

User Experience Goals for 2010

A Cross-Industry Snapshot



Eric Schaffer, CEO and Founder
Susan Weinschenk, Chief of Strategy, Americas
Human Factors International

“Putting attention on your UX strategy now will help you be prepared for growth and change that is likely to occur within 2010. We suggest you give some thought to how you would answer these questions for your own organization, and at the very least, put some time into crafting a draft UX strategy for your organization.”

User Experience Goals for 2010

A cross-industry snapshot

Table of Contents

Executive Summary	4
The Process	4
The Respondents	4
Question 1	5
Question 2	7
Question 3	8
Question 4	9
Question 5	11
Question 6	13
Question 7	13
Conclusions	14
About the HFI Commentators	15

Executive Summary

Are your user experience (UX) initiatives getting the results you hoped for? Do you have a UX agenda laid out for 2010? How effective is your approach? What are other organizations doing? Are you taking advantage of the latest knowledge and trends in the UX field?

Effective UX requires organizations to regularly assess user experience shortfalls and define UX priorities and goals. This white paper looks at where 16 organizations are in their user experience process and what their UX plans are for 2010.

The responses revealed a clear and present need for an institutionalized UX process. We encountered a significant degree of variance in the approach to UX design—with the exception of a few mature organizations, large enterprises lack clarity when it comes to their UX efforts. The understanding of what to do, how to do it, what to prioritize, and even how to build an internal UX capability can vary widely from organization to organization.

Many organizations still deal with UX on an ad hoc basis rather than taking a long-term, proactive, strategic approach. In some cases, usability issues are tackled as they arise or as revenue allows.

The Process

We spoke with executives and managers at 16 different organizations in the United States, Canada, and India, asking them about their UX capability, UX institutionalization strategy, and UX goals for 2010. We then asked Eric Schaffer, Ph.D., CUA, CPE, HFI CEO and Founder, and Susan Weinschenk, Ph.D., CUA, HFI Chief of UX Strategy, Americas, to comment. Are organizations taking the best approach to user experience? Are they doing the right things? Do they have the right UX priorities?

Respondents

Note: In consideration of the strategic advantage of the organizations that were kind enough to discuss their user experience strategies with HFI, we have not used their names, or the names of the individuals who spoke with us.

- › Vice President, eChannel, Insurance Enterprise
- › eProgram Director, Insurance Firm
- › Head of Marketing, Multinational Bank
- › IT Application Analyst, Financial Services Enterprise

- › Senior Vice President, Internet Strategy & Development, Financial Services Company
- › Managing Director, E-Business. Automotive, Travel, Insurance and Financial Services Group
- › Vice President, Online Brokerage
- › Global Director, International Enterprise Accounting Firm
- › Director Operations, Software Products & Projects, IT Enterprise
- › President eCommerce, Ecommerce Trading Platform
- › Director, E-commerce, Telecommunications Enterprise
- › Vice President, Product Development, Publishing Conglomerate
- › User Experience Design Director, Interactive Marketing Agency
- › Director, Counselor Desktops, Global Travel Firm
- › Manager, Information Technology, Cruise Line / Resort Company
- › Manager Online Marketing and Creative Services, Nationwide Retailer

Question 1

What is your most important UX objective or targeted area of improvement for 2010?

Selected Responses

“While it’s hard to list a single, most important UX goal, it comes down to this: how do we continue to create an easy-to-use user environment that lets research professionals get what they want easily? How do we design task flows that facilitate and keep the focus on the professional tasks they need to accomplish?”

“Our biggest UX goal for 2010 is to ensure that our online experiences provide outstanding, seamless customer experience, end-to-end.”

“We want to make the customer journey... more intuitive and easy in our public-facing (non-login) site. However, even that fundamental mission is complex. There’s a transactional, informational and advisory piece; all those need to be integrated. You have to balance the sales prerogative with the biggest point of view.”

