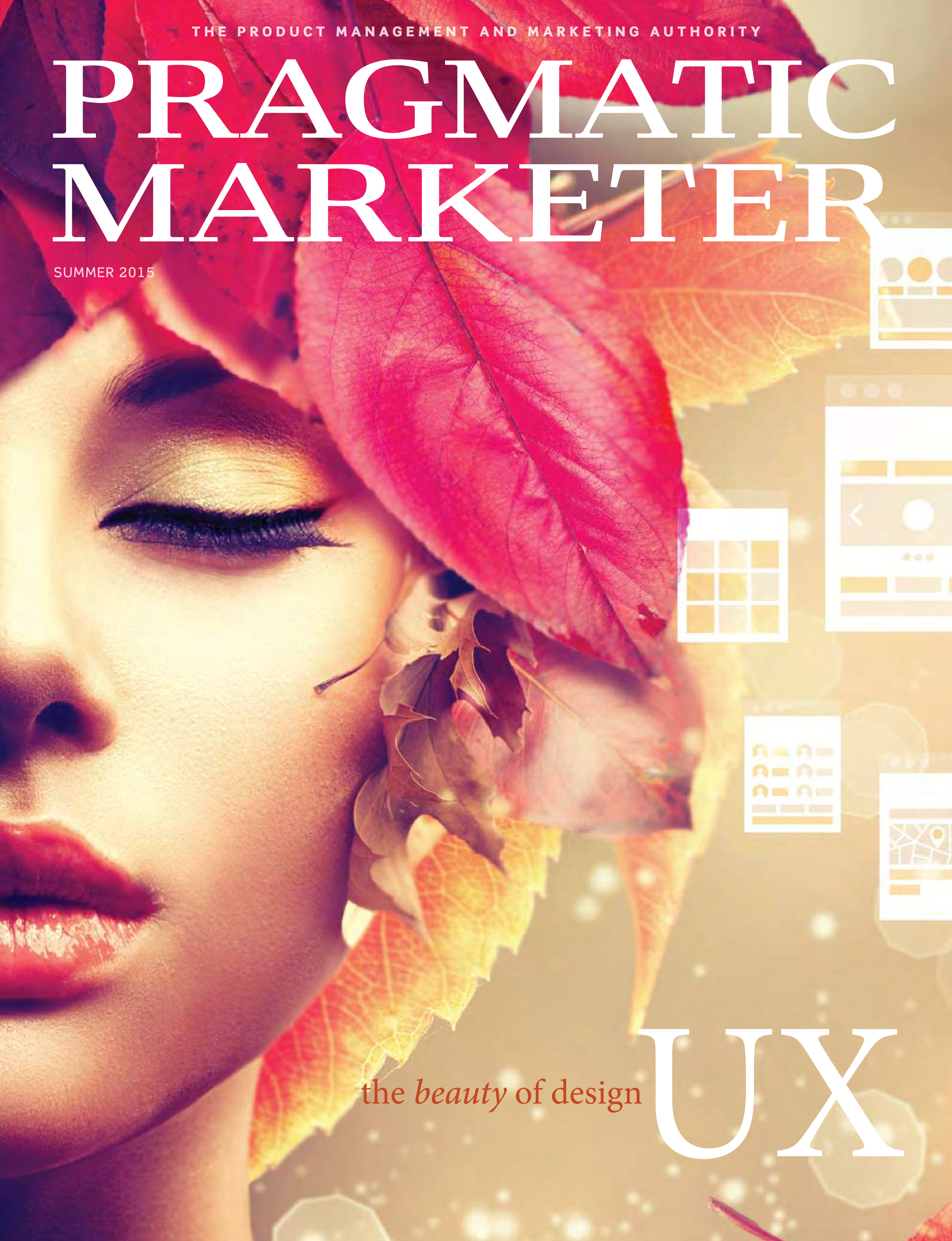
THE PRODUCT MANAGEMENT AND MARKETING AUTHORITY

PRAGMATIC MARKETER

SUMMER 2015



the *beauty* of design UX

USER EXPERIENCE

I HAVE THE PRIVILEGE OF WORKING with an award-winning designer every single day. I see the difference he makes in everything we do here at Pragmatic Marketing. And you see it every time you flip through the pages of one of our issues.

Design controls whether you pick up our magazine, which articles you read and how much you retain. In the case of the products our clients build, it influences everything from sales to satisfaction to retention.

Design matters. And it's so much more than the look and feel; it's the power of the user experience, the beauty of solving problems for customers in ways they never dreamed possible.

In this issue of *Pragmatic Marketer* we delve into the art and science of UX. We explore everything from how it integrates with the rest of the product team, to how it transformed LPL Financial's core product, to what drives these professionals to drink. And as always, we do so in a way that is filled with actionable tips and best practices you can implement immediately.

Happy reading,

Rebecca Kalogeris
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PRAGMATIC MARKETER
THE PRODUCT MANAGEMENT AND MARKETING AUTHORITY

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FEATURES

DEPARTMENTS

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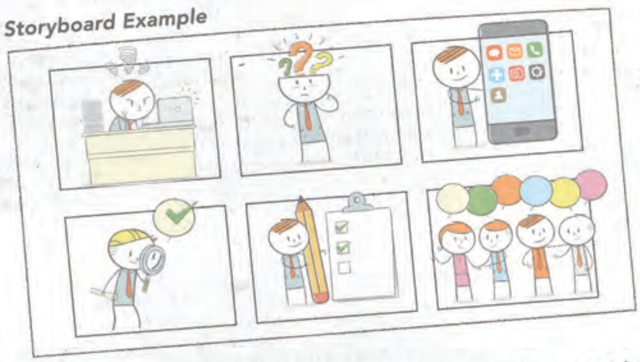
Say It Like You Mean It

If you're new to the UX field or to working with UX teams, these terms will help you get started.

- **Accessibility/** The degree to which a system allows people with physical or cultural handicaps to interact effectively with it.
- **Customer Experience (CX)/** The interaction between an organization and customer over the duration of their relationship.
- **Effectiveness/** A key measure of usability that involves the ability to complete a task.
- **Efficiency/** A key measure of usability that involves the time taken to complete a task.
- **Engagement/** The degree to which something attracts and holds a user's attention and interest.
- **Eye Tracking/** A technology that monitors eye movements to study how people interact with text or online documents.
- **Iterative Design/** A design methodology involving repeated cycles of design, evaluation and analysis; refinements are made for the next cycle based on analysis and feedback.
- **Journey Map/** A framework that maps out the stages of customer lifecycles, increasing your understanding of how customers interact with your product to identify areas for improvement.
- **Learnability/** The ease of learning the functionality of a system and gaining proficiency to complete basic and necessary tasks.
- **Optimization/** Improving the user experience of products so that usability, utility and persuasiveness are as good as possible within the constraints of the resources available.
- **Storyboard/** A graphic organizer that provides a high-level view of a project to show and share design problems and solutions.

Storyboard Example



- **Usability/** The degree to which something—software, hardware or anything else—is easy to use and a good fit for the people who use it.
- **Usability Testing/** A process of validating that a system, product or service is intuitive to use and provides an efficient, effective and satisfying way of meeting the users' objectives.
- **User-Centered Design (UCD)/** A design approach that involves the continuous involvement of users in the design process; products and services developed with user-centered design are likely to show increased usability and deliver a better user experience.
- **User Experience (UX)/** The process of enhancing customer satisfaction and loyalty by improving the usability, ease of use and pleasure provided in the interaction between the customer and product.
- **User Interface (UI)/** The means by which a person controls a software application or hardware device. A good UI allows the user to interact with the software or hardware in a natural, intuitive way.
- **User Journey/** A sequential series of interactions that a user has with a product or service, typically with a start point (going to a website home page) and an end point (finding the desired information).
- **Wireframe/** A rough outline of navigation and content elements that make up a user interface.

Travel Tips for Road Warriors

Picturesque Prague

Prague is a city permeated by history. With a population of more than 1.2 million, it is the largest city in the Czech Republic as well as a cultural and historical hot spot. A stroll through the city reveals winding cobblestone lanes and elegant architecture that ranges from Romanesque to Baroque to Gothic and even Art Nouveau. If that isn't enough to entice you, consider this: Prague produces some of the world's best beer. It has been brewed, sold and drunk there for more than 1,000 years. Locals call it "liquid bread" and it costs less than water in most restaurants.

U Medvidku Beer Hall and Restaurant www.umedvidku.cz
Serious beer drinkers will want to head straight to this 550-year-old institution to sample its infamous X-Beer 33. A dark, bittersweet lager, X-Beer 33 is the strongest beer in the Czech Republic, with an alcohol content of 11.8 percent. To soak up that alcohol, eat some hearty Czech food, such as larded roast beef in sour cream with white-bread dumplings.

Old Town Square www.pragueexperience.com
Travel back to the 12th century with a visit to Prague's Old Town Square. Notable sights include Prague's most famous landmark, the astronomical clock, which features an hourly procession of 12 apostles that appear from the sides of the clock, as the figure of Death strikes the time. It is also the site of Tyne Church, a Gothic church with a Baroque interior said to have given Walt Disney his inspiration for Sleeping Beauty Castle.

Prague Castle www.planetware.com
Once the home of Bohemia's kings, this popular tourist attraction is the official residence of the Czech Republic's president. Built as a fortress around 970 A.D., the largest ancient castle in the world contains examples of most leading architectural styles from the last millennium. The complex spans 18 acres and includes St. Vitus Cathedral and St. George's Basilica, so wear your walking shoes.

Eating Prague Tours www.eatingpraguetours.com
What better way to discover a city than through its local cuisine? This four-hour guided walking tour takes you into restaurants and cafés that locals cherish but tourists rarely stumble upon. Experience traditionally butchered meats and sausages. Savor soup while gazing out at the city's skyline and taste classic Czech drinks, including the city's famous *pivo* (beer!).

Prague River Cruises www.prague-boats.cz
Take a boat cruise down the Vltava River for a relaxing way to see some of Prague's most famous sites. Choose from one-hour cruises, two-hour cruises—with or without lunch and music—dinner cruises and even private cruises.

Kutna Hora www.1pragueguide.com/kutna-hora
Hop a train to this well-preserved medieval town one hour east of Prague and immerse yourself in Bohemia's Gothic past. Fans of the macabre will want to make a beeline for Sedlec Ossuary, known locally as "the bone church." In 1870, a woodcarver used the bones of 40,000 people—many of whom died from the bubonic plague—to create bizarre decorations and furnishings for the crypt. Skull-and-femur garlands line the walls, and a massive chandelier includes at least one of every bone in the human body. If you prefer a more traditionally splendid monument, visit St. Barbara's Church, one of the most famous Gothic churches in central Europe.

Ask the Experts:

How do you find the weakness in a competitor's strength?

WHEN BUILDING A COMPETITIVE STRATEGY, it's important to distinguish between a weakness and a weakness in a competitor's strength. If your strategy relies on taking advantage of your competitor's weaknesses, it could be short lived. Once your competitor realizes you are gaining an advantage because of its weaknesses, it will focus on fixing them. It can acquire a company, license something from a third party or update its roadmap to fill the gaps.

A competitor's strength, on the other hand, is generally not something it wants to change or "fix":

- The strengths of large enterprise vendors, like IBM, HP, SAP and others, are based on their breadth of offerings and lack of silos.
- The strengths of hosting companies, like Rackspace and Amazon, lie in remote hosting and cloud-based applications.
- Companies like Google make new products available on a regular basis to drive innovation.

The challenge for their competitors is to find the weakness in those strengths:

- Do the larger enterprise vendors have compelling offerings for small, one-off opportunities? Have they sacrificed best-of-breed solutions for generalized, one-size-fits-all products that are customizable only through high-cost professional services?
- Does IT want to move all applications to an off-site hosting provider? Would some applications provide better security or performance if they were available on-premises?
- Will Google support new apps for the long term? Can you bet your business on new technologies that may not stick around?

Another well-known example of weakness in a competitor's strength is the historic battle between Barnes and Noble and Amazon. Barnes and Noble's strength lies in its customer experience in "brick and mortar" stores. It's known for personalized service that includes on-site coffee and bagels and comfortable browsing areas. This is Barnes and Noble's strength for people who want to touch and feel the books. But it is a weakness for busy professionals who don't want the hassle of going to a store to buy a book.

John Milburn, Instructor
Pragmatic Marketing

Amazon identified this market and focused on making the selection and buying process easier for customers who don't want (or have time) to visit a bookstore. Because they were concerned about the impact to their store business, Barnes and Noble took a long time to offer a web presence. Meanwhile, Amazon became the online leader.

The best way to build a compelling sales strategy for your product is to arm your sales team with talking points that acknowledge a competitor's strengths and then counter them. That's the beauty of finding the weakness in a competitor's strength. PM

Do you have a question for our experts?
Send us an email at experts@pragmaticmarketing.com.


2
If someone sends you a site map created in Word
3
If generating reports for management takes more time than doing the work
4
If someone wants to go back to the first design after the 20th revision
5
If someone tells you that the target audience is everyone
6
If someone says reviews are more important than engagement
7
If a developer says, "I need complete wireframes before I can code"
8
If you tell people that you do web design because you're tired of explaining UX
9
If someone says, "We trust your expert opinion" yet insists it should be pink
10
If someone asks for the Pantone number of the green button
11
If someone argues about the UX design process but has no UX portfolio
12
If someone says, "Requirements aren't needed to do wireframes"
UX
DRINKING GAME
BASED ON
THE UX DRINKING GAME BY
PATRICK NEEMAN
www.uxdrinkinggame.com
HOW TO PLAY
Gather two or more players, age 21 and older, preferably with a background in UX design.
Roll a pair of dice.
Find the number that matches the rolled dice. If it's something you have experienced, drink according to the corresponding icon.
Beer chug
Sip of wine
Tequila shot
Whiskey shot
Game ends when you are the last one standing.

