THE DESIGNER'S GUIDE TO PRODUCT VISION

LEARN TO BUILD YOUR STRATEGIC INFLUENCE TO SHAPE THE FUTURE

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New Riders

VOICES THAT MATTER™

PART II: THE VISION

CHAPTER 1

THE STATE OF THE DESIGNER

Let's call it how it is: the majority of businesses have yet to recognize design—a proven competitive advantage in today's marketplace—as a core competency. In turn, without that seat at the table, designers aren't in a place to influence leadership decisions or positioned (or encouraged) to reach their full potential, causing the discipline of design to idle. Suffice to say, this is hurting both business and design.

As designers, our struggle to be seen as more than tactical resources is real. Very real. But it hasn't deterred us—in fact, the opposite is true. Determination to prove our worth and that of design has gotten fiercer. However, we can't continue to try to move the needle individually, in a vacuum. To achieve success, we designers must unite under a shared mission, define a universal means for advancement, and organize the movement to claim our rightful position as strategic leaders. All signs point to this being the time for that revolution.

Designers intuitively trust that our profession is destined for a higher calling. Answering that call will require us to first reclaim the discipline

of design and then redefine it for modern times. As it stands today, the accepted role of the designer is to define aesthetics (what it looks like) and identify potential usability concerns. We're often viewed solely as decorators responsible for delivering a superficial layer of a product. This isolates design at the tactical end of the project funnel. By this definition, design is purely reactive and tactically focused. Design's greater contribution includes—or should include—the work at the beginning of the funnel, helping to assemble strategy. This is modern-era design. Practitioners of modern-era design are called on to be skilled in defining not only form and function, but *strategy* as well. Designers adept at modern-era design leverage their highly creative lenses to assemble connections via skillful problem solving. With this new platform, designers can envision and create the future—a gift that bears a weighty responsibility. We must use this gift to its fullest extent and effect change only for the *better*.

The champion of modern-era design is the strategic designer. But design will have to earn its seat at the strategic table. It will take a track record of success for businesses to see the greater worth of design, and by extension the greater worth of the design practitioner, beyond what is currently universally defined and accepted.

You may decide focusing solely on the tactical aesthetic route is the right path for your design career. That may be enough for you, and that is perfectly okay. However, if you want to be at the forefront of creating the product vision—and be a core member of the *Visioneering* leadership team driving its implementation—then you must be strategic. That means becoming conversant with the business side of things.

In this chapter we'll introduce the role of the strategic designer, explain the difference between tactics and strategy, and assert the designer's central function in establishing a product vision. We'll take a brief look at the history of the product designer and consider employment options for the powerful role of strategic designer. Finally, we'll introduce the two processes central to this book: the product vision and Visioneering.

STRATEGY VS. TACTICS

To help clarify the difference between strategy and tactics, we'll turn to the tried-and-true sports analogy. The head coach of a football team is responsible for developing a strategy to win a game (winning games being the goal of the team, obviously). To do this, the coach will research the strengths and weaknesses of the opposing team. After developing a solid understanding of their opponent as well as the skills of their own players, the coach will develop a high-level game plan (strategy). For instance, our research tells us that the opposing team's quarterback completely falls apart under pressure. In other words, when the opposing team's defenders get close to the quarterback, he gets rattled. The coach's strategy applies that knowledge by designing a game plan that puts considerable pressure on the quarterback with frequent blitzes (i.e. sending one or more additional defensive players to attack the quarterback).

Understanding the head coach's "pressure the quarterback" strategy, the defensive coaches and players develop the specific plays (tactics) used on the field to do just that. Plays include staying close to the opposing team's receivers with man-to-man coverage and applying extra pressure on the quarterback. Then, in real time during the game, the tactics are evaluated and adjusted based on how well they're observed to be working. If it's clear that the tactics are failing, it's time to revisit the strategy. The same is true for product strategy.

Well-conceived product strategy surfaces and identifies the right dots that will be continuously connected via the tactics in order to achieve business outcomes. *The success and failure of individual tactics are the yardstick of a winning strategy.* Memorize that line; it slays every time.

A DEMANDING JOURNEY

Here's the fine print: it won't be easy. Most designers working as sole contributors or members of a product design team are predominantly tactical designers—at the lowest rung of the ladder, tethered to the pixel

deliverables and respective usability. Not exactly what we envisioned for ourselves as proud architects of the user experience. Advancing from tactical designer to strategic designer is a demanding journey to get to the promised land.

