

# User Experience Capabilities Assessment

by Leah Buley, June 16, 2015

## KEY TAKEAWAYS

### **A Firm's UX Practice May Be Outdated, Progressive, Or Modern**

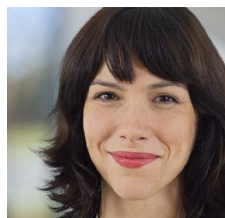
Outdated user experience (UX) teams mostly focus on usability testing and UI design. Progressive teams develop more specialized skills and take on more digital touchpoints. Modern UX teams work across the end-to-end customer journey.

### **Six Factors Determine What Kind Of UX Capabilities You Have**

To assess the strength of your organization's UX capabilities, pay attention to how your UX function approaches scope, strategy, research, design, staffing, and measurement.

### **No Matter What State Your UX Organization Is In, You Have Work To Do**

Outdated UX organizations must focus on staffing. Progressive organizations need to beef up their leadership capabilities. Modern UX teams should keep their eyes on the future and their hands on the metrics.



## User Experience Capabilities Assessment

by [Leah Buley](#)

with [John Dalton](#) and Ryan Trafton

### WHY READ THIS REPORT

The words “easy to use” appear at or near the top of requirements lists in countless customer experience (CX) project specification documents. But saying that usability is a requirement doesn’t necessarily ensure that firms have what it takes to make it happen. This report presents customer experience professionals with a tool to check whether their company has the necessary user experience chops to deliver the goods.

### Table Of Contents

- 2 **How Modern Is Your Company’s User Experience Practice?**
- 2 **Find Out How Your Company Stacks Up**
  - Scope
  - Strategy
  - Research
  - Design
  - Staffing
  - Measurement
  - Calculate Your Score

### RECOMMENDATIONS

- 11 **The First Step Is Acceptance**

### Notes & Resources

This report is an assessment based on Forrester’s user experience research. It is informed by Forrester’s Q4 2014 Global Customer Experience/User Experience Online Survey.

### Related Research Documents

- [Customer Experience Maturity Assessment](#)
- [Digital Customer Experience Trends, 2015](#)
- [How To Modernize User Experience](#)



## HOW MODERN IS YOUR COMPANY'S USER EXPERIENCE PRACTICE?




Firms can't reasonably expect to offer best-in-class customer experiences — digital or otherwise — if they're still stuck on usability 101. Leading CX firms also have leading user experience (UX) practices.<sup>1</sup> But many firms simply aren't there yet, hobbled by outdated ideas about UX as mere user interface design. Today firms fall into one of three camps when it comes to UX:

- **Outdated.** These organizations conduct UX activities on an ad hoc, case-by-case basis. UX work focuses primarily on user interface design for Web and mobile. Usability testing is minimal or absent. Of course, even in an outdated UX organization, more cutting-edge UX work often can happen. It's just that the firm is paying a lot of money to outside agencies for it. One financial services firm reported paying millions of dollars a year to agencies, but only staffed two UX designers in-house to support online, mobile, tablet, dot-com, and digital sales.
- **Progressive.** Progressive organizations have more robustly staffed UX teams representing a broad range of skills including user research, interaction design, visual design, prototyping, and copywriting. In addition, they have UX managers who have the bandwidth and strategic foresight to evaluate staffing needs and manage a pipeline of projects that align with firm and CX strategy. These organizations adjust their standard development processes to make room for UX as standard operating procedure.
- **Modern.** Some firms bet big on experience design, which is reflected in the shape, breadth, and scope of their UX organization. In these companies, central UX resources conduct end-to-end experience research, set strategy, and manage firmwide experience standards and guidelines. Meanwhile, fully staffed UX teams in the business lines conduct product or channel-specific research and design activities. At Customer Experience Index (CX Index™) leader USAA, hundreds of UX designers throughout the organization have a dotted-line relationship to a central experience design group that works on omnichannel experience architecture and experience design standards for its 8,000 person member experience organization.

## FIND OUT HOW YOUR COMPANY STACKS UP

Several factors, including scope, strategy, design, research, staffing, and measurement, determine the sophistication of a firm's UX practice (see Figure 1). To find out where your company stands, answer the questions below, and then calculate your score.

