be. And I’ve had the good fortune to work with many truly exceptional product teams. The real difference is how you deal with these truths.”

Marty Cagan



Top Ten Reasons Why New Products Fail



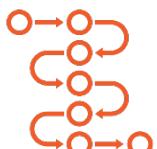
Project management is disguised as product ownership



UX Design functions under the “lipstick on the pig” model



Engineering gets brought in way too late



Agile enter the picture far too late



Top Ten Reasons Why New Products Fail



This entire process is very project-centric



Customer validation happens way too late



The opportunity cost of what the organization could have and should have been doing instead.



What is Jobs to Be Done



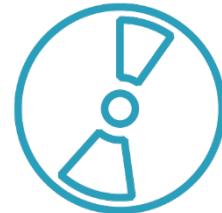
A Brief History of Music Indulgence



LP



Walkman



CD



MP3



Cloud steaming



Voice command



“People don’t want to
buy a quarter-inch drill.
They want a quarter-inch
hole.”

Theodore Levitt



Jobs to Be Done has been a
hot topic in the
Product Design community.

There are many approaches,
and this is one of them.





Outcome-Driven Innovation® (ODI) is a strategy and innovation process that ties customer-defined metrics to the "job-to-be-done", making innovation measurable and predictable.



How to Quantify the “Big Idea” with Outcome-Driven Innovation®



ODI Innovation Process



Define the Customer



Define the Customer



People buy products and services to get a "job" done

Customers are loyal to the job (e.g., listening to music), not the product (e.g., LPs, CDs, the iPod)

There are two type of customers

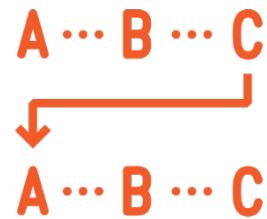
- The job executors
- The job beneficiary



ODI Innovation Process



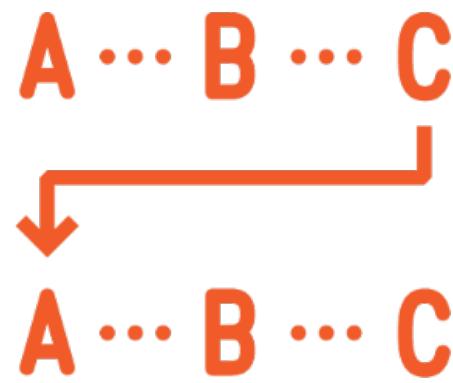
Define the Customer



Define the Job-
to-be-done



Define the Job-to-be-done



Customers define markets in terms of the job they are trying to get done

Every product will one day become a thing of the past.

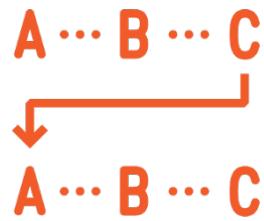
But just because a technology or a product becomes obsolete doesn't mean the market disappeared



ODI Innovation Process



Define the Customer



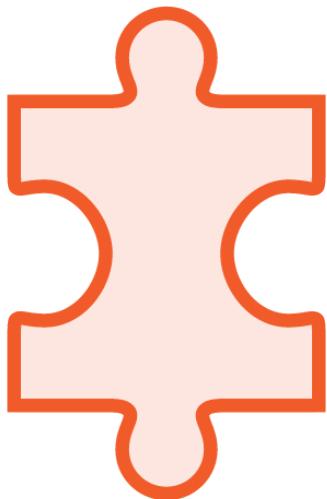
Define the Job-
to-be-done



Uncover Customer
Needs



Uncover Customer Needs



Customers use between 50 and 150 metrics, called outcomes

Outcomes are used to judge how successfully they can execute the job-to-be-done

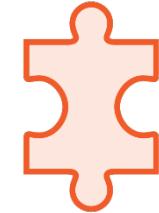
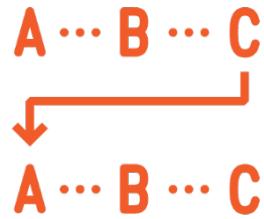
Outcomes are customers' needs



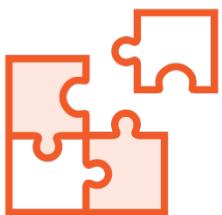
ODI Innovation Process



Define the Customer



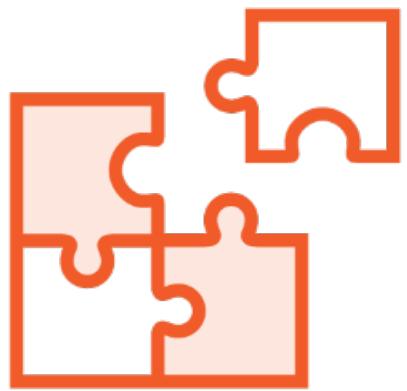
Uncover Customer
Needs



Discover Unmet
Needs



Discover Unmet Needs



Find which of those needs are unmet

Quantitative research reveal just how satisfied the customers are with their ability to address each of the needs

A customer need is unmet when it is important to the customer, but not well satisfied with the solutions available

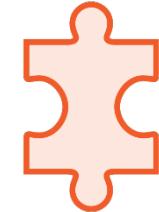
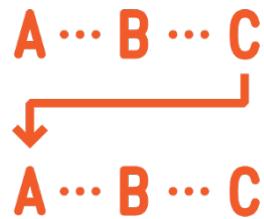
Strategyn devised a mathematical formula called the opportunity algorithm to find all the unmet needs with a scientific approach



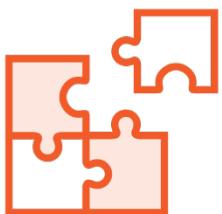
ODI Innovation Process



Define the Customer



Uncover Customer
Needs



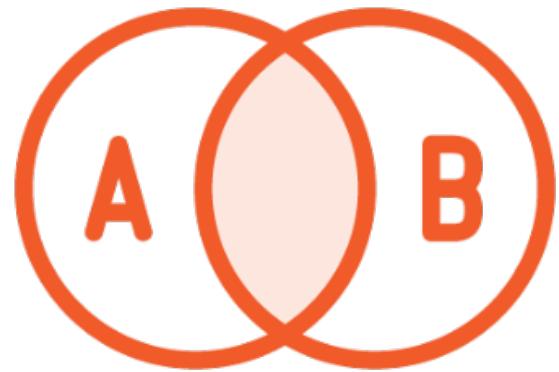
Discover Unmet
Needs



Find Segments of
Opportunity



Find Segments of Opportunity



Demographic, psychographic & behavioral market segmentation doesn't apply

Traditional segmentation approaches are the cause of failed product and service efforts

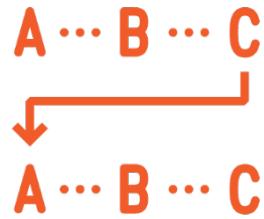
Instead, use customer's unmet desired outcomes as the basis for segmentation



ODI Innovation Process



Define the Customer



Uncover Customer
Needs



Discover Unmet
Needs



Find Segments of
Opportunity



Size the Market
Opportunity



Size the Market Opportunity



Sizing a market from a product perspective doesn't work

Quantify the number of people who execute the job and what customers will pay to get the job done better

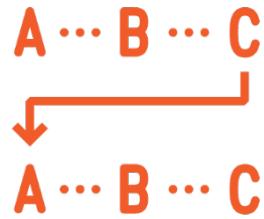
Trying to size the market around a product or technology leads to highly inaccurate results and poor market selection decisions.



ODI Innovation Process



Define the Customer



Define the Job-to-be-done



Discover Unmet
Needs



Find Segments of
Opportunity



Size the Market
Opportunity



How to Strategize the “Big Idea” with Outcome-Driven Innovation®



ODI Innovation Process



**Conduct Competitive
Analysis**



Conduct Competitive Analysis



All the customers' needs must be known, if not they can't assess how much better or worse a product is at helping customers get their jobs done

Therefore companies compare product features instead.

Should provide the information to beat competitors through developing products and services that help customers get a job done better



ODI Innovation Process



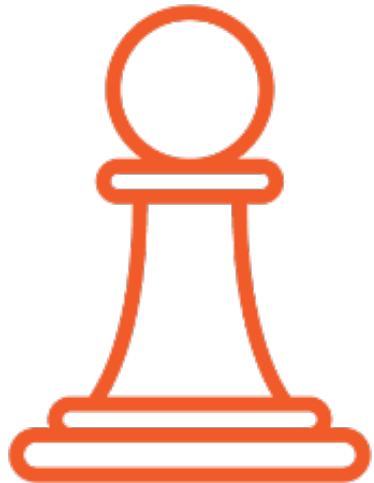
**Conduct Competitive
Analysis**



**Formulate the
Innovation Strategy**



Formulate the Innovation Strategy



**How many times I have said the word
“idea” in the previous clip?**

**Because to innovate, you don't start with
an idea, you start with a real human
problem**

**For the whole framework to work, this
formula must be applied on a statistically
significant number of responses**



ODI Innovation Process



Conduct Competitive Analysis



Formulate the Innovation Strategy



Formulate the Pricing Strategy



Formulate the Pricing Strategy



Asking customers how much they would pay for a product is the wrong approach to pricing.

Customers aren't paying for a product; they are paying to execute the job-to-be-done



ODI Innovation Process



Conduct Competitive Analysis



Formulate the Innovation Strategy



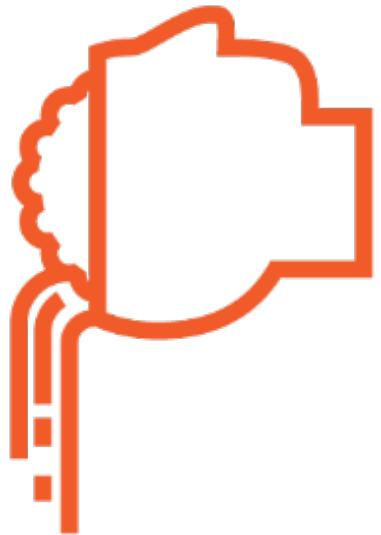
Formulate the Pricing Strategy



Ideate the Solution



Ideate the Solution



We can all come together to throw ideas around the room, as we are now properly preparing for this exercise.



ODI Innovation Process



Conduct Competitive Analysis



Formulate the Innovation Strategy



Formulate the Pricing Strategy



Ideate the Solution



Evaluate the Solution



Evaluate the Solution



It's time to validate if the product ideas get the job done significantly better

This ensures the product or service's success and the organisation's growth



ODI Innovation Process



Conduct Competitive Analysis



Formulate the Innovation Strategy



Formulate the Pricing Strategy



Ideate the Solution



Evaluate the Solution



Position the Solution



Position the Solution



Value is created when a product helps customers execute the job-to-be-done better

Value is communicated by explaining to customers how a product does this with the angle of the emotional jobs they are trying to fulfil

There is a correlation between the customers' functional and emotional jobs



ODI Innovation Process



Conduct Competitive Analysis



Formulate the Innovation Strategy



Formulate the Pricing Strategy



Ideate the Solution



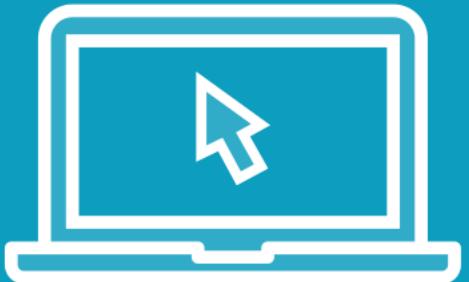
Evaluate the Solution



Position the Solution



Demo



Can we apply the concept of divergence and convergence to Outcome-Driven Innovation® ?

Define which design process is

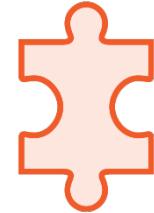
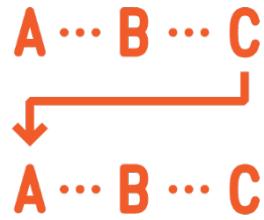
- Product Specific
- Product Agnostic



