



# Scaling UX impact in a digital-first world

UX experts from Smartsheet  
and Google describe  
how world-class UX teams  
deliver breakthrough  
experiences at scale



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## Foreword

Now more than ever, organizations are leading with digital experiences. As companies look to innovate and maximize new opportunities, user experience (UX) teams must be able to understand user needs quickly—and now by necessity, remotely. The right techniques and tools are essential to scaling the impact of your UX research in this environment.

In this guide, we share best practices that enable world-class UX teams to deliver breakthrough experiences at scale. Here you'll learn how to:

- + Simultaneously improve respondents' experiences and the quality of your insights
- + Expose yourself and your team to, and benefit from, new ways of thinking and working
- + Bring a balance of domain expertise and individual agency and creativity to your work
- + Foster a culture of continuous learning and contribution within your team
- + Push the envelope on, and be a part of, what's next in UX research innovation



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SECTION 1

# Delivering breakthrough UX at scale

## Delivering breakthrough UX at scale

It's a digital-first world: People now spend more than half their time every day on media and connected devices.<sup>1</sup> They rely on technology to facilitate experiences ranging from remote work to healthcare, banking, shopping, education, socializing, and more. In this world where a customer-centric approach to UX is essential to your business, the role of the UX team matters more than ever. This means that a strategy to enable rapid, scalable, and impactful UX research (discovering your customers' behaviors, motivations, and needs through observation, task analysis, and other types of user feedback) in your team is a must.

UX research has traditionally involved working directly with members of your target audience through UX testing sessions, remote session observation using digital tools, surveys for collecting user feedback, and many other methods and techniques. But the playing field for UX teams is more challenging today than in pre-COVID-19 times: Schedules are tight, resources are constrained, and options to conduct in-person research are limited. For now, many teams rely mostly or even entirely on remote-based tools.

Leading UX teams have positioned themselves to continue delivering breakthrough UX by delivering impactful insights faster and scaling them more efficiently. Read on to learn how your team can do the same.

<sup>1</sup>Digital Marketing Institute. "Brand Awareness: Why a Digital First Approach Is Essential."

## SECTION 2

# Fostering a high-performance UX team

## Fostering a high- performance UX team

### MAXIMIZING YOUR EFFORTS

A high-performing team is key to delivering UX insights that drive optimal user experiences.

Whether your team is large or small, fostering efficiency, learning, and knowledge-sharing drives outcomes for your organization. These best practices from high-performing UX teams can help you maximize your team's efforts.



### START WITH WHAT YOU KNOW

Before your team initiates new UX research to deliver on an objective, look at what's already known. You'll often find that someone has already done the research or has the knowledge you need.

## Fostering a high- performance UX team

Work through these questions before you move ahead:

+ ***What do we know as background knowledge?***

Pick up a textbook; gather background information. Learn from what's already available as a starting point.

+ ***What do we know as existing industry standards and research?***

Learn what work others have done on this topic. Likely someone has already conducted research that will answer some of your questions.

+ ***What do we know as a company?***

Teams in marketing, customer success, support, and other functions may have objectives similar to yours. Go on a listening tour. Learn what they know that can help you.

### Start with what you know: Assess your knowledge base





## Fostering a high- performance UX team

After you've identified and made the most of the knowledge around you, you can better identify what you don't know and efficiently and economically design your research to fill the gaps. As a result, you can spend more of your research efforts on delivering new and innovative insights.

### Designing UX research that scales



## Fostering a high- performance UX team



### ENCOURAGE A CULTURE OF LEARNING AND KNOWLEDGE SHARING

Scale your research outcomes by chartering your team to foster learning and knowledge-sharing across the company. There's no such thing as over-communicating your research outcomes.

- + **Make your research outcomes approachable** and easy to access for your stakeholders—and repeatedly reach out to offer that access even if you don't get initial uptake.
- + **Avoid the mistake** of simply housing your research findings in an archive and expecting your stakeholders to find it. Create a platform for everyone in the company to share their customer knowledge.

“There's no such thing as over-communicating when it comes to sharing research insights. Whatever time you put into your research, spend 10X that time communicating your results.”

Lada Gorlenko, Director of Experience Research, Smartsheet

## Fostering a high- performance UX team

### **A forum to share customer knowledge**

The Smartsheet UX team organizes a weekly customer insights “lunch and learn” session. Anyone in the company may attend to learn or present outcomes of research studies or informal knowledge. Participation has grown to some 10% of employees, cross-pollinating customer insights across the company.



### **BE A FACILITATOR OF RESEARCH**

If you have a one-person team or small group that supports a large organization, move beyond being research owners and become research educators. Invest time to teach members of your broader organization how to listen to customers and conduct customer research. This will increase your team's impact and create the social ROI of a broader group with an investment in the outcomes of UX research.