**Figure 1** The Range Of User Experience Practices In Firms

	 <b>Outdated</b>	 <b>Progressive</b>	 <b>Modern</b>
<b>Scope</b>	Projects are ad hoc and digital only	All digital products have dedicated UX work streams	UX spans all customer interactions end-to-end, including digital and non-digital interactions
<b>Strategy</b>	UX strategy is absent	UX strategy only extends to gathering requirements, which may be informed by customer research	UX conducts distinct strategy activities to understand business goals and capabilities, user needs, competitive landscape, and relevant trends, and then sets product/service vision and develops a UX road map aligned to firm strategies
<b>Research</b>	Usability testing	Usability testing, as well as ethnographic research and iterative validation with customers	Usability testing, ethnographic research, and iterative validation with customers, as well as hypothesis-driven experiments that are informed by both qualitative and quantitative customer research
<b>Design</b>	Design process revolves around wireframes	Design process is iterative and evolves from sketches to high fidelity	Design process begins with establishment of design vision, experience principles, and design guidelines. Process then moves into iterative design that evolves from sketches to high fidelity.
<b>Staffing</b>	UX generalists with low ratios of UX per product	Full UX teams with research, interaction design, visual design, content strategy, and prototyping expertise staffed against products or in lines of business	Executive UX leadership that oversees full teams as described at left plus central capabilities for strategy, research, and end-to-end experience design
<b>Measurement</b>	UX is measured in terms of users' task completion rates and efficiency (i.e., what can be measured via usability testing)	UX is measured in terms of impact on user behavior as demonstrated through analytics (e.g., conversions, time on-site/task, dropoffs, etc.), as well as what can be measured in usability testing	A greater range of measures are tracked in relation to UX, including user behavior as demonstrated through analytics, customer satisfaction as measured through surveys, sentiment mined through customer feedback or social monitoring, and profit as reflected in firm key performance indicators

122509

Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.

## Scope

Some firms scope UX as a strictly digital concern. Others deploy the UX toolkit as a technology-agnostic process — featuring user research, iterative design and prototyping, and frequent validation with customers — to customer touchpoints across the end-to-end journey (see Figure 2).

**Figure 2** Assessment For UX Scope

Question 1

What does your UX team work on?	Circle your score
Just the core product or website	1
Multiple digital touchpoints, (may include web marketing, SaaS, mobile, employee tools, etc.)	2
Full end-to-end customer journey (may include non-digital touchpoints)	3

### Strategy

Just as the *customer experience* strategy is the game plan that spells out the type of experience your company intends to deliver in broad strokes, the *user experience* strategy is the game plan for the parts of the experience that UX drives by force of its scope above.<sup>2</sup> In some organizations, other groups such as business analysts, product managers, and even CX set UX strategy. In others, UX plays a more active role in analyzing, envisioning, and road mapping the UX strategy (see Figure 3).

**Figure 3** Assessment For UX Strategy

Question 2

<b>Which of the following best describes your UX team's role in customer experience strategy?</b>	<b>Circle your score</b>
We are a downstream recipient of experience strategy decisions; projects come to us pre-scoped	1
We participate in requirements gathering and project scoping based on experience strategy that is set in other parts of our organization	2
We actively participate in discovery, research, visioning, and road mapping to shape our firm's digital and customer experience strategy	3

## Research

Customer understanding is another of the six fundamental disciplines of CX maturity, and yet just 16% of firms regularly conduct research into customers' unmet needs.<sup>3</sup> User experience teams often agitate for and drive this form of research in their organizations. A key measure of UX maturity is whether so called "user research" has become a repeatable and integrated practice (see Figure 4).