Strategyn's Innovation Process



Define the Customer



Uncover Customer
Needs



Discover Unmet
Needs



Find Segments of
Opportunity



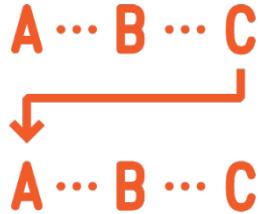
Size the Market
Opportunity



Strategyn's Innovation Process



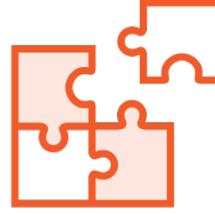
Define
the Customer



Define the Job-
to-be-done



Uncover Customer
Needs



Discover
Unmet Needs



Find Segments
of Opportunity



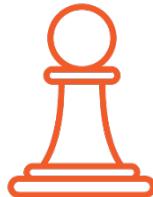
Size the Market
Opportunity



Strategyn's Innovation Process



Conduct Competitive Analysis



Formulate the Innovation Strategy



Formulate the Pricing Strategy



Ideate the Solution



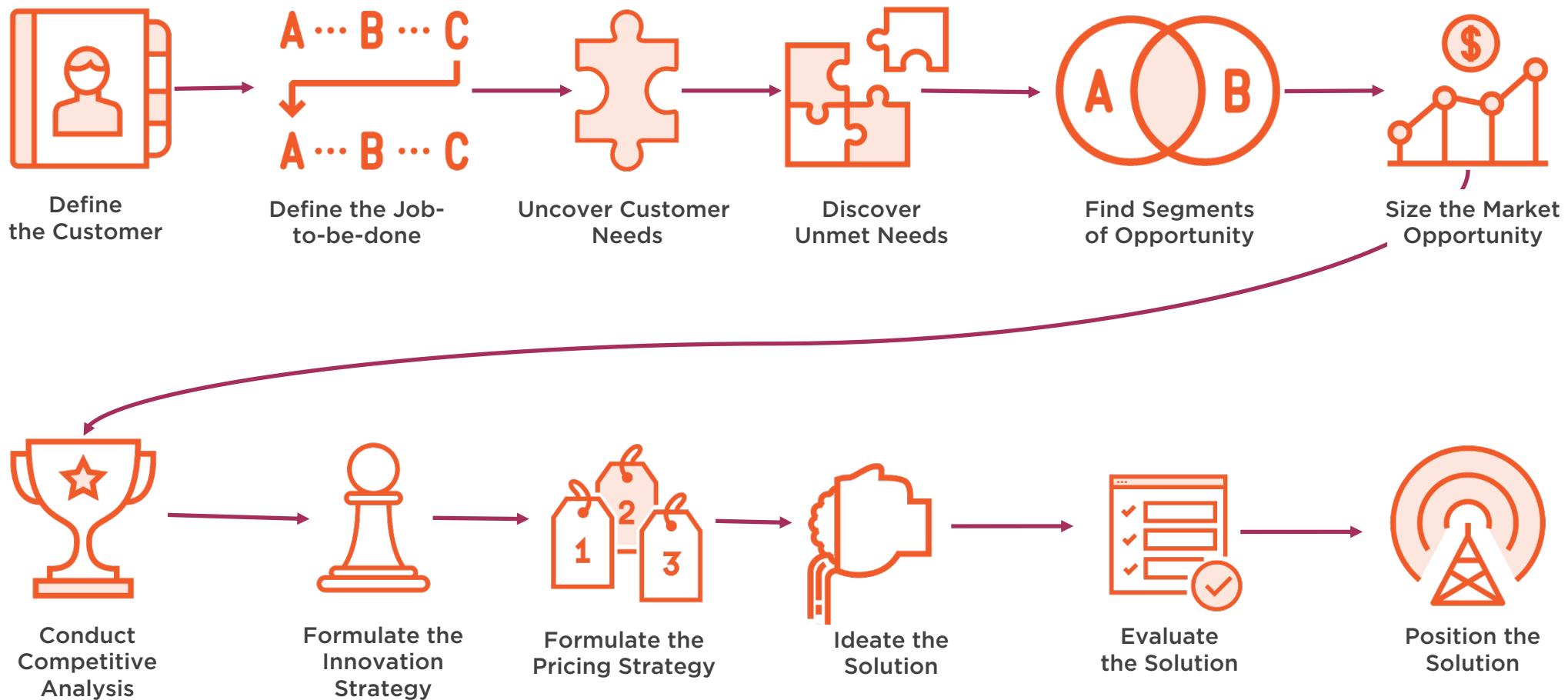
Evaluate the Solution



Position the Solution



Strategyn's Innovation Process



Diamond-shaped Process



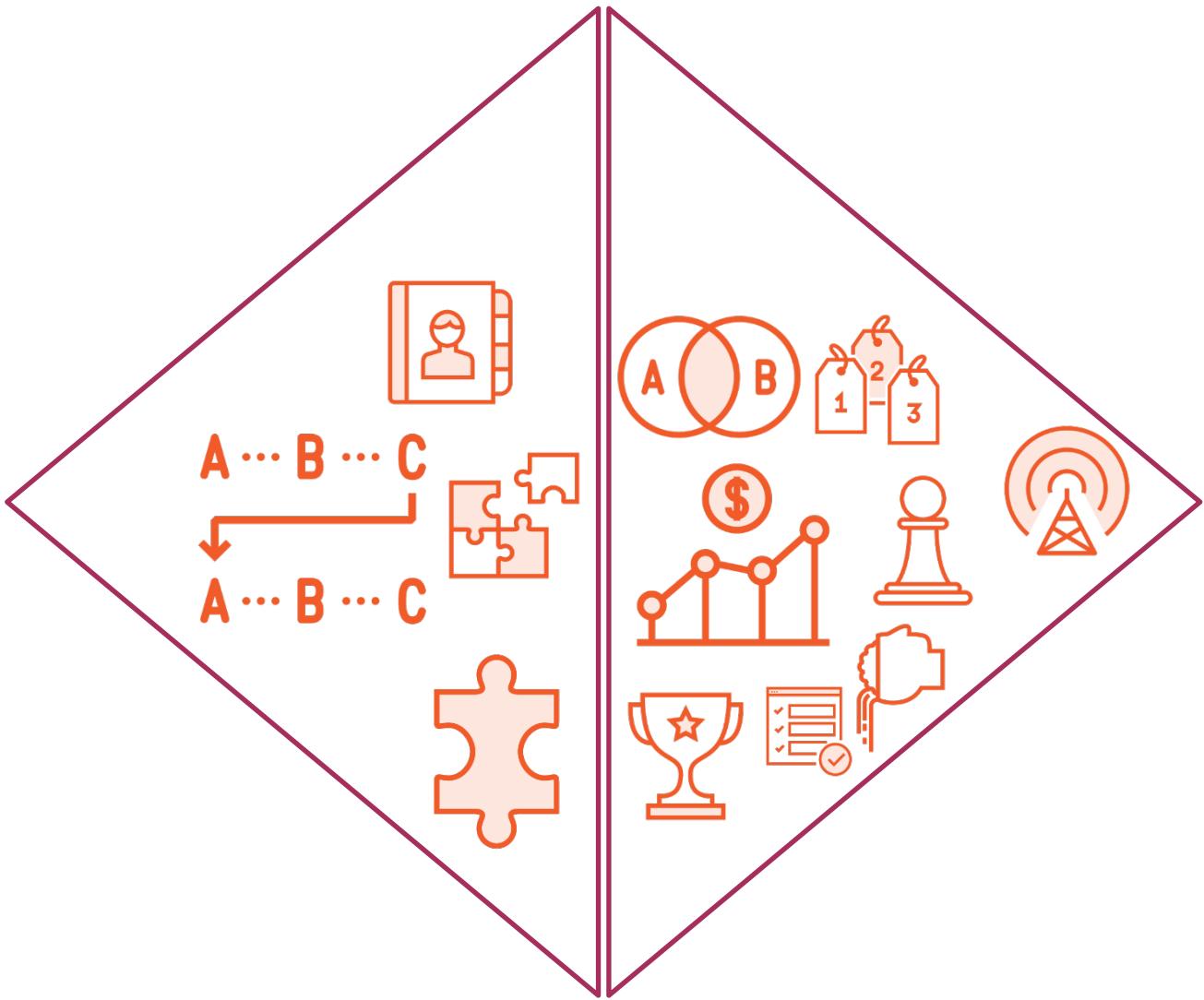
Diamond-shaped Process



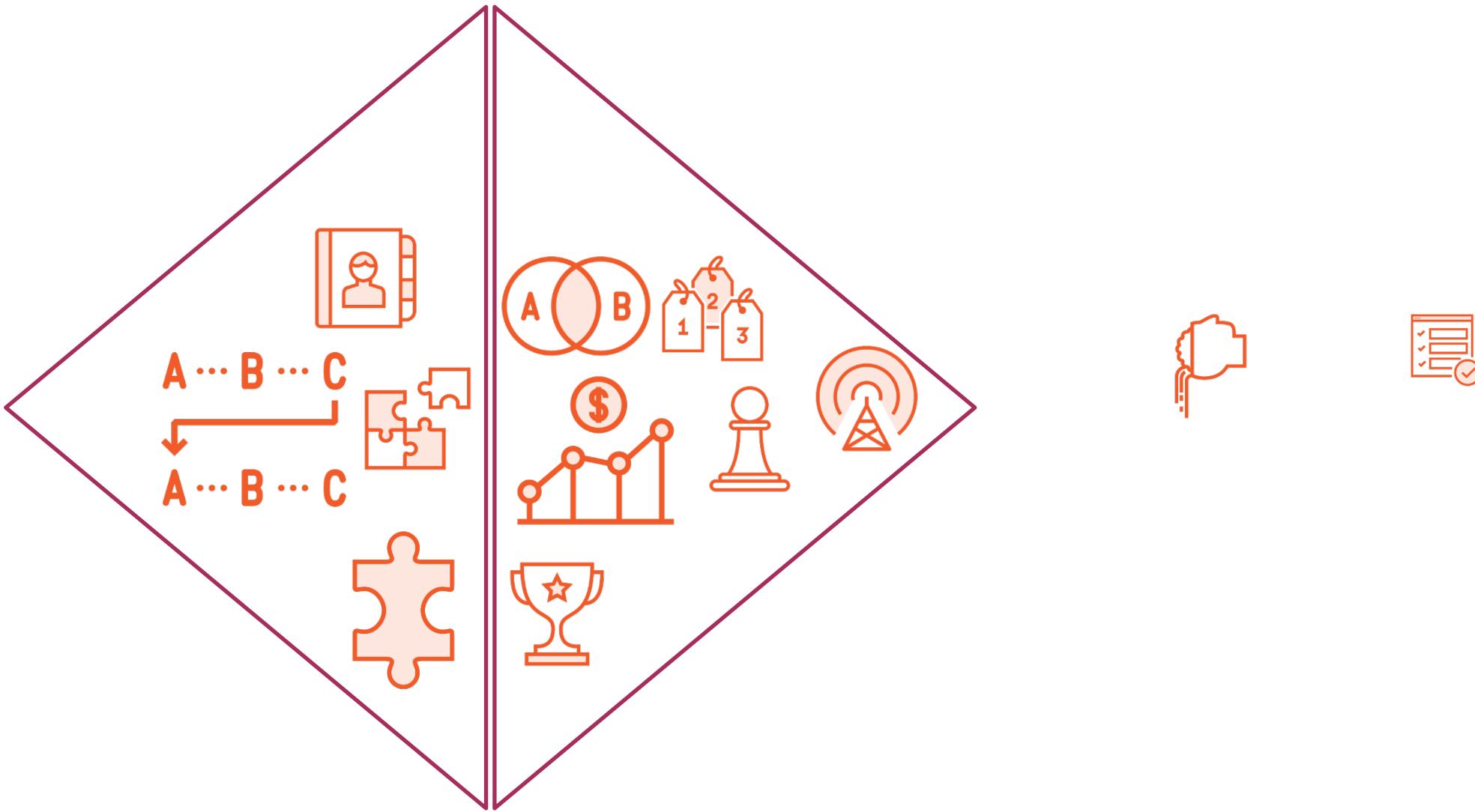
Diamond-shaped Process



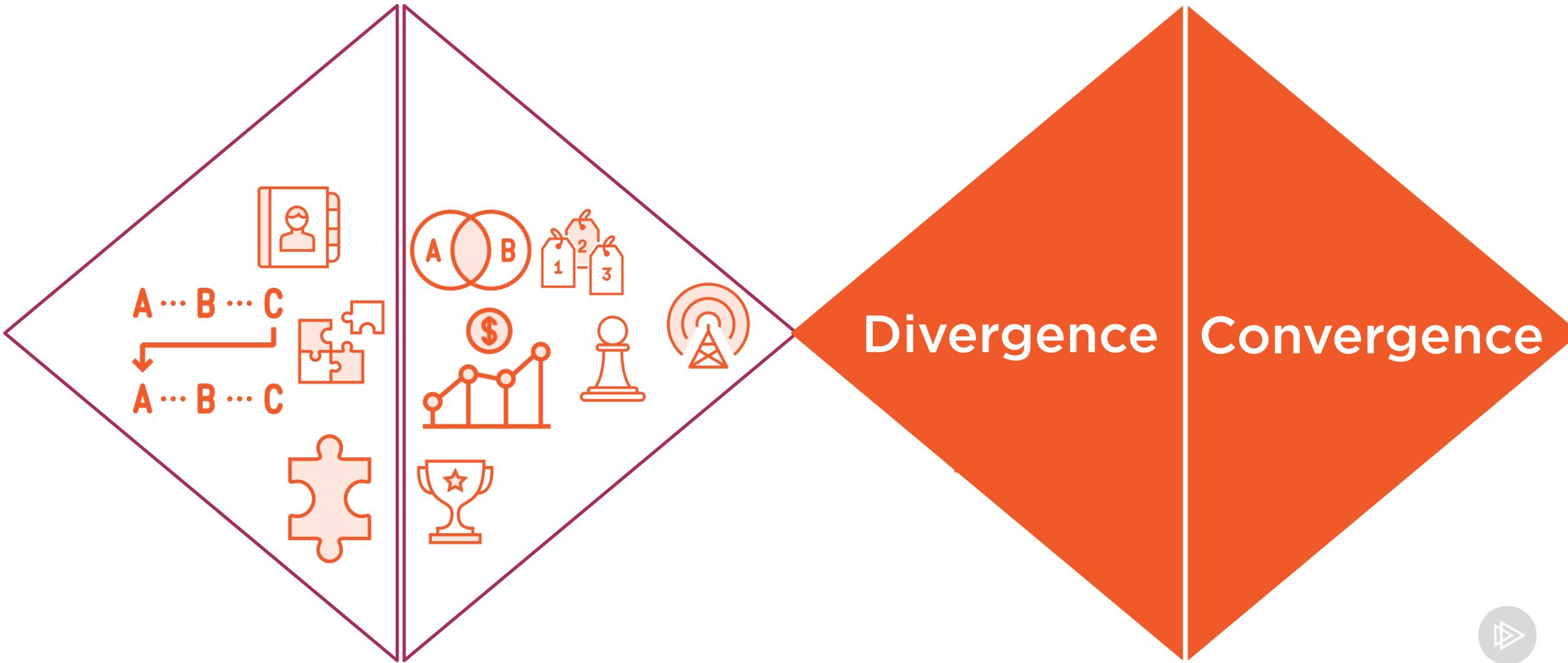
Diamond-shaped Process



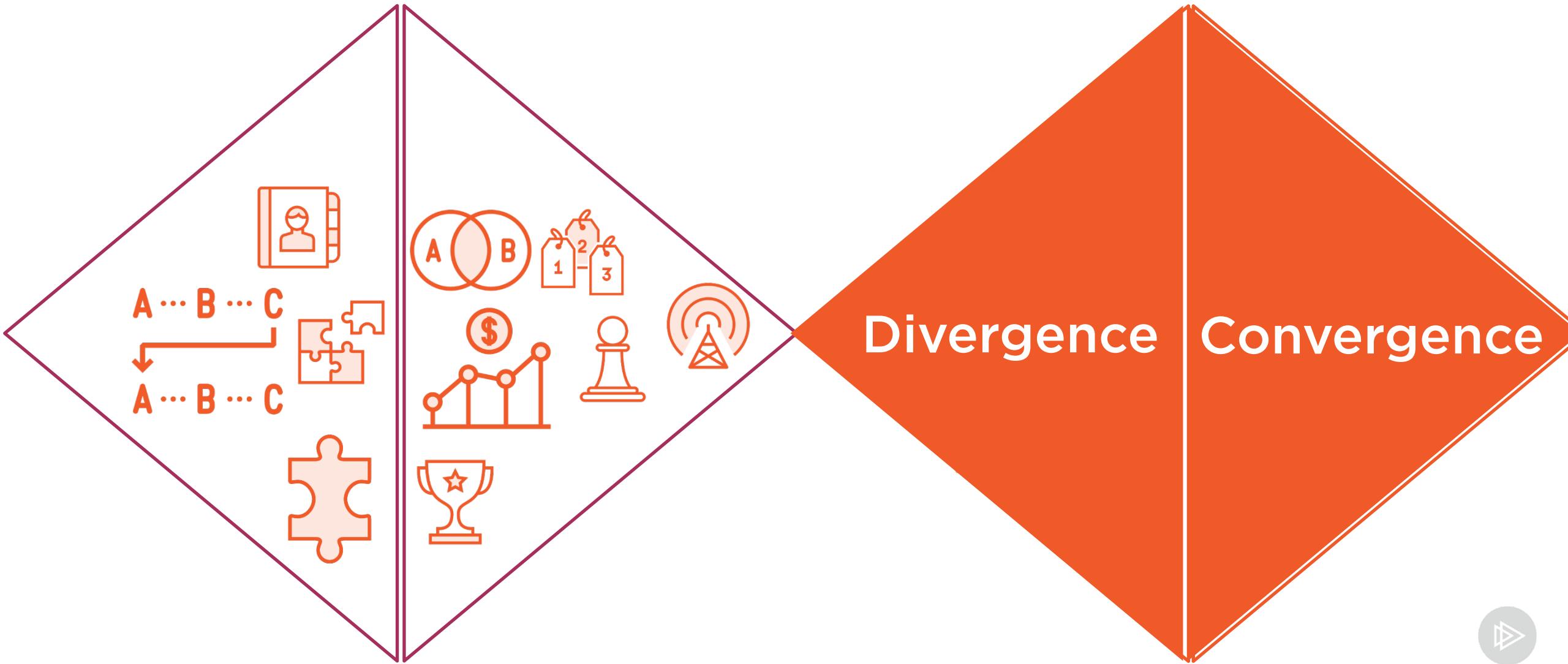
Diamond-shaped Process



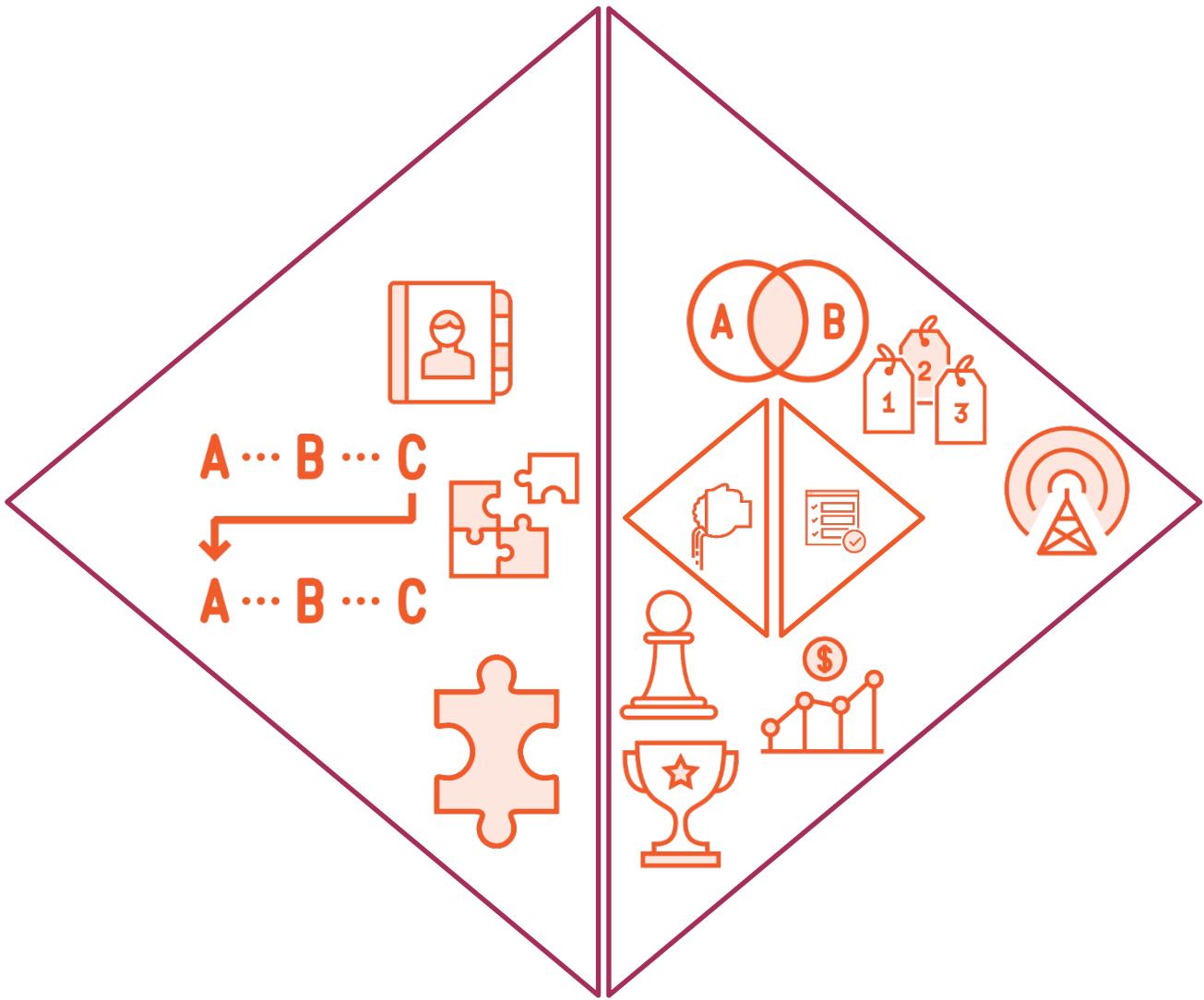
Diamond-shaped Process



Diamond-shaped Process



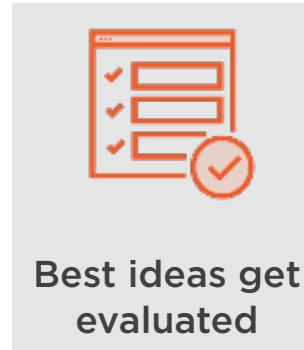
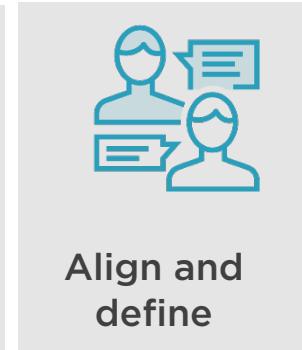
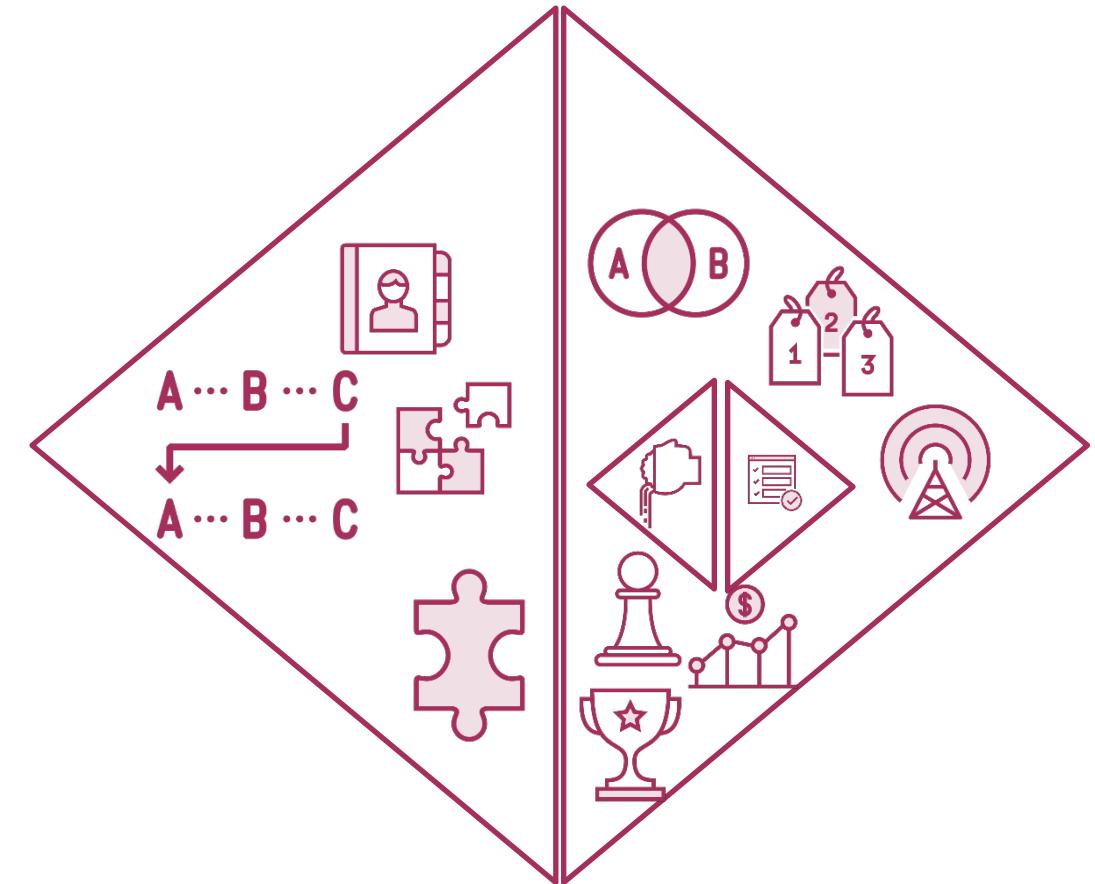
Diamond-shaped Process



