

Design for the Big

How User-Centric Innovation and Strategy Can Move UX Up the Value Chain

A Conversation with Eric Schaffer
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Design for the Big—How User-Centric Innovation and Strategy Can Move UX Up the Value Chain

In this conversation, Dr. Schaffer outlines his vision for the future of user experience design. He describes the move to innovation and strategy as the crucial next step for the serious UX practitioner. And he introduces HFI's new course "*Design for the Big: User-Centric Innovation and Strategy*" which lays the groundwork for those who want to grow in their UX careers.

“Good design sits within a strategy,
and exists as the result of an innovation”

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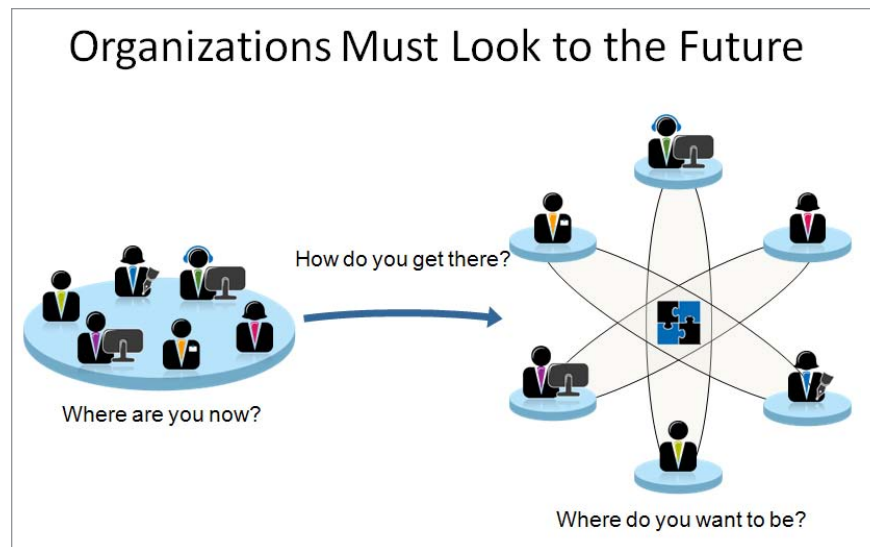
“As UX practitioners, we need to get the highest-level picture across all channels and all applications, and then come up with innovative new ideas that address particular markets.”

What is the next big step for UX practitioner?

As UX practitioners, we need to go beyond the design of good quality, easy-to-use applications and websites—we have to start dealing at that higher level: strategy and innovation. We have to design for the BIG picture.

There are people thinking about all areas of strategy—business strategists, marketing strategists, and domain strategists. But what they’re missing is the *user-centered perspective*—understanding the customer ecosystem and being able to design overall strategies and products with a systematic, informed and validated approach. UX practitioners have a unique foundation of ecosystem understanding and customer-centric technology with which to approach strategic issues.

Classic usability is becoming a hygiene factor. It has to be there, it’s important, people do care about it, executives get it—but it’s no longer a differentiator. Persuasion design is a very important and still-emerging field, but even that is not as far as we need to go if we want to aggressively compete in markets that are moving, evolving and changing fast. I was meeting yesterday with a bank in Singapore. They said, “We’ve just gone through this whole process of putting these functions in place that we need for our commercial banking and putting usability in place. We think we have that now, and we want to really be *competitive* in the markets.”