Not sure the strategic route is for you? Accruing expertise in the complexities of strategy and underlying discipline of business may seem overwhelming. No worries; it's not for every designer. Those who choose to remain as tactical designers fill a crucial role. Not only is the work defining the topmost layer of a product valuable, it's also incredibly time consuming. No decent art director will underestimate the dense hours that go into defining a comprehensive visual language. But here's the ask: elevate your tactical efforts beyond just defining, to contribute more making. Just as the strategic designer will have to become the bridge that connects design to business, in the same way, the tactical designer must be the bridge that connects design to engineering: the *elevated* tactical designer.

Not too long ago, the designer doubled as both the definer and maker. Circa Y2K, the web designer's job responsibilities included front-end web development. The front end was less complex back then—most designers were up and coding in no time. And yes, this was a disparaging of design. We were required to code because design was deemed far less valuable than engineering contributions. Nevertheless, this is the right idea—an interface concept spec'd out in Sketch is just theory until the CSS is built and tested. This requires the designer to have a good understanding of not only the pixels but also how to implement them on the screen. In the digital space, this means brushing up on front-end development basics. Think CSS, JavaScript, and the fundamentals of cross-browser compatibility. The developer you pair with, iterating on-screen specs in real time, will thank you.

Over time, as an elevated tactical designer with a daily scrum schedule that keeps the two disciplines closely intertwined, you'll learn to make all the right moves to function as the bridge that connects design

to engineering. You'll be familiar with the basics of front-end code, and you'll have nurtured your logical thinking skills and practiced putting objectivity in front of subjectivity. Because of this, the elevated tactical designer is the best candidate to level up to strategic designer when ready.

For those designers who are ready to come along for the ride, the transformation from tactical designer to strategic designer is revealed, step-by-step, in Chapter 2, "re-Design School." And once your place as a fully-fledged strategic designer is earned, then comes the good stuff. Harnessing that newfound power through the keystone of a product or service: product vision.

Trust that now is the best time for designers to fulfill our professional destinies. It's progress that's been 45 years in the making. Marking a long-awaited coming of age. Let's take a gander at how strategic designers arrived at this moment...we have a theory.

HISTORY LESSON

The designer's family tree winds through centuries of artistry, craftsmanship, and industry to eventually extend a new branch into the digital age. There in the pixels of the 1980s, at innovative companies like Xerox, Microsoft, and Apple, traditional software architecture and the business of technology began to deliberately fuse with the core capabilities of human-centered design. The future of the designer looked bright—and strategic. That is, until it didn't.

The history of modern digital technology is ultimately a story of the power struggle between three key constituencies: software developers, business associates, and product designers. Each group's discipline is crucial to the ultimate success of an organization, but true to human nature, the balance of power is almost always unevenly distributed. The individual who holds the most power makes decisions that affect the direction of the business and its customers. The story of design's rise, fall, and rise again follows this vein.

EARLY DAYS

At the dawn of computing, software engineering teams possessed the majority of the influence. Computers—prior to the advent of the desktop personal computing revolution—were loud, large, complicated, and very expensive. User-friendly was not a term that mattered to the relatively small group of hobbyists and highly trained technologists who operated these early machines. If a monitor and keyboard were even connected to the GPU, a command prompt that accepted only specific text-based inputs was the absolutely bare-bones user interface. No point and click. No drag and drop. No problem.

In the late 1960s through the mid-1970s, research and development by trailblazers like Douglas Engelbart and Alan Kay began to influence the shift to personal computers that could potentially be used by untrained operators. Driven by Engelbart's guiding philosophy that computers could be used by all to augment human intelligence and make the world a better place, technical achievements like the computer mouse and graphical user interface (GUI) ushered in an era of user-friendly human computer interaction.

In these early days of personal computing—in order to reach the widest possible audience—design and usability were the strategy, and did that strategy ever pay off. The desktop metaphor, first introduced by Kay at Xerox Palo Alto Research Center, was designed expressly to make it easier for users to interact with their computers. The metaphor incorporated traditional office objects (files, folders, trash can, windows) into icons and a visual system that became second nature to modern computer users. This metaphor was popularized by the first Apple Macintosh in 1984 and became a worldwide phenomenon and standard bearer for GUI operating system design after the launch of Microsoft Windows 95. This user-centric strategy spawned the world's most successful and valuable companies and led to an industry that's currently worth $5 trillion globally.

In the 1990s, when we still went to physical stores and purchased software that was sold in boxes with floppy discs and CD-ROMs inside, a lot of the design work was being executed by software engineering teams. And many of the product decisions were driven by roadmaps that were owned by business teams. Although desktop computers had reached a point of maturity where they had become fairly easy for most users to operate, many of the software products being developed at the time became overly specialized and complex—forgoing the founding principles of user-centered design.

