UX Strategy - thinking & doing

Welcome to our interview series on Experience Design Strategy.

In this series Tim Loo, Executive Director of Strategy at Foolproof, will be talking to global leaders and experts on the thinking and doing of experience design strategy.

Tim's second interviewee is **Ronnie Battista, practice lead for experience design at Slalom consulting** and co-creator of experience design programme at Rutgers University.

Tim Loo

Ronnie Battista

Q. Could you describe what experience design strategy is and what you do?

A. Sure. That's a great question because we're often asked, especially when you consider user experience, customer experience, service design, experience design, product design, what is the strategy thing – because strategy is often an overused term. The way I want to make sure that we frame the experience in business is really at the highest level starting with what is the business strategy.

Often our field, which is filled with some great folks, is really more of a focus on what the UI looks like, what is the experience of a particular product like. Even at the stage of what's the end-to-end journey, which is a little bit more on the strategy side, but ultimately the first questions we should be asking our companies and our clients when we're working with them is what is the business problem you're trying to solve? What is the business strategy you're trying to realise? Is it top line growth? Is it bottom line productivity savings? Is it entering new markets? Is it growing your existing customer base? Is it enhancing and improving shareholder value? There are lots of those questions that I think that strategy really deals with.

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My view of experience design and strategy is that first and foremost we need to be at that table - at the big table - in the beginning to make sure that what those business goals and values and KPI's are, are aligned to the customers, employees, the audience that they're serving.

Q. What does experience design strategy look like as a process and what are the components of that?

A. One of the first pieces is having a solid understanding of the current business climate. Certainly, reviewing the financials, reviewing effectively what the 18-36 month plan is for an organisation and then making sure that there is an understanding across those from the business side, finance, product, operations, marketing and HR, and that there is a solid, agreed and aligned understanding of what any changes - be they technical, process, or people wise - and how that is going to be framed in a larger understanding of what the customer experience is.

Ultimately this all rolls down to customers, so even if it's an employee-based project, those employees are in service of customers. The upfront thing we want to do is make sure that we have a good understanding of what those typical

customer segments are via personas. Then take those and, as best as possible, frame the end-to-end experience and be able to talk to what the typical journey map things are; what are the touchpoints, the channels, the processes, the thinking and feeling pieces and certainly, where possible, underpinning that with the technology that is supporting this end-to-end experience.

So even more from an ecosystem mapping perspective, really thinking about what a service blue print would look like. That, in terms of being able to start an engagement, is one of the first things that I would advocate you undertake.

Q. What are the conditions for creating an experience design strategy?

A. That question is framing the crux of what is one of the largest challenges. Anything that we do, on its face, we can show to anybody and they would get it, they'd be like: it's great we should do that, but the execution of that is usually where things go wrong. There are a lot of reasons things go wrong. I would say that there are technical limitations, people might just be mired to a legacy system that while they'd love to get off it they can't, so you've got to do your best to get the most horse power out of that.

There are industry challenges, specific industries that have been doing the same thing for a very long time and it's a challenge for them to be able to move around that. Most notably in industries like healthcare and financial services, which have highly regulatory compliance based things that prevent them from doing the best they can do in providing a customer experience.

If I was to really boil it up to one thing that I have seen consistently across all industries, in terms of the relative success and failure rate, it's around true cultural transformation. Having the executive, the C-suite, invested and engaged and believing in it is really the most important recipe to success.

I'll just add on top of that it's one thing if a CX transformation is considered a programme, so something that has a start and end date with a certain amount of money and we're going to get there within 3 months, 6 months, without setting appropriate guardrails around short-term wins, really long-term goals. Once again, even the best intended efforts are going to really be at risk for not taking root if it's not something that's followed through.

Q. Do you have an example of a client where you've had an impact around culture and working practices?

A. There's a client that I work with that has made a very significant investment in a customer-centric organisation. The interesting piece is that there is still a little bit of a challenge in making that connection because this is an organisation that is being viewed by some as "the next flavour of three years of customer-centric thinking". One of the small ways that I'm trying to help effect some change is helping make connections at a team level within the organisation, so there is some degree of understanding of their language, understanding of their challenges, understanding most notably of how they're incented, and making sure that folks have those understandings across teams.

One of the big things we know - and I believe you're reading a book that I got a lot of mileage out of and value out of - ["Team of Teams" by Stanley McChrystal](#) - is that idea of embedding folks from different backgrounds and views of the same elephant and allowing time for those teams to learn from each other and build that trust.

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We are in an extremely competitive and fast moving environment where traditional companies are being up-ended by up-starts that come in without any of the institutional baggage. People have a general sense of anxiety about what their role is and how they're going to be considered a valuable member of an organisation moving at a greater velocity. Finding ways to have people feel that they can look left and look right and that everyone is marching in service together is a big key. I'm trying to find ways to just say "hey, I know you're working on this particular project or app or something, you might want to just liaise with X person in marketing and just sort of share and get some of their ideas", and just start a bit of that bottom up cultivation of various teams across the organisation.

Q. Why do you think experience design and experience design strategy seems to be at the forefront as a potential solution to some of the problems we're having in society?

A. I think the reason that experience design is particularly well placed for the changing business environment is because our focus is on the customer. I know that we throw these phrases out, like "no business exists without the customer", but the fact is unless somebody is buying something from your company you're not a company, you're not a business.

By us being able to say to marketing I know you're trying to reach this to reach your goals and digital impressions, or whatever, but ultimately, it's because we want to get more customers, or achieve this business goal. Or saying, operations you need to keep this running at some degree of profitability etc. etc. This is all because we're trying to run a business that's serving our customers. I like to look at us as that very neutral, but advocate level for the customer that crosses different parts of the organisation.

