STRATEGIC MANAGEMENT

The Usability Professional as Visionary / Strategist

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This talk is not prescriptive – I can't really tell you how to be "visionary" or even "strategic" – although I will try to offer some suggestions and hopefully instill a sense of purpose. My goal is to explore what it means to consider both vision and strategy in the practice of user-centered design and usability, and through this exploration to identify some practical things we can do to take on a "thought leadership" role within organizations and projects.

Are the seeds for this important perspective already in your work? Consider these questions:

- Have you had insights and observations that go beyond the scope of a particular system or site you are working on?

- Have you seen the same user needs and challenges cropping up on three or four projects, and realized that you are seeing a pattern?

- Have you worked on standards for design and development of web sites or information that need to be applied across many different projects and services?

- Have you become involved in conversations with managers where you have the opportunity to share how "things could be better" for users overall, beyond the boundaries of a single site?

Have you taken the opportunities to have strategic conversations when they arise?

What do "vision" and "strategy" mean?

There is a broad over-use of these terms, along with "mission" and "tactics" and "plan" and so many other buzzwords that infect management today. Despite the over-use, if we really want to make a long-term difference for users and for organizations, we need to get to know these concepts.

At the end of this paper is a section with some common definitions. For now, here is a simple overview to help us look at these terms and their relationship more clearly.
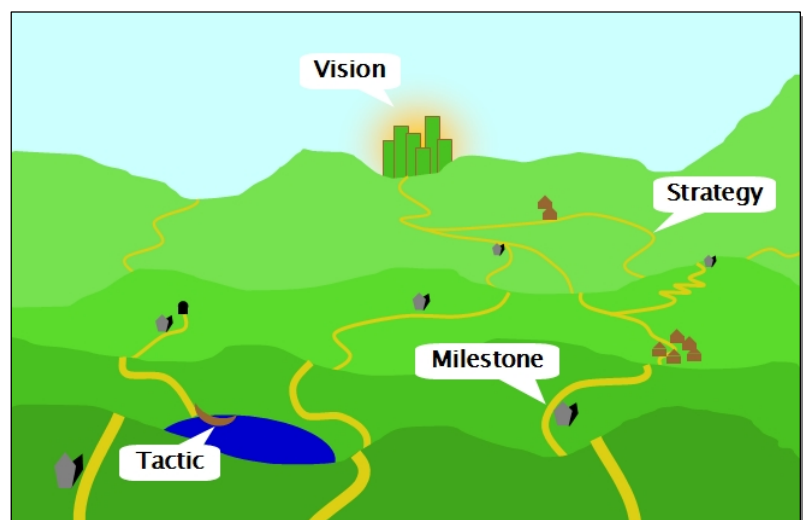
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Your **vision** is a goal or aspiration of a possible future. It is also more than that – it can become a shared understanding of the *desired* future. However, many times people start off, wander into a valley, and lose sight of that goal. You need the vision to be clear enough that it remains in people's minds, and you need a *path* for them to follow. **Strategy** is the mapping of the paths (there may be more than one) that take you toward the vision. There is the awareness and confidence in being on the path, and having a route that is agreed among you all.

Milestones are important, also – they help you measure your progress on the way, they reassure others that everyone is on the path, and they offer brief respites to look at the landscape and decide if slight changes in direction would improve progress. Your **tactics** help you organize the daily movement of everyone, and allow you to deal with the environmental conditions that come up along the way, be they sudden rainstorms, slight deviations in the path to go around obstacles, ways of incorporating people you encounter along the way, and the like.

Is this something you just *do?*

Are there formal roles or jobs as user visionary/strategist, or is it more of an attitude when working on any project? Terms like "Strategic Designer," "Usability Standards Lead" and "Enterprise Information Architect" are sometimes used as job titles to explain our increasingly senior role in organizations. But let's ask: can it only be done when we formally have that role?