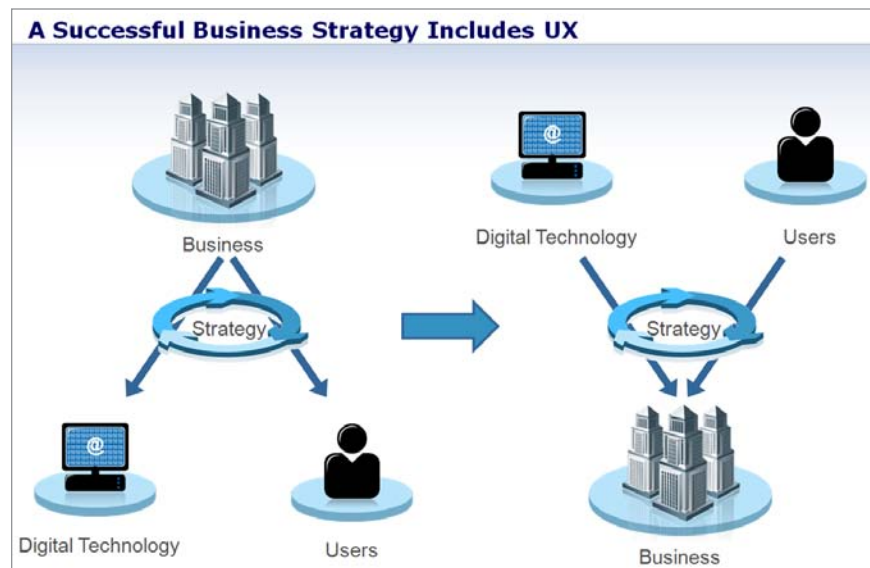
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“As we move up beyond radio buttons and checkboxes to structural design, then to persuasion design, we move up the value chain. What we’re talking about here is a final move up the value chain to strategy and innovation.”

Strategy says that the big picture for the applications as they fit together is not just consistency and coordination between channels, but having a smart presence in the market—addressing the market with a branding position and value proposition that is different from the competition. That the old strategy of being a “fast follower” is foolish, if not impossible. So, as UX practitioners, we need to get that strategy right. We need the highest-level picture across all channels and all applications, and then come up with innovative new ideas that address particular markets. After that, we need to ensure that our “hygiene factor” of usability and persuasion engineering is in place.

As you mention, there is business strategy, there is design strategy, there is online strategy, there’s strategy for all the contact points a company has with its users, whether they’re online or walking into an office. From the perspective of the UX practitioner, how do you define the strategy you’re talking about?

As UX professionals, we have a lot of insight into the taskflow and the ecosystem of a given market. That’s important when we design an application, but it also has implications into the way an organization moves into a domain that it wants to be in. That insight has implications in terms of the brand and market position, and the unique selling proposition that drives the positioning into the market. It has implications in terms of business models and specific offerings. So on



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“UX practitioners need a seat at the table in the conversation about what the strategy is.”

the foundation of technology, business models and business objectives, we can participate in the conversation of what the *big picture* is. We can engage with executives on how that model or those offerings fit into the market, and the implications it has for competitors.

This is tremendously important for companies that need a customer-centric viewpoint—and for usability professionals who can expand their influence and power within the organization. If all we’re doing is setting up a radio button or checkbox our value is fairly limited. As we move beyond that kind of detail to structural design, then to persuasion design, we move *up the value chain*. What we’re talking about here is a final move up the value chain to strategy and innovation.

In what specific ways will it help the UX practitioner to add a strategic perspective and innovation expertise to his or her skillset?

The value of a UX practitioner is in the extent of his or her influence and contribution to an organization, so this is something that radically increases our value.

I’ve heard usability people complain about a branding firm that does half a million or even a million dollars worth of work, and turns in four words. The usability practitioners may say, “Wait a minute—for that, I’ll design two systems!” But you know what? Those four words are very powerful. That’s the new company’s direction, their tagline. As we do deeper, more fundamental work at higher and more strategic levels within an organization, we have more power in the organization. It’s like the difference between taking a log and burning it, and converting it to energy at the atomic level. In one case you warm your hands, in the other case you heat a whole city. Our position is exactly like that: as we move up, our strategy may be nothing but a few words or a few pages, yet it has an enormous impact on guiding and coordinating the overall organization.

If someone does that work equipped only with a marketing viewpoint or only a technology perspective, the result is not likely to be as powerful as if they also had a foundation in usability.

Now, I can’t count the number of times I’ve been asked to build some kind of system when it just isn’t a good idea. It may just be one page, the concept of what that system is going to be—but if that one page is wrong, there is basically

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no way to recover from it in the structure and details of the design. So we can also add real value in terms of customer-centric innovation. Innovation may not turn out as many pages, but the power of each page—of a good idea—is huge.