UX: A CRITICAL PART OF YOU

IT CAN BE DIFFICULT FOR YOUR SOFTWARE COMPANY to stand out with a growing number of competitors in an industry that seems to accelerate with each new technology wave. The good news is that a product's user experience (UX) is one key differentiator that can help win the minds of customers. All other things being equal, a product with a great UX is easier to demo and sell than its competitors and results in higher customer satisfaction. In addition, an exceptional UX can help overcome real or perceived gaps in your solution.

Although the appearance of your product can affect the perception of value—and even of quality—usability is not only about visual appearance. It's not just a matter of consistency, either. In fact, in some situations, you want to ensure that distinct functionality is presented in a way that reflects the differences. And while the user interface should reflect the brand in terms of tone and quality, it doesn't have to match your website. Most importantly, UX isn't a "skin" to add to a product after the fact; it is integral to the product.

Steve Jobs famously said, "Design is not just what it looks like and feels like. Design is how it works." Good interaction design is a component of UX work that is specifically dedicated to the design of the product user interface.

How a product works is much more difficult to define or change once it's been implemented, or even during implementation. And a strong UX team will help define not only the way features work, but also how to prioritize them and decide on the depth and scope of functionality.

So how does UX fit in with the rest of the product team? Think of UX as a complementary and often-overlapping area of focus. Much as a technical product manager or business analyst focuses on functional requirements, a UX professional is concerned with user requirements. There is common ground, but a good way to think about the delineation is that product management defines *what* the product does, focusing on the customer, and UX defines *how* the product does it, focusing on the end user. A *business model* of the application considers the customer and market and is the domain of product managers. A *conceptual model* considers how the product works related to the end user's workflow and goals and is done by UX. Another way to look at it is that product management and UX work together on product *utility*, while UX specializes in *usability*.

UX can also be vital in communicating product vision to internal stakeholders. Like product management, they must have the ability to focus on short-term objectives, including upcoming user stories and sprints, and the product's long-term vision and direction. The two roles can work together to add early visualizations of major features and milestones. This can help non-technical audiences understand the product direction without having to extrapolate from relatively abstract product backlogs. Both roles can aid and inspire the development group by providing a concrete goal to work toward, even while it is done incrementally.

UX is also vital to discovery. To improve the UX team's effectiveness, it's important to empower them to be the voice of the user, much as a product manager is the voice of the market. When you include your UX group in researching market problems and talking to end users, they develop an understanding of the target market. Customer site visits and usability testing—including

R PRODUCT TEAM

BY CHRIS RYAN AND RYAN ST. HILAIRE

testing of competitive products—are great ways to develop context. All UX teams should observe end users in their natural habitat to develop an understanding of how your customers work, then develop user personas based on their visits. Finally, involve your team in product management activities such as writing user stories and reviewing the product backlog. And at the development level, be sure to include them in daily standups.

It's essential to have people on your team who can focus on UX—not just the UX design component, but the other critical activities such as user research, prototyping and usability testing. It isn't something most other roles have the education, experience or expertise to do effectively, especially when they have other responsibilities, like day-to-day product management or writing code.

The ideal is to form a trio that includes a product manager, a UX professional and a lead developer to define and shape the product. Together, these three roles can drive requirements that consider the needs of end users, include input from your technical teams and ensure that your solution solves market problems. It will also save you time, money and frustration. And, you'll have a better chance of delivering a high-quality product that gains your customers' attention and outshines the competition.

Before you can build a product with a great UX, you have to build and elevate the UX function within your organization. Start by hiring dedicated, experienced UX professionals if you can.

When hiring, keep in mind that UX, like product management, is a multidisciplinary field. Although there are an increasing number of dedicated certificate, undergraduate and graduate programs, you can also find people with UX experience who have backgrounds in other fields, including psychology, computer science and visual design. If you don't already have usability or UX professionals on staff, consider asking local groups or communities for recommendations; you might even want to involve them in the interview process.

By empowering a UX team to be the voice of the user and incorporating UX into your product from the start, you'll distinguish your product from the competition and help secure a loyal customer base. PM

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READY.
SET.
SELL.

REDUCE THE RISK OF PRODUCT FAILURE

A Practical Guide to Usability Testing

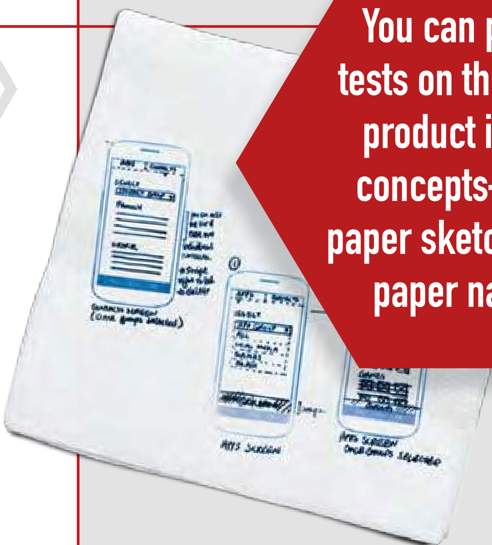
BY PETER HUGHES

USABILITY TESTING INCLUDES A RANGE of techniques that reveal how well your product performs from a very important perspective: your customers'.

At its core, usability testing is an opportunity to observe target customers using your product to perform specific tasks that can validate product assumptions, provide valuable feedback, or identify potential pain points or enhancements. After several tests, you'll notice usage patterns and comments about what works and what doesn't. This is vital information you'll use to fine-tune your product and increase its value to customers.

The sooner you validate product assumptions, the better. There's little excuse not to run at least a few usability tests as you develop your product; you can run them at minimal cost (from virtually free to a few hundred dollars). And, when you compare the cost of changing

You can perform tests on the earliest product ideas or concepts—think paper sketches, even paper napkins.



designs early in the process instead of after you've launched, you're talking peanuts.

Some tests take only a few minutes to set up and a few seconds to run. Literally. And with the right preparation, there's little impact on product development schedules.

Let's take a look at which tests to run at each point in the life cycle, followed by some real-world examples to highlight situations in which usability testing has been effective. Finally, I've included step-by-step-instructions for four usability tests you can implement immediately.

TESTING ALL STAGES OF THE CUSTOMER EXPERIENCE

The type of usability test you use depends on where you are in the product development life cycle and what you want to learn. You can perform tests on everything from the earliest product ideas or concepts—think paper sketches, even paper napkins—to prototypes to fully developed systems. Furthermore, you can run these tests on websites, mobile or wearable apps, and everything in between.

As customers develop a relationship with your product, usability tests will offer insights into what happens at each stage. Each test will contribute to an invaluable repository of insights into how your customers think about your product and what they value, because you'll see the world through their eyes.

First Impressions

Watch what happens when customers first encounter your product. What gets their attention? Is anything confusing? Do they understand the marketing messages on your home page, and does the information resonate with them? Ultimately, do they feel compelled to explore more deeply?

Early Experiences

If you've communicated a positive initial impression and customers decide to explore your product, can they discover the features and functions that help get them up to speed? Does your interface provide clear, streamlined paths free of unnecessary instructions, distracting visual elements, or unneeded features or functionality? Finally, how well does your product help customers get the benefits they want, or even lead them to benefits they were unaware of?

Testing helps determine if customers find the terminology clear and jargon-free; whether the page and content is organized logically from their perspective; if processes—such as registration, checkout or upgrading—are efficient and easy to use; and if it's clear how to cancel a process or navigate to a specific function or location.

Maturity

Over time, discovering shortcuts and advanced functionality will help mature customers do their jobs more quickly. You'll want to test how these options are communicated and ensure that they address the needs of these customers without impacting the experience of other customers.

Unless you test with actual users, your product team won't get a true perspective about what your product is like to use by the people who matter most: the users themselves. This may seem obvious, but in many organizations, approximate customers—such as salespeople—are sometimes used to review products. After all, they have a lot of customer contact. But salespeople don't have the same motivations or context as customers. At best, this approach is risky. When you test with real users, usability tests ensure that all product stakeholders get a realistic, honest view of your product's effectiveness.

If you have never watched a customer use your product, you might be in for a surprise. "Obvious" product assumptions may be challenged, or you might find that customers think differently about what value means to them. Whatever you discover, you'll unearth information to develop products that are more likely to be ones that your customers value.

If you have never watched a customer use your product, you might be in for a surprise.

REAL-WORLD USABILITY TESTING

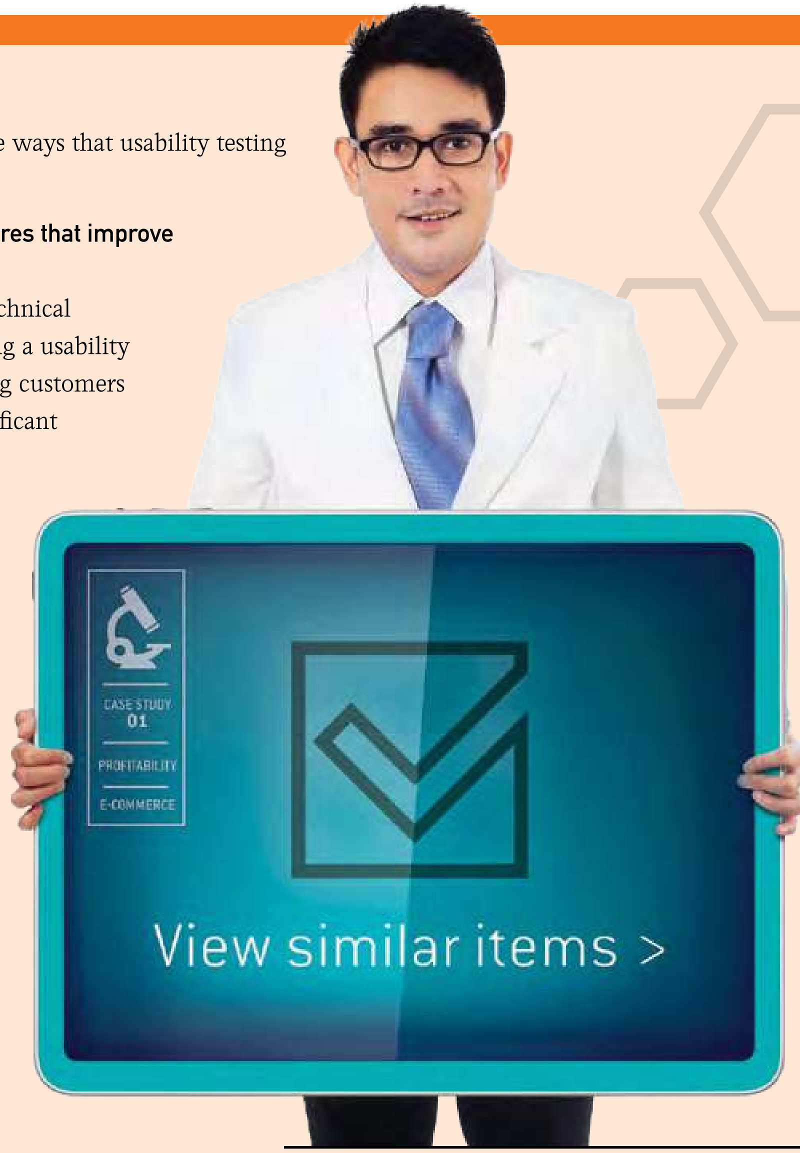
The following real-world examples illustrate ways that usability testing can improve your product.

CASE STUDY 01

Discover new or unanticipated product features that improve product profitability.

An e-commerce website, selling specialist technical products upgraded its website design. During a usability test, the company was delighted that existing customers thought the new website design was a significant improvement. However, when customers were asked to buy particular products, several said they found it frustrating when an item was out of stock. While most users believed that alternative products were available, they weren't sure what those were. It was a primary trigger for customer-service calls.

Based on initial testing results, the new site design was altered to include a "view similar products" option when the customer's first choice was not available. Further testing demonstrated that the feature was an instant hit. The business increased sales, decreased the odds that customers would go to competitor sites to complete their orders, and reduced customer-service costs.



CASE STUDY 02

Validate assumptions to create more effective upsells and cross-sells.

A major bank was interested in selling additional products to new customers during the sign-up process. Earlier testing clearly showed that when customers signed up for a specific product, they weren't interested in being marketed other products until they completed their primary task.

The bank's designers developed several concepts to introduce other products after sign-up completion. One concept included visually rich banners and product feature boxes on the thank-you screen. The other was a series of check boxes and brief product descriptions to indicate "other products you might be interested in."

Many on the business team were surprised to hear customers say that they found the plainer version to be a more compelling invitation to explore other products. The reason? It more naturally followed from the application process they had just completed. They perceived the visually rich version as "more obviously selling" and found it harder to focus on specific products because of the visual competition.

CASE STUDY 03

Validate assumptions early to avoid the high cost of changes late in the development cycle.

An online bookseller specializing in college textbooks wanted to use social media to increase self-promotion. When a book sold online, the system posted purchase details on each buyer's Facebook page, based on the assumption that buyers would want to share this information. In addition, other social sharing features were strongly recommended.