Often, as the person who hears the users' needs first-hand and works to synthesize the insights from analysis, design and testing, we have the "evidence" to share stories that have broad impact. Here are some situations where strategic insights arise, along with some thoughts on how you "capture" and "translate" the insights in order to drive the agenda/direction for projects and organizations.

What you see	How you translate the insights
You are performing usability tests on a web form used by the public. You notice confusion with a particular service, tangential to the one you are testing. Users are unsure about their eligibility, and thus whether they should continue completing the form that you are testing.	▪ Think about what you observed in terms of the overall goals of the organization. What is the effect of the confusion about eligibility on the demand for those services? How prominently do those services feature in the organization's performance goals or annual plan? What is the effect on the user of not receiving those services? ▪ Describe the observation clearly, and then ask the kinds of questions above to people who are responsible for shareholder or public performance by the organization. Remain engaged in the conversation, and consider how the user experience might be changed.
When users are asked whether the service they are using is valuable to them, they consistently reply, "if it allows me to do this other thing as well." You realize that this comment has come up frequently, not only during this project but during two other recent projects.	▪ Why is that "other thing" dominating user perceptions of value? Is it valuable to users because it is hard to do directly, or because it provides significant value? Why does it "stick" in so many people's minds? ▪ Identify the business aspiration to see if meeting user demand has positive or negative connotations for the business. If positive, link the services in your report and conversations. If negative, make people aware of the effect that it is having on users, and how this impacts the business as a whole.

What you see	How you translate the insights
During analysis, you notice that users are often interrupted by phone calls while completing a task. As you start designing the interface, you realize that creating a smooth flow between your application and another application that provides information for a caller would increase quality and reduce interruption time.	▪ Describe the design recommendation in the context of the overall user environment for that task. Envision the environment via a user story. Personalize the impact of the interruption. ▪ Then ask people to consider the impact of 10 errors in that task per month, or the cost of losing 2 minutes every time an interruption occurs.
Ideas formed during requirements and design sessions that you facilitate become a vision of the user's experience.	▪ Help the project team and stakeholders "imagine the situation" whenever design features are discussed. ▪ Use the vision as a focal point for "keeping on track" when development and implementation discussions become confusing. Whenever you answer a question, mention the vision that prompted that particular answer. Make the answer *relevant* to people.
Usability test results indicate users aren't actually looking at a product that is important to the business' margins. You suspect that there could be a direct impact on the "bottom line" that executives will care about.	▪ Identify the management reports and business plans that address the business goal affected by your observation. Draw quotes from that report into the findings review, to relate the finding to statements in the reports/plans that they recognize. ▪ Mention any metrics from the previous year or two, and ask people to consider the effect of a 2% change in that area (be conservative).
User needs are identified but not fully met in a current version of a site or application – they are set aside for a future release.	▪ Offer to maintain the "future features" list for the application. Describe it as a *roadmap* – shaping a strategy for meeting user needs that can extend beyond a single project. Create the list with scoring criteria, including columns for "user value" and "impact on other systems." Actively review that list regularly. ▪ Ask what the current development schedule is for other affected applications, to see if there is an opportunity to collaborate in design – people will soon recognize that there is a relationship between applications that they should monitor/discuss.
You are performing contextual observations and interviews for a range of projects over two years. People tell you about frustrations or bottlenecks that, if solved, could create significant improvements in users' satisfaction and performance. The more you listen, the more you hear the consistency in their concerns.	▪ Reflect the contextual analysis insights in any conversation about findings – for example: "The people I met were very supportive and offered great suggestions. They mentioned that our site was always used in conjunction with their financial query tool, which is very frustrating to use. This seems to be a common sore point with users. Should we be concerned, that they will start to associate our site with that tool? We might want to start talking with that project team about what we discovered, and possibly set up a joint design team to explore how we can apply more consistent interaction standards that will benefit the users."