We need a seat at the table in the conversation about what the strategy is. For that, it’s imperative to go beyond just being good designers. We need to move forward beyond just being a formulaic practitioner, beyond following a set of rules or standards, even beyond even being innovative—this is about going all the way to the top level, to the boardroom level, and being a participant as business directions are set.

Is this the logical next step for a CUA? Is this something for anybody who has an interest in practicing usability?

Certainly anyone can take the new HFI course, *Design for the Big: User-Centric Innovation and Strategy*, and benefit from it, but it’s particularly beneficial for people, particularly senior practitioners and managers, who have a foundation in usability, but want to move beyond just designing to participating meaningfully in higher-level, critical discussions within the organization.

When you go into these kinds of strategic discussions, having a solid foundation in customer-centric technologies is important. I would hate to see somebody walking into a board room and try to give insights into strategy, go through innovation projects or recommend whole new applications and business models if they didn’t have a foundation in UX—how to understand human information processing, and model and design for ecosystems. This takes that skillset up a level.

An organization succeeds when it has an effective team engaged in creating the organization’s story via an ongoing dialog. And that story is made up of:

- › where we’re going
- › what kind of approaches we’re using
- › what ideas we have

As UX practitioners, we want to participate in that story-creation process, not just be implementers of the story.

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“There will be a set of lifestyle changes that will require that we massively rethink and reengineer the way that we function. These kinds of changes need to be understood as we think of ideas and strategies for the future.”

You’ve been talking about innovation and ecosystems a lot; can you clearly explain what you mean by innovation and how ecosystems are involved in that?

Innovation is about coming up with good ideas: new business models, new products, new services, new applications, new websites. There are different ways of approaching that. You’ll see cases where technology folks say, I have this great idea for this capability, and I’m going to create this new product because I can do it. Well, great. The problem is, you may be able to do it, but nobody may want you to do it. Now, the customer-centric/user-centric viewpoint is very different. It says yes, I need to know your technology, what you can do, what your channels are, but the idea for your new product or service needs to come out of an understanding of a specific ecosystem.

For example, HFI has a team going to Kenya to study coffee growers and their financial ecosystem. That team is going to create ideas for new banking systems that will go far beyond a standard set of banking products in that market. It’ll be tuned to the needs of the market, to the realities of its different actors and challenges. That should be a routine procedure for ideation, not just guessing—not just saying, “Here’s a technology that we can use, let’s see if it works.” You have to study the ecosystem, model it, and drive that towards the design of new ideas

Find your target



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“Any good company designs their offerings for particular ecosystems. As those ecosystems change—and the rate of change starts becoming exponential—there’s a very high value in design for innovation.”

And how is that different from the traditional data gathering that a UX person would do?

Well, that’s the important point: in many ways, it’s the same data gathering. Many of the same skillsets that we use when we study users to design an application—the task-analytic interviews that help us understand what people do, how they think and what their emotional schema is around a given area—those are all things that are foundational to doing innovation. That’s why I think usability people will be very comfortable with innovation work.

In some cases we need to do things that are inspired by people who study cultures, the bigger picture of the way that lifestyles change. We don’t use classical ethnography because an ethnographer would go live for two years in a cultural environment in order to understand it—we can’t afford that. But we have to use related methods to give us the big picture of the way that the environment works

Is it important for practitioners to understand the impact of lifestyle trends and changes so that they can anticipate and develop appropriate positioning in the design of new products and services?

We live in a world where things are changing very fast, and are likely to start changing even faster. There will be a set of lifestyle changes that will require that we massively rethink and reengineer the way that we function. In our new course we’re going to show models of how lifestyles are likely to change based on ecological imperatives, and on people’s desire to be happier. These kinds of changes need to be understood as we think of ideas and strategies for the future.