### SECTION 3

# Leveraging research tools and techniques to drive efficiency and innovation

## Leveraging research tools and techniques to drive efficiency and innovation



### MAKE THE MOST OF REMOTE RESEARCH TOOLS

Remote research methodologies are always an effective way to scale your UX research. When in-person testing isn't an option, they're an imperative. UX teams can leverage a range of tools to support digital-first research at scale:

- + **Remote participants:** Services such as Respondent.io provide access to a diverse range of verified participants for remote studies.
- + **Qualitative insights:** Qualitative research platforms such as dscout provide access to remote participants who will record and share experiences and perspectives.

“I will continue to encourage teams to use remote tools to identify and access more diverse participants. That has been a real boon in this COVID environment. It's something I definitely want them to keep up as we move forward.”

Lauren Palmer, Director of UX Research, Google

## Leveraging research tools and techniques to drive efficiency and innovation

- + **Usability testing:** Tools such as UserZoom and AnswerLab allow and scale remote usability testing.
- + **Concept testing:** Platforms such as QualtricsXM make it easy to test and analyze all aspects of product concepts online.



### USE AN AGILE RESEARCH APPROACH

Your team can deliver impactful UX insights to fit any resourcing level or schedule by developing a “minimum viable insights” mindset. There will always be a question you can answer for your stakeholders within their timeframe and with your available resources.

- + **Take your stakeholders** on the journey with you as you iteratively deliver these minimum viable insights.
- + **Discuss what’s missing** and define the next minimum viable insight to pursue. Your stakeholders will stay engaged as you deliver living, changing iterations of insight.

## Leveraging research tools and techniques to drive efficiency and innovation



### RUN RESEARCH PROJECTS WITH A THREE-IN-A-BOX OR N-IN-A-BOX MODEL

Build UX project research teams that go beyond your UX team. The three-in-a-box model includes representation from product management, engineering or development, and UX. You can also extend this to an N-in-the-box model by bringing in representatives from other disciplines as needed to drive research and development across the product lifecycle. The result is a cross-functional team that has ownership and is invested in delivering impactful UX.



### TEST YOUR ASSUMPTIONS

Use the fact, opinion, guess (FOG) method, as this process fosters open, respectful conversation about the validity of the knowledge your group holds and provides objective answers.

- + **Work with your team** to brainstorm everything you think you know about the challenge areas you want to investigate.
- + **Review your assumptions** together and flag each as an objectively known fact, an informed first-or second-hand opinion, or just a gut-feeling—a guess.

## Leveraging research tools and techniques to drive efficiency and innovation



### DISTILL UX INSIGHTS INTO EASY-TO-CONSUME VISUAL ARTIFACTS

No one wants to sort through hundreds of data points or slides to understand what your research can tell them.

- + **Package your research** outcomes in an easy-to-use, understandable way.
- + **Make your research insights accessible** through visual artifacts—simple summaries and other visuals that clearly tell what you've learned and what to do about it.



SECTION 4

# Learn from the body of knowledge around you

## Learn from the body of knowledge around you

Studying the work of others across the UX discipline and beyond is part of the culture of continuous learning and knowledge-sharing. Here are some books we recommend.

### RESOURCES FROM THE UX WORLD

- + *Interviewing Users: How to Uncover Compelling Insights* by Steve Portigal – Fundamentals of qualitative research (see also his podcasts <https://portigal.com/podcast/> on UX)
- + *Practical Design Discovery* by Dan Brown – Framework and templates for practicing design activities
- + *It's Our Research – Getting Stakeholder Buy-in for User Experience Research Projects* by Tomer Sharon – Principles for successful “three-in-a-box” and co-ownership in usability research

### PERSPECTIVE BEYOND TRADITIONAL UX RESEARCH

- + *Why We Buy: The Science of Shopping* by Paco Underhill – Perspective about the art and power of observation
- + *Don't Think of an Elephant: Know Your Values and Frame the Debate* by George Lakoff – The impact of how insights are framed
- + *Talking to Strangers: What We Should Know about the People We Don't Know* by Malcolm Gladwell – Grounding on the importance of avoiding assumptions about people

## SECTION 5

# Power impactful, customer-centric UX outcomes with Qualtrics

## Power impactful, customer- centric UX outcomes with Qualtrics

The Qualtrics Experience Management (XM) Platform helps UX teams like yours deliver innovative research to fuel impactful, customer-centric user outcomes.

- + **Use the XM Platform** to collect feedback from your customers at every meaningful touchpoint and instantly analyze their comments.
- + **Understand how your digital experiences** impact how your customers perceive and feel about your product so you can fix experience gaps, create user delight, and better connect with your customers to foster their loyalty.
- + **Maximize customer uptake** and usage of new digital products and services with real-time insight into how they are performing.
- + **Drive continuous improvement** by automatically routing recommended actions to the people in your organization who are in the best position to make changes.

**WANT TO SEE HOW IT ALL WORKS?**

Prefer to chat? Contact [sales@qualtrics.com](mailto:sales@qualtrics.com)  
for more information on how to get started.