DEMOCRATIZATION

Cue the AOL 56k dial-up connection. As the World Wide Web grew exponentially from message boards and under-construction animated GIFs to an imperative for every legitimate (and illegitimate) business, graphic designers looking to get in on the digital action swapped QuarkXPress, dpi, and CMYK for FTP, pixels, and hex codes. They christened themselves "web designers." The early job responsibilities spanned branding, visual design, ad banners, graphics, interactive CD-ROMs, and respective HTML implementations. The beauty of the early Internet was how easy it was for virtually anyone to build and launch their own websites. The web democratized digital technology and design.

As Robert Kennedy, Jr. and many others have pointed out, "Democracy is messy." Not surprisingly, most early web designers approached the digital page with the same editorial lens as a paper page, trying to lay out a magazine-like grid to structure the information and control the presentation flow. But this age-old, commonsense approach would prove rather incompatible with the fluid nature of this new digital medium and the inadequate capabilities of web browsers at the time. The early web became saturated with spacer GIFs, HTML tables, pop-ups, Flash preloading screens, and dark UI patterns that sacrificed accessibility and usability.

As the web matured through the dotcom boom of the late ’90s and early 2000s, so did the practice and skills of web designers. Businesses that operated on the web needed to engender trust with users, many of whom were skeptical about entering their credit card information into a form on a web page. Business owners realized website designs that were aesthetically pleasing, professional, and usable instilled more confidence in their users, encouraging them to make a purchase.

In a recent retrospective article titled “A 100-Year View of User Experience,” published by the Nielsen Norman Group[1], author Jakob Nielsen explains why the web platform boom motivated executives to invest in design. Nielsen points out that with traditional software, the buyer first purchases the product and then has access to the experience. On the web, the sequence is reversed. The customer experiences the product before payment—making the user experience the gatekeeper to the money. Once again, user-centric design emerged as a winning strategy for successful companies doing business online—so successful, in fact, that according to the U.S. Department of Commerce, e-commerce transactions actually surpassed brick-and-mortar retail sales in February 2019[2].

RISE UP

Unbeknownst to us mere web mortals in the mid-2000s, a seismic shift was on the horizon—Apple launched the iPhone in 2007, and subsequently the App Store in 2008. This radical innovation opened the door to any brand, in any vertical, who wanted to release a thin slice of their software offering at our fingertips. Only a few years later, Apple’s 2010 launch of the iPad rocked the landscape again, by increasing the screen real estate to dimensions comfortably situated between the size of the smartphone and the classic desktop monitor. Traditional software, once weighed down by its heavy desktop anchor, could now have a portable, slimmed-down

1 www.nngroup.com/articles/100-years-ux/
2 https://www.cnbc.com/2019/04/02/online-shopping-officially-overtakes-brick-and-mortar-retail-for-the-first-time-ever.html

companion. Over the next decade a tsunami of touch-enabled devices crashed into the market, reshaping user expectations about how, when, and where they could interact with software. Designers and developers watched what we knew as the web quickly evolve as we faced exponential screen size fluidity and increasingly advanced browser and technical capabilities.

As technology evolved, so did the role and specialization of the web designer. Web design (and now mobile application design) was no longer just a safe haven for graphic designers looking to transition from print to digital. Websites became more complex, transforming from simple About Us, FAQ, and Contact Us forms into full-blown web applications. The data became more robust, and a wave of user-generated content, including image libraries, streaming audio and video, and social media, made everyone a creator. An alphabet soup of specialized design roles emerged, from information architects (IAs) and user interface (UI) designers, to interaction designers (IxDs), and ultimately the user experience (UX) designer. And let's not forget about the user researchers, UX developers, UX writers, and design thinkers.

GREAT EXPECTATIONS

Gone are the days of booting up a desktop computer just to run some accounting software or going online to check last night's scores. Our computers are practically always powered on and always close at hand. We don't have to "go online" anymore; we're always connected to the Internet and to one another. Software is everywhere; it's become like oxygen. It's in our hands, in our home appliances, in our cars, on our bodies.

The preponderance and diversity of software has transformed user expectations about how they interact with machines. In barely the span of our lifetime, the average user of a computer has shifted from highly trained operators and niche hobbyists to literally everybody—a realization of Douglas Engelbart's vision. User expectations about how software should

look and work (the "user experience" of interacting with the software) have become increasingly demanding. Gone are the days of computers being intimidating. Billions of people throughout the world now have an intimate and personal relationship with the computer that they carry with them daily. Interactions and interfaces can no longer be complicated because they're so commonplace. Why should the programs we use at work be so frustrating when Facebook is so easy to use?