As we look at having conversations about the future of a bank, telecommunications or services company, or ecommerce facility, we need to be aware of the megatrends that are happening. Everything from the classical megatrends, the kinds of ideas that John Naisbitt came up with, to the more current trends around a technology or a specific domain. Look at banking, for instance. It’s changing so fast, we see whole areas where in place of money, people are buying and selling mobile phone minutes and transferring those as a way of doing transactions. There has been an enormous growth in online digital money,

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and in money that exists only in gaming environments. So if we don't understand, model, and constantly observe how the world is changing, our recommendations will be off the mark.

“We see changes in the way that people socialize. There is a never-ending set of things that we do because of all these lifestyle changes.”

Digital Mega-Trends

We live in exponential times...

- 1. Wired World**
Close to 2 billion people will be online by 2010...
- 2. Invisible Computers**
Today, there are more than 1 billion devices connected to the Internet...
- 3. Online Business Models**
Long tail: amazon.com
Brokerage Model: eBay (Buyer/Seller)
Free + Premium = Freemium: Kodak Gallery
Online Advertising: Google AdSense
- 4. Social Computing**
1995: classmates.com
1997: eMachines*
Today...: Friendster, LinkedIn, MySpace, orkut, Facebook, Ning, opensocial
- 5. User Generated Content**
Millions of Content Creators (Consumers) → Web-based Content → Thousands of Publishers
- 6. Organic Knowledge**
Business Intelligence is the #1 IT spend in the last ten years...
Documented / Formalized: Reports, Glossaries, Help Systems, Research, Business Rules, Taxonomies
Organic / Experiential: Tagging, Notes, Previous Actions, Comments, Communities, Blogs, Wikis

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“It’s really about looking at the big picture. We need to be able to drive to the right market, model its “Big” and use that data for ideation and strategic discussion.”

You say that being aware of changing customer ecosystems give the UX practitioner value within the organization. Can you tell us lifestyle changes that have shaped the way you’ve designed something for a client?

Yes, certainly. Let’s stick with the banking theme, where we see such enormous changes. The rise of the Islamist movement has spawned Islamic banking. The Indian diaspora means that banking specifically to non-resident Indians has become very important. We have done with banking facilities work on those kinds of specific applications.

We see changes in the way that people socialize. Systems that allow people to telesocialize are becoming very commonplace, and we’ve been working with some of the biggest technology companies, expanding telesocialization technologies, building systems to enable people to socializing remotely, and have a better, richer experience doing it. There is a never-ending set of things that we do because of all these lifestyle changes.

Any good company designs their offerings for particular ecosystems. As those ecosystems change—and the rate of change starts becoming exponential—there’s a very high value in design for innovation.

It wasn’t very long ago that in the US, we were worried about page weight. We spent a lot of time worried about things like, “Can I have that image there or not?” We were worried about reducing the weight of individual images. Today, in the US, at least, broadband is the norm. So something like YouTube, a cultural phenomenon, is just normal, whereas a few years ago the idea of having video was just ridiculous—having little animations with multiple GIFs was really remarkable and exciting for people.

We see changes in lifestyle, changes in technology. All of this is moving—and moving in ways that can be understood. We’re going to be modeling what those lifestyle changes are for people who take our class, all the way from very macro kinds of changes such as globalization of the economy and the power of small businesses—even the changes in the way that consumers look for value in their purchases—all the way though technology and domain issues, and lifestyle changes around ecological imperatives.

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“This kind of strategic capability really means you get visibility all the way to the top.”

Today’s UX practitioners are pretty familiar with how to figure out what kind of user you’re dealing with through the use of personas. Now, however, it seems as if you are saying we have to go beyond that, to a broader ecosystem approach. How will that impact our practitioners? How does understanding an ecosystem compare to creating a persona?

A persona is a component of an ecosystem. That skillset is very important. But the course we’ve created is not about how to design personas—that’s something we’re assume is actually fairly well understood, so we won’t be spending much time on that at all. We’re going to talk about some advanced ways of understanding ecosystems: using ethnographic techniques, doing affinity walls, DILo analysis, ecosystem charts, and understanding how to derive opportunity points from those kinds of analyses so we can see directions that can be exploited.