"Ask your customers, ask your employees what do they want."

I always think we have the easiest job in the world because twice a week I'll say to somebody I know you think that they want the purple button and I know she thinks they want the green button, but I don't think either of you matter - I think what we need to do is ask your customers, ask your employees what do they want. It provides a bit of what I call a neutrality that says this isn't about what my goal is, it's about our customer's goal.

Q. What are the big skills, or what are the big areas for the skills development that you see are required for experience design strategists?

A. I'll answer that in two ways. One is beyond our field. I think there is the need to cross-train the basics of experience design, understanding the importance of strategy, research, design evaluation, throughout an organisation. At Slalom one of the things we do, which I'm particularly proud of, is teaching the Rutgers course.

When I came to this field I was a business analyst and was turned on to the field because I was seeing that we were putting systems in, but we weren't really talking to the actual people. In Slalom we've got folks that are information management analysts, we've got folks in delivery leadership space, organisational effectiveness, custom development. Part of my thinking was let's not just have the UX team or the XD team come in and do this, let's try to get folks from each of these various

practices to come and take the Rutgers course and get their feet wet in - not so much the specific templates - but really just teaching the fundamentals of how to start thinking differently. When we come into a room we don't have to have a lengthy conversation convincing people of why this is important because it's already imbedded in how we think.

I do think there is a broader education effort to bring experience design to those that don't do it for their day job. I think for the experience designers and researchers, strategists, IA's, prototype folks, this entire field would be... it's hard to say other than to elevate beyond, to really be able to look left and right, to wear their charge with experience.

When we think about that journey map we get so very good at focusing on building the one thing - the iPhone, the app, the IoT (internet of things) devices - that these are all really great, and obviously they're getting a lot of uptick and people are engaging with them, but I like to think a little bit more aspirational, that in doing all of this we're sort of hyper connected. Theo Forbath just wrote a really great [article about this](#) on LinkedIn, that we're so interconnected, but in some ways we feel more lonely than ever.

If our job, much to my 10 commandments of XD strategy, is about humans, then we are about making lives better and enriching lives. In some ways, while we focused on very specific things that make our lives easier - faster, quote unquote more connected – then those in this field that are thinking more strategically about the bigger picture need to really take out beyond the products and the services and the companies and think about how we can start to embrace larger elements of creating experiences within humanity.

I know it seems a bit lofty, but I think that as social issues become more imbedded in the fabric of organisations, that the millennial population - known for their idea that it's not about the money, it's about the cause - that we all need to take a step back and say what does that mean and how can we be using our craft, and using our understanding of humans and how they interact with one another to elevate the roles that we have in ways that can bring us together.

Certainly, in today's day and age, where we just seem to be getting more and more tribal in our conversations and more and more bubbled in the kinds of things we're doing, if we want to solve problems with companies, and in the world, we have a beautiful vocation to get us being part of getting a broader sense of communitas within the world.

Q. Could you explain a little bit more about this idea of communitas?

A. It's a word that I stumbled into that has existed for years. Victor Turner is a cultural anthropologist and he did many of those studies of tribes and how they interact with one another. It's certainly in the music industry and certainly when you look at some of the marches that have gone on, on both sides of the political spectrum. There's a sense that when people are in the same location, experiencing the same thing at the same time, there's a sense of belonging and communality that I don't think we get. Although we can see our friends on Facebook, etc., there's something about the quality that comes from that.

I went to a bunch of concerts last summer, and I'm planning a bunch of them now. I really had that strong sense of connection when you would see people - that for all intents and purposes are going to get in a car with a Trump sticker and a Clinton sticker at the time and be diametrically opposed on just about everything, unfollowing each other on Facebook and not ever have a nice word to say about each other - but were literally linked arm in arm singing the same song that they brought with them from their past

There was a connectivity there that I just thought was really powerful and that's a very physical presence type of communitas, but I just wonder when you think about the memories and experiences that people have in life, that there are not too many products that you can look at and say "boy I'll never forget the first time I did X", but you'll never forget that concert, that event you were at, that time when you and others were together doing something. Those are the memories, those are the things, that's the value in life that we draw from and I just think that there's opportunity for companies to find ways to do that again.

Depending on the company it might be a little easier, you know, for a music company to do that than maybe somebody that's selling industrial cleaners. That said I think we need to start turning our view towards where those might exist.

Q. How do you think about the future for experience design and actually where it's going and its role in the world?

A. This is one that is both a very strong interest personally, obviously because it's how I make my living, but also in that broader lens I feel like if we're doing our job the way we should be doing our job, if we are making those impacts culturally within the organisation, if we are embracing a generation of folks that were born this way - that understand and communicate in different ways - I think that our field, if we're doing it right, we shouldn't exist. And that sounds a bit provocative, but the need to have a strong advocacy for customer centricity feels like it's getting a cup of sand on a beach and going and selling somebody on the value of sand.

I still think there are going to be some years before this is fully entrenched, and over the course of time there will always be a role and a need for someone to play a coordinating role, whether a chief customer officer, an experience officer, someone that needs to keep a company aligned to this as they move forward in good times and in bad.

> "The execution skills of experience design professionals are going to become more native to all roles."

The execution skills of experience design professionals, I think, are going to become more native to all roles. It's going to go without saying that a developer can't just code, they're going to need to code 'that', they're going to try to engage someone else in 'that'. There are always going to be roles throughout an organisation, but I think that you'll find that more and more that this is more native to a lot of roles within businesses, certainly in the IT space.

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