Outcome-Driven Innovation®
is a product agnostic
innovation process



Diamond-shaped Process



Product or service agnostic

Product or service specific



Diamond-shaped Process



Product or service agnostic

Product or service specific



Demo



How can this process be implemented in an agile environment

Label the divergence and convergence of the newly defined diamond

Identify the end-to-end UX Strategy design process to implement with your team



Diamond-shaped Process

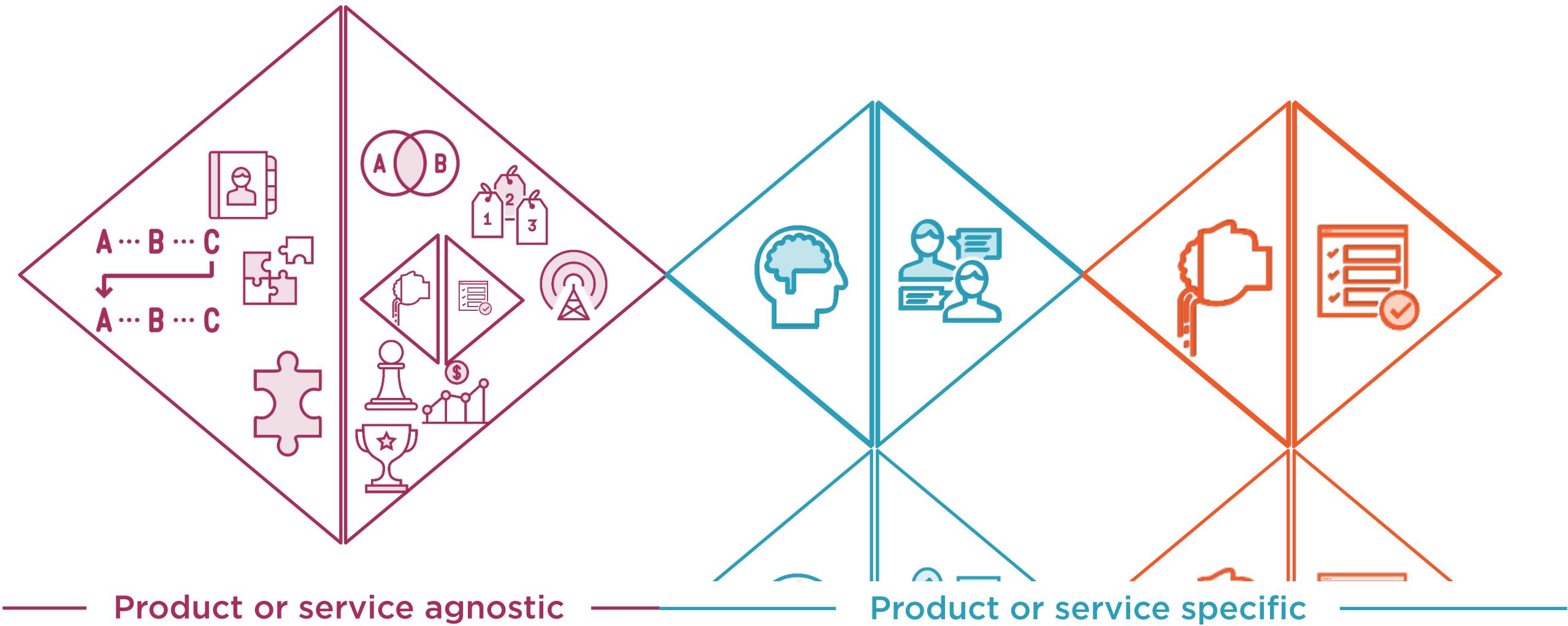


Product or service agnostic

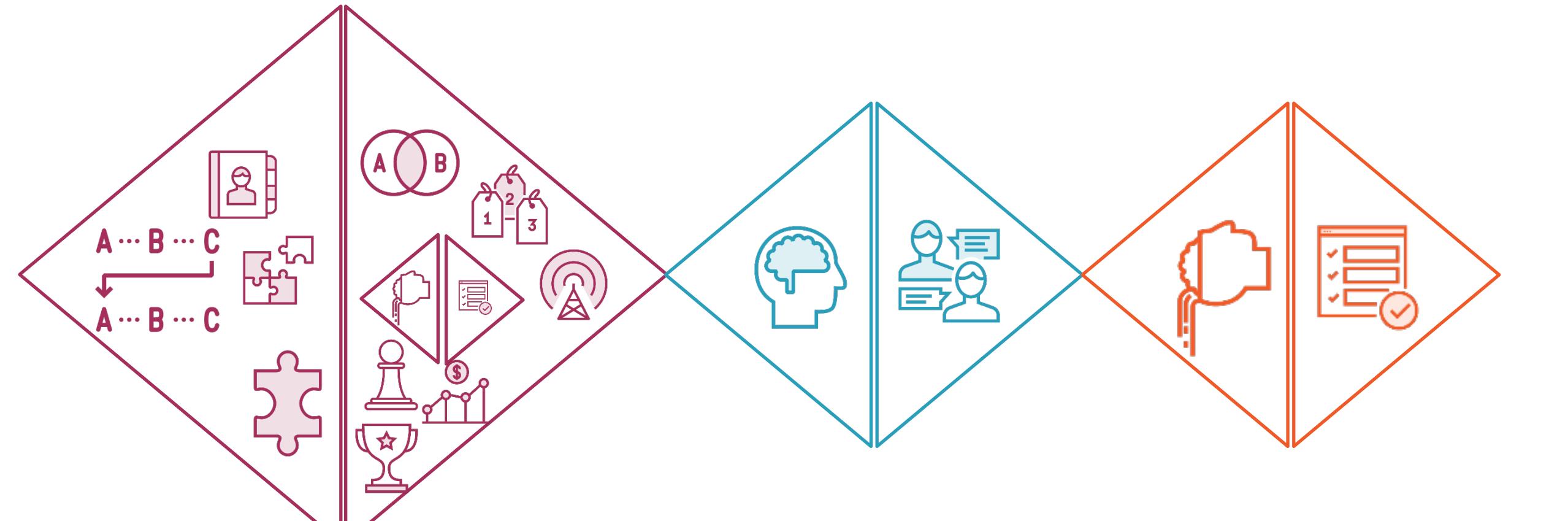
Product or service specific



Diamond-shaped Process



Diamond-shaped Process

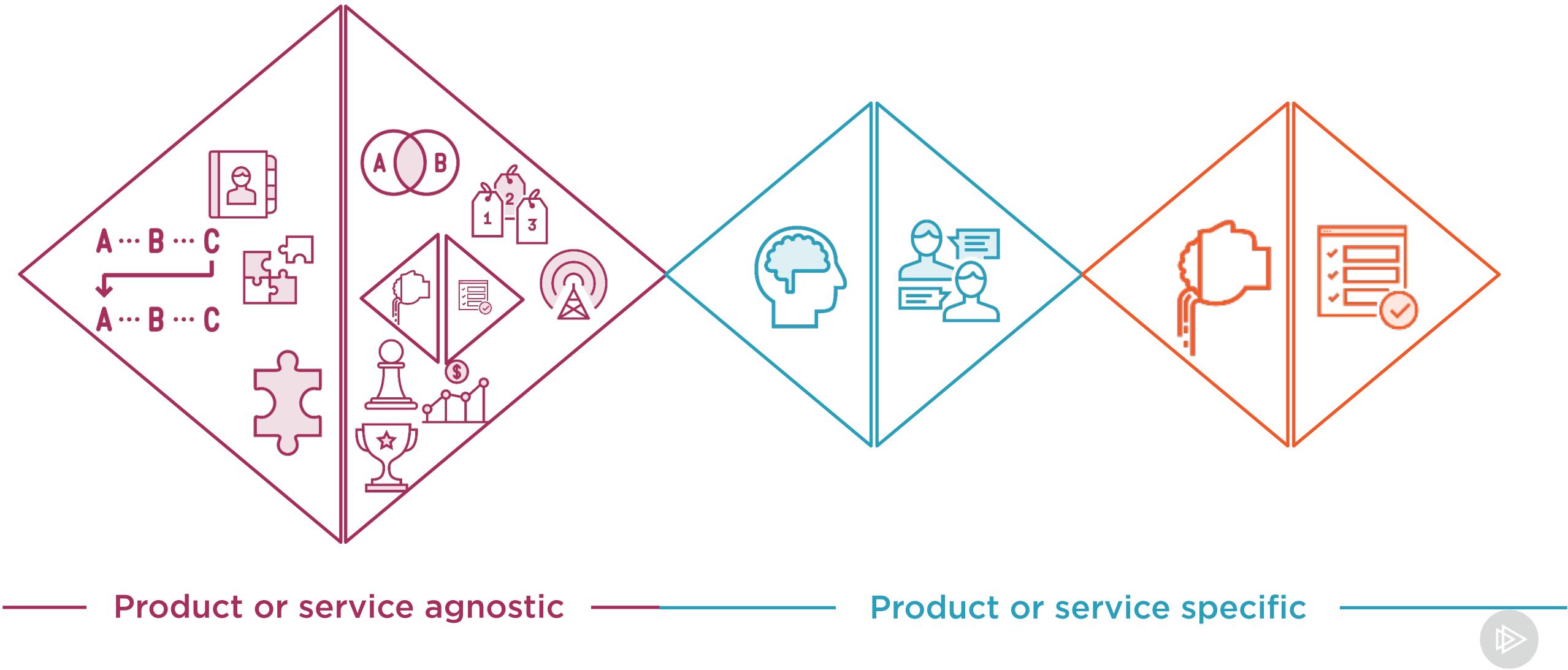


Product or service agnostic

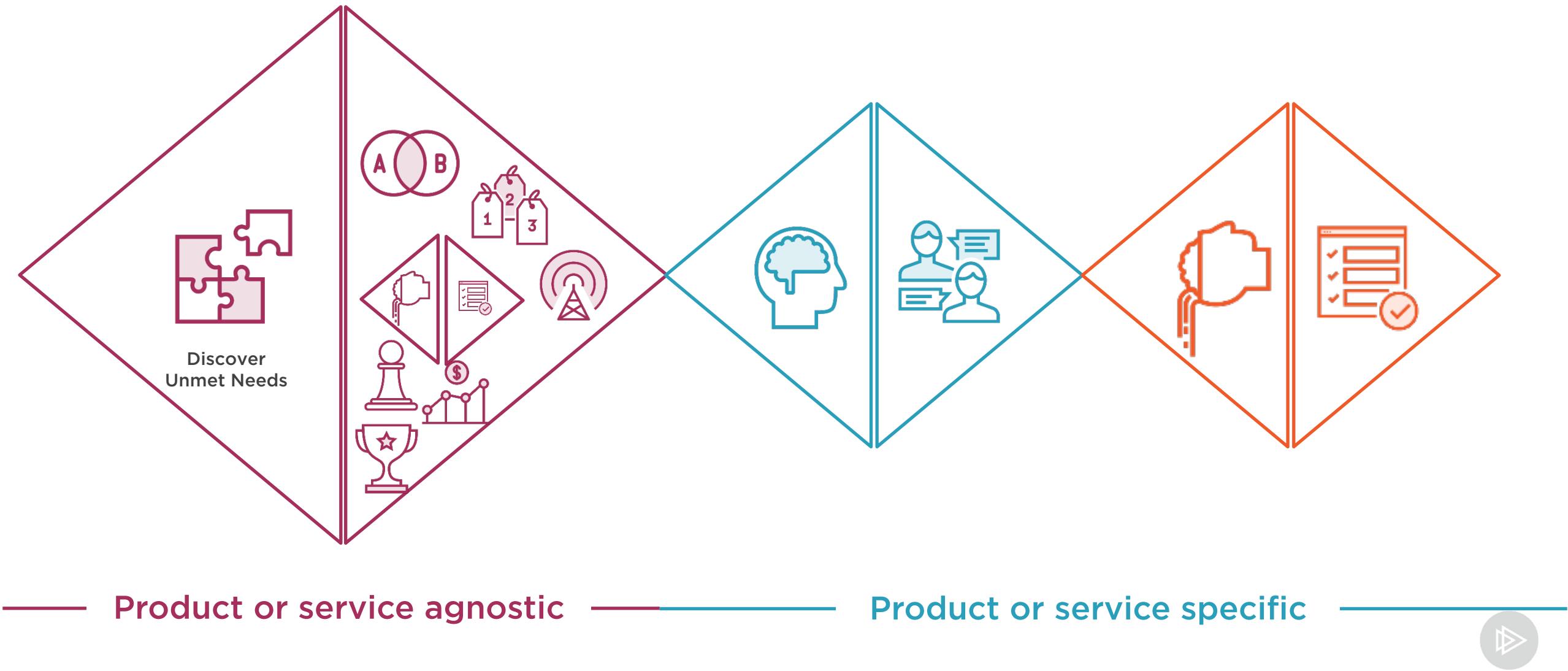
Product or service specific



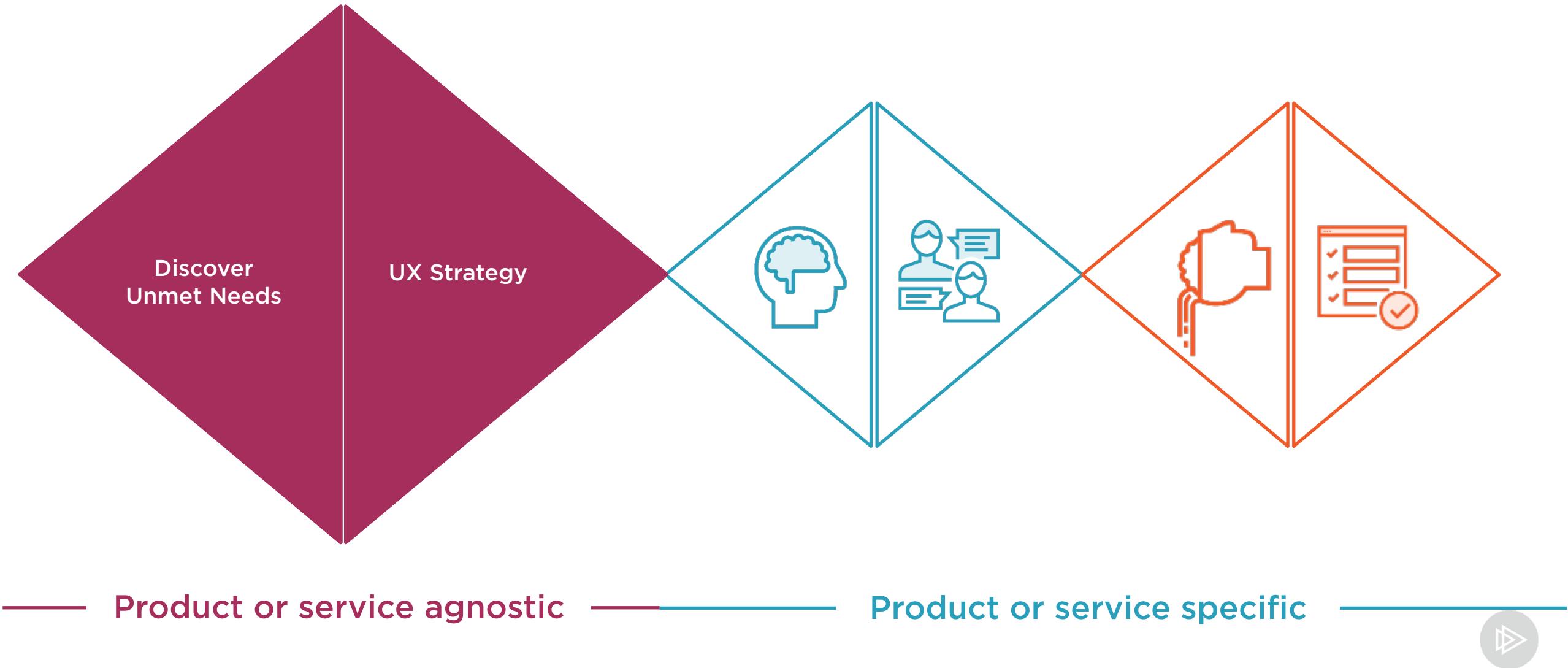
Diamond-shaped Process



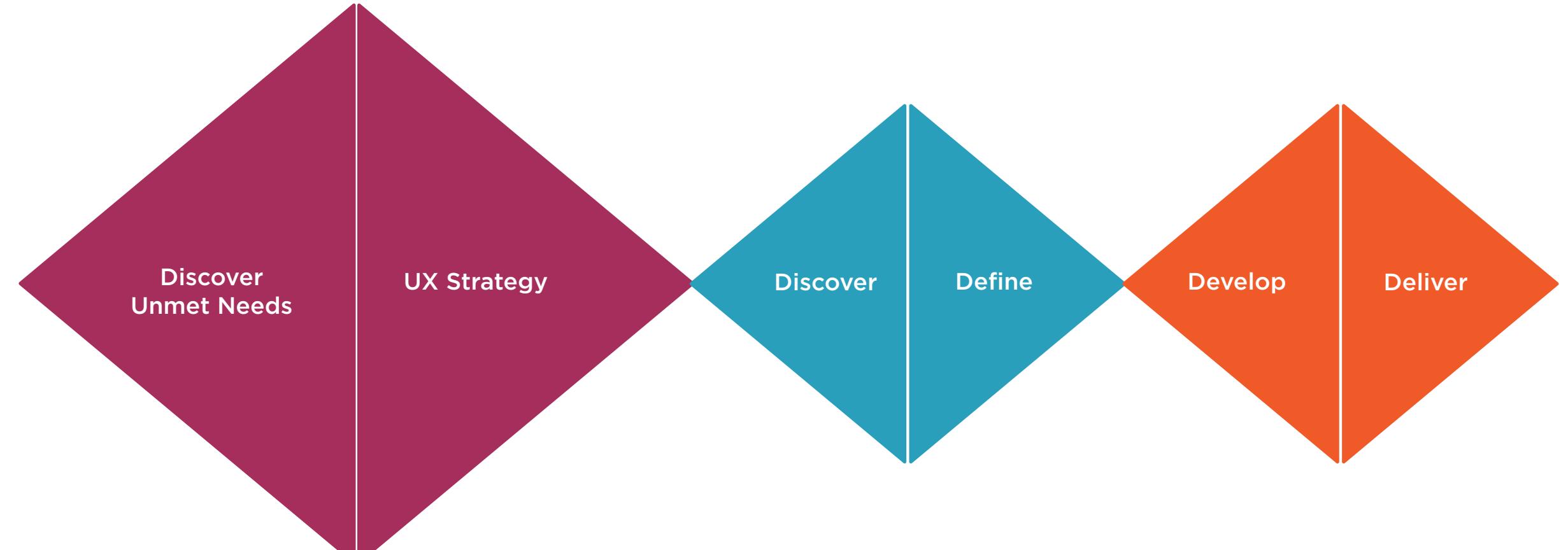
Diamond-shaped Process



Diamond-shaped Process



Diamond-shaped Process



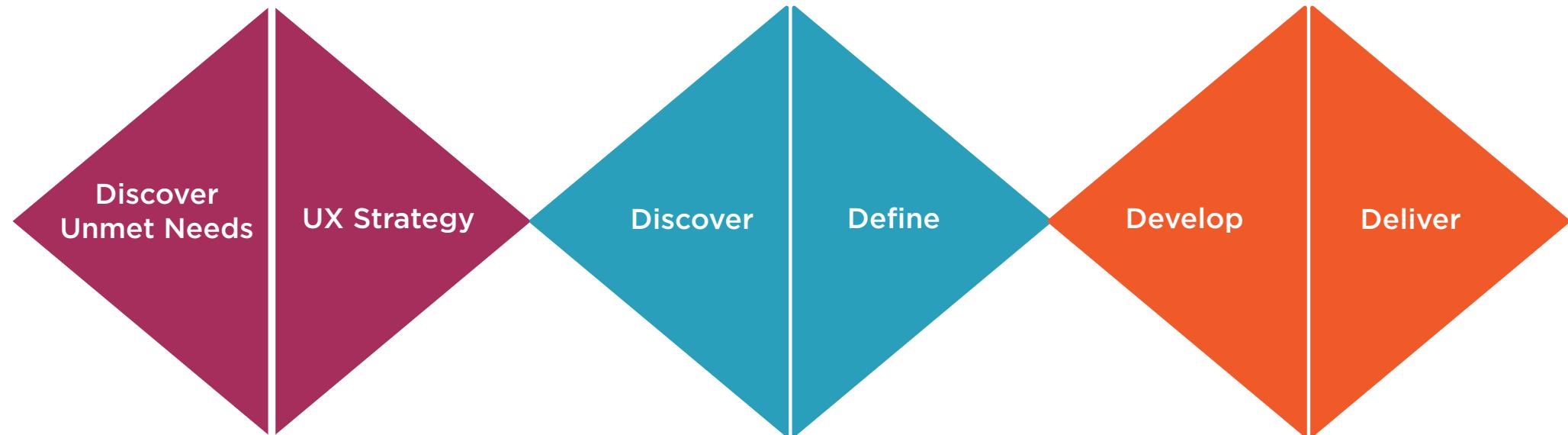
Product or service agnostic

Product or service specific



Diamond-shaped Process

Designing strategies right Designing the right thing Designing things right