It’s really about looking at the big picture. We’re used to being told, “OK, go after that market,” and we go after that market...but how do we decide what market to go after? That in some ways is the more interesting question. If we’re told to go after the wrong market, we fail. We need to be able to drive to the right market, model its “Big” and use that data for ideation and strategic discussion.

Many usability practitioners that we’ve talked to have said they’re excited about UX but don’t get buy-in from the executive level. Will this new direction help them to get buy-in?

We’re going to offer a separate course with specific training on how to develop executive sponsorship, deal with governance and the more advanced kinds of issues such as building organizational capabilities for UX work—building a UX practice.

But in addressing discussions with executives, we need to go beyond simple design issues and have conversations that executives care about. You’re not going to get an executive excited by showing him that three nouns in a row confuse people, however much that matters. However, if you can say, “Hey, look at this lifestyle change—do you see how it threatens our business? Here’s how we can move the business to take advantage of it”—and then suggest a whole new business model that allows success with a more unconventional strategy, perhaps

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using a freemium approach or long-tail approach—chances are the executive will be very interested. If we want to succeed in those executive-level conversations, the discussion needs to be *bigger*.

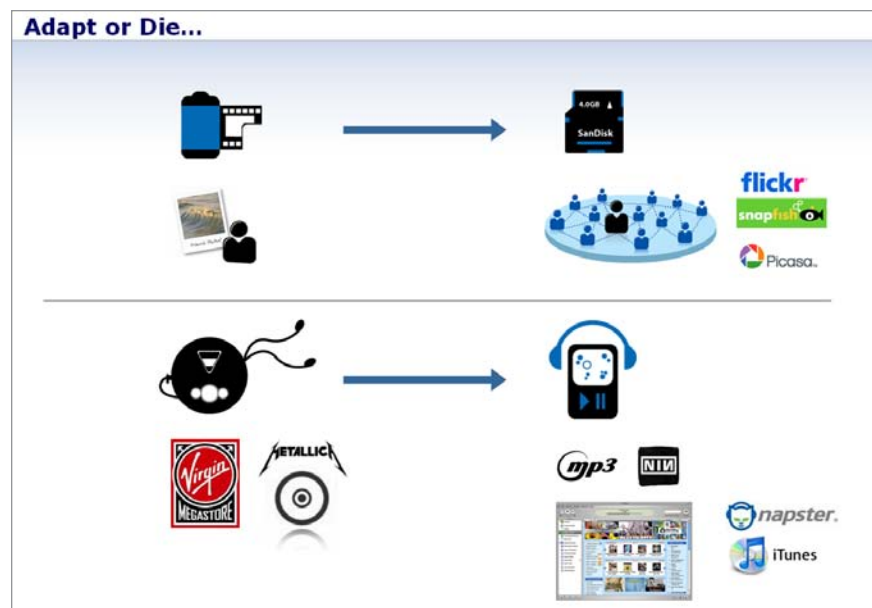
This kind of strategic capability really means you get visibility all the way to the top.

What kinds of conversations should UX practitioners be having—not only with strategy teams, but with marketing and product teams—to fully engage all the stakeholders for a holistic UX strategy?

“One of the things I see today is that executives get it. It’s so different than it was even five years ago.”

Strategic direction is something that comes about as a discussion within the organization. It’s not something where we walk in and say, “Where’s a strategic direction—bye!” We want to participate in this conversation. The technology folks will have a CIO who’s going to participate, the marketing folks will have a CMO

who will participate. We need to participate as well—that’s how you get a CXO. But to participate in that conversation we need to understand the models and how our unique perspective, our unique capabilities, empower us to participate at that level.



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How does it help companies to add the UX model to their business strategy?

One of the things I see today is that executives get it. It's so different than it was even five years ago. Today I talk to executive after executive, even in very remote, emerging markets, who truly understand the imperatives of customer centricity. They've read the books, they've looked at the data, and their question is not do we need to do this—their question is *how*. They want to know concretely what they need to do, and how it will have an impact, not just with detailed design issues but in informing their overall business approach.

We have always talked about the importance of having an executive champion on the UX team. It seems that now you are telling UX practitioners that they themselves can actually take a role in being executive champions, and talk in their own right at the executive level.