Once again, just like during the desktop computing revolution, the introduction of the World Wide Web, and the mobile era, design is the differentiator. Businesses that understand that design—not just how a product looks, but the value it delivers—is a competitive and strategic advantage have proven time after time that they will outperform and outlast their competitors. Why? Because out of the three primary contributing roles in the product development and delivery process (design, business, and technology), *design* is the capability that is principally dedicated to understanding and delighting the end user. Customers that receive value from and feel good about their interaction with a product are more likely to be repeat customers and to tell other people about their experience, which, in turn, leads to increased customer loyalty and revenue growth.

RESTORED BALANCE

Now, having just made the case for the importance of the designer and strategy rooted in design, let's clarify that we are not advocating that the design discipline should wield more power relative to our peers. Design should be an equal to technology and business. Businesses that do this will quickly see the positive results of this balancing act. But organizations that don't hold design in equal esteem—putting more emphasis on technology or business needs—will eventually see the negative results of the power imbalance. As a strategic designer, you will not only earn design a seat of power at the table but will be a force of balance.

THE PRODUCT VISION

As a designer, and reader of this book, you've most likely been preoccupied with a nagging suspicion that there's a better way forward. Prettying up difficult-to-use interfaces and churning out a bunch of forgettable features hasn't provided you or your end users with much value. You've intuitively understood—even if you couldn't find the words to express your instincts—that without an aspirational yet achievable endpoint in mind, the project is unlikely to arrive at a meaningful destination.

Unfortunately, it's become commonplace to rely on features to spark the strategy of a product. Surely many of you may have experienced a time when a client or business partner requested detailed designs to inspire their product roadmap. Fingers crossed. Even worse, at some organizations, features are the "strategy." Either way, this often means the latest and greatest tactical processes are quickly pushed full throttle to get those features delivered. How many times have you opened up Sketch and questioned, "Why are we doing this again?" No feature-level design exercise has a prayer of clarifying a product's strategic plan.

> **Vision without action is a daydream. Action without vision is a nightmare.** — COMMONLY CLAIMED AS A JAPANESE PROVERB

A "vision" isn't just a visual exercise for the marketing department or a fun break from your day job. As the keystone of any product or service, the job of a product vision is to explain a strategy's complex connections and express the product's future intended destination. This can be done by telling the story of an experience and conceptually illustrating the offering's intentions, without getting into detailed designing. Ultimately, our product vision conveys the story of how our product or service will forge an idealized partnership between the company and their customer.

Think of it as the overarching game plan that fuses a bold future with thoughtful strategy and clearly reflects the values of an organization. Inspiring a product team to achieve greatness. It's all about ingenuity, creativity, and eventually, the smart approach to iteratively execute.

Startups get this, as do a handful of business elite—think Apple, Tesla, and Amazon. But most established businesses, don't recognize the necessity of product vision. Product vision work is shoved into a half-day effort, the kickoff of a new project. Relegated to a singular, inaugural blue-sky exercise—no more than wishful ideation. So, where's the disconnect?

Here's what's happening: the development of and adherence to a product vision is a common casualty of the transition that occurs when businesses grow from lean startups into larger, more mature enterprises. Lucky for larger businesses, designers are ready to step in and help: first, by leading a team in a new approach to create a product vision: Part II, "The Vision"; then by working with product programs to develop and align teams that execute the product vision: Part III, "Visioneering."

MAKING AN AIRTIGHT CASE

The loss of product vision is the root cause of a whole lotta enterprise problems. We strategic designers can see it oh, so clearly now. But it may not be so plainly obvious to the business. If it were, this book wouldn't need to be written. So, the designer will have to lay out a strong case to drive home the point that needs to be made. Fortunately, hindsight is an excellent tool to use to do that.

Hindsight is 20/20

Product vision is—most often—a casualty to the transitional phase where a business grows out of a lean startup and into that of a larger company. At the startup level, product vision is the ultimate necessity that both secures funding and gets an inaugural product out of the gate. Bold vision, check.

Solid strategy, check. Notably, at this stage, the product's vision and respective strategy are closely intertwined—if not, one and the same—with the fledgling company's mission. Their raison d'être.