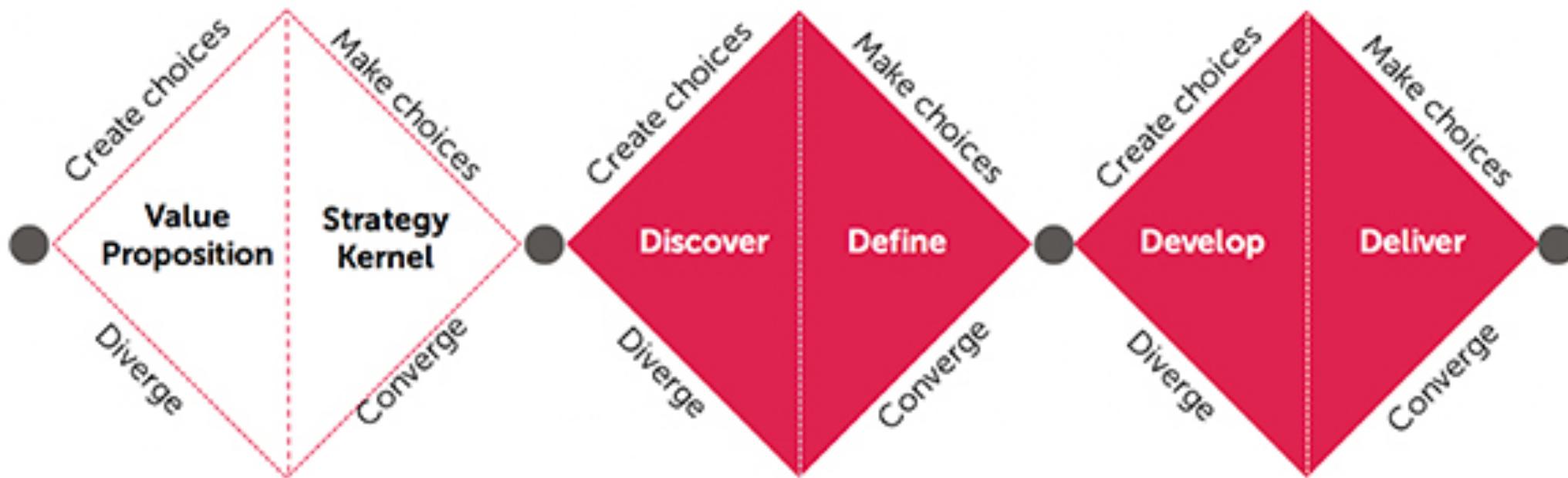


Product or
service agnostic

Product or
service specific



The Nomensa Triple Diamond



Skill Set Necessary to Deliver a UX Strategy



Core UX Skills

Visual or UI Design

Usability Research

Information Architecture

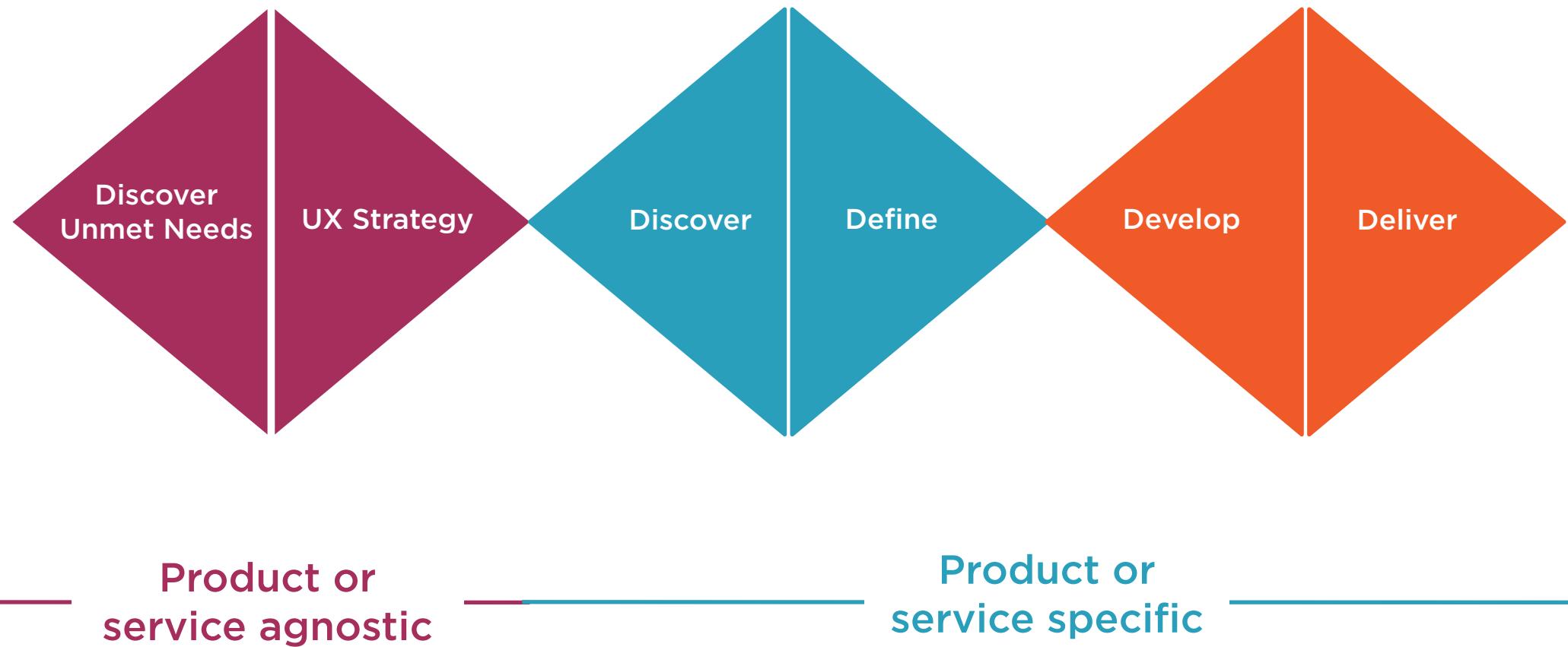
Interaction Design

Copywriting



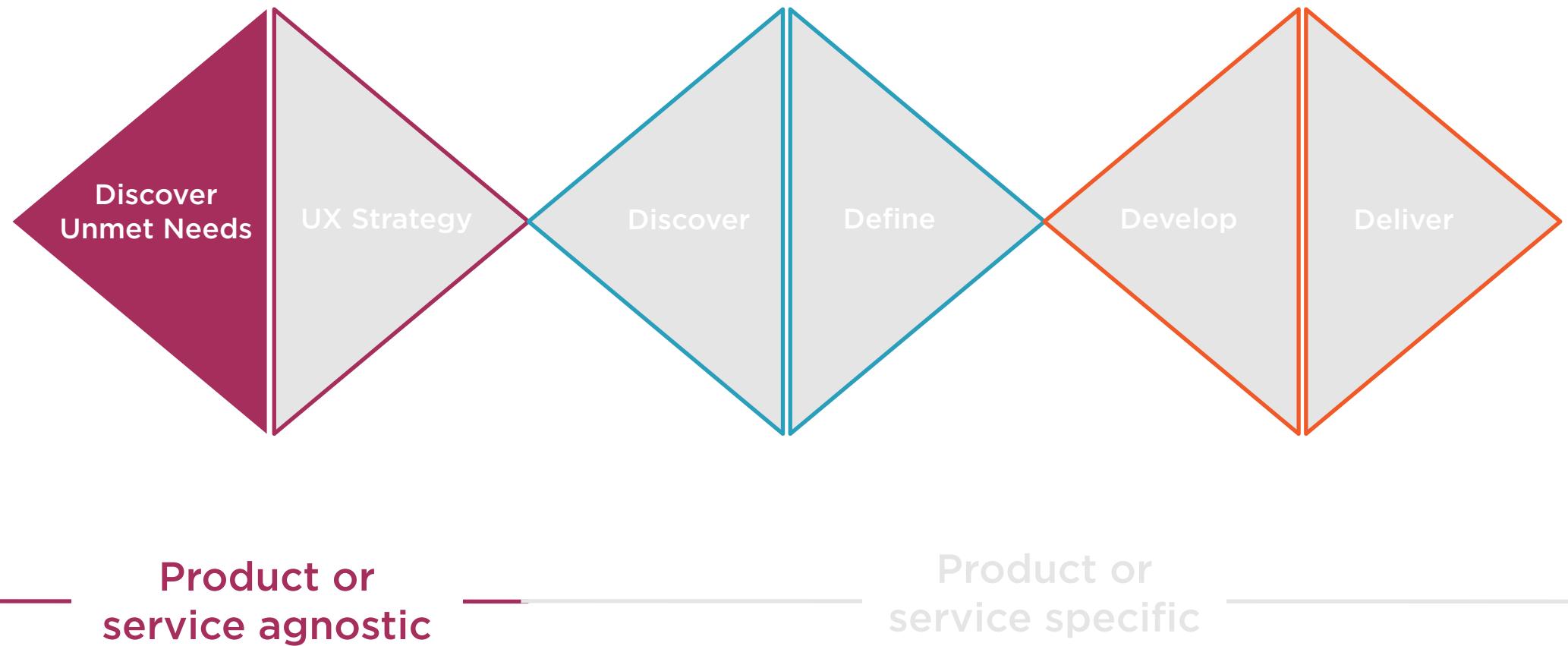
UX Strategy Delivery Process

Designing strategies right Designing the right thing Designing things right



UX Strategy Delivery Process

Designing strategies right Designing the right thing Designing things right



Ethnography ❤
Statistics
Social listening

Unmet Needs Discovery
Skills

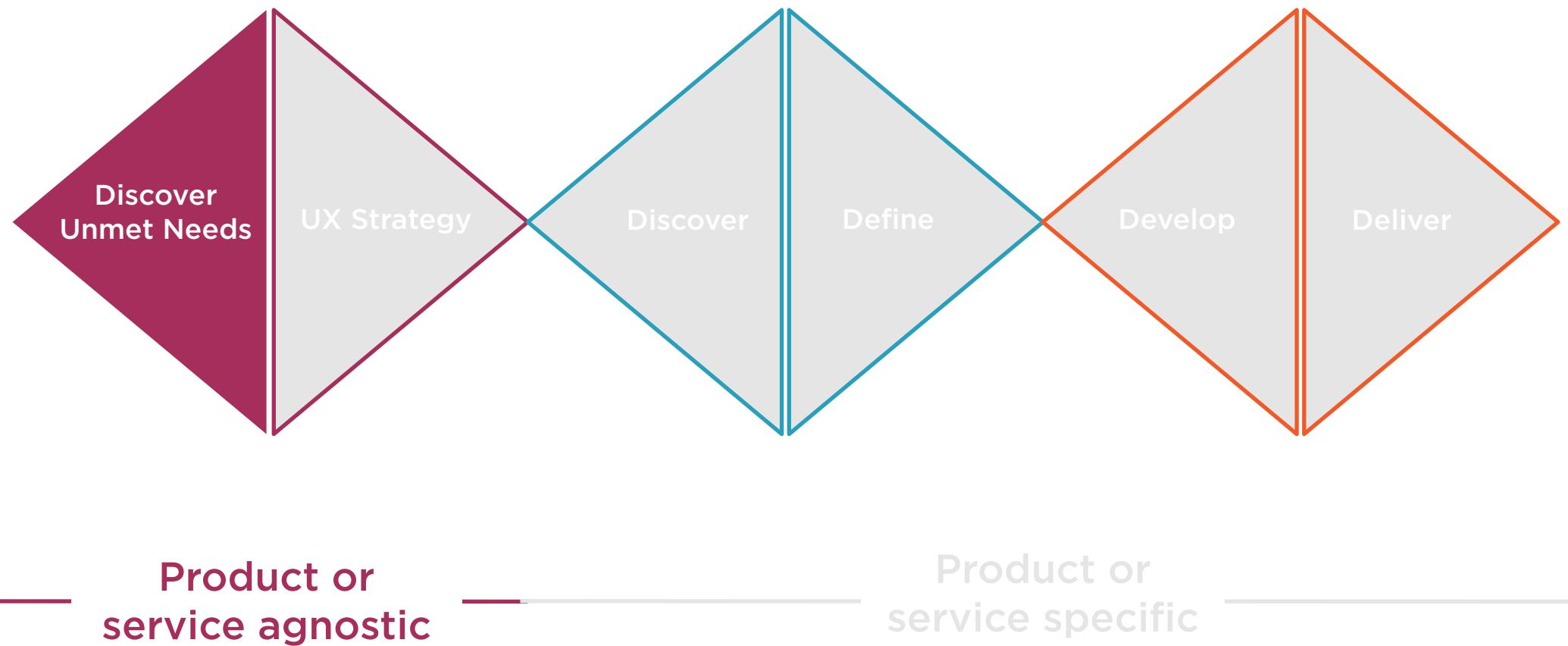


Skill particularly important in non-profits



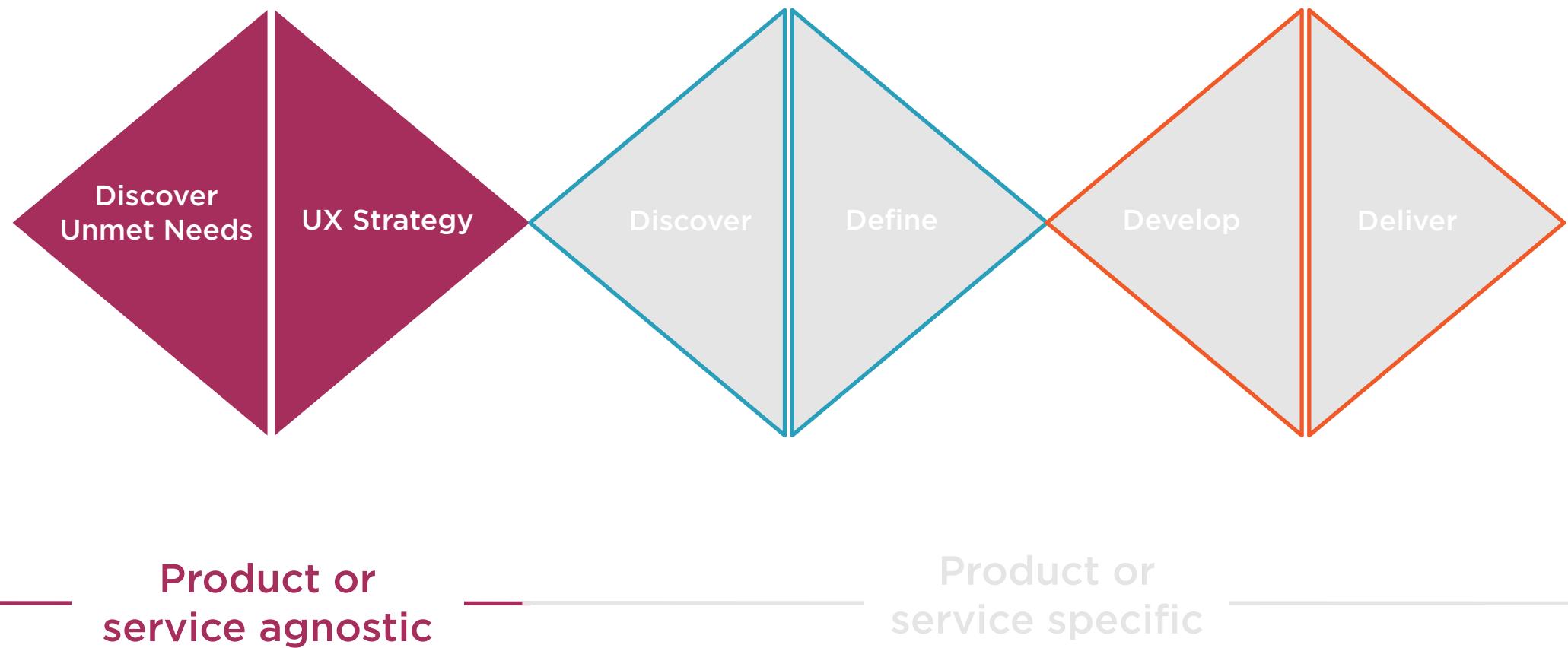
UX Strategy Delivery Process

Designing strategies right Designing the right thing Designing things right



UX Strategy Delivery Process

Designing strategies right Designing the right thing Designing things right



Sector Knowledge

**Multi-disciplinary
Strategy**

ROI/SROI 

Domain Knowledge

Systems Thinking 

UX Strategy Skills

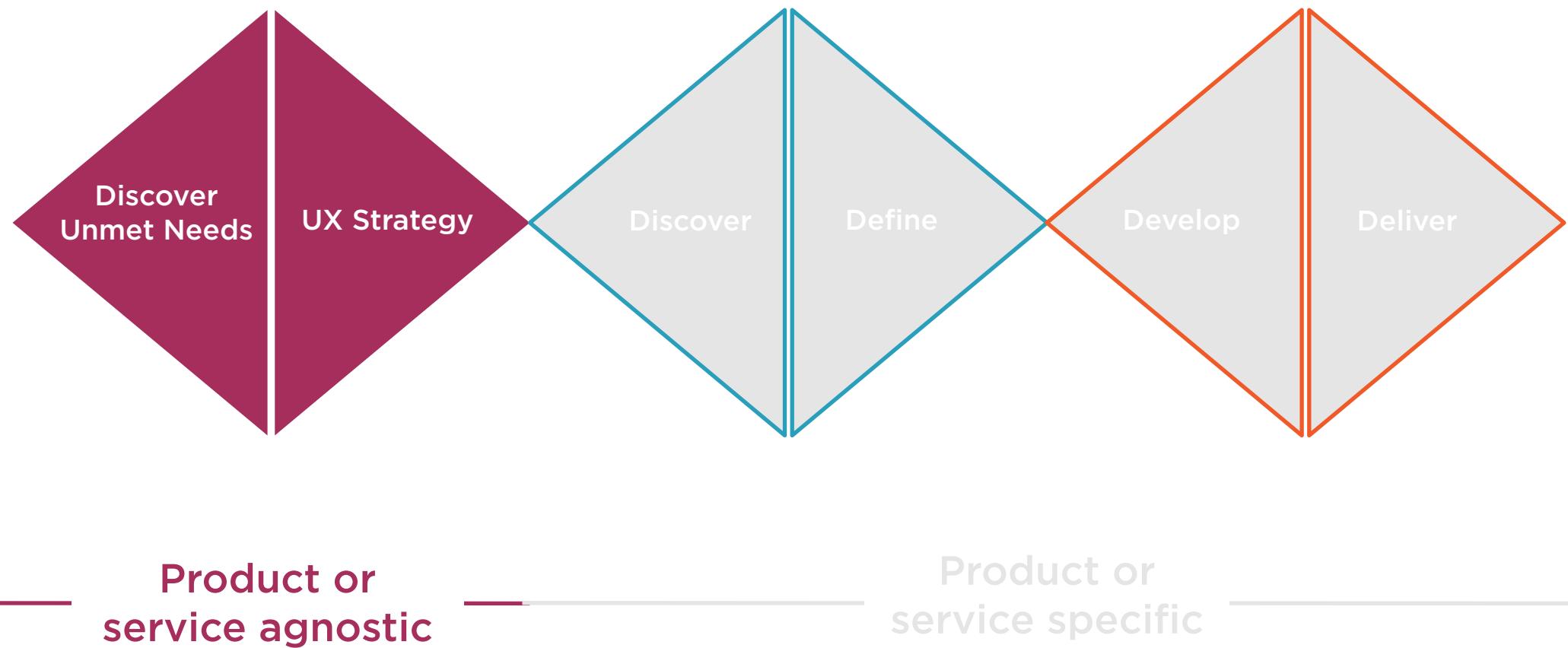


Skill particularly important in non-profits



