

Experience Design

A Framework for Integrating Brand, Experience, and Value

Patrick Newbery
Kevin Farnham



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Contents

Section I

Chapter 1

Chapter 2

Chapter 3

Chapter 4

Section II

Chapter 5

Chapter 6

Chapter 7

Chapter 8

Section III

Chapter 9

Chapter 10

Introduction	1
---------------------	----------

Context	13
----------------	-----------

Thinking about Design	16
-----------------------	----

Thinking about Business	38
-------------------------	----

Thinking about Change	50
-----------------------	----

Thinking about Experience Design	62
----------------------------------	----

Frameworks and Tools	85
-----------------------------	-----------

Brand Frameworks and Tools	88
----------------------------	----

Product/Service Frameworks and Tools	102
--------------------------------------	-----

Customer Journey Framework	132
----------------------------	-----

Putting It Together	166
---------------------	-----

Moving Forward	173
-----------------------	------------

Getting Business to Act on Experience Design	178
--	-----

Working with Vendors	196
----------------------	-----

Final Thoughts	209
-----------------------	------------

Notes	213
--------------	------------

Acknowledgments	219
------------------------	------------

Index	223
--------------	------------

Introduction

There have been incredible changes in the business landscape over the past few decades. Technology and globalization have made it possible to see the entire world as a market that is always on. Industries that have been rock solid find that their foundations are rapidly eroding, and new start-ups are given valuations in the millions without having a proven revenue model. The options available to consumers are rapidly expanding, and at the same time, consolidation is the strategy chosen by some businesses to ensure that they can continue to meet consumer demand and provide returns for shareholders.

All of this raises the question: How does anyone stay in business? How do you stay in business? Or perhaps the more appropriate question for the majority of us is: How does the company we work for stay in business? Most of us engage in a process that creates value for someone else—our customers. We create enough value that they are willing to pay money in exchange for it. And we stay in business by charging more for this value than it costs us to create it.

Value is predicated on asymmetry. *The Merriam-Webster Dictionary* defines *value* as “a fair return or equivalent in goods, services, or money for something exchanged.” Inherent in this definition is that one side has something that the other desires. This is the basic asymmetry. But in many cases, there is an underlying asymmetry in information. Someone knows how to make something that another doesn’t; someone has used knowledge to produce a good or service that another person needs but doesn’t have the requisite knowledge (or resources at hand) to produce on his or her own.

The basic purpose of business is conducting a value exchange with the ability to achieve a financial benefit. Businesses exist when they can (profitably) create value for customers. This value comes in different flavors. The reason for this differential is that different products and services can fill different needs. Tangible value is relatively easy to demonstrate and quantify; it is objective. It appeals to a broad number of people who have a similar need and would all agree on how it should be met. This is a basic aspect of almost every product or service. Often, the scarcity of products delivering only tangible value, as well as the immediacy or importance of the need they fulfill, determine how much demand and what kind of pricing they can command. Most basic products and commodities fall into this category.

There is also intangible value, which can be harder to demonstrate, and is best described through qualities. Whether or not a person agrees there is value in it tends to be more subjective. Many products or services imply some aspect of intangible value. In some cases, the intangible value is based on aggregation of specialized tangible value, where the excess is not needed by all but is nice for some people to have for practical needs (professional-level tools). In this case where the buyer of this kind of value may never actually need to use it, the value is really measured in how possessing this excess of tangible value fulfills an emotional or psychological need of the buyer: security, excitement, habit, and so forth. Because it is intangible and subjective, this kind of value is often only truly measurable by the individual. Many nonessential products and services or things that command a premium fall into this category. And many products or services compete based on how their intangible value differentiates them from others.

Finally, there is aspirational value, which is related to intangible value but with a slight twist. Here, rather than merely satisfying an internally defined need, aspirational value is often tied to the status and desires of an individual person; things we want to believe about ourselves, or things we want others to believe about us. In other words, it is about satisfying an internal need in an outward way. Aspirational value is often an attribute of luxury products and services and is commonly the underlying premise of brands (brand being a belief system originally developed to differentiate one’s products from those of competitors when relying on tangible value would be insufficient).

Today’s intricate businesses, industries, and economies are built on chains and networks of value creation. These can be quite complex—multitiered, vertically integrated, and synergistically aligned. The result of this happening at a global level

is that there are fewer and fewer things one can make or obtain for oneself that are of lesser cost and better quality than one can buy from someone else. In other words, consumers generally need to rely on someone else to provide many of the necessities and niceties of living.