Because no obvious messages or confirmations were provided, it became clear during testing that participants didn't realize their purchase information was being shared. Participants became visibly annoyed when they realized that certain class titles—which might suggest deviant interests—had gone public. This problem was amplified when participants struggled to remove information and change the site's default sharing options. The site owner's assumption was clearly invalidated.

This testing only occurred close to launch, when the system was largely completed. As a result, the cost of making changes was significant and could have been avoided if the concepts and assumption had been tested before any coding was done.

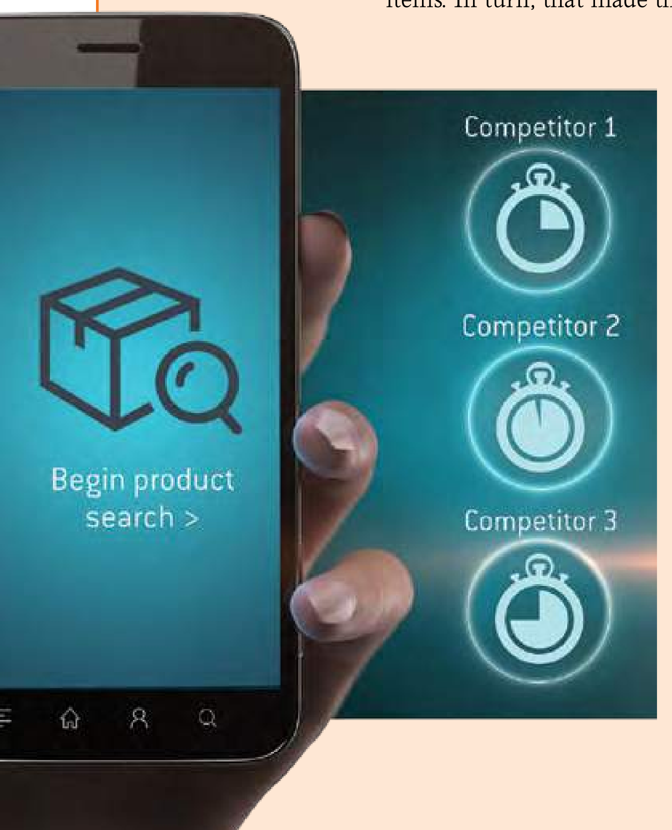
CASE STUDY 04

Avoid unintentional problems by revealing the real user experience.

A hardware company wanted to assess the ease of its home set-up process for a new version of its product. Customers had to connect the device to a video screen and had the option to access the Internet via Wi-Fi to enhance its capabilities.

To mimic real life in the test, customers were given brand-new devices sealed in their original packaging. They were asked to set up the device and use it. A high-definition TV and Wi-Fi Internet were provided. As the client's product team watched participants via a remote video link, it became immediately clear that the volume of opened packaging made it difficult to find already-unwrapped items. In turn, that made the set-up process longer and more frustrating than necessary. Participants also complained that the Wi-Fi set-up was too difficult.

As a result of testing, the hardware company reviewed its packaging and took steps to streamline the Wi-Fi set-up process.



CASE STUDY 05

Test your branding perception and create compelling marketing communications that paint an accurate picture.

XYZ Software's product enabled clients to create custom software products from a range of modules. Their website prominently featured several customers, one of whom organized conferences. When visitors to XYZ's site saw this featured customer, they thought XYZ was a conferencing company, not a software developer.

When XYZ Software became aware of the misperceptions around its branding, the company revamped the website to ensure that primary messaging and imagery matched what their brand actually offered customers.

CASE STUDY 06

Improve product performance and compare it against competitors.

ABCDE Corp. was eager to assess the effectiveness of its online product search against competitors' systems. Target customers were invited to locate the same product on several competitive sites as remote observers timed each attempt. This time-on-task method was repeated periodically to measure site improvements.

By observing customers as they repeated the time-on-task method, ABCDE Corp. was able to tighten its online product search and make site improvements. Changes to the way the search and search results were presented, and to the underlying search engine software, drastically improved visitors' ability to quickly find the products they were looking for.

DO-IT-YOURSELF USABILITY TESTING: A USER'S GUIDE

These four usability tests will provide valuable insight into your product's effectiveness and help build confidence in your product. Plus, they're easy to set up and perform.

Remember, in any usability test, the less said, the better. Don't provide additional information about the task unless a clarification is required. Screens must explain themselves, because in real life you wouldn't be in the room. And although it isn't necessary to test final screens, if you intend to test a mock-up, make sure it contains realistic content.

In any usability test, the less said, the better.

01 FIVE-SECOND TEST

Assess which screen design elements viewers find most memorable. The results give product teams a good idea of how well the product is understood and whether it offers the value that target customers want.

FOR TESTING:

- Branding and marketing messages
- Value propositions
- Calls to action
- What customers notice
- Content clarity

STEPS

1. Take a screenshot of the page you want to test and open it in a web browser.
2. Minimize the browser.
3. Locate users who fit target profiles and test one person at a time.
4. Explain to users that you will show them a screen and then ask questions.
5. When they're ready, maximize the browser.
6. After five seconds, minimize the browser.
7. Ask the user one or two questions about the screen they just saw. Focus on the screen's priorities. It's okay to include a general question. Here are some examples you might use:

- Whom does this site belong to?
- What is this website for?
- What does this business do?
- What is the tagline?
- What options are available to …?
- What is the special offer?
- What, if anything, caught your attention?
- Do you recall anything that you particularly liked or disliked?
- Do you recall anything that made you pause and think?

TIPS

If you include several screens in your test, repeat the process and test one screen at a time. Use different questions for each screen so participants can't anticipate your intent.

02 BASIC USABILITY TEST (TASK TESTING)

This is the most common usability test. You create realistic tasks that you'd expect customers to perform, then watch as they try to complete them. This will reveal how well your product performs.

FOR TESTING:

- Navigation
- Content clarity
- Effectiveness of specific functionality

STEPS

1. Prepare screens that illustrate the main steps someone would take to perform a task (think paper sketches, finalized screen concepts or live screens).
2. Locate five people who fit a particular target profile to be your test participants, but test one person at a time.
3. Read out one task at a time. For example, ask the participant to search for a product. Next, ask them to show you what they would do.
4. Ask them to think aloud as they perform the task and summarize their experience when they're done.
5. Compare your observations from each participant to identify patterns that suggest problems.

TIPS

Your tasks should describe a situation and desired outcome but not include information about how to do the task. For example, "You want to buy a waterproof hiking boot and spend no more than $100. You go to BestShoesInTheWorld.com and land on the following page. What would you do?"

03 CONTENT TEST

This test uses existing content as the starting point to determine what customers find most valuable and how easy it is for users to find that information on your website. The test results are a great way to ensure your site's content is appropriately focused.

FOR TESTING:

- ✔ Content that users find most compelling
- ✔ Whether users can easily find the content they value most

STEPS

1. Print screenshots of the website's primary pages.
2. Place printouts in a folder. Page order isn't important. The goal is to provide a variety of site content.
3. Invite users to review the folder and highlight content they think is valuable (create a new folder for each user).
4. Take the folder from the user. From the examples they highlighted, select one at a time and ask them to locate that content on the live website.

TIPS

Adobe Acrobat Pro has an option for automatically printing out a website's pages.

04 INHERENT VALUE TEST

Identify what your best customers value most about the product. These power-users know your product well and often develop work-arounds and techniques to maximize its effectiveness. You can use this knowledge to create tasks for new or potential customers. Their reactions will indicate whether they recognize the main value of your product and how well your product leads them to this value.

FOR TESTING:

- ✔ The effectiveness of communicating the product's value and best features to new customers

STEPS

1. Invite your best customers to demonstrate—preferably in person—what they value most about your product, how they use it and explain why it is valuable to them (e.g., saves time, make a job easier to perform).
2. Create tasks for the things your experienced customers value most. For example, if you make home-management software, an experienced customer might note that you can set up multiple tasks to occur with one trigger. You could then create a task such as "I want to wake up at 7 a.m., have my coffee ready and have the bathroom heated to 80 degrees."
3. Locate new or potential customers and ask how they would do the tasks you have created.
4. Note any variations between experienced and new customers. For example, new customers may not realize they can set multiple tasks to occur from a single trigger, and may set up three separate tasks. After getting their reaction, show them the experienced users' path and ask for their thoughts.

TIPS

Even if everything is going smoothly, it's good practice to play dumb and ask participants to explain what they're doing and why. You may be surprised by what you hear.

These four usability tests will help you evaluate new product concepts, product upgrades, current products and competitors' products. Not only will they provide valuable insight into your product's effectiveness, they'll also help you build confidence in your product.

If you would like to learn more about usability testing and how your organization can benefit from this powerful technique, register now for Pragmatic Marketing's September 17 webinar (1p.m. EDT) at pragmaticmarketing.com/live. You'll learn how to improve your usability skills and increase the value your product provides to customers. PM

ABOUT THE AUTHOR

Peter Hughes has spent 19 years conducting usability tests for industry-leading corporations and organizations such as JPMorgan Chase, MetLife, T. Rowe Price, Boeing, Honeywell, Hearst Media, Scholastic, the College Board, Nintendo and the Robert Wood Johnson Foundation. He is founder and lead consultant at Ascest, where he coaches organizations on how to bring the usability testing skills they need in-house and squeeze the most out of those tests. He is passionate about teaching skills that help companies avoid building products no one wants and harnessing those valuable resources to build exceptional products. Peter can be reached at peter@ascest.com.

IMPROVE UX WITH IN-APP GUIDES

BY ERIC BODUCH

HOW DO YOU EFFECTIVELY ANNOUNCE new features and teach people to use your software in a world of diminishing attention spans, unread emails and fewer manuals? It's challenging work to deliver compelling user experiences that ensure users get the maximum value from your software.

One way to remedy this is to use in-app messaging or guides that help users stay informed and accomplish tasks. These guides are actually automated visual messages that appear in concert with your application. You can use them to inform, teach or help users. There are two main types: lightboxes and tooltips. Lightboxes automatically pop up or overlay a portion of the interface to reveal an important, more global message than tooltips, which often appear alongside a specific feature or element.

When used effectively—and in combination with analytics—in-app guides make it possible to communicate throughout the customer life cycle from trial conversions and onboarding through upgrade and renewal messaging. Think of it as a one-two punch: Analytics show you how people use your software, and guides help influence that use.

One of the most straightforward use cases is to make announcements about important new information, including major updates. Guides are also a highly effective way to deliver help. Imagine learning about the capabilities of a menu or button by clicking on a nearby tooltip badge. Such in-context help can make a significant difference in the overall user experience. However, guides that provide this in-context help should fold seamlessly into the user experience; they should be available when customers need them but avoid distracting customers when they're not.

Some software programs have functions or capabilities that may not be easy for first-time users to understand. If that's the case, connect multiple guides to create walk-throughs that lead users through the exact steps required to accomplish a task.

If you're using guides to improve trial conversions, analyze usage from successful trials and compare that to usage in unsuccessful trials. Patterns will emerge around product engagement and feature usage. For example, you may discover that usage of a certain set of features is a strong indicator of a successful trial.

Now, apply this knowledge. Create a guide that targets users who haven't used those features in the first seven days

Guides are a highly effective way to deliver help.

of their trial period. The guide can educate them about those key features and steer them in the appropriate direction. This can create a material impact on trial conversions. At Pendo, for example, we worked with a software vendor who reported a 57 percent bump in trial conversions by using analytics and guides in a similar manner.

Combining analytics and guides can also be effective in researching upgrade opportunities. Focus on the areas where customers are most likely to use your guides. These are the areas where it makes sense to highlight the benefits of those capabilities.

GETTING STARTED

01 Target your guides to customer behavior.

02 Personalize each guide based upon what you know about your target.

03 Make your guides beautiful.

04 Build interactivity into your guides.

05 Create guides that are easy to find and searchable.

Guides can be strong training or notification tools, though you'll want to consider how the interactions should occur. For example, should the guide interrupt the user or not? If you publish an important announcement about an upcoming unplanned outage, you might want to use a lightbox that interrupts users and requires them to manually close it. However, if you are launching a new column in an analytics report, you probably want to use a tooltip badge that users can click on at their leisure to learn more.

You can use guides in a similar manner for onboarding. First, define the steps of a successful onboarding process. Next, use guides to inform and educate users about those steps. You can track the completion of those steps using analytics information and then target additional guides to users who get stuck in different areas of the onboarding process.

Renewals offer another opportunity for analytics and guides to gather powerful data. Create guides a few months prior to the contract expiration date. Then start to highlight new and upcoming features or engage customers with functional areas they might not have used. Whenever you see usage patterns slowing down—even if it isn't close to renewal periods—you can proactively target guides to users.

But remember, too many guides can quickly clutter a user interface, so always target guides to user behavior. When you take a steady approach to education and avoid overwhelming users with guides, you'll ensure they get the maximum value from your software. PM

ABOUT THE AUTHOR

Eric Boduch is a founder of Pendo.io, the provider of a product engagement platform that is used by software vendors to capture usage analytics and deliver in-application messaging and guides. Contact him at eric@pendo.io or follow him on Twitter at @pendoio.

EXPERIENCE DESIGN: BEYOND THE PIXELS

BY CHRIS PAUL

USER EXPERIENCE (UX) DESIGN has become a strategic and competitive imperative for any modern product development effort. Fueled by iconic examples from companies such as Apple, product leaders are under increasing pressure to leverage user experience to meet and exceed consumer, competitive and market expectations.