Startups that succeed don't remain startups. A successful startup matures to a self-sustaining enterprise. And in many cases, that original product vision becomes harder to hold onto. As priorities shift, additional employees and teams are brought in to establish new initiatives, and that once clear and compelling vision becomes cloudy or fades completely. The company mission detaches from the singular product to make room for additional offerings. The strategic game plan is replaced with a tactical roadmap—a timeline that plans out feature-level deliverables. What follows is a punishing product cycle.

The once lean startup that ran like a well-oiled machine now struggles to keep in step with the nimbler way of working. The larger company tries to hold on to some semblance of an agile delivery model. But weighed down by corporate hierarchy and a lack of empowerment, the Waterfall-model habits start to slowly seep in. Desperate to keep up with small releases that can be launched in real time, a shortsightedness confines planning to the immediate near term. The focus on being accountable to the current roadmap and backlog—Scrum ceremonies, stories, and sprints—steals attention from why the work matters in the first place. Without that vision of the future, the work isn't tethered to any kind of strategic direction aimed at reaching bigger goals.

The conclusion? Product vision is often a casualty of a company's sizable growth. Yet it shouldn't be. The exceptions to the rule: the rare mega company that never lost sight of their product/service's product vision: Apple, Amazon, Google, Disney. Those company's founders mastered the art of establishing a strong vision and strategically carrying that vision thread through the entirety of a product's life. Visionary founders whose companies value design as a core competency. Coincidence? Definitely not.

RIPPLE EFFECTS

Losing product vision isn't just detrimental to the success of the respective product. Effects can polarize how a company arranges itself to work.

In many cases, from a bird's-eye view, product designers working on user experience teams are detached from the forward-thinking, innovative efforts of skunkworks or blue-sky teams. Positioned at one end, designers are dedicated to the tactical designed deliverables and usability enhancements that will launch in the near term. Within the product teams lives the user and respective experience. In contrast, at the other end are the skunkworks programs and blue-sky teams. These innovation groups focus on "visions" that push the furthest boundaries—typically in semi-secrecy with an open-ended time line. The output is rarely expected to deliver immediate commercial value. This dysfunctional, polarized setup positions the experience in the weeds and the company's future stuck in the stratosphere, leaving a vast space in the middle that should be filled with strategy-led product vision (**Figure 1.1**).

FIGURE 1.1 Dysfunctional polarized setup.

Now with strategy-led product vision back in the fold, a business's organizational structure can rearrange and unify to reflect a comprehensive product continuum. This unification looks like design, engineering, and business comprehensively integrating to mindfully craft the best *experience* for the user. Going forward, experience is the highest guiding tenet. We are witnessing the beginning of the designer leading the charge to restore balance (**Figure 1.2**). More on this in Part II, "The Vision."

Suffice to say, the case to help non-startup businesses resurrect product vision should be airtight. But if stakeholders still aren't so easily convinced, do a thorough retrospective and illustrate how the company's growth maps to that of their flagship product. Highlight the product's lifetime milestones and how progress, or lack thereof, correlates to the absence of a clear future and lack of strategy. If that still doesn't hit home with stakeholders, then pack your designer bags; it's time to find a new business to help.

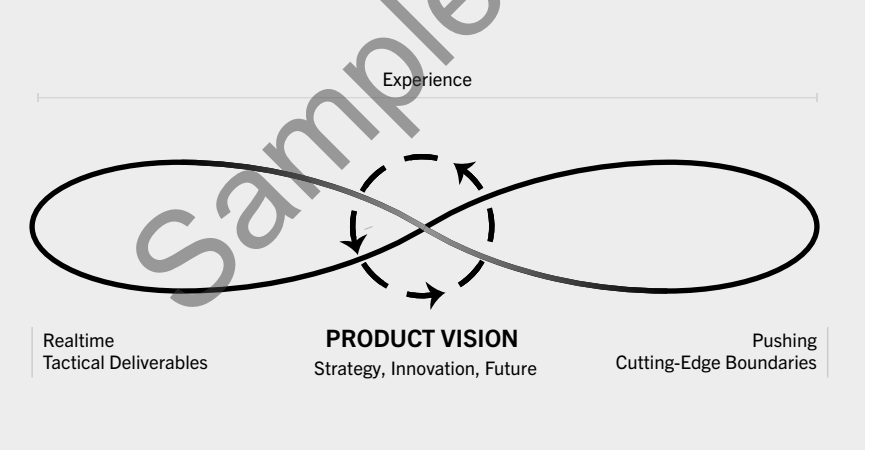

FIGURE 1.2 Product vision unites all the pieces of the puzzle.