

# **STRATEGIC DESIGN: ALIGNING BUSINESS GOALS AND USER NEEDS**

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UPA-DC UserFest: October 15 2019  
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## agenda

- 1. brief introduction**
- 2. define the damn thing:  
design strategy**
- 3. design strategy in practice**
  - a. collaborative design strategy**
  - b. design strategy as a deliverable**
  - c. examples**
- 4. questions**

## brief introduction

**1**

**brief introduction**

## let's set expectations

Adaptive Path has an 8 hour design strategy workshop led by 2 people

Nathan Shedroff leads an entire MBA program in Design Strategy

You have me for 40 minutes, including Q/A.

## let's set expectations

### **NO**

Criticism of your current approach

Empty promises

Discussion on software or platforms

Venn diagrams

### **YES**

Definitions of Design Strategy

Buzzwords (but hear me out)

A useful and implementable approach

How to use what you already know

## define the damn thing

**2**

**defining design strategy**

## conventional strategy

Leadership makes the key business decisions  
Codify into business strategy  
Bring in design team to implement the strategy

## defining design strategy (part 1 of 3)

design strategy:  
**the process of carefully framing a project of what to design before you figure out how it should be designed**

**Brandon Schauer**  
Adaptive Path

## defining design strategy (part 2 of 3)

design strategy:  
**the use of design processes, perspectives, and tools to create truly meaningful, sustainable, and successful innovation across a variety of design disciplines**

**Nathan Shedroff**  
chairperson, MBA in Design Strategy program  
at California College of the Arts

## defining design strategy (part 3 of 3)

design strategy:

**[defines the design activities] within the constraints of time and resources...to help the designer select the best mix of creative and rational methods.**

**Richard Branham, Alp Tiritoglu**  
**CHI 97: Design Strategies and Methods in Interaction Design**

## defining design strategy

### **tangible design strategy:**

baseline analysis & current state of where you're at

roadmap & vision

research-based personas

decision, process or task flows

rough prototypes or sketches

competitive & market analysis


balanced scorecard

feature/value analysis

measuring results:

what, when, how to define success

## defining design strategy



**design strategy is fluid**

defining design strategy



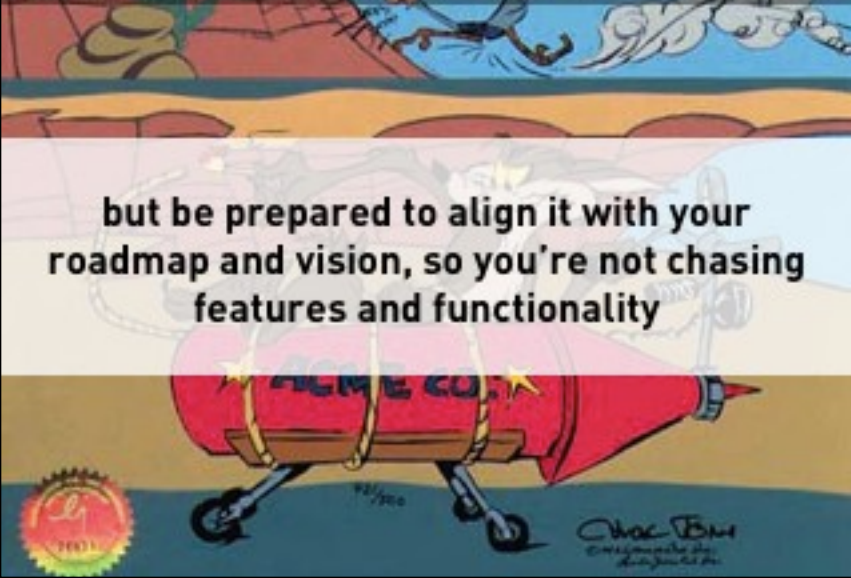
not a rigid process

defining design strategy



expect new insights & opportunities  
in unlikely places

defining design strategy



but be prepared to align it with your  
roadmap and vision, so you're not chasing  
features and functionality

## defining design strategy



**and measure progress & success  
if you pursue the new path**

## collaborative design strategy

collaborative strategy helps avoid:  
**the air sandwich**  
**overly ambitious ideas**  
**choosing certainty over clarity**  
**individual status over team results**  
**saving, preserving personal ideas**

The New How, Nikofer Merchant

## collaborative design strategy

collaborative strategy helps avoid:  
the air sandwich  
overly ambitious ideas  
**choose consensus, not concession**  
individual status over team results  
saving, preserving personal ideas

The New How, Nikofer Merchant

## recap (1 of 2)

**goals of design strategy:**

**feasible, viable vision**

**discover threats, insights & opportunities via research**

**determine how to measure success **over time****

**articulate how your product fits within the ecosystem**

**a plan to make it happen **over time****

## recap (2 of 2)

**design strategy is:**

**a collaborative process to  
understand what to design before  
you design it**

**a plan to align business objectives  
with design goals**

**documentation to align stakeholders,  
colleagues & investors with your  
plan of attack**

## design strategy in practice

**3**

**design strategy in practice**

**is design strategy necessary for success?**

**incremental innovation**

**feature-creep, feature-chasing,  
useless features**

**little differentiation from competitors  
or your own offerings**

**functionality that may threaten the  
service/product's ecosystem**

**how do you bring design strategy  
into your organization?**



## where to start

Identify what you don't know:

**product vision, roadmap, plans**


**origin of features**

**definition of success**

**customer (& user), CoP perception**

**concrete strategic business objectives**

## where to start



determine what you need now to  
**avoid disaster or follow a hunch**

## where to start

**Don't wait for project kickoff or sprint zero**

## collaborative design strategy

Which stakeholders or business units might have an opinion here?