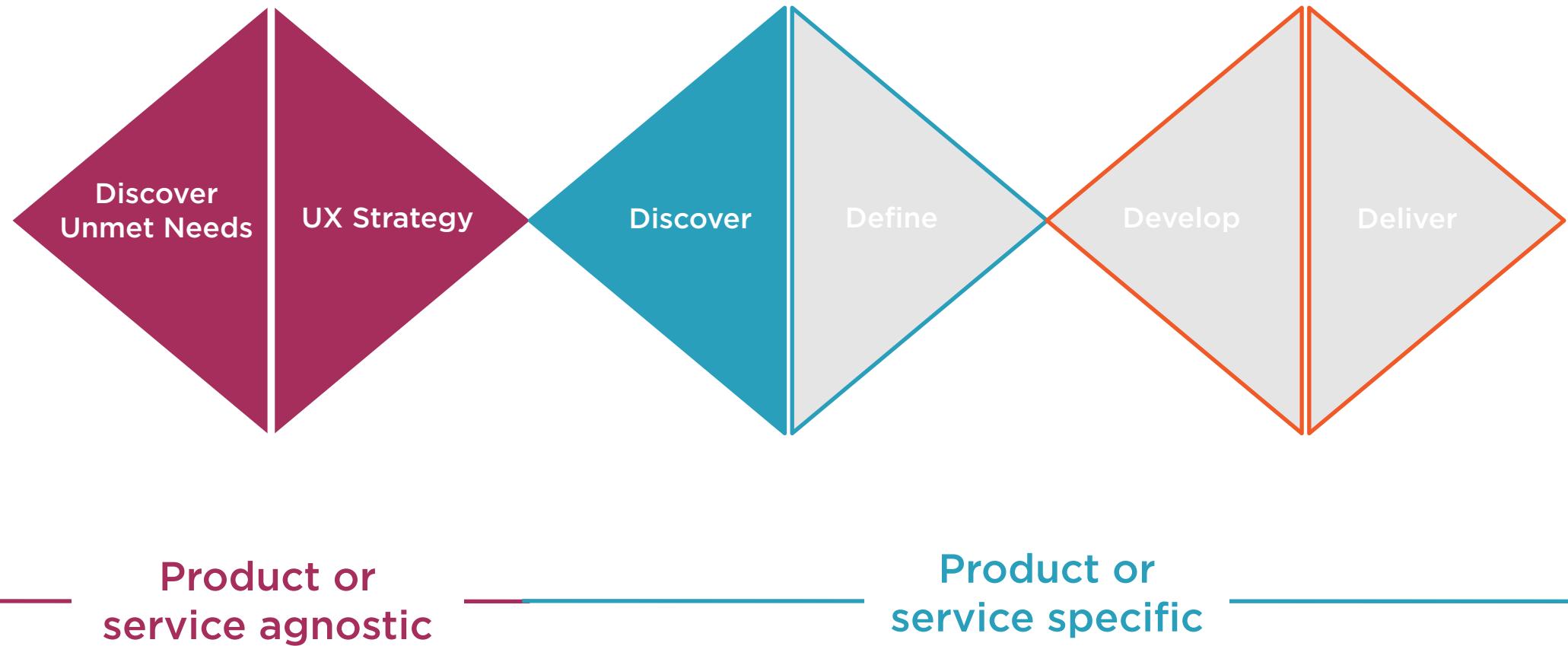
UX Strategy Delivery Process

Designing strategies right Designing the right thing Designing things right



UX Strategy Delivery Process

Designing strategies right Designing the right thing Designing things right



Product Design

Service Design 

**Analytics &
Measurement** 

**Multi-disciplinary
Discovery**

Product & Service
Discovery Skills

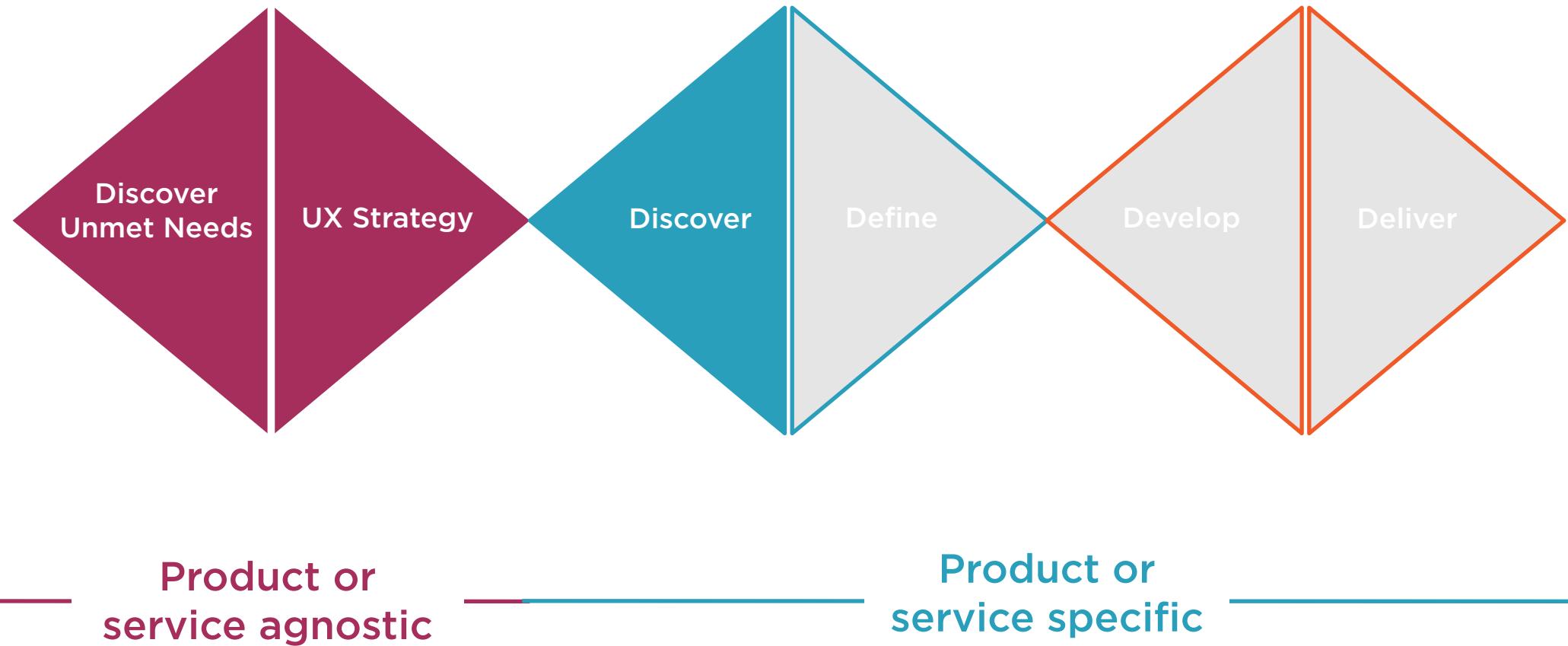


Skill particularly important in non-profits



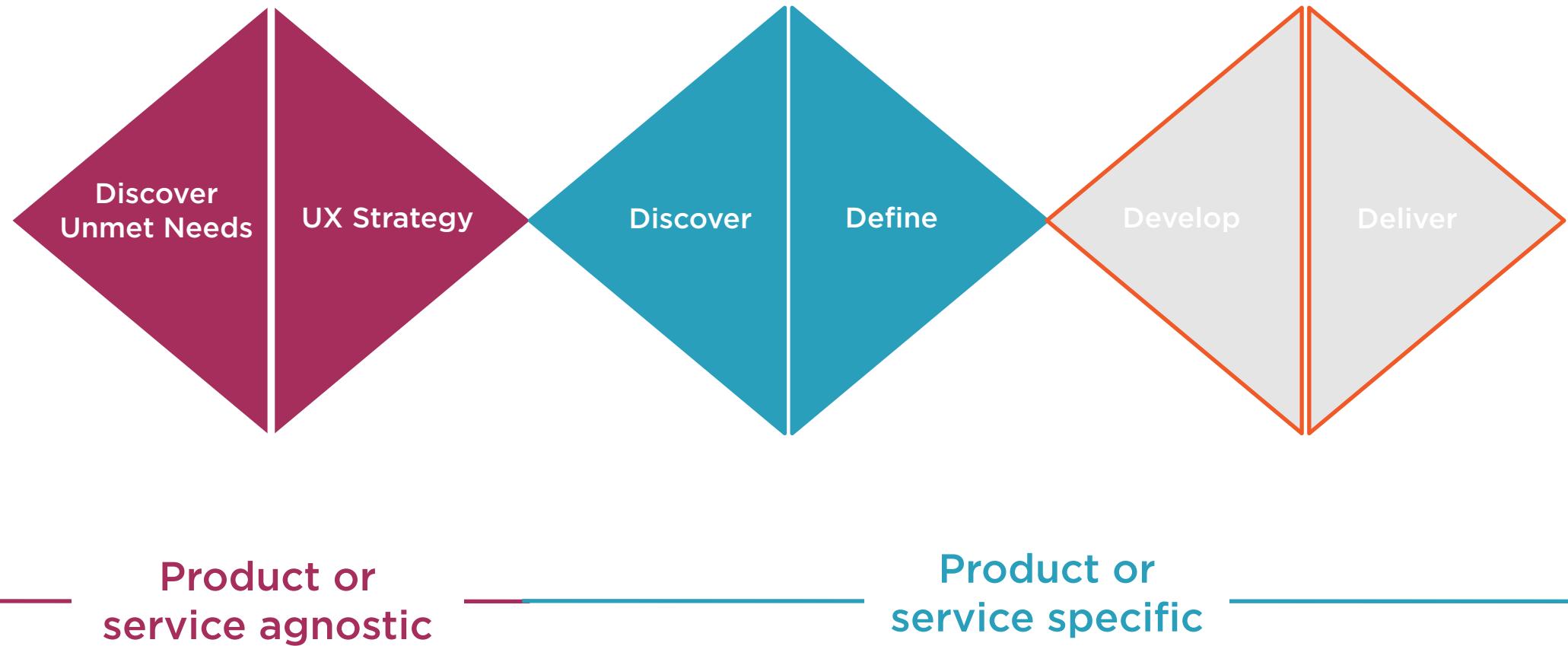
UX Strategy Delivery Process

Designing strategies right Designing the right thing Designing things right



UX Strategy Delivery Process

Designing strategies right Designing the right thing Designing things right



Design ❤
Communication
Design Process
Management

Definition and Alignment
Skills

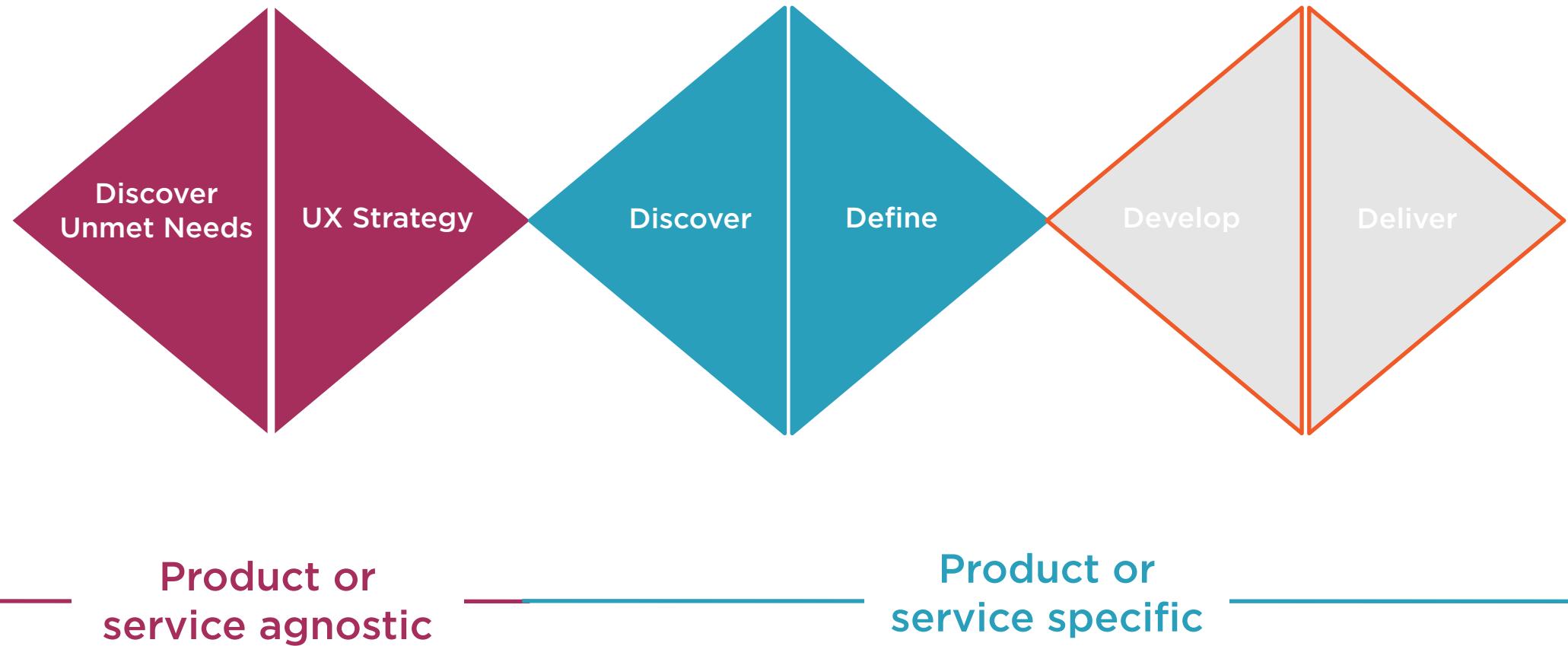


Skill particularly important in non-profits



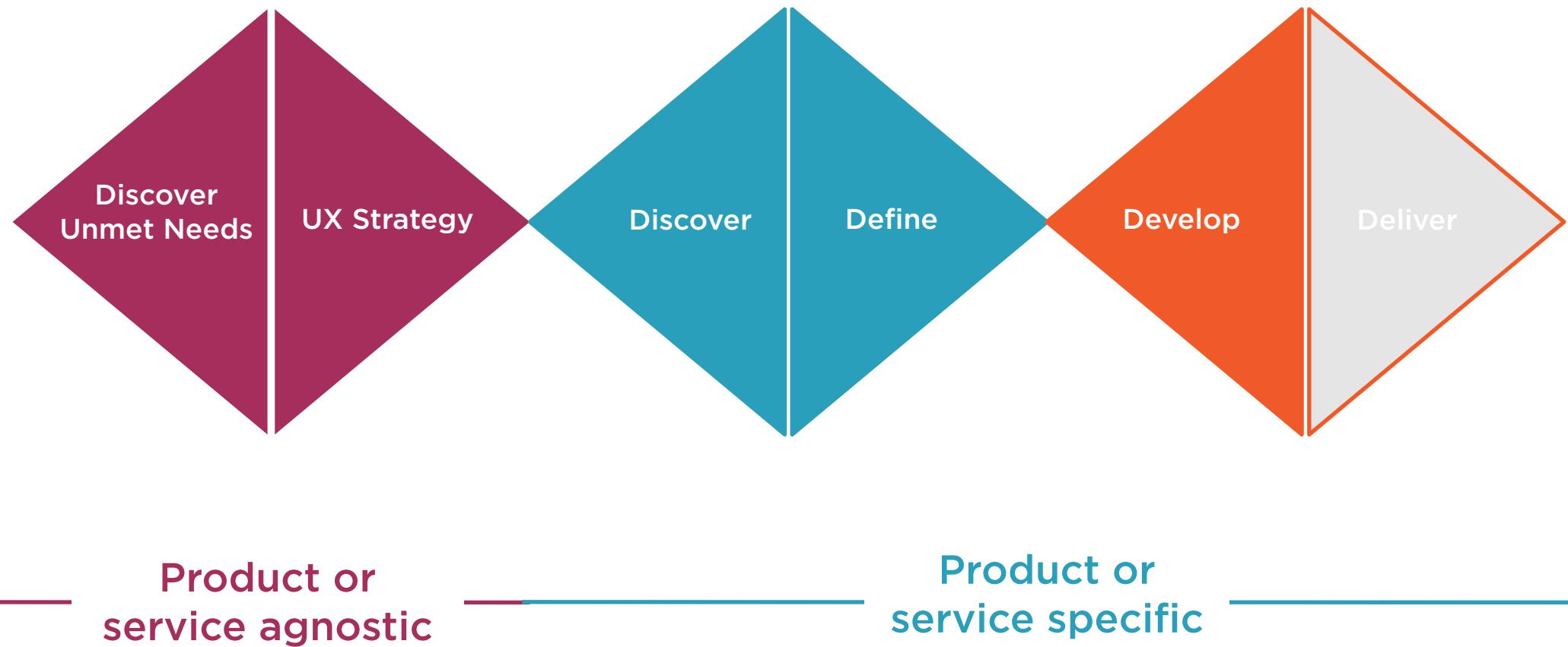
UX Strategy Delivery Process

Designing strategies right Designing the right thing Designing things right



UX Strategy Delivery Process

Designing strategies right Designing the right thing Designing things right



Information Design

Social Interaction Design ❤