Modern technology consumers drive the market. They have a clear sense of how technology must fit into their daily routines and existing digital ecosystems. In terms of user expectations, they no longer differentiate between work and home technologies, demanding the same utility, elegance and seamlessness from both. Yet despite prominent examples of successful user experiences, many product teams still struggle to define what UX designers do or how to effectively incorporate UX into their efforts to deliver products.

UX designers live in details seemingly imperceptible to many, but that, when taken in aggregate, define the quality of the user experience.

Loosely defined, UX design is the discipline of creating the means by which users operate a product. The discipline attracts individuals with an innate and deep curiosity about how things work and are used. The best designers are internally driven to solve problems. They don't sleep until they've solved a challenge and validated the solution with real users. UX designers live in details seemingly imperceptible to many, but that, when taken in aggregate, define the quality of the user experience. When empowered, designers have a key function on product teams, forging the central links between product management, engineers and users. Once engaged, the design process offers teams a means to identify and leverage opportunities to delight, innovate and drive competitive advantage. We saw this firsthand at LPL.

At LPL, our financial advisory technology creates operational efficiencies that allow our clients to focus on what they do best: serve their clients, the investors. It's one of our key differentiators in the market. Our design team obsesses over how users interact with technology and how we can make those interactions better, faster and more efficient. In 2013, we had reached a crossroads. How could we provide the best user experience on a superior technology platform that would meet and exceed the expectations of our clients? How could we set ourselves apart as a leader with the technology solutions we provide so that our clients could manage and grow their businesses? And finally, how could we appeal to users across generations?

Because we emphasize client satisfaction, the user experience was a top priority as we set out to create our next-generation technology platform, ClientWorks℠. The LPL technology leadership team initiated the project in the summer of 2013, and it quickly grew into one of the most ambitious technology transformations LPL has ever undertaken.

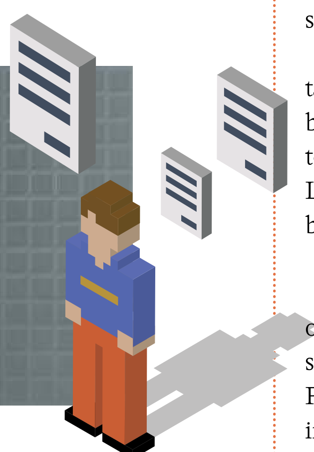
Our goal was to dramatically improve the efficiency and utility of our platform. We understood that our success would be judged by our clients, the advisor community. And that meant that the function of UX design would be a prominent one throughout the project.

As a start, we conducted a thorough evaluation of the current platform from a variety of perspectives, including end user, back-office user, efficiency, productivity, device/browser support and more. We invested in extensive research within the advisor community, engaging directly with advisors, sales associates, and support and operations staff across all business segments.

In the end, the design team invested more than 1,500 hours in office visits, feedback sessions and shadowing, plus hundreds of hours with subject-matter experts within LPL. This investment dramatically increased our chances of identifying core challenges and compelling opportunities for these users.

Armed with this data, the design team identified essential task flows and built corresponding journey maps to represent the current and aspirational user experiences. These tools helped the product team better understand the context for product use and identify opportunities for efficiency and productivity, innovations and competitive differentiators.

Sharing narratives and storyboards is a critical step in any product development.



We created high-level user narratives and supporting storyboards to help communicate the shared vision to internal stakeholders, a critical step in any product development. The team used the storyboards as a starting point and partnered with engineering to create an interactive, clickable prototype that facilitated more efficient end-user validation. The prototype brought the storyboard to life and helped the design team quickly work through lower-level design details with our engineering partners.

The interactive prototype evolved as we drove refinements and inputs from user and business feedback sessions into product development. The prototype was easy to change and refine, encouraging a great deal of agility within the product team in the early stages of the development cycle. Ultimately, we used the prototype's front-end code as the basis for the product's production-level user interface code, capitalizing on this early development investment.

After analyzing the inputs and design docs, we identified three imperatives upon which to build the new platform: flexibility, simplicity and integration, and customization. Through the above process we were able to deliver on them all:

- **Flexibility**—We designed ClientWorks to be accessible from desktop and mobile devices, including tablets and smartphones. It allows our advisors to choose the platform and browser that best matches their business needs.
- **Simplicity and integration**—The modern user interface intuitively supports essential task flows. For example, daily tasks such as client and account management, moving money, trading and new-account opening are designed to reflect conceptual models for those tasks that were already established in the minds of the users. Links are created across supporting sub-systems to ensure users can complete all tasks in context.

We developed core interaction patterns and guidelines to support these task flows and then propagated them across the platform's applications to increase approachability and raise system-wide usability measures. We continuously iterated task flows and screen designs until we exceeded the usability and simplicity targets.

- **Customization**—ClientWorks encourags end users to tailor the platform to support the nuances of their specific business model. Sophisticated filtering controls allow advisors to collect the precise combination of information from across LPL systems to better understand their clients, accounts and business.

ClientWorks underwent an exhaustive set of measures on user satisfaction, task efficiency and productivity, achieving significant productivity improvements across the core tasks. Perhaps most compelling, we've provided advisors with near-instantaneous access to insights that previously took hours—or days—to achieve. ClientWorks also offers advisors a more holistic view of their clients, associated accounts and their broader business, insights at the top of advisors' wish lists.

Feedback has been overwhelmingly positive. Engaging our users directly in the design of ClientWorks allowed us to deliver compelling capabilities and build widespread support at LPL and within the advisor community. ClientWorks is now in active piloting with our early adopters.

Leading with the user experience has been critical to the success of ClientWorks. This approach ensured we had clearly defined business requirements driven from real-world use and balanced with internal business needs. We worked early on to establish UX designers as key contributors on the product teams and maintained a regular cadence of end-user interaction throughout the process. By leveraging the design team and the design process in this manner, we facilitated the creation of the compelling innovations necessary to drive market differentiation and product success. PM

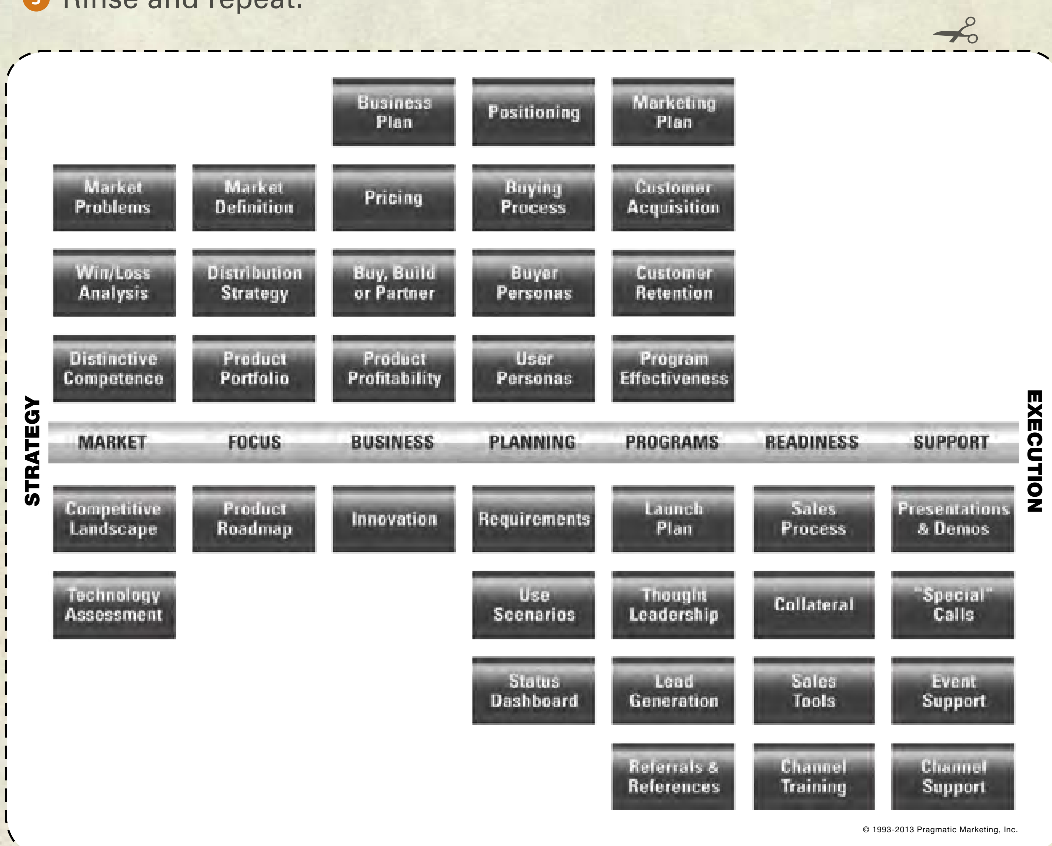
ABOUT THE AUTHOR

Chris Paul is a senior vice president of experience design at LPL Financial. Learn more at www.lpl.com.

How to Succeed in Technology

A STEP-BY-STEP GUIDE:

1. Cut out framework, avoiding pesky paper cuts.
2. Post conspicuously throughout office.
3. Follow framework faithfully with peers.
4. Reap the benefits of being market driven.
5. Rinse and repeat.



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DEPARTMENTS

Managing Internal Feature Requests

BY MIKE SAVORY

WHEN I WATCH THE TV SHOW *Bob the Builder* with my kids, the product manager in me always takes issue with Bob's catchphrase question, "Can we build it?" I guess it's because I get asked this deceptively simple question all the time at work. I try not to reflexively shout, "Yes, we can!" as Bob's construction-equipment friends always do. My more pragmatic response is usually, "Sure, we *can* build just about anything, but *should* we?" I guess, "Should we build it?" doesn't make for such a great catchphrase, but it would make Bob a better product manager.

The most successful ideas usually originate from the customer in some form, but there's no shortage of contributions from internal stakeholders. Predictably, these ideas from within the organization are often internally focused. For example, marketing wants new purchasing options within the product, or support requires new administrative tools. These are things that typically provide internal value, but not much for the end customer. So, how can you help limit internal requests that often have competing goals? The following three suggestions have worked well in my career.

Get Aligned on a Set of Objectives

If information security's goal is security and uptime, and sales' goal is revenue, it's difficult to prioritize each of their needs in a common backlog. But if you, as the gatekeeper, can point to one set of top-down objectives, it becomes easier. If the organization's objectives include increasing revenue per customer, and sales asks for a product widget that enables them to sell add-ons, it's clear this request trumps others that don't directly contribute to the revenue goal.

This list of objectives should be limited to a select few. It should be clearly publicized by top leadership. And representatives from each part of the organization should be involved in its creation so they feel a sense of ownership. Of course, if you work with other product teams, the first step is to make sure your own team is in alignment!

Yes, we can!

Create a Transparent Roadmap

When you tell someone outside of product management that their idea will be "added to the backlog," how do you think they interpret that? I suspect they visualize the closing scene from *Raiders of the Lost Ark*, in which the ark is shelved in some giant warehouse, never to see the light of day. While some ideas deserve such a fate, you should be completely open about what is included—and excluded—in your roadmap.

I recommend publishing your roadmap internally for all to see. Make sure it includes a simple executive summary with relative priorities, and leave out requirement details. Each project or feature within your roadmap should reference the business objective it supports, and, whenever possible, supporting data such as survey results or user testing. Also, add a change log to show regular additions and adjustments. When everyone can see your purposeful, prioritized roadmap, the potential impact of inserting additional projects becomes clear.

Don't forget that your roadmap can and should be used for self-promotion. Put a big checkmark on completed projects and include results data, such as a project's effect on your net promoter score or conversion rates.

Know the Facts

Let's face it. It's easy to blame the product. You've probably been in a meeting where the following conversation occurred:

"You know, Big Scary Competitor just released Super Cool Feature."

"Really? Why don't we have Super Cool Feature?"

"We should! I bet that's why sales are soft this month!"

Suddenly everyone is giving you that desperate "Can we build it?" look. This is when some relevant data can help avoid debate and objectively explain why Super Cool Feature should not be a priority.

Regularly spending time with both customers and data will supply you with the qualitative and quantitative ammunition needed to fend off impulse projects. As with your roadmap, your research should be shared openly in an effort to help everyone make more informed decisions. The best way is to take survey data, analytics, conversations, tests and observations, and craft them into stories that educate and excite your team. As Paul Simon said, "Facts can be turned into art if one is artful enough."

As a product manager, you should enthusiastically welcome your colleagues into the ideation process. You never know from where the next great opportunity will come. But it's your responsibility, for which you are uniquely qualified, to evaluate each idea against a focused set of objectives. Be consistent in your message, candid with information and perhaps a bit diplomatic. You'll find requests from colleagues become more focused as they join you in asking, "*Should* we build it?" PM

About the Author

Mike Savory is a product manager for Sage in Atlanta, with product strategy responsibility in North America for Sage's entry-level cloud and mobile accounting solution, Sage One Accounting. Mike has managed small business technology products for more than 15 years, including desktop, SaaS and mobile. He can be reached at mike.savory@sage.com or on Twitter at @MikeSavory.

...but should we?

Product Backlog Flows

BY ROBERT BOYD

THERE ARE PLENTY OF DISCUSSIONS IN THE AGILE community about how agile teams work and develop over time. Often neglected or poorly understood is how that work makes its way from the customer to the team. Below is a blueprint for creating an effective and efficient flow of work. I've included details but also left it flexible enough to be customized for your company's specific circumstances.