“Why are people coming to the site and what are they doing? We did UX interviews around key areas...that research has helped us prioritize components of a new site for 2010.”

User Experience Goals for 2010 / A cross-industry snapshot

“We are seeking to boost conversions in 2010 by closely studying the behavior of our online users. What are the drop-out areas? The registration page? The login page? How can I improve usability so that the drop-out rate is less and the conversions are greater?”

“Our single most important goal now that we’ve made significant strides in our UX campaign, is to unify systems and get departments to work together within the development team on a single platform.”

“Upgrading and updating legacy systems is a clear must-have for us if we are to compete on the global stage.”

“Most of our IT staff are committed to UX, but without any real internal resources. we need a consulting company to do that work. “

“My most important goal is go educate people more about the value of UX, that it’s about more than graphic templates. I also want to increase the size of my UX team.”

Dr. Weinschenk’s comments:

There is a lot of variety in the responses to this question, which probably reflects the various points of “maturity” of each organization in their UX journey. General themes seem to be: improve the UX for the customers/users, update technical/legacy constraints that make an elegant user experience possible, and get the UX team efficient, productive, and coordinated.

Dr. Schaffer’s comments:

The scary thing for me is that the objectives are so very unspecific! “We want to make the user experience nice” does not make sense to me as an objective. If we want to have end-state objectives I would like to see specific metrics (e.g., help desk calls down 20%, or registration time down by 30%). I would however, be happier to get objectives that are more systemic. These could be: ensure that executives receive a quarterly presentation on UX wins, or, we need to develop UI standards for mobile.

Question 2

What is the biggest threat to your UX effort?

Selected Responses

“The biggest threat to our UX efforts is getting people who are unfamiliar with the concept of UX over the hurdle of recognizing it as something different from UI.”

“It’s a problem when usability is seen as an ancillary aspect of IT—about making nice screens, rather than a core business competency.”

“The biggest threat UX faces here, really, is that so many people in my organization think they can do UX work. They don’t understand that it is a specific discipline for which one needs specific training, and that you have to start design projects by working with the UX team. So my challenge is, how do I show the organization that there is real value in UX to justify expanding my team? How do I get a seat at the table? In many cases UX challenges are about UX administration more than just UX design.”

“Sometimes an important executive sponsor wants something square rather than round or green rather than blue simply because he likes it that way. But these preferences have nothing to do with a serious application of UX principles. For instance, once I had to get up in front of a global managing partner who did not want to adopt the UX initiatives I was advocating; I advised against the direction he wanted to take because of the research that I then presented. He thanked me profusely for the feedback, and said, ‘Now go away and do what I want.’ Of course after a month he called me back and asked me to revisit those decisions because of feedback he was getting. The point being that the unwillingness to accept the objectivity of rigorously applied UX is a significant threat.”

“The biggest threat we face to our UX effort right now is budgetary.”

“Our challenge is to give the user an experience that is somehow better than where our IT architecture is.”

“Sometimes we think we know what the customer thinks, but do we really know?”

“As we move from storyboard to implementation, to the middle phase of UX design development, it’s all too easy to get away from the idea that the user is part of the process—to take shortcuts on user feedback, especially when time requirements are tight. We need to keep the process iterative at all times...”

to make room for iteration, for user feedback and subsequent revisions at each stage along the way.”

Dr. Weinschenk's comments:

The common theme I hear in these responses is the need for UX to be deeply ingrained into the fabric of the organization. The people responding to this question are all saying, in their own way, that they aren't “there” yet, and that this makes them feel that the role of UX is still a little shaky within the organization.

Dr. Schaffer's comments:

Until it is firmly ingrained in the culture, we need to constantly communicate the nature and value of UX work. External consultants can help if they bring in lots of examples and demonstrations, but you also need to showcase internal wins.

Question 3

Do you feel you have adequate executive sponsorship? (Is there at least one top executive pushing for UX?) Does your organization have a written strategy for the promotion and development of its UX capability?