So you've gained the insights. You've clarified the message and the impact. You've applied the ideas in specific projects (hopefully with some success!). Now what?

Initiating *vision* conversations

1. Take every opportunity to say "what if…?" and offer a constructive vision.

2. Listen carefully to people's aspirations, goals, and needs… considered from the broadest perspective.

3. Tie your conversations about vision to the larger mission/goals/performance objectives of the organization, so it is not only compelling but also relevant to the situation.

4. Describe the "now" (put people emotionally in the current situation) and then plant the seeds for how that experience could be different.

5. Tell the same stories consistently – keep your user stories simple and tell them often, rather than having lots and lots of stories that overwhelm the people you work with. How do you know when you've told a story often enough? When people start telling it back to you! They share the vision!

6. Echo other people's stories – but also reinterpret them from a long-term user experience perspective.

7. Show a vision – capture the imagination in a tangible way. Create small skunk-works applications or prototypes that help people experience a different way of interacting with software and information.

Initiating and promoting *strategic* conversations

1. Anchor every conversation about the vision with suggestions about the path(s) to get there.

2. Help people perceive that change is possible – describe concrete, do-able ways to achieve goals.

3. Routinely frame tactical activities/tasks in the context of a roadmap that clearly communicates a larger plan for your work – this fosters confidence. Even if future projects/developments are not planned, it should be clear that the future is being thought about as part of the current work.

4. Promote partnerships with stakeholders – not just in the current project, but among people who are grappling with similar challenges in other parts of the organization. Everyone appreciates the idea of "reuse" of designs, code, and information when it is initially considered with a larger view.

5. Be pragmatic in your relationships. For example, ask yourself these questions:

   - Is anyone is thinking about/working on the challenges I'm seeing?

   - Do they need help?

   - If not, can I comfortably leave that challenge alone, or do I feel the need to speak up?

   - How aware are people about a particular challenge - is education and evangelizing required?

   - Who needs to be involved? Do I already have strong relationships with them?

Stories of success: focusing on vision and strategy

The following are examples of client projects where I have put these ideas into practice.

Creating a small-scale portal based on big ideas

We only had three months to create a portal site for 2,000 users to access thousands of pages of complex government regulatory information. The information changed fairly often. The site information, links, and locally-created summaries of external sites were to be maintained by part-time subject specialist staff with no experience (or interest) in HTML coding or site management.

The user experience needed to be extremely simple and relevant. It needed to answer specific questions in a very short period of time, and also make the experience feel consistent (even though the information was held on numerous external sites). Content needed to be easily updated remotely by non-technical people. Most importantly, it had to work well and stand alone with no ongoing developer intervention.

The design addressed the need for ease of use, and took a metadata-driven approach that reflected the strategic need to keep content and search relevant to user needs in the face of regular changes. During the design process, the project team bonded around the vision of relevance and sustainability, supported by strong stories that clearly spoke to user and organizational value.

For over a year following the launch of this site, people told me that whenever they experienced a different type of interaction that was frustrating, they thought of this small application we had built and realized that their experiences could be better. *Change became possible* in their minds, and this led to discussions, follow-on projects, and finally executive commitment to create large-scale, relevant, metadata-driven, usable sites.

Needs analysis for an international computer maintenance organization

The project began with a small heuristic evaluation of an inventory management application, followed by a training needs analysis to address short-term data entry problems with the current version. Our needs analysis included a survey of 1,000 field engineers, asking them to describe the situations in which information was collected. The result was a wealth of information about how their situations (being on a client site with client staff present) did not match the way the computer system was designed (to collect detailed information such as serial numbers, as well as general information for sales people).

The findings led to conversations with executives, focusing on the impact that data quality issues had on their particular information needs. We used the data from the analysis to paint a picture of "life in the field," making the context of the engineers' working environment more real. With executive guidance, our planning for the project and the system could then address the relationship between the users' performance goals and the executives' information reporting goals.