The Problem of Transparency

The blueprint for the product backlog flow focuses primarily on increasing the visibility of how customer requests make their way to the development team. Agile and lean startup emphasize the importance of customer involvement from ideation to product release and beyond. By making the customer request process more transparent, all stakeholders—including customers, development, product management, product marketing, marketing, sales and support—can provide input and feedback. For the business, it places a real focus on customer requests and personalizes customers for internal stakeholders. The customer request ceases to be a number and becomes a problem that the customer needs to solve. The entire business will then tackle the customer's problem as if they're helping a friend.

The requestor, or more likely, the customer proxy or business sponsor, also benefits from this transparency; now they can see how their request is progressing. The customer proxy can keep the requestor up to date on where their request sits.

Product Backlog Flow Overview

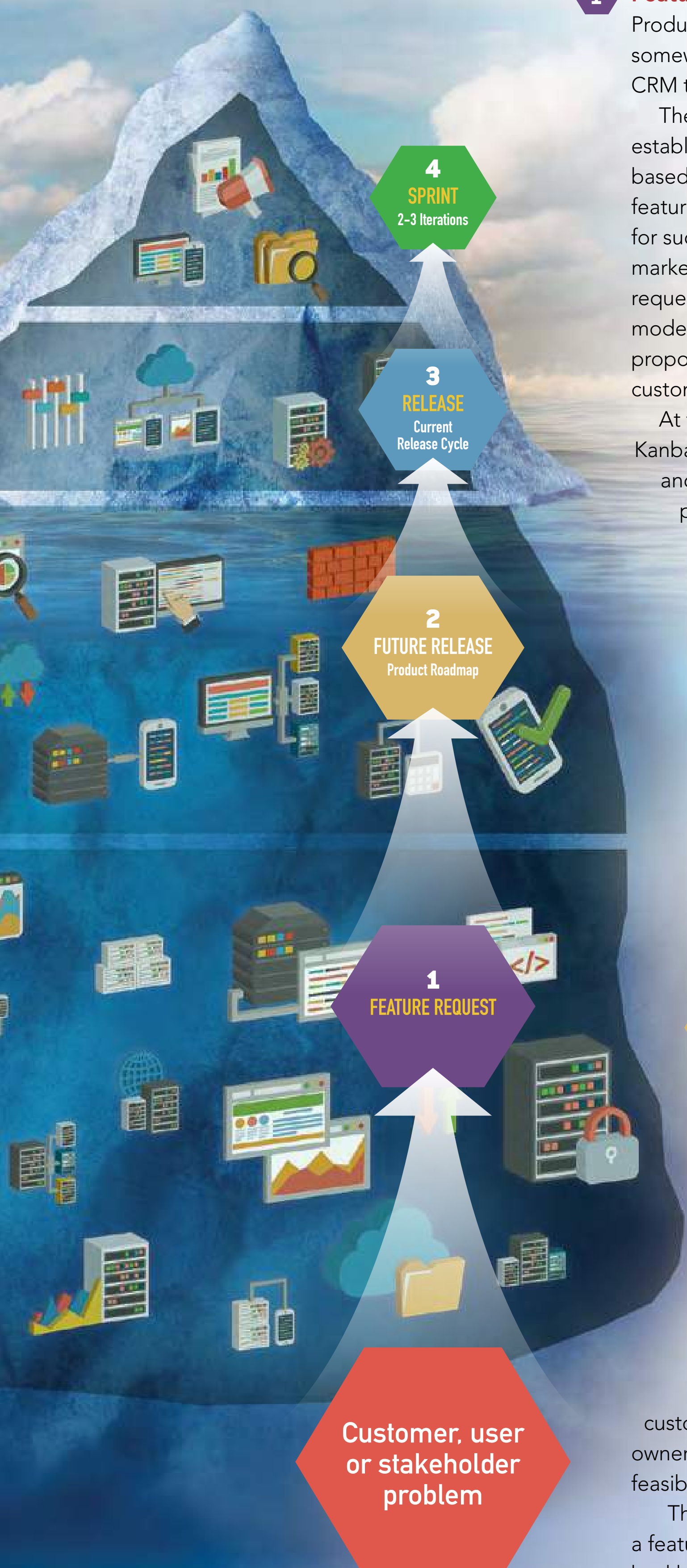
The product backlog flow consists of four sub-flows that occur simultaneously, but independently. These flows deliver customer pains and problems to the agile team. You can visualize them using a variation of Mike Cohn's Product Backlog Iceberg, shown at right.

These four flows work most efficiently with up-to-date accurate prioritization and lean's just-in-time techniques. Stories will move from feature requests to future releases, then to release, and finally, to sprint. Of course, features have a finite validity runway, the timeframe where product/market fit remains intact and the product owner and business believe that the feature's core capability will not change. Moving epics up the product backlog too soon introduces the risk of wasted work if a feature is dropped for any reason.

From Ideation to Release: The Nilezon Example

Let's start with a marketplace app called Nilezon, created at an imaginary company by the same name. As a customer, not only do you want the Nilezon app to remind you that your mom's birthday is coming up in a week, you'd like Nilezon to automatically send mom a birthday present based on some criteria you previously entered. Mom gets her gift from you, your forgetfulness is covered up and Nilezon gets paid from your credit card. It's a win-win-win situation.

You send your product enhancement idea to Nilezon and wait for the new app release that includes your feature. Nilezon sends a thank-you note and asks you to monitor Nilezon's Twitter and Facebook pages for product development news. Then Nilezon begins the process of transforming your idea into a working product.



1 Feature Request State

Product management or marketing documents the new feature request somewhere that's accessible to all internal stakeholders. It could be in a CRM tool, Confluence, a spreadsheet or even on a wall.

The idea goes through a review process based on some set of established rules to see if it warrants further research. At Nilezon, it is based on the number of similar requests and on the current and likely feature sets of competitors. Lucky for you, this is not the first request for such a feature. The next step then is for product management and marketing to conduct a business feasibility study on this latest feature request, now nicknamed Mom's Gift. They must establish a business model canvas to identify the problem, a possible solution, unique value proposition and customer personas. Then they begin validating the customer problem to verify that it's worth solving.

At this point, it may make sense to add new feature requests to a Kanban-like board to increase visibility and help product management and marketing manage their portfolios (Figure 1). Throughout the process of establishing a business case, ongoing visibility allows stakeholders to make suggestions about the solution, how to market and how to sell the new product feature, all of which are captured on the business model canvas.

The timing for moving ideas into future release will vary by company. For example, within Nilezon, there's a small start-up component that takes new ideas through to problem/solution fit and lays the groundwork for establishing product/market fit. Once product management and marketing are satisfied that there's a valid business case—and the feature has a high enough business priority—Mom's Gift will be submitted to the executive committee for approval.

Once the executive committee approves the feature, Mom's Gift will move onto the product backlog as a roadmap item. Without a definite release date, it will go into the future release state.

2 Future Release State

Future release items in the product backlog represent a collection of features encapsulating real customer problems that the business believes are worth solving.

Items in the future release state have a more complete business model canvas where problems are validated with customers, and cost and revenue are roughly estimated. Each item is prioritized and includes a description, customer acceptance criteria and an estimate.

At Nilezon, the Mom's Gift feature has been formally added to the product backlog. A lot of unknowns remain, including a high-level architecture and validation for how the customer would set up criteria for automatic gift selection. The product owner and a technical subject-matter expert (SME) will do a rough feasibility study to identify any high-level risks.

The strategic and tactical business concerns are the prime focus while a feature epic rests in the future release state. The number of product backlog items in future release will generally match the company's product roadmap length. If the roadmap projects the next 24 months, then you would have 24 months worth of estimated product backlog items in future release and release.

During this stage, the product owner keeps an open and running dialog with customers and potential customers. This is part of the ongoing review to confirm or adjust the priority of the product backlog based on business value. This priority can change at any time. Perhaps the feature in the product backlog loses its competitive advantage or there's a spike in requests for it.

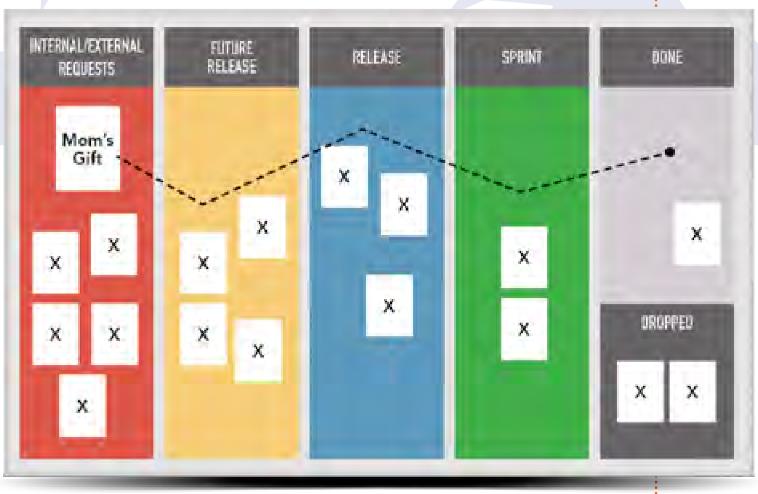


Figure 1

At Nilezon, the product team manages stakeholder expectations by keeping them informed of any changes in business value or priority. The product owner keeps the product backlog and business model canvases available and accessible to all stakeholders.

3 Release State

A product backlog item moves to the release state when it's the highest-priority item in the future release column and a spot in the release column opens up. The item is now tagged for a specific planned release. The product team makes every effort to complete the business model canvas for Mom's Gift. All customer problems and solutions are validated. The product owner and technical SME conduct a detailed analysis including a high-level architecture and more comprehensive risk analysis based on the design. User interface mockups are created and validated with customers and users.

Features are reviewed and analyzed by the agile team that is expected to implement the epic. The feature epic may be broken down to facilitate estimation or to isolate its riskier aspects. The goal is to confirm the feasibility of implementing the feature within a specific release window.

The product owner is responsible for maintaining the priority of product backlog items in the release state. Once a week, the product owner of Mom's Gift reevaluates the business value and priority of product backlog items with the other product owners.

4 Sprint State

A product backlog item will move to the sprint state when it's the highest-priority item in the release column and a spot opens up in the sprint column. The backlog item is broken down into smaller, more manageable pieces of work that can be completed inside a single iteration or sprint. Because development will have addressed outstanding questions in earlier meetings, that team will already have a thorough understanding of these small slices of functionality—known as sprint-ready user stories.

It takes Nilezon's development team four sprints to implement Mom's Gift. Each sprint adds functionality and capability, and the results of each are shared with stakeholders and customers so they may determine whether the development team and product owner are building the right solution.

When the acceptance criteria are met for all user stories and customers and stakeholders agree the feature is fit for its purpose, the product backlog item moves into the "Done" state, completing the journey through the product backlog.

Incorporating the four sub-flows into your product backlog flow will increase the transparency of the customer request process and ensure that each stakeholder can provide input and feedback. It places a real focus on customer requests and personalizes those customers for internal stakeholders. PM

ACKNOWLEDGEMENTS
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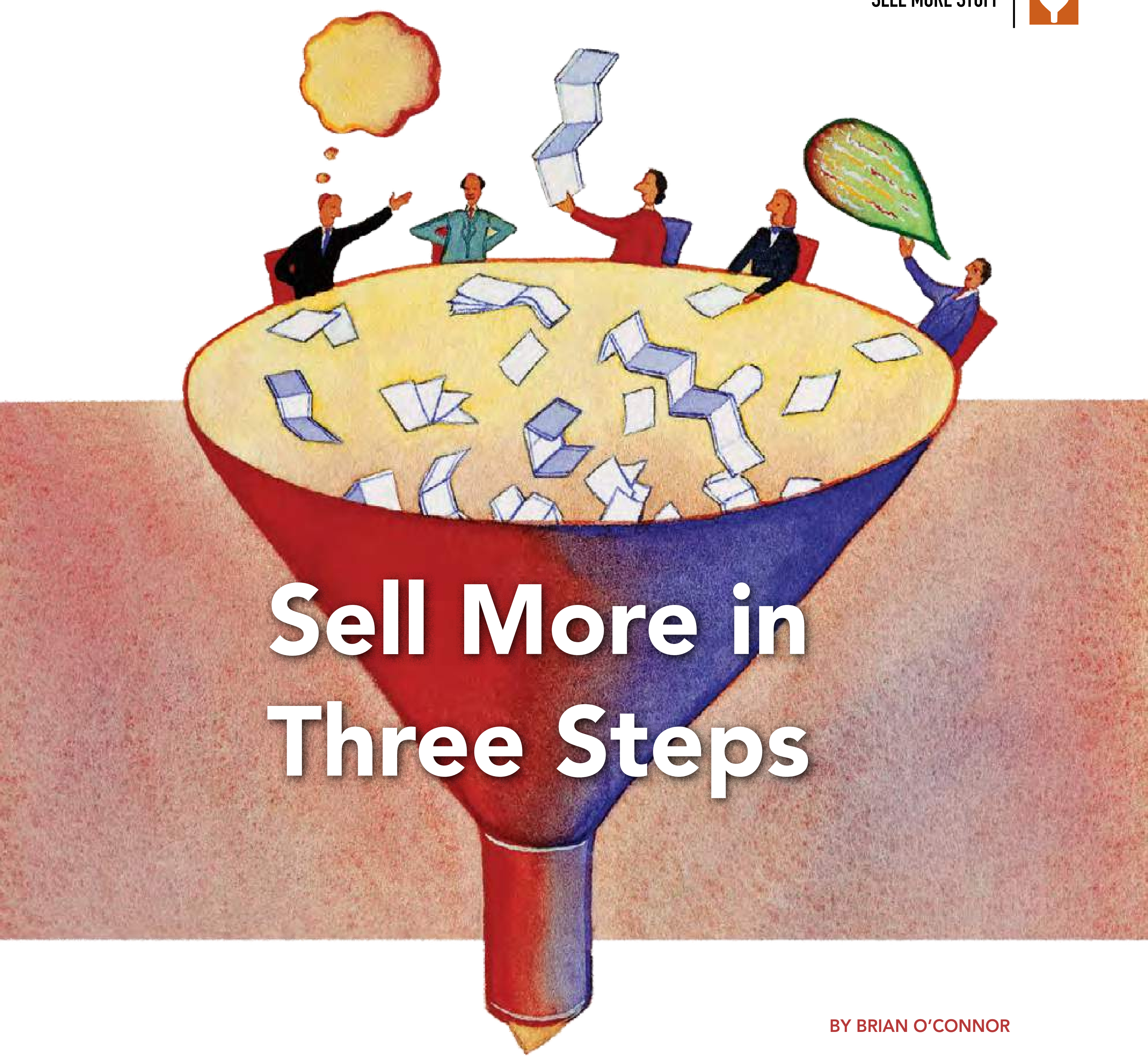
About the Author