Selected Responses

“Executive sponsorship for UX is everything we could want. There is commitment at the C-level for constant improvement of the customer experience.”

“There's really not much UX synergy here at all...we have so many different silos. Getting everybody on the same page, usability-wise, is a battle. However, we have been able to be incredibly effective in spite of that, and are slowly making a case for ourselves, making management aware of who we are and what we do.”

“C-level sponsorship happens not programmatically, but project by project and executive by executive. I've found that the best way to create a UX culture is to prove the value of UX project after project rather than hoping that some corporate UX policy will be mandated. The reality here, and at many organizations, is that you have to work with a less-than-optimal state of institutionalization.”

“We do have significant executive sponsorship. We may fall short of our goals in speed-to-market and resource issues, but not in our commitment. While we don't really have a written UX strategy, as such, the goal of usability is fairly deeply

embedded in our mindset even at the executive level. We have a set of practices that is habitual and well understood at the 'genetic' level, rather than necessarily being written down."

Dr. Weinschenk's comments:

I am concerned for the organizations responding who do not have an Executive Champion. Even if UX is accepted and seemingly routine, without a strong Executive Champion and a written UX Strategy for the next 3-5 years, the entire UX effort can fall apart if there is a re-org, budget cuts, or a few people leave the company.

Dr. Schaffer's comments:

I'm seeing more executives understanding that customer centricity is important. That is much less of a problem today. But then the problem becomes getting them to understand what it takes to do UX work. They often think that a pep talk to staff will make things customer centric.

Question 4

What elements of your UX team infrastructure do you have now, and what do you plan to implement in the following areas in 2010?

(Percentages indicate the number of respondents who have these UX elements in place already.)

- › **UI standards (60%)**
- › **templates for all deliverables in your methodology (50%)**
- › **UI Standards governing browser interfaces, applications and mobile devices (60%)**
- › **a library of usable graphic objects (45%)**
- › **training for UX staff (40%)**
- › **8% or more of the development budget allocated to UX work and staffing (30%)**
- › **a documented UX methodology embedded in the overall development lifecycle (25%)**
- › **UX training for executives and managers (10%)**

Selected Responses

"Our methodology is not completely embedded within the software development lifecycle yet."

User Experience Goals for 2010 / A cross-industry snapshot

“While we don’t necessarily have a UX strategy, we do have an embedded UX methodology. And we keep trying to improve it.”

“We have a methodology...but no one uses it!”

“We are starting down the path of a documented UX methodology. There is new content on the websites, and we have performed a review of the wireframes and an assessment of buttons and layouts. That’s built into our UX process for 2010.”

“UI standards are not yet in place. It’s a goal for this year—we will at least try.”

“Rather than having a documented methodology imbedded in our process, we have a CUA [Certified Usability Analyst] leading our usability efforts.”

“Our business analysts received their CUA certification in 2008. That’s pivotal, because our UX methodology is really part and parcel with other, overall business processes.”

“We’ve been in a perpetual hiring freeze, so we have not had training for our UX executives or new staff—however, all our usability specialists have been trained and certified as CUAs.”

“We currently have a fifth person finishing HFI training and a sixth person coming on board for us who will become a CUA as part of his UX training. We are considering Certified Experience Analyst [CXA] training for our CUAs, but we have no firm plans for that yet. I would love to see even more advanced training and certification, something at the Ph.D. level.”

Dr. Weinschenk’s comments:

There is a lot of variety in the responses to this question, and many of the organizations have work to do in terms of putting templates, training, and standards in place. With the recent economic environment, and ensuing budgetary issues at most organizations, it’s not a surprise that some of this infrastructure work may have stalled. As the economy improves, however, it’s important to have a plan in place for what infrastructure elements need to be addressed and in what order. This is why having a UX strategy in place is so important.