Content Strategy

Inclusive Design ❤

Ideation Skills

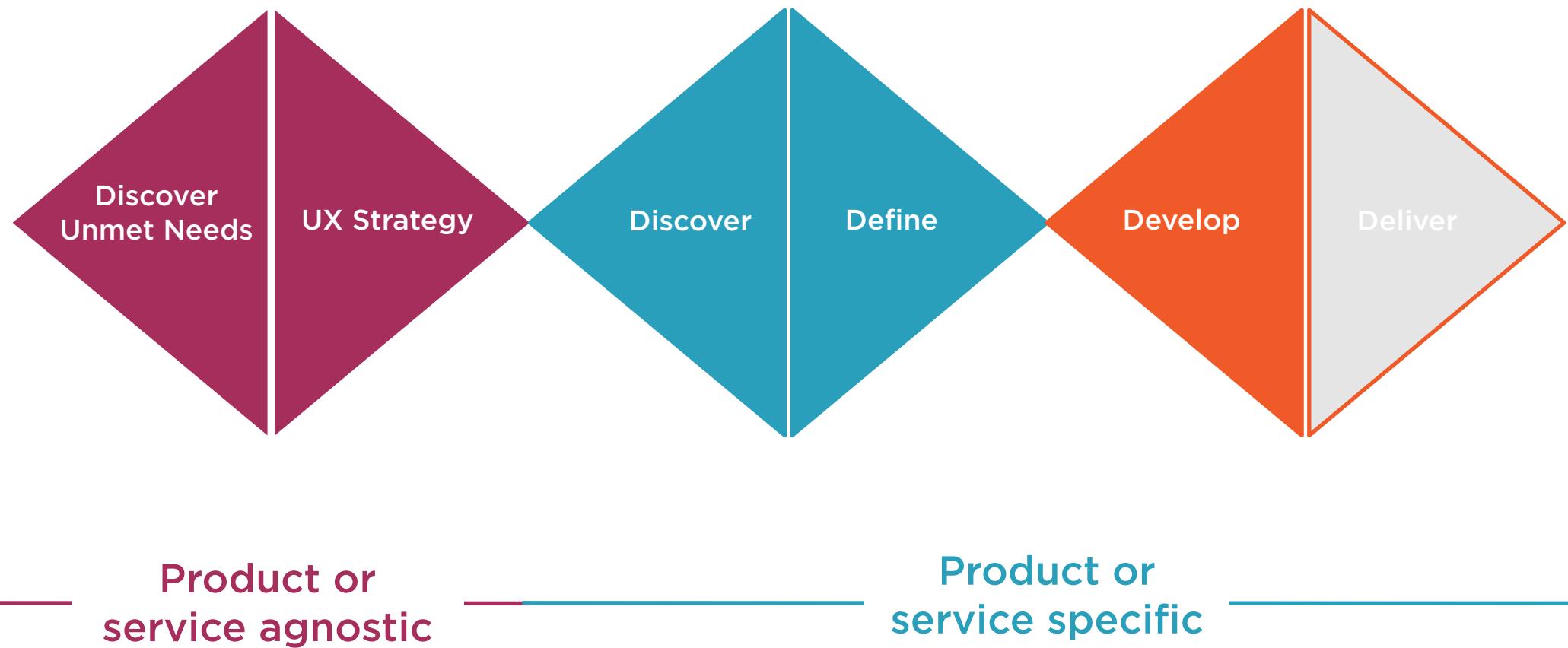


Skill particularly important in non-profits



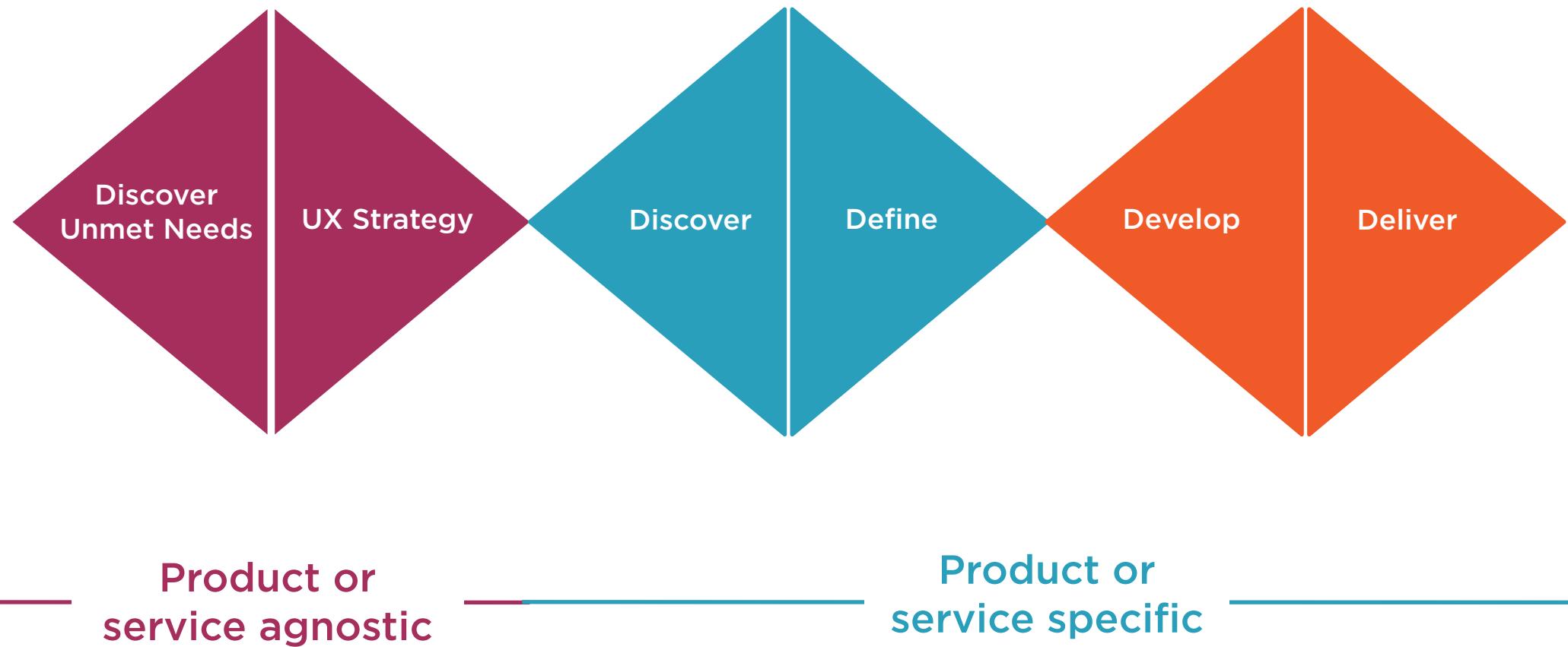
UX Strategy Delivery Process

Designing strategies right Designing the right thing Designing things right



UX Strategy Delivery Process

Designing strategies right Designing the right thing Designing things right



Development Methods

Design-To- 
Development Documentation

Design Delivery Skills

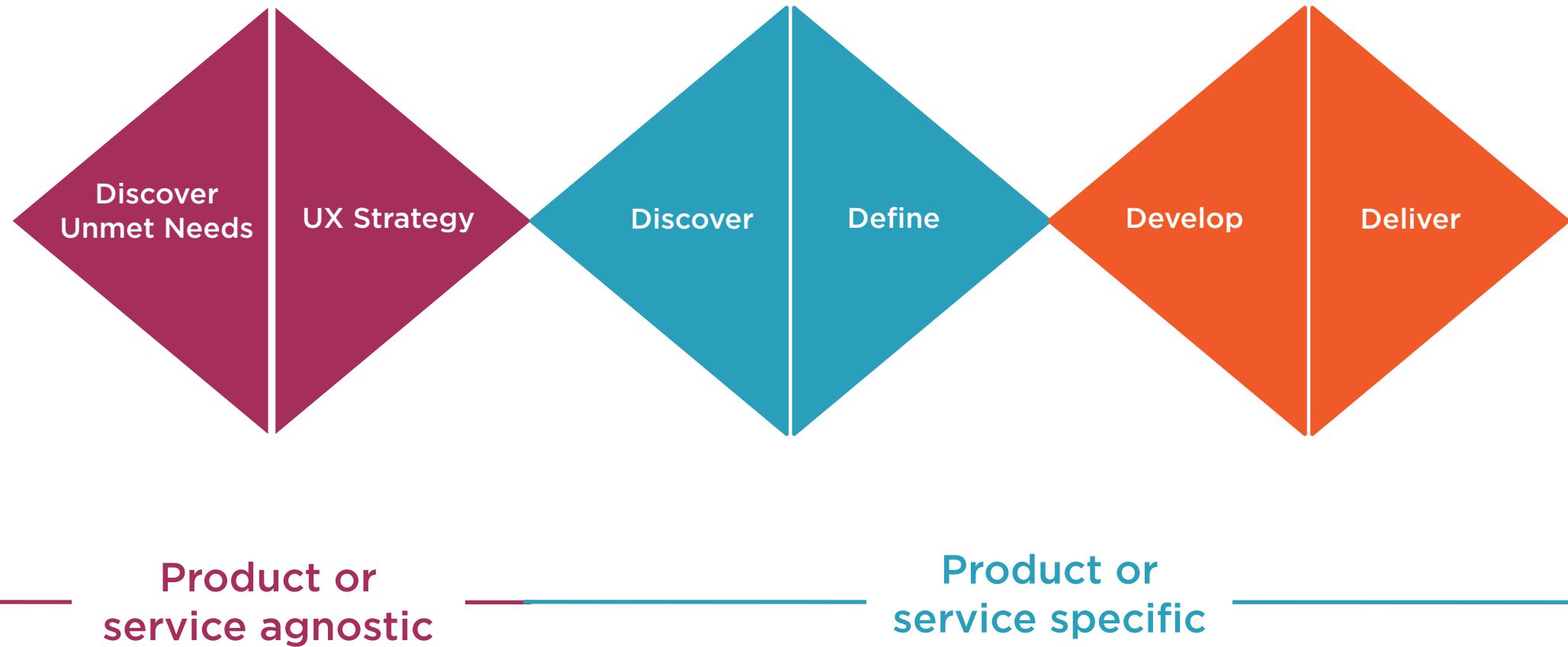


Skill particularly important in non-profits



UX Strategy Delivery Process

Designing strategies right Designing the right thing Designing things right



Timeline

Designing strategies right

Discover
Unmet Needs

UX Strategy

Designing the right thing

Discover

Define

Designing things right

Develop

Deliver

UX
Strategy
Skill set

FT
Full Time

Ethnography

Sector
Knowledge

Product
Design

Design
Communication

Information
Design

Development
Methods

T
Training

Statistics

ROI/SROI

Service
Design

Design Process

Social
Interaction
Design

Design-To-
Development

C
Contract

Social
listening

Domain
Knowledge

Analytics &

Management

Interaction
Design