Robert Boyd is a CSM (Certified Scrum Master) and CSPO (Certified Scrum Product Owner). Robert began his career with the U.S. Navy, where he worked on nuclear submarines. He transferred his skills to the private sector, working on submarine combat systems at Raytheon for 22 years. During that time he helped streamline processes and systems for the Australian Collins Submarine. He moved to Australia permanently in 2002 and began creating new software development processes for Integrated Research in Sydney. He also introduced agile methodologies to software and product management departments, resulting in a 300 percent increase of feature deliveries. Robert earned a B.S. in computer science from University of Rhode Island. He can be reached at robert.boyd@ir.com.



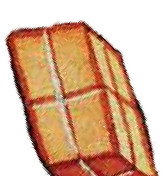
Sell More in Three Steps

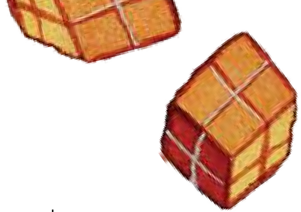
BY BRIAN O'CONNOR

IF YOU ASK THE CEO OF ANY COMPANY—it doesn't matter how profitable it is—they'll tell you that just about anything can go wrong when you scale a product. You may have the world's best marketing and sales team, a built-in market and an amazing product, and still not achieve your revenue targets.

It's a constant process to troubleshoot your marketing and sales methodology. When businesses underperform, some companies make excuses and claim that the market isn't big enough, the distribution plan doesn't scale or the competition pivoted too quickly. Other companies try to outrun the problem with temporary Band-Aids such as heavy discounts. But while these strategies may momentarily mask the problem, over time they will inhibit future growth and profits.

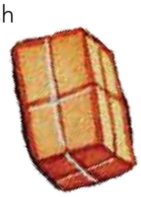
If you have trouble increasing sales—and know the problem isn't the product or audience—there's only one other thing to consider: the connection between your product and customers. Fortunately, it's not difficult to evaluate your current positioning and reorient yourself to what your customers actually need. Here are three steps to help you get there.





Understand Customer Context

Marketing, sales and product problems rarely pop up out of nowhere. If you pay attention, you'll often see a problem develop throughout the course of a standard launch and sales process. While you start out expecting to identify customer needs, build and launch the product, and ring the cash register, it rarely goes that smoothly. And if you spend the majority of your time optimizing tactics—including checklists that codify how you will go to market—you may fail to spend enough time thinking about customer context.



When you lose sight of customer context, you rely on default marketing copy such as "industry-leading solution for ..." Your sales pitch becomes less compelling, and you begin to lose your unique positioning. And when customers hear about your product, it can feel like it was built in a vacuum, a generic, impersonal solution to a problem that they may not recognize as their own.

This is the moment to reorient marketing and sales efforts to focus on customer context. Because unless you incorporate this knowledge into your marketing and sales presentation, you'll quickly turn into an interchangeable commodity that will be negotiated on price, encouraging heavy discounts and falling margins. The only way to get back on track is to analyze each customer's individual context, ensuring your product truly meets their needs.

Orient Your Product Toward Customer Context

Fortunately, the process of reviving customer context is completely within your control. Start by identifying your customer's context down to the tiniest detail. Large and small companies are different, and use cases differ across verticals. Companies also have different objectives, perspectives and annoyances. You can tap into analyst reports for some answers, but you also need to dig deeper to identify differences that you can't quickly uncover.

For example, if you sell product life-cycle management (PLM) software, you'll want to consider how a supply chain vice president perceives new tools, how they run their department and how PLM fits within that firm's processes. Understanding context means taking a wide-angle view of the customer.

When you draw a connection between each customer and how your product solves their problems, you'll create an emotional and logical connection. There won't be any question about how the customer can use your product to achieve success because you will already have outlined it for them. This will help take pressure off of your marketing and sales teams by creating a differentiated message and product.

Ask Five Questions to Identify Customer Context

The following questions will help define customer context: why customers need your product and how that product will help them achieve their goals. The case study of TrueVoice—an innovative firm that helps Fortune 100 companies understand, visualize and activate social data—illustrates how to apply those questions in the real world.

Who is my target market?

The first step in identifying customer context is to define the demographics and motivations of your target market. Outline who the customers are, including job title, company and personal factors, and what matters for that audience on the job.

"As we began this process, we knew that every business's social presence has incredible potential for social data intelligence," said Brock Pernice, co-founder of TrueVoice. "But it took time to realize that our customers often don't understand how to tap into those insights and listen to the right data because they are distracted by industry regulations that heap requirements on their social media communications."

Working through this line of thought, TrueVoice realigned positioning to meet their customer needs. In particular, TrueVoice focused on CMOs and VPs of marketing who risked regulatory fines if they didn't listen to and act on online customer commentary, particularly in company-owned social channels.

What do prospects dislike about solutions in this space?
Dig into what you know about the other solutions in this space. What frustrates customers and what excites them? Evaluate every source of data you have, from industry reports to customer feedback. Learn about the nuances that set one product apart from another.

TrueVoice realized that customers were interested in using social monitoring tools, but rarely understood how they fit into the bigger picture. Customers invested in data and dashboards only to realize they had created an incomplete solution, as they lacked the people and processes to extract meaningful insight from social media chatter. TrueValue realized it had an opportunity to provide more education, specialized talent and support for products that companies had already invested in.

When you draw a connection between each customer and how your product solves their problems, you'll create an emotional connection.

How does my product or service advance objectives of the buyer's key stakeholder?
Consider how that target market's decisions will play out for them in their current role. How is your buyer measured or rewarded on the job? What do they need to do to receive recognition from their boss's boss?

By talking out these questions, TrueVoice realized that customers needed to leverage the reduced cost and increased efficiency of social media and digital marketing to create qualified leads. TrueValue also realized that its product could help achieve those goals by filtering, translating and analyzing social data. In addition, the product packaged results into easy-to-read scorecards for executive decision-making that offered clear, directional recommendations to deliver measurable stakeholder value.

How do prospects determine they need to change what they're doing?
Where do customers get their information? When they learn something new, how long does it take them to research and find a solution? These questions help you understand the context of a prospect's journey and create a sales presentation that resonates as it reflects your customers' actual experience.

"We knew that our customers are highly educated and strategic, but we did not expect that so many would be unaware of the challenges and lack of value that comes with depending on social monitoring platforms as a solution," Pernice said. "Supported by industry-leading resources like McKinsey and Forrester, we needed to educate our executive prospects about the state of the industry and why these platforms are not enough to remain competitive."

TrueVoice applied this insight and realigned its marketing strategy to focus on sharing new information about social data intelligence on its blog and social media channels. By aligning its story with the latest developments from reputable research institutes, it made the case that its product was cutting edge.

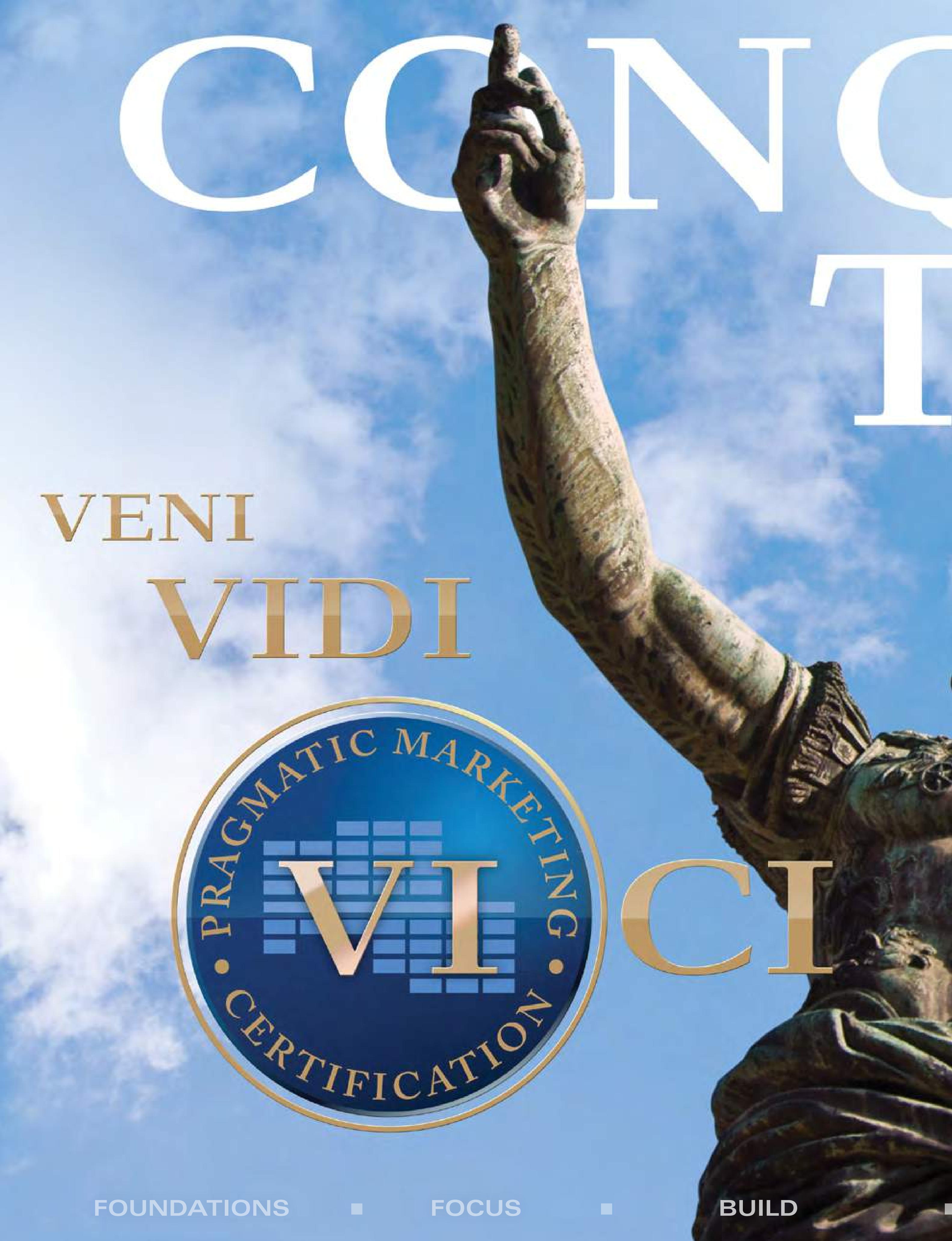
How do prospects organize their priorities for investing and implementing new solutions?
Wouldn't it be great if sales were as simple as impressing customers? But the truth is we not only need to catch the interest of customers but also of their key decision-makers. It's important to understand what takes precedence when a company decides to finance and deploy new solutions. Otherwise, you could outline the perfect case only to discover that the investment never had senior management's support.

TrueVoice used the insight it gained from studying prospect companies to clear any obstacles an eager prospect might have in convincing management of their need for TrueVoice's services. To create buy-in, TrueVoice addressed all the questions that senior management might ask throughout the sales presentation and positioned its product as a way to translate social data intelligence into actionable data for executives.

If your latest product struggles to meet sales goals, don't settle for excuses or discount tactics that may threaten the future of your business. Instead, dig deep into your customer context to understand the obstacles those customers face, then remove those obstacles. PM

About the Author

Brian O'Connor applies his unique blend of strategic insight, entrepreneurial spirit and operational prowess to help the largest global companies and pre-revenue start-ups get it together and set a new path to growth. The views expressed are his own, and you can follow him on Twitter at @BOCTweets.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From Niche Market to Broad Appeal

Accelerating Revenue for a "Cool" Tech Tool

BY NEIL BARON AND CHARLIE BAKER

BUILDING COOL TECHNOLOGY CAN BE THE FIRST STEP in creating a product that changes the world. But just because companies have the knowledge to develop a revolutionary technology doesn't guarantee success. They may fail to understand how future customers will use their final product to solve critical problems, or even how that product will be profitable in the long run. As a result, many companies end up launching their change-the-world technology based on market assumptions and siloed opinions.