There is this new role of the Chief User Experience Officer (CXO). Someone at that level can be the executive champion—but that person must be high in the executive suite. Don't think for a minute that someone who is a UX manager can be an executive champion. I often see that kind of confusion, and it's counterproductive. When an executive champion moves somewhere else and the person who is given that responsibility doesn't get it, it results in failure every time.

The CXO position is new in the C suites—where are we in the process of businesses recognizing UX at the strategic level?

The CXO position has evolved from being a far-fetched idea to a leading-edge practice. CXOs are out there, though in most large corporations they're not a normal practice yet. That is the future, I think. It's just now beginning to be taken up by early-adopter companies.

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“We want to get beyond the design, beyond just *implementing* the idea. We need to participate in *developing* the idea, too—the strategy.”

In your expanded, strategic vision for the UX person, he/she has to do things that would traditionally have been the domain of marketing researchers, doing research, wearing an ethnographer’s glasses...

Marketing researchers play an important part in that customer-centric viewpoint. But they tend to answer different questions. They tend to focus on what people want to buy—their capability to buy. What we focus on is how people live, how they use technology and how they feel about the technologies that they use. So we have a strikingly different perspective than that of the market researcher.

Market researchers tend to base their insights on massive studies, surveys about what consumers do and how they feel. That has value, but doesn’t really provide the depth of understanding of the ecosystem in which people and technology operate, of the interplay between different actors within the ecosystem or of the artifacts and environmental issues that are so common for UX staff to think about. The different perspective of the UX person means he or she has an important contribution. That’s what’s exciting.

We want to get beyond the design, beyond just *implementing* the idea. We need to participate in *developing* the idea, too—the strategy.

We are seeing more and more marketing people get involved in UX—taking the PET design course, for instance. Would you say this new direction is an extension of that?

There is a significant movement among staff who used to be in marketing and advertising who want to understand more about the UX field. I had an interesting conversation last week with the CEO of an agency in Asia who said that the business model of an ad agency has really come apart. It used to be that an ad agency made all its money by getting a percentage of the media spend, and that’s just not happening anymore. The agency needs to go beyond just creating ads, because that won’t work as a revenue model—they have to begin to advise customers on the entire scope of the customer’s interaction with the company.

And so they’re moving as fast as they can—and we are trying to help them—to get their arms around a wider perspective. Not just *how do I make an ad with a great idea to get the customer to the store and buy that thing*, but what is the cus-

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customer's experience out of the box? Can they use the product? Do they like it? Do they tell their friends about it? Being able to engineer the customer experience has become a new objective of agencies.

The problem is that many of them base their approach on good intentions and a wild guess. What we can do is help them understand that those kinds of things are not simply good ideas—they must be informed and validated. They have to be based on research, principles, and design processes that have more to do with *engineering* than creativity. We are happy to help marketing and advertising people make the shift from the “cool idea” paradigm to a much more scientific approach in dealing with complex interactions, complex environments and cross-cultural issues.

“Marketing and advertising need to make the shift from the “cool idea” paradigm to a much more scientific approach in dealing with complex interactions, complex environments and cross-cultural issues.”

It sounds like the ad agencies are going to have to come to the UX professionals in order for the agencies to stay afloat.

I'm not sure exactly how it's going to play out. I think that they may hire UX professionals, they may have to learn UX skills—a combination of things—but clearly the agency of the future is not going to succeed simply by coming up with that great tag line, color scheme or advertisement. That's just not a valid business model for long-term survival, and I think the agencies all know that. They are going to have to provide more value-add. And that value-add may be, for many agencies, in providing a user experience strategy rather than a mere ad strategy.

You've alluded several times to a course that will train people to take User Experience to a more strategic level. Tell us more about this course.

The course is called *Design for the Big—User-Centric Innovation and Strategy*. We have been working for quite some time on it. We started it as a workshop three years ago, when we referred to this field as contextual innovation, and we've been evolving it and fine-tuning it ever since. It is really a flagship course in how to operate at a different level as a UX professional—it will take people through a transformation in what our values can be.