Documentation

F
Freelance

Systems
Thinking

Measurement

Process

Content
Strategy

Development
Methods

S
Secondment

Multi-disciplinary

Discovery

Inclusive
Design



Demo



Let's help David create a proposal for the enterprise

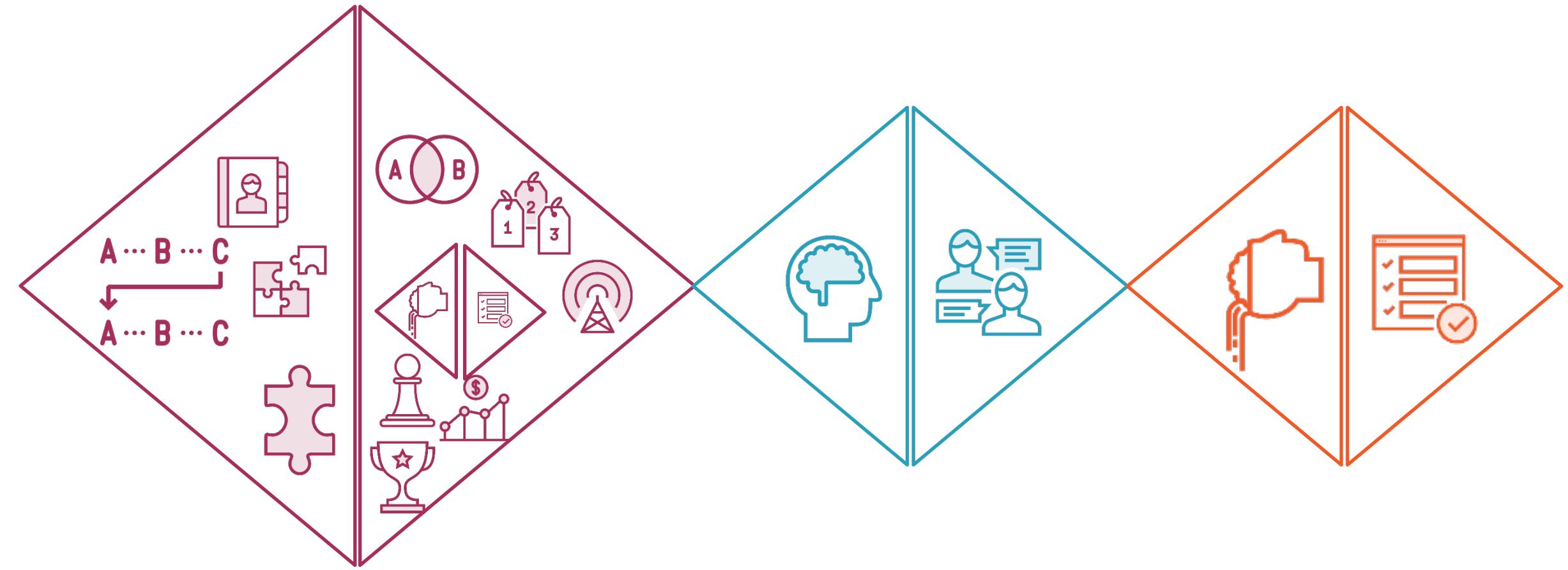
Bring the process and skill set together

- Timeline for the first release
- Ways of mustering all resources

Look into an initial proposal for the nonprofit organization



Diamond-shaped Process



Product or service agnostic

Product or service specific



Timeline

Designing strategies right

Discover
Unmet Needs

UX Strategy

Designing the right thing

Discover

Define

Designing things right

Develop

Deliver

UX
Strategy
Skill set

FT
Full Time

Ethnography

Sector
Knowledge

Product
Design

Design
Communication

Information
Design

Development
Methods

T
Training

Statistics

ROI/SROI

Service
Design

Design Process

Social
Interaction
Design

Design-To-
Development

C
Contract

Social
listening

Domain
Knowledge

Analytics &

Management

Design
Process
Management

Documentation

F
Freelance

Systems
Thinking

Measurement

Multi-disciplinary

Content
Strategy

Development
Methods

S
Secondment

Discovery

Inclusive
Design