Which ones are we assuming might not be affected? How can we confirm?

Who's left out of this discussion?

Where do we anticipate conflict?

The New How, Nilofar Merchant

## design strategy in practice

### And then decide what fits the job.

baseline analysis & current state of where you're at

roadmap & vision

research-based personas

decision, process or task flows

rough prototypes or sketches

competitive & market analysis

balanced scorecard

feature/value analysis

measuring results:

what, when, how to define success

## tools of the UXer

strategic

experience diagrams

concept models

observation

process flows

interviews

personas

prototypes

usability testing

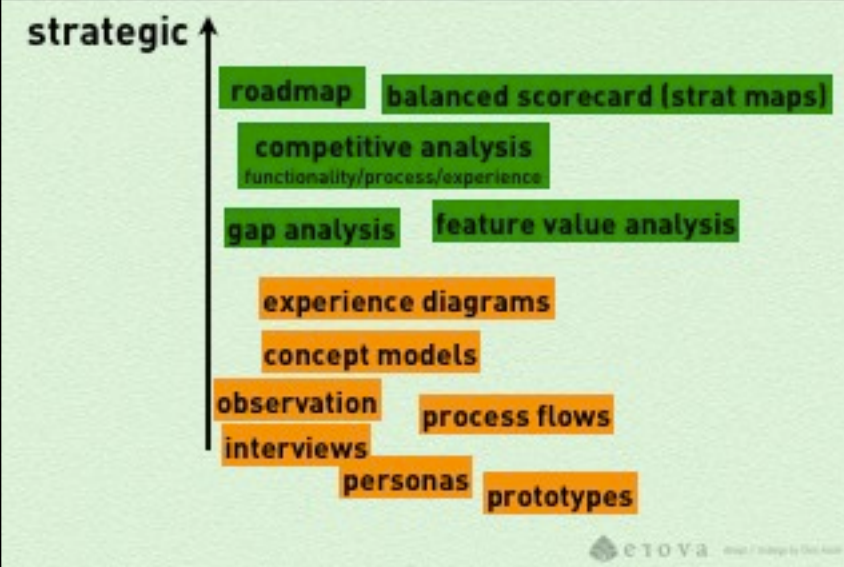
tactical

wireframes

mockups

project duration

# tools of the UXer as design strategist



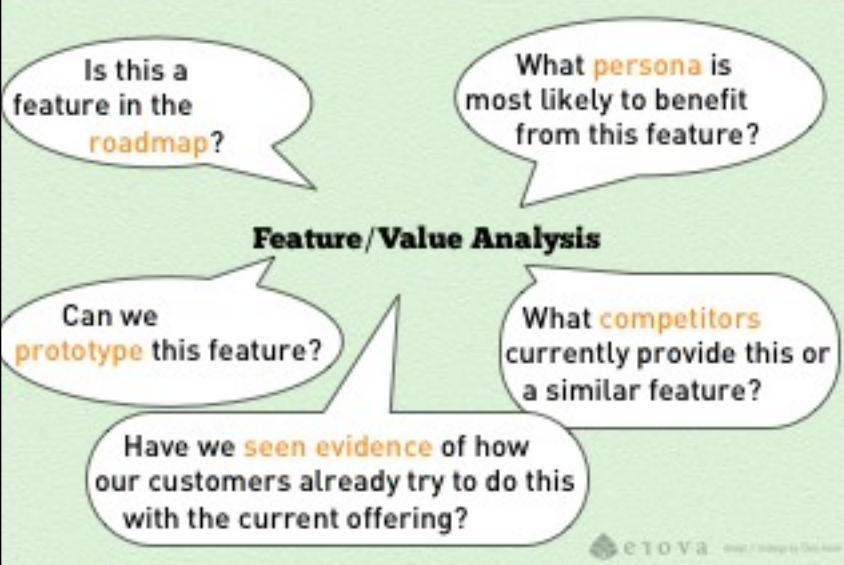
## examples: Feature/Value Analysis



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**Feature/Value Analysis**  
feature description  
business priority (1-3)  
strategic objectives  
design level of effort (1-3)  
technical level of effort (1-3)

## examples: Feature/Value Analysis



## tools of the UXer as design strategist

Reference the documentation you use today to reflect strategic objectives:

**How does this wireframe align with the roadmap? What could the next version look like?**

**How are this persona's needs reconciled with the strategic business objectives?**

**Where can the process flow reveal gaps from our current state to future ideas? Or our competitors?**

## other tips to documenting design strategy

**Begin annotating wireframes, mockups, with business goals or referencing the FVA**

**Convert process flows to experience flows**

**Beef up competitor research to include business process (what they're doing), not just functionality**

**Identify triggers, metrics to substantiate a hunch**

**Map primary business objectives to the customer lifecycle: reinforce human experience**

## common useful resources

**Design Management Institute**  
**Harvard Business Review**  
**strategy+business (booz allen)**  
**BusinessWeek**  
**Core77**  
**MIT Sloan Management Review**

## questions

**4**

**questions**

**Thank you.**

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