Dr. Schaffer's comments:

Getting infrastructure in place is a major part of the journey. It is, of course, a huge mistake to try to invent the solution from scratch. Your organization probably did not invent their own SDLC, programming languages, or systems training programs. Why would you try to reinvent usability infrastructure. You buy it and customize it.

Question 5

Which of the following extensions to conventional UX work have you implemented, and which do you have planned for 2010?

- › **Cross-Cultural Design or Design for Emerging Markets**
- › **Persuasion Engineering**
- › **New Business Model or Product Ideation**
- › **High-Level Digital Strategy, based on UX Considerations (e.g. improving your organization's position by leveraging social media, mobile devices, group work and ubiquitous computing)**

Selected Responses

"A lot of what we do—more than 70%—is global in nature, and a lot of that is in instances. We have the Asia-Pacific instance, the North American instance, the European instance, the South America instance. Every single one of these gets designed working with the target audience, with our constituents heavily involved in the process. We are very respectful of local requirements. So in every instance, cross-cultural design is the result of a pragmatic, systematic approach. Our company transacts its business in English, so it is primarily other features and UI that change to be culturally appropriate."

"Cross-cultural design has become essential in our UX work. Asian-language design is key this year, with internationalization and localization initiatives being accomplished using internal and external resources."

"We have six 'flavors' of our site, between the US, Canada and Puerto Rico, and English, Spanish and French language settings."

"We are making cross-cultural marketing part of our approach for 2010 as we pursue ethnic niche markets: Chinese, South Asian and so forth. As a Canadian firm, our focus and usability groups are already in English and French, but we are beginning to exploit French-language SEO—that is 25% of our market, after all."

User Experience Goals for 2010 / A cross-industry snapshot

“Cross-cultural marketing is our primary usability objective now. In India, we have seven languages for which we would like to develop sites. We are still in the conceptual stage, and will be starting with four or five languages while looking for opportunities to understand how we can be available in more languages.”

“The old hard sell approach won’t work. Something more subtle and powerful is needed, an approach so different that for us it’s really a new business model. We feel persuasion design will be very important in this initiative, so we elected to take PET design™ [Persuasion, Emotion and Trust] training with Dr. Eric Schaffer. We plan to bring these PET design processes to bear to develop our membership acquisition program.”

“We might do PET design work based on how our budget season goes.”

“Developing a high-level digital strategy is a big goal for this year—especially building a module for social media, with visual keys consistent with our branding.”

“Our bank has a strong overall digital strategy, covering web, mobile and brick-and-mortar offices, but we are just putting our toe in the water with email and social media enhancements.”

“We discussed digital strategies at the end of 2009 and have some great initiatives cued up; however, we are waiting on the development of our mobile platform. That technical requirement is a big goal for 2010.”

Dr. Weinschenk’s comments:

The field of User Experience is broad, and encompasses more than the idea of “just” usability or performance design. The responses to this question demonstrate the broad interest UX professionals have in designing optimal customer and user experiences.

Dr. Schaffer’s comments:

Cross-cultural design is a key and complex sub-specialty in our field. I live in India now, and it is a different world. Translating to a few of the 230 Indian languages is a clueless solution. We need to design for the very different pragmatic realities, world views, decision making processes, and lifestyle imperatives. Even our UX methods need to be adapted. A classic usability test won’t work well in Asia.

Question 6

Do you have a knowledge management solution that lets you access data about users, scenarios, environments, etc? For example, could you easily pull together all research your organization has done on a given customer segment?

Selected Responses

“As far as our knowledge management system goes, we do online surveys, abandonment surveys, specific usability testing on new initiatives and ongoing market research. Anything specific to e-business is accessible in a network of shared drives...although no, it's not technically centralized. It's ad hoc, but it works for us.”

“We have a knowledge management solution, but we would like it to be better.”

“At present we use an analytics tool to understand customer behavior rather than detailed info. Maybe you know where the customer has come from...”