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“I think we’re going to see business strategies that are more effective because they have that UX spin to it.”

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STRATEGY — INNOVATION
GROWTH

TARGET MARKET

GROWTH %

BRINGING THE UX PERSPECTIVE TO STRATEGIC AND INNOVATIVE PROJECTS

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Anybody who has really focused on doing good design their whole career will see there is a whole other level they sit within. Good design sits within a strategy, and exists as the result of an innovation. This class is going to give them that perspective and the skillset to engage with those higher, overarching levels in the organization.

We’re going to talk about how to have those conversations. We’ll equip you with the foundational material you need in order to understand what an executive’s mindset is. UX people often wonder why their discussions are not really resonating with an executive. You see, executives know about megatrends—they read about that stuff all the time, because they care about it. They also know about design trends and where business models are headed. We need to be able to

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This course is for the practitioner, the UX manager, the director of the UX group, and the UX staff, because what we want to be able to do is to move up in our visibility and be heard by the executive suite.

understand and talk to executives in terms of those kinds of concepts or they will not value what we have to say.

Design for the Big will help UX professionals think and frame their discussions in those terms. It will also show practitioners how normal ecosystem work can be extended to create a solid foundation for strategy and ideation work.

This seems to offer a way for UX professionals to provide a lot more input, to be valued in their organizations, and listened to with respect—a whole new world, in effect.

I think so. I also think we're going to see business strategies that are more effective because they have that UX spin to it—strategies that talk about how a corporation uses persuasion engineering methods as a core method of positioning in the industry, or how a business restructures its product offerings to face a set of changes in lifestyle and consumer value systems. We're going to see a set of innovations that are truly tuned to customer needs from the outset—that are driven by that, instead of mere guesses. (A few of these guesses actually work. But with such a high-cost, high-risk activity, it's a needless gamble).

Innovation needs to be professionally done. It needs to be informed and validated, not a question of luck. This is the new age of UX work, I think. This course really represents that step forward for the field, and I feel very excited about that.

Should the executive champion be taking this course, or is it more for the UX practitioner?

This course is for the practitioner, for the UX manager, for the director of the UX group, for the UX staff—what we want to be able to do is to move up in our visibility and be heard by the executive suite, talking about things that they care about. An executive with a background in marketing, sales, business or technology is unlikely to be able to take this course and get it without a foundation in UX. But a UX professional who takes this course is going to do a much better job of talking to the executive about strategic issues. He or she is going to be more successful participating in strategic discussions and innovation discussions.

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“We need to plan strategies that put a topspin on UX techniques—that’s what separates the leaders from the followers is on the level of strategy and innovation.”

Do you feel that *Design for the Big* might put a UX practitioner on track to become a CXO?

Good grief, yes! Somebody who aspires to become a CXO must absolutely have this course.

What would you tell people who are interested in this course, in bringing this knowledge into their companies? Who should attend?

This is a great course for UX practitioners. Also, marketing professionals, business researchers / analysts, strategy planners, and design researchers would all benefit from it, particularly if they have had some previous UX training.

This is all about moving up the value chain. It’s all about moving UX up as a profession. If we want to know that we won’t be the first to be budget-cut anymore, and to have the kinds of higher-level positions within the organization that we well deserve, we need to be able to participate at a higher level than just detail design, or even structural design. This knowledge is the level where the real value is, the high value. This is a whole new world into which we can bring our capabilities.

And this is the time for it. The differentiators are not hardware or software anymore—the differentiator is user experience. When you look at which bank you want to bank with, do you care how nice the bank’s branches are? You are more concerned with how its digital channels work, because that touches you every day. Does the bank do a good job of getting you online and using the power of its online channels? Does it let you use mobile, keep you informed, and make you feel secure? There are so many ways of doing that—UX is the differentiator.

We need to plan strategies that put a topspin on all those techniques. Sure, everybody can swing and hit the ball. Everybody is out there setting up UX teams, setting up standards—and all of that important. But it’s that topspin that separates the leaders from the followers is on the level of strategy and innovation. That’s the stuff that matters.

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About Dr. Schaffer



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.



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