The conversation with software developers was equally important – together, we focused on designing how their stock control system could alleviate – rather than exacerbate – the burden on the field engineers, while also improving information quality.

What began as a small staff training project became a thoughtful and comprehensive development review and prioritization of their inventory system, drawing in strategic considerations for the organization as a whole and eventually creating a roadmap for future system development.

In summary: Why *must* we do it?

You are the advocate for users. You are uniquely placed to listen to their needs and their stories, and promote those insights into the organization. As usability professionals, it is virtually impossible to do your work and not see *how to make things better*. Use that knowledge and awareness!

In my experience, having a clear vision becomes a magnet for others who want to keep their perspective in the light of that vision. Consistently presenting a clear vision and strategy builds everyone's *confidence* that you are committed to success and aware of long-term needs and risks.

That, more than anything, builds **trust**.

After-words: other comments on vision

"The future belongs to a very different kind of person with a very different kind of mind – creators and empathizers, pattern recognizers, and meaning makers.

These people – ...inventors, designers, storytellers... big picture thinkers – will now reap society's richest rewards and share its greatest joys."

"A Whole New Mind," Daniel H. Pink, 2005

About.com

A vision statement is sometimes called a picture of your company in the future but it's so much more than that. Your vision statement is your inspiration, the framework for all your strategic planning.

A vision statement may apply to an entire company or to a single division of that company. Whether for all or part of an organization, the vision statement answers the question, "Where do we want to go?"

What you are doing when creating a vision statement is articulating your dreams and hopes for your business. It reminds you of what you are trying to build.

http://sbinfocanada.about.com/od/businessplanning/g/visionstatement.htm

Accessed: 9.17.2006

BuildingBrands.com

The Vision and Mission of a company should be a driving force, setting the strategic direction of the business.

- A Vision is a description of the business as you want it to be... It involves seeing the optimal future for the business, and vividly describing this vision. The description might include HOW things will be, WHERE, WHO with, WHAT you'll be doing and HOW you'll feel.

- A Mission is the definition of the 'special assignment' being undertaken by the business. It is likely to cover the customer groups that are being served, as well as (perhaps more importantly) the customer needs that are being met.

Ask yourself: do the Vision and Mission of my company:

- Bring focus and clarity to the desired future of my business?

- Inspire people to work towards this future?

- Guide people in their decision-making as they reach for this future?

http://www.buildingbrands.com/definitions/11_vision_mission.php

Accessed: 9.17.2006

Definitions

Vision

- OED: (2) The ability to think about the future with imagination or wisdom. (3) A mental image of what the future will or could be like.
- Merriam-Webster: The act or power of imagination; unusual discernment or foresight <a person of *vision*>.
- WordNet: The formation of a mental image of something that is not perceived as real and is not present to the senses.
- Wiktionary: An ideal or a goal toward which one aspires.

Strategy

- OED: A plan designed to achieve a particular long-term aim.
- Merriam-Webster: A careful plan or method; the art of devising or employing plans or stratagems toward a goal.
- WordNet: An elaborate and systematic plan of action.
- Wikipedia: A long term plan of action designed to achieve a particular goal, as differentiated from tactics or immediate actions with resources at hand.

Tactic

- OED: An action or strategy planned to achieve a specific end.
- Merriam-Webster: A device for accomplishing an end.
- WordNet: (tactic) A plan for attaining a particular goal. (tactics) The branch of military science dealing with detailed maneuvers to achieve objectives set by strategy.
- Wikipedia: A method employed to help achieve a certain goal.

Sources for definitions of the terms above (accessed 9.18.2006, 9pm):

- AskOxford.com: the Compact Oxford English Dictionary: http://www.askoxford.com/dictionaries
- Merriam-Webster Online Dictionary: http://www.m-w.com
- WordNet 2.1: http://wordnet.princeton.edu/perl/webwn
- Wikipedia: http://www.wikipedia.org and http://www.wiktionary.org