Dr. Weinschenk's comments:

As UX infrastructure increases over time, organizations will realize that it is important to collect, centralize and use the wealth of IP that UX work generates.

Dr. Schaffer's comments:

The HFI Laboratories has a team that has been on the knowledge management problem for 3 years. I see it as the next big step in the institutionalization of usability. We need to have a growing corporate memory about the customer ecosystem, or we'll keep starting projects from scratch. I think I have the solution coming out shortly.

Question 7

What is your organization planning regarding spending on UX in 2010?

Responses were split between organizations that were planning to increase their spending and those that were planning to keep it the same. Fortunately, nobody was planning to decrease their UX budget.

Dr. Weinschenk's comments:

It's actually quite amazing that, in this time of still difficult economies and budgets that there are not plans to decrease the UX budget. It's a testament to the point of maturity the field has reached—it's not a "nice to have", but is a critical part of the organization.

Dr. Schaffer's comments:

Budget is important. In general 10% of the development spend should be on UX work. But there are also costs associated with setting up a UX practice. Generally we see clients spend \$800K–1.2 million on infrastructure, over a two year period.

Conclusions

The field of UX is at an important point of maturity and growth right now. We expect that it will grow stronger as the economy improves. Putting attention on your UX strategy now will help you be prepared for growth and change that is likely to occur within 2010. We suggest you give some thought to how you would answer these questions for your own organization, and at the very least, put some time into crafting a draft UX strategy for your organization.

Where does your organization stand? Fill out our Institutionalization of Usability Self-Rating Scorecard to see your strengths and weaknesses.

www.humanfactors.com/services/I-19scorecard.asp

About the HFI Commentators



Eric Schaffer, Ph.D., CUA, CPE
Founder and CEO
Human Factors International

Dr. Eric Schaffer is the founder and CEO of Human Factors International, Inc. (HFI). In the last quarter century, he has become known as the visionary who recognized that usability would be the driving force in the “Third Wave of the Information Age,” following both hardware and software as the previous key differentiators. Like Gordon Moore’s insight that processor power would double every 18 months, Dr. Schaffer foresaw that the most profound impact on corporate computing would be a positive online user experience—the ability for a user to get the job done efficiently, easily, and without frustration.

Dr. Schaffer’s book, *Institutionalization of Usability: A Step-by-Step Guide*, provides a roadmap for companies to follow in order to make usability a systematic, routine practice throughout their organizations. Dr. Schaffer also co-developed The HFI Framework™, the only ISO-certifiable process for user-centered design, built on principles from human-computer interaction, ergonomics, psychology, computer science, and marketing.

Dr. Schaffer has completed projects for more than 100 Fortune 500 clients, providing user experience design consulting and training. He has recently been traveling the world teaching HFI’s newest course, *How to Design for Persuasion, Emotion, and Trust*.

Dr. Schaffer is a member of the Human Factors and Ergonomics Society and a Certified Professional Ergonomist.

User Experience Goals for 2010 / A cross-industry snapshot



Susan Weinschenk, PhD, CUA
Chief of UX Strategy, Americas
Director of Training
Human Factors International

Dr. Susan Weinschenk has over 30 years experience as a consultant worldwide and is Chief of UX Strategy, Americas at Human Factors International. Her areas of expertise include persuasive interface design, neuropsychology, user centered design, and generational differences.

Dr. Weinschenk has a Ph.D. in Psychology from Pennsylvania State University. Susan has published 4 books on user experience. Her most recent book, *Neuro Web Design: What Makes Them Click?*, published by New Riders, is in its second printing.

She is a highly rated workshop and keynote presenter.

Acknowledgements

We would like to thank HFI Senior Writer Douglas Gorney for conducting the interviews and creating this white paper.



Human Factors
International

410 West Lowe, P.O. Box 2020
Fairfield, IA 52556
Phone: 800.242.4480
Fax: 641.472.5412
hfi@humanfactors.com
www.humanfactors.com