The only way to predict the market's need for new technology is to get out of your insulated office and ask the right people the right questions. As Pragmatic Marketing Rule #7 reminds us: "Your opinion, while interesting, is irrelevant." If a product is truly going to change the world, it requires market insight, commitment to solving market problems and a plan to get there.

A company called Renesys faced this challenge. Renesys had the ability to measure global Internet performance through a core technology that used a state-of-the-art global sensor grid to continuously monitor, collect, analyze and correlate Internet routing and performance data. Renesys' customers understood how the Internet changed in real time and could make decisions to ensure their products and networks were continuously available to customers and connected in the best possible way. Although interesting, the information was squarely targeted at a particular set

of customers: the business development groups and network engineering staff at Internet service providers (i.e., Comcast and British Telecom) and network service providers (i.e., Level 3 and NTT).

Dyn, the leading Internet performance provider, acquired Renesys in May 2014 and leveraged years of research and development to bring the Internet Intelligence product line to market. Dyn knew it had something unique, but not all stakeholders in Dyn's existing customer base understood the need for this technology, or what it would mean once the companies combined. Dyn's challenge was to translate its value to the broader enterprise IT market as it prepared to transition to the cloud.

Dyn understood that simply rebranding the Renesys product wouldn't be enough to create an immediate market demand for Internet Intelligence. While Dyn knew that its 3,000-plus customers needed the Internet performance products it could now produce to provide a comprehensive view of their Internet presence, their customers did not. Dyn needed to explain the value from the customer's perspective; it needed to understand its customers in a new way.

Dyn immediately understood its challenges:

1. A few large design partners drove revenue and the roadmap. Renesys products typically targeted the service provider space. Work on a market-expanding product was just getting underway, but the product roadmap for the new product suite was driven by a handful of key design partners that continued to drive revenue and requirements. Dyn needed to consider the needs of its larger customer base and how the product line would broadly appeal to them.

2. The product was designed for technical users. The Renesys Internet Intelligence product was regarded as a best-in-class solution. Technical users loved the information and detail, but to take full advantage of the solution required a high level of expertise and training. In order to gain value, non-technical users needed to have a base knowledge of the Internet's inner workings and specifics on the product. Relatively few users had this type of knowledge.

3. Specific customer problems were not defined for a broader market. Just as enterprises needed the technical skill to use the original product, they also needed the technical foresight to understand how the new technology could help them. Refining current use-cases for broad market appeal became an immediate priority.

Dyn quickly recognized its need to create a process to overcome these challenges. Dyn contacted Neil Baron from Baron Strategic Partners to lead an objective, third-party effort to remove ambiguity and bias as it brought its new Internet performance products to market. The companies began work to reposition and establish customer-centric value propositions for the Internet Intelligence product line. Dyn's leadership set an external launch date of September 16, 2014, which gave Dyn something to work toward and effectively raised the urgency on the difficult process.

The Approach: Refining the Value Proposition

Any product refinement process begins with identifying the key questions that will eventually impact customers. Unfortunately, companies often make assumptions about their potential customer market. This tends to differ from actual market data and prevent a company from developing a product or service that customers value.

For example, Internet Intelligence was an innovative product for Dyn because it could tell users how the Internet was performing at any given time in any part of the world. But the relevance of these analytics would be lost on most of the potential customers that Dyn already knew. It was not a commercially viable go-to-market strategy to assume that the prospect of a "cool" technology would impress customers. Dyn needed to focus on translating the technical features of a complex product into business value that customers and prospective customers could understand.

To develop a successful go-to-market strategy, the Dyn team established a process to answer the following questions:

- What customer problems does Dyn's Internet Intelligence product line solve?
- Where is the best market fit for Internet Intelligence?
- What is the value proposition to Dyn's existing customer base?
- What does Dyn actually know about its customers, and what assumptions has it made about them?

Stakeholders learned how to engage in objective conversations to identify ideal target customers and their reasons for buying. This was critical, because for a company to deliver superior value in a profitable

Find out where and whom to target by identifying potential customers based on their current and future needs.

way, it has to choose the right customers: those who will get the most value from a vendor's offering. These customers are most likely to buy a new product and become loyal customers, with minimal discounting required by the sales team.

A company must also be absolutely clear about what value customers will receive when they buy the product and the entire organization must understand its role in profitably delivering this value.

Steps to Providing Superior Customer Value

Customer Interviews

Options for collecting customer information include surveys and sales anecdotes. But nothing is better than actually talking with customers who have used a product. By leveraging his third-party status, Neil managed to avoid common barriers and ask tough questions that he could translate back into unbiased data for Dyn. He also encouraged Dyn to sit in on his interviews to get a feel for this unbiased approach. The interviews were crucial to knocking down organizational silos by ensuring that Dyn put customers at the center of the conversation.

Segmenting and Targeting Customers

Segmenting a market typically starts by focusing on the vendor. However, Dyn honed in on market need for its Internet Intelligence product line. It segmented customers based on urgency of need. This was an important distinction, because at launch, the Internet Intelligence product line was a future technology for many potential customers. Segmenting by urgent need, non-urgent need, no-need and need already met helped Dyn articulate its go-to-market strategy.

Iterative Workshops

Neil and Charlie Baker, Dyn's director of product management, conducted workshop sessions where they used market segmentation data to refine the customer value proposition for the product line. Dyn looked at which customers needed the product line and examined whether there was a value proposition for those with no current need. This allowed Dyn to make critical decisions that tailored the product to true market demand.

Objective Customer Interviews

It's sometimes difficult to speak objectively with customers; you can become excited by a customer's reaction to the product, or defensive if the product doesn't impress. But it's critical to building a successful go-to-market strategy. Much time was spent honing these skills on Dyn's product team. Post-launch, Dyn continues to cultivate a stable of customers who are open to honest conversations and educate its employees about how to conduct these interviews.

Process Results

Dyn successfully launched its Internet Intelligence product line in September 2014 with a SaaS-based product that provides real-time visibility into critical Internet connectivity and routing data. The go-to-market process identified similarities between Internet service providers and the largest enterprise businesses in the world. The target company size for the initial Internet Intelligence products, therefore, was Global 2000 businesses, because these companies fit into the urgent need segmentation category.

> *Urgent Need Example*—A Global 2000 company is growing globally and expanding its current data center footprint. These enterprises dedicate a tremendous amount of energy in the decision-making process and execution of network expansions. What information is available for them to make a decision? Will the new data center location serve their target customers and critical business partners well? Will performance meet expectations? Which transit providers are key to consider?

By identifying the potential customers based on their current and future needs, Dyn knew where and whom to target.

Market Results

More than 10 publications—spanning business, tech and trade publications and top analyst firms—wrote about the launch of the Internet Intelligence product line. These included reviews in *Network World*, in additional IDG publications and a feature story in *Quartz* about the need for tools like Internet Intelligence. If Dyn had not changed its product focus to address customer pain points, a value-focused review like *Network World's* would have been impossible.

> ***Slow Internet links got you down? It's Dyn to the rescue***
> *Internet Intelligence is an interesting product and has solid value. Before it was available, if you wanted to ping any IP address or Internet provider, you would have to know the location of either and try to piece together what is happening from the results. It was time-intensive and tedious. Internet Intelligence makes this process easier by having several basic troubleshooting routines that are available.*
>
> ***—Network World***

Customer Results

Beyond coverage, Internet Intelligence saw success where it matters most: with customers. Large brands looking to grow their international footprint, such as LinkedIn, became Internet Intelligence customers. Fitting in with Dyn's initial strategy, existing enterprise customers, like Ustream and Interxion, also bought the product. Now, almost a full year after its launch, interest and sales are driving key initiatives across the business.

To begin the process, Dyn acquired a unique, state-of-the-art technology from a highly talented team at Renesys. Partnering with a third-party consultant, Dyn objectively determined the exact market need for its product, based on hard data. With a customer-centric focus, Dyn successfully launched its Internet Intelligence product line, spoke to actual market demand, and transformed a specific market technology into an important tool, applicable to a broad market.

The process, however, remains ongoing. Dyn understands that its product line is useful to new market verticals with specific use cases and is using these customer-first, unbiased methods to determine exactly who these customers are and what these uses include. As the progression of Internet Intelligence products unfold, Dyn will unveil them to an even larger audience. PM

KEY TAKEAWAYS

1 **Companies often overstate their value or don't understand what customers value.** It's difficult to objectively collect information on the value a vendor provides customers. Company employees may be emotionally tied to their products, creating a barrier that takes practice to overcome. Concerted training efforts on how to ask thoughtful follow-up questions can help.

2 **Segmenting by urgency of need can be a highly effective way to group customers.** A product team can look at their roadmap and decide if they have the strategic resources needed to appeal to potential customers with no immediate need or little need.

3 **Refining value proposition is a critical activity.** Refining value proposition is an orchestrated effort. If the product team leads, they can own the strategic pieces and make direct changes as necessary, since they both own the product and the end-user experience.

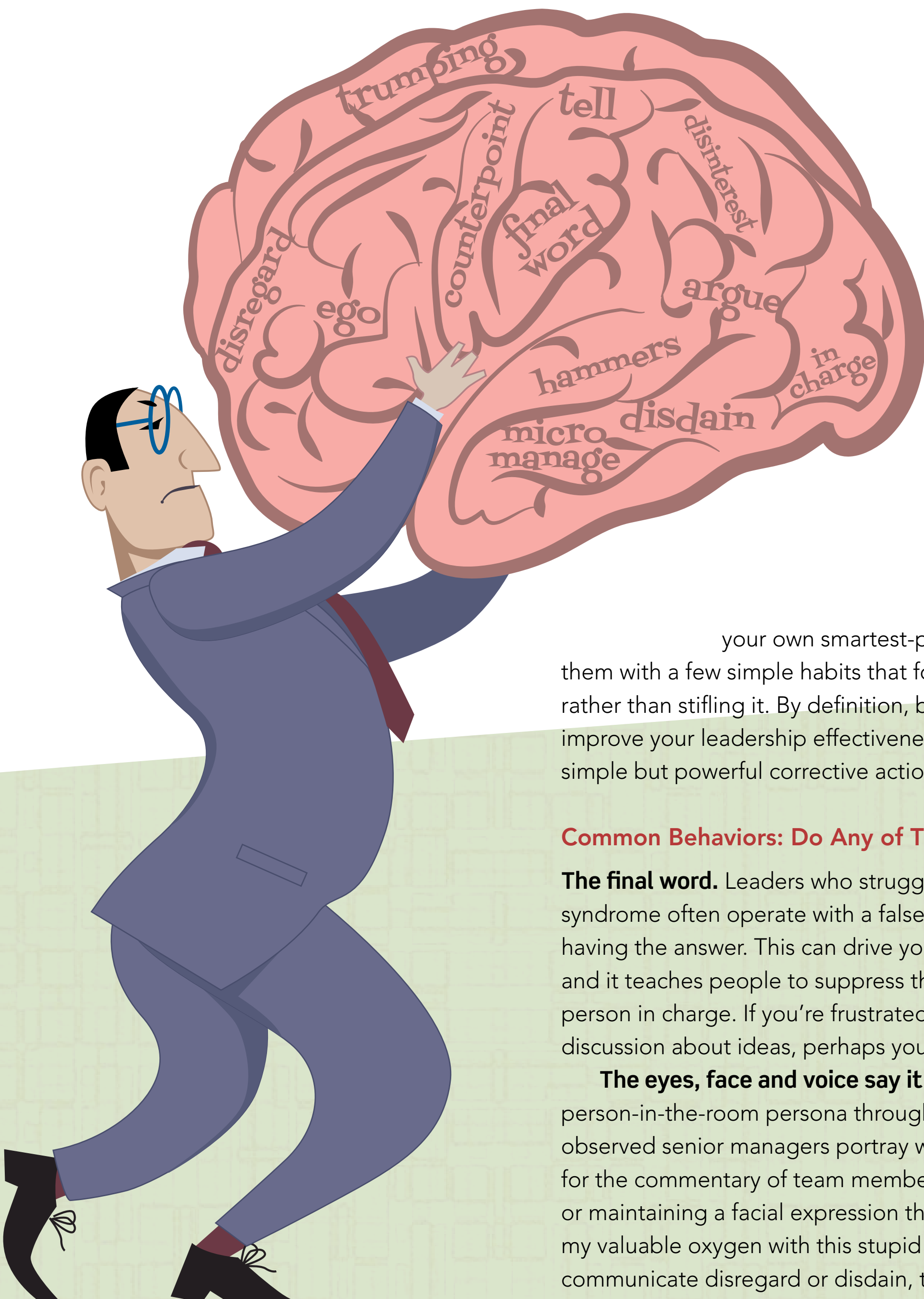
4 **There is great value in having a fresh pair of eyes assess your organization's challenges.** It's not every day that an organization refines its processes. A third-party consultant who understands industry best practices can offer an outsider's perspective and bring focus to the conversation.

About the Authors

Neil Baron is an internationally recognized authority on selling and marketing innovative products, services and solutions to risk-averse customers. He has served in a variety of senior marketing and management roles at companies such as IBM, Digital Equipment Corporation and Sybase. He is passionate about involving customers throughout the go-to-market process. In 2009, he started Baron Strategic Partners, a consulting firm focused on helping organizations launch groundbreaking products and services and reenergize older ones. Contact Neil at nbaron@baronstrategic.com or www.baronstrategic.com.