**Figure 4** Assessment For UX Research

### Question 3

What types of research activities does your UX team engage in?	Check all that apply
• Usability testing for validation purposes	<input type="checkbox"/>
• Iterative testing during the design process	<input type="checkbox"/>
• Exploratory or ethnographic design research	<input type="checkbox"/>
• Combined quantitative and qualitative UX and CX data	<input type="checkbox"/>
• Hypothesis-driven experiments using prototypes	<input type="checkbox"/>

To score, count the number of boxes you checked	Score
If you checked 0-1 boxes, circle 1	1
If you checked 2-3 boxes, circle 2	2
If you checked 4 or more boxes, circle 3	3

## Design

Design is the heart of the UX practice. Even in outdated UX organizations, there is little argument that UX should play an active role here. But there are different ways to approach design. Modern UX organizations embrace iterative design practices that involve customers, de-risk design decisions, and naturally complement Agile and Lean methodologies (see Figure 5).<sup>4</sup>

**Figure 5** Assessment For UX Design

### Question 4

What design activities does your UX team engage in?	Check all that apply
• Iterative design from low to high fidelity starting with sketching	<input type="checkbox"/>
• Co-creation with customers and stakeholders	<input type="checkbox"/>
• Detailed interaction design	<input type="checkbox"/>
• Detailed visual design	<input type="checkbox"/>
• Design prototyping	<input type="checkbox"/>
• Developing of experience design standards, guidelines, and patterns	<input type="checkbox"/>
• End-to-end journey design/service design	<input type="checkbox"/>

To score, count the number of boxes you checked	Score
If you checked 0-2 boxes, circle 1	1
If you checked 3-5 boxes, circle 2	2
If you checked 6 or more boxes, circle 3	3



## Staffing

Modern UX teams fully staff up for core products. In these organizations, UX often evolves to hub and spoke or matrixed models, where product teams have dedicated UX resources and separate, often centralized, UX resources that focus on cross-product strategy, patterns and guidelines, and capabilities enablement (see Figure 6).

**Figure 6** Assessment For UX Staffing

### Question 5

<b>Which of the following best describes your UX staffing model?</b>	<b>Circle your score</b>
We have UX generalists embedded in lines of business, technology, or marketing	1
We have full UX teams with a range of UX specialties such as interaction design, visual design, and user research embedded in lines of business or a central team	2
We have full UX teams (as described above), plus team leads, UX managers, and executive-level UX leadership, with some centralized capabilities and governance	3

### Measurement

Modern UX teams routinely connect their work to key progress indicators for the business. In a recent survey, 71% of modern UX teams said they know how UX drives behavior metrics for their products and services, whereas just 39% of firms with the outdated UX team model could demonstrate that linkage.<sup>5</sup> Modern UX teams also use business metrics as an input *into* their process, gathering existing data from their analytics, voice of the customer systems, and market research colleagues to foster a more informed UX strategy (see Figure 7).

**Figure 7** Assessment For UX Measurement

Question 6

Which of the following measures has your firm found UX to influence?	Check all that apply
• Behavior metrics	<input type="checkbox"/>
• Conversion	<input type="checkbox"/>
• Customer satisfaction	<input type="checkbox"/>
• Social feedback	<input type="checkbox"/>
• Cost reduction	<input type="checkbox"/>
• Revenue growth	<input type="checkbox"/>

To score, count the number of boxes you checked	Score
If you checked 0-2 boxes, circle 1	1
If you checked 3-4 boxes, circle 2	2
If you checked 5 or more boxes, circle 3	3

### Calculate Your Score

To calculate your score, add up the total from the six questions above (see Figure 8).

**Figure 8** Total UX Assessment Scorecard

**To calculate your score, add up the total  
from the six questions above**

Category	Score
Scope	
Strategy	
Research	
Design	
Staffing	
Measurement	
Total score	

---

## RECOMMENDATIONS

### THE FIRST STEP IS ACCEPTANCE

Start by determining where your UX practice stands today. Whether you're outdated, progressive, or modern, there's more work ahead:

- **6 to 9 points: You have an outdated UX organization.** One surefire way to spot an outdated UX organization: Count the number of UX pros per project. If your UX professionals are spread across multiple projects at any given time, they simply do not have the bandwidth to do more than fix the most egregious UI design issues and conduct cursory testing. If you're in this camp, where do you begin? Calculate a case for a bigger investment in UX.<sup>6</sup> Once you get the funding, spend it building out at least one fully staffed UX team that includes interaction design, visual design, and user research, plus a manager to prioritize projects and say no.
  - **10 to 14 points: Your organization is progressive.** Congratulations, your firm is making realistic investments in UX! But the work doesn't stop there. It's likely that your UX organization is still not as active as it should be in user research and strategy. You're probably doing usability testing, but make sure that you're also doing exploratory research to spot unmet needs. That type of research invariably creates new insights that bring UX into strategy conversations.<sup>7</sup> Senior UX leadership is key here. Its role is to make sure that UX work aligns with CX, digital, and firm strategies, and also integrates effectively into development processes. If you don't have that senior UX leader, you need to hire her.
  - **15 to 18 points: You have a modern UX organization.** Well done. The human-centered design process is improving customer-facing experiences, employee-facing experiences, and maybe even internal business problems in your firm. But don't rest on your laurels. The technology landscape and consumer expectations will continue to shift underneath you, so dedicate resources to explore emerging interaction paradigms, track technology trends, and examine weak signals that may portend customer expectations to come. Finally, even modern UX organizations still have work to do to prove the relationship between UX and the measures that are most important to the business: customer loyalty, business profit, and shareholder value.
-

## ENDNOTES

- <sup>1</sup> Today, UX is an essential capability in any firm's CX practice, bridging businesses' and customers' goals. Leading firms are known to spend on, cultivate, and vigorously pursue strong UX capabilities. For more information, see the "[How To Modernize User Experience](#)" Forrester report.
- <sup>2</sup> Organizations looking to move up the CX maturity curve should use this report to assess the extent to which they perform these key practices today. For more information, see the "[Customer Experience Maturity Assessment](#)" Forrester report.
- <sup>3</sup> Today's most widely adopted CX practices might prevent bad experiences, but they won't produce great ones. To deliver truly outstanding customer experiences, companies need to push beyond their comfort zones and adopt less common techniques. For more information, see the "[The State Of Customer Experience Maturity, Q4 2014](#)" Forrester report.
- <sup>4</sup> A healthy UX process involves institutionalized customer research, a strong UX strategy, and a rigorous "design, test, revise and repeat" methodology. For more information, see the "[How To Modernize User Experience](#)" Forrester report.
- <sup>5</sup> Advanced firms deploy UX skills on a range of products extending far beyond software design. They also involve UX pros in a wide swath of activities ranging from experience strategy to nondigital UX design, and they see a greater relationship between UX and key performance indicators. For more information, see the "[How To Modernize User Experience](#)" Forrester report.
- <sup>6</sup> Customer experience professionals still struggle to justify the cost of user experience design. To help, we've outlined a six-step process CX professionals can use to discover and make the business case for investing in user experience to improve their digital customer experiences. For more information, see the "[Cost-Justifying User Experience Design: A Refresher](#)" Forrester report.
- <sup>7</sup> By bridging the gap between the quantitative analysis of CX and the models and frameworks that UX professionals tend to prefer, new customer insights can be discovered and mined for innovation. For more information, see the "[Bridging the CX/UX Divide](#)" Forrester report.

## About Forrester

Global marketing and strategy leaders turn to Forrester to help them make the tough decisions necessary to capitalize on shifts in marketing, technology, and consumer behavior. We ensure your success by providing:

- Data-driven insight to understand the impact of changing consumer behavior.
- Forward-looking research and analysis to guide your decisions.
- Objective advice on tools and technologies to connect you with customers.
- Best practices for marketing and cross-channel strategy.

### FOR MORE INFORMATION

To find out how Forrester Research can help you be successful every day, please contact the office nearest you, or visit us at [www.forrester.com](http://www.forrester.com). For a complete list of worldwide locations, visit [www.forrester.com/about](http://www.forrester.com/about).

### CLIENT SUPPORT

For information on hard-copy or electronic reprints, please contact Client Support at +1 866.367.7378, +1 617.613.5730, or [clientsupport@forrester.com](mailto:clientsupport@forrester.com). We offer quantity discounts and special pricing for academic and nonprofit institutions.

---

## Forrester Focuses On Customer Experience Professionals

To improve the perceived quality of customer interactions with your company, you must leverage emerging digital technologies and lead enterprisewide customer experience transformations. Forrester helps you create forward-thinking strategies to justify decisions and optimize your individual, team, and corporate performance.