Charlie Baker, director of product management, oversees the roadmap and strategic direction for Dyn. In addition to his career in product management, Charlie served in the U.S. Air Force and assisted with design, upgrade and deployment of Space Defense and Optical Telescope systems. He is a graduate of the U.S. Air Force Academy and earned his MBA from Boston University. Follow Charlie on Twitter at @charliebakerjr.

Letting Go of Your Need to Be the Smartest Person in the Room



BY ART PETTY

ONE OF THE MOST COMMON AND DAMAGING blind spots for a leader is the compulsion to consistently demonstrate that you are the smartest person in the room.

Many well-intentioned leaders don't realize this bad habit affects them. The impact of what is often no more than one or two behavioral tics includes stifling creativity and innovation and derailing any hopes of developing a high-performance environment.

The challenge is to recognize your own smartest-person-in-the-room behaviors and replace them with a few simple habits that focus on drawing input from team members, rather than stifling it. By definition, blind spots are difficult to see, but a desire to improve your leadership effectiveness will help you self-diagnose and take some simple but powerful corrective actions.

Common Behaviors: Do Any of These Feel Familiar?

The final word. Leaders who struggle with smartest-person-in-the-room syndrome often operate with a false belief that being in charge means always having the answer. This can drive you to assert your opinion as the final word, and it teaches people to suppress their own ideas and wait for solutions from the person in charge. If you're frustrated with your team's lack of creativity or active discussion about ideas, perhaps you taught them to wait for the last word.

The eyes, face and voice say it all. Some leaders telegraph their smartest-person-in-the-room persona through verbal and non-verbal responses. I've observed senior managers portray what is perceived as disinterest or disdain for the commentary of team members by interrupting them in mid-sentence or maintaining a facial expression that seems to ask: "Why are you using up my valuable oxygen with this stupid idea?" While a leader may not intend to communicate disregard or disdain, team members will pick up on visible and audible cues. If your team members are less than enthusiastic about sharing new ideas and approaches, perhaps you've inadvertently shot them down too many times.

I'll see you and raise you. A closely related cousin to the first two behaviors is the leader who listens to team input but fails to acknowledge good ideas. One top leader had the unique habit of responding to input with her own feedback in a seeming point-counterpoint battle that employees interpreted as either arguing or trumping their ideas. In reality, she was using an unrecognizable form of active listening to translate what she heard into her own words. But that's not how her employees saw it.

Combating Your Own Smartest-Person-in-the-Room Syndrome

Ask more than tell. Questions are powerful leadership tools and much more effective than orders in most circumstances. Train yourself to respond to ideas with questions that help you and others better develop their ideas. Strive to understand before offering your own perspective.

Shut up and let others decide. While you never have to cede your right to veto an idea or approach, use this power sparingly. Through questioning and building upon the ideas of others, you can often encourage the modification or adaptation of someone else's approach without throwing your weight around. If you must, use the line-item veto.

Look for the beauty in ideas, not the flaws. Some people see the beauty in an idea, while others find the flaws. A micro-managing boss sees the flaws and hammers people for changes to minutiae. An effective manager acknowledges the beauty inherent in ideas and focuses questions and efforts on realizing that beauty. A simple discussion around risks may be all you need to address potential flaws.

A Few Ideas For When Your Boss Doesn't Recognize They Suffer From Smartest-Person-in-the-Room Syndrome

Resist the urge to argue. It's tempting. It's one of my own weaknesses and it's often wrong. Take a deep breath, close your lips and think. If you must talk, ask clarifying questions. It never hurts anyone to seek first to understand.

Manage upside-down. If your boss is generally well-intended and receptive to team input, construct an effective feedback discussion with behavioral examples. Indicate the business or performance consequences of the smartest-person behaviors and suggest one or more of the previous techniques. Offer to observe and look for opportunities to apply these techniques. Agree on a mechanism to signal an improper behavior and suggest a different course on the fly.

It takes personal courage to offer feedback to your boss. Remember, the operating assumption is that you sense they are interested in strengthening their performance and growing as a leader. Some leaders will not take kindly to your feedback. Tread softly and if the ice is firm, proceed. If not, move on to the next option.

If the boss isn't approachable, use judo. A little bit of child psychology can go a long way with a challenging boss. Start by positively reinforcing your boss's ideas, then suggest approaches to strengthen those ideas. Of course, these approaches will match your original suggestions, but you'll have reframed the idea as your boss's.

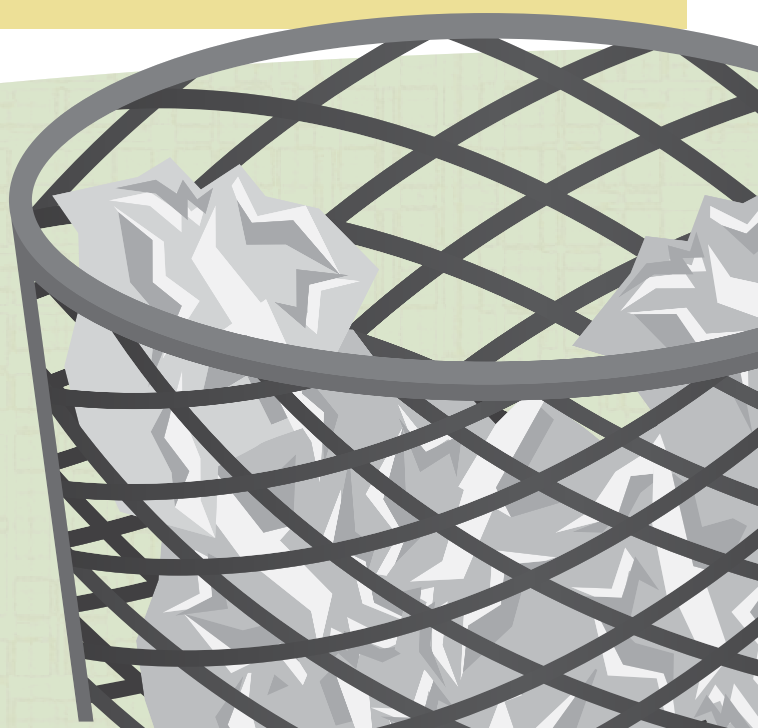
Facilitate idea development and proactively discuss risk. A calm discussion will allow you to ask clarifying questions and—at the appropriate time—suggest an exploration of the risks. List them on a board or flip chart. The act of highlighting risks may be enough to gain cooperation from someone who believes they are always right.

The Bottom Line

Powerful internal drivers push some people to assert that their opinion is the right one. From compensating for a lack of self-confidence to falsely believing that being in charge means being right, this need to assert is a performance- and environment-killing habit. Learn to recognize your tendency to do this and use discipline to resist that temptation. Like reaching for a handful of almonds instead of the donut on the snack table, it's difficult to do at first. If you work for the smartest person in the room, strive to be just a little smarter by managing the psychology and resisting the urge to argue. The effort is worth the potential improvement. PM

About the Author

Art Petty is the founder of Art Petty Group, where he works with high-potential professionals on the executive track and with CEOs to strengthen senior management team performance. Art has decades of experience as a marketing, strategy and sales executive in software and systems. He's an avid writer on the topics of leadership and management and is the author of *Leadership Caffeine: Ideas to Energize Your Professional Development* and co-author of *Practical Lessons in Leadership*. He also writes the Management Excellence Blog at artpetty.com/blog and is a graduate management educator at DePaul University.



The Surprising Truth About What Motivates Us

BY DANIEL H. PINK

IN THE SPRING OF 2009, AS THE WORLD ECONOMY was reeling from a once-in-a-generation crisis and the financial shenanigans that stoked it, a few Harvard Business School students glanced in the mirror and wondered if they were the problem. The people they'd aspired to be—financiers and corporate dealmakers—weren't, it turned out, heroes in an epic tale, but villains in a darker story. Many of these high-profile businesspeople were the ones who pushed the financial system to the brink. Meanwhile, these young men and women looked among their classmates and saw the seeds of similar behavior. In one survey of MBA students a few years earlier, a whopping 56 percent admitted to cheating regularly.

So a handful of Harvard second-years, fearing that what was once a badge of honor had become three scarlet letters, did what business students are trained to do. They made a plan. Together they fashioned what they called "The MBA Oath"—a Hippocratic oath for business grads in which they pledge their fealty to causes above and beyond the bottom line. It's not a legal document. It's a code of conduct. And the conduct it recommends, as well as the very words it uses, leans more toward purpose maximization than profit maximization.

From the first sentence, the oath rings with the sounds of Motivation 3.0:

"As a manager, my purpose is to serve the greater good by bringing people and resources together to create value that no single individual can create alone," it begins. And on it goes for nearly 500 words. "I will safeguard the interests of my shareholders, co-workers, customers and the society in which we operate," the oath-takers pledge. "I will strive to create sustainable economic, social and environmental prosperity worldwide."

These words—"purpose," "greater good," "sustainable"—are rarely heard in business school because, after all, that's not what business school is supposed to be about. Yet students at arguably the world's most powerful MBA factory thought otherwise. And in just a few weeks, roughly one-quarter of the graduating class had taken the oath and signed the pledge. In launching the effort, Max Anderson, one of the student founders, said: "My hope is that at our 25th reunion our class will not be known for how much money we made or how much money we gave back to the school, but for how the world was a better place as a result of our leadership." Today, more than 300 institutions—from the London Business School and the Seoul School of Integrated Sciences and Technology to the Thunderbird School of Global Management (which established its own oath of honor in 2006)—have embraced the MBA Oath.

Words matter. And if you listen carefully, you might begin to hear a slightly different—slightly more purpose-oriented—dialect. The strategy guru Gary Hamel says, "The goals of management are usually described in words like 'efficiency,' 'advantage,' 'value,' 'superiority,' 'focus' and 'differentiation.' Important as these objectives are, they lack the power to rouse human hearts." Business leaders, he says, "must find ways to infuse mundane business activities with deeper, soul-stirring ideals, such as honor, truth, love, justice and beauty." Humanize what people say, and you may well humanize what they do.

That's the thinking behind the simple and effective way that Robert B. Reich, former U.S. labor secretary, gauges the health of an organization. He calls it the "pronoun test." When he

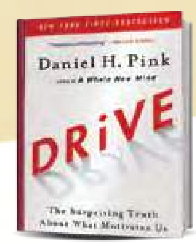
visits a workplace, he'll ask the people employed there some questions about the company. He listens to the substance of their response, of course. But most of all, he listens for the pronouns they use. Do the workers refer to the company as "they"? Or do they describe it in terms of "we"? "They" companies and "we" companies, he says, are very different places.

Finally, consider what is perhaps the most underused word in the modern workplace: *why*. This three-letter interrogative packs enormous power, as Adam Grant, a University of Pennsylvania psychologist, discovered in a study of call center representatives. Grant obtained permission to talk to people making calls for a university fundraising operation and divided his participants into three groups. One group, each night before they made calls, read brief stories from previous employees about the personal benefits of working in this job—earning money, developing communication skills and so on. The second group also read stories before hitting the phones, but theirs were from people who had received scholarships from the funds raised and who described how the money had improved their lives. The third group was the control group; they worked as they usually did, reading no stories before dialing for dollars. Participants were also told not to discuss what they'd read with the recipients of their calls.

What happened?

The people in the group reminded of the personal benefit of working in a call center were no more successful in raising money than those in the control group. But the people in the second group, who read about what their work accomplished, raised more than twice as much money, through twice as many pledges, as the other groups. A brief reminder of the purpose of their work doubled their performance.

In business, we tend to obsess over the "how"—as in "Here's how to do it." Yet we rarely discuss the "why"—as in "Here's why we're doing it." But it's often difficult to do something exceptionally well if we don't know the reasons we're doing it in the first place. People at work are thirsting for context, yearning to know that what they do contributes to a larger whole. And a powerful way to provide that context is to spend a little less time telling how and a little more time showing why. PM



About the Author

Daniel Pink is the author of *A Whole New Mind*, the long-running *New York Times* and *Wall Street Journal* bestseller that has been translated into 24 languages. The author of two other bestselling books, *The Adventures of Johnny Bunko* and *Free Agent Nation*, Pink has contributed to the *New York Times, Harvard Business Review, Fast Company* and *Wired*. He also lectures to corporations, associations and universities on economic transformation and the new workplace. He invites readers to email him at dhp@danpink.com.

A PRAGMATIC APPROACH

Put this issue's ideas into action.

Understand Your Customers

To develop an understanding of the target market, include UX in researching market problems and talking to end users.

Chris Ryan and Ryan St. Hilaire

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Confirm What Works

Watch users perform specific tasks to validate assumptions about your product.

Peter Hughes

page 15

Customize Guides

If usage patterns slow down, create in-app guides that highlight new features or functional areas that may have been underused.

Eric Boduch

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Cultivate Success

Identify your key differentiators and continually work to improve them to stand out from the competition.

Chris Paul

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Limit Feature Creep

Ask each other: "Should we build it?" instead of "Can we build it?"

Mike Savory

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Be Transparent

Strengthen customer relationships and encourage stakeholder input by creating a transparent customer request process.

Robert Boyd

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Create a Connection

Demonstrate how your product solves customer problems to create an emotional and logical connection with them.

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Be Needy

Segment customers by need to crystallize your go-to-market strategy.

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Focus on the Beauty

Encourage team-member participation by focusing on the positive aspects of their ideas, rather than the flaws.

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Tell Them Why

Use purpose-oriented language to connect with employees and improve their performance.

Daniel H. Pink

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the *power+beauty* of design


UX
the *power* of design