However, one of the possibilities arising from creating and competing on intangible and aspirational value is a disparity between what value is offered and what value is received. Although this is true for tangible value as well, it's a little easier to spot the discrepancy before committing to the purchase. It's not difficult to see that the more intangible and aspirational value is involved, the more subjective this evaluation can be. Many products and services today use a hybrid of value types in communicating with markets, and much of the competition between similar offerings is driven by trying to find the right combination of value types. Add to this that value chains and networks often require many stages of effort and multiple partners to deliver value to an end customer, and determining what portion of the overall value they deliver becomes murky. It's often easier to describe what value should be there and why than it is for the customer to actually find and experience that value.

Business managers and their consultants spend a lot of time and effort looking at how to minimize the costs and optimize the processes of creating and delivering value, especially as public, political, national, and environmental constraints are taken into account. And many businesses have adroitly understood that there should also be a focus on how the customer accesses, receives, and evaluates the value their businesses provide. They spend quite a bit of time and money with consultants to figure out how best to communicate their proposed value and to whom they should be communicating.

So a modern business has many moving parts. But from a customer's perspective, what they see are facets of a single thing—an interface that connects them to the business. All the products, services, mailers, ads, customer support calls, and conversations with sales associates are part of the interface through which value is represented and ostensibly flows. And lucky enough for us (the authors), business relies on design to help create these interfaces.

How Business Uses Design to Create Value

Design has been a practice of the human mind since we first started making tools. The value of design probably didn't play much of a role in early economic transactions, which were likely just trading tools for something of more immediate value: food. Over time, design has surfaced as the foundation of many areas of skill that create our modern world. But our belief is that at some point in the evolution of the processes defining and planning for value creation and delivery, design and business aspects became separated and design took a backseat.

Perhaps part of this has to do with the duality of the word *design* itself. *Design* is both a noun and a verb. As a noun, it's the idea, artifact, and outcome of a process. As a verb, it's the process of conceiving, planning, and executing an idea. We associate this dual meaning mostly with the artifacts that are designed—cars, clothes, books, consumer electronics, houses, aircraft, and so on. Most anything human-made has benefited from the design process on its way to becoming real. We believe that the process of design has a high degree of influence on the outcome: Designing aircraft is different from designing clothes. When people who are not familiar or concerned with the process of designing a specific kind of product or

service make decisions about that process (whom to work with, what they should produce, how it should be produced, how trade-offs in cost and effort affect final products, etc.), the value of the final design can be easily compromised. Sometimes the customer is the first to feel the impact of these compromises, and the experiences that this creates can be harmful to the long-term health of the business that provided the product.

Business relies on design. In creating, marketing, and delivering value, design is used to make sure that the end result is what business believes will be effective enough to connect with customers and help them realize the value they are seeking. There are as many kinds of design processes as there are design outputs. But with the focus on the final product, business can be tempted to look for the designers whose portfolios best meet what the business is attempting to do. This can lead to a cherry-picking of design skills that are better at providing a level of style or artifice, as opposed to having a deep knowledge of the process. The trade-off is that the compromises made to the process affect the outcome in ways that are not obvious to business or design but that become all too obvious to customers, much to their dissatisfaction and disappointment.

What's Changing in the Relationship and Why

This relationship between business and design has been great for the design professions. As the interface between businesses and customers takes on new forms, and occurs across new touch points, there are more opportunities for design to play a role in looking at what can be improved. New branches of design can split off from traditional practices. This creates an interesting situation. Business may increase its reliance on design to get things done, but the design processes and the resulting outcomes are harder to coordinate, now operating in parallel, across many aspects of the customer interface.

The result is that businesses spend a lot of money on design services. In many cases, they create permanent in-house design teams responsible for capital-intensive or highly proprietary value creation (where risks, such as security, need to be managed). These internal efforts often operate somewhat independently from external design processes, and are focused in different areas. Some of these internal costs are treated, at least philosophically, as investments, whereas others are viewed as expenses with no measurable return. It is up to business managers to make sure that all of these design services and the outputs they provide are coordinated with regard to creating and delivering value.

On the surface, this makes a lot of sense and allows for a degree of specialization in the design field. Theoretically, everyone is happy. But we believe that this leads to an unintended problem. If business is able to decide what and where design adds value, what is the process to make sure that the total of value and effort, as seen by the most important party—the customer (the final arbiter of value)—is greater than the sum of the parts? Or more important, what is the process to ensure that the individual design outcomes don't conflict with or create problems for each other, leading to an overall outcome that is not even equal to the sum of the parts? If the business managers don't understand the nuances of value or the design process and its effects on the design output, what's to prevent decisions that shortchange the value that design can create? And who identifies when the trade-offs are helpful

or harmful and from what vantage point?

With all this to consider, business may inadvertently be asking design to create the most effective interface between itself and its customers—but in a way that actually makes it more challenging for customers. If the efficiency of this interface is key to the health and well-being of the business, then things get even more challenging for business. Of course, the challenges increase with external pressures as well.

Technology's rapid rate of change provides new problems and opportunities for creating, marketing, and delivering value. The economics of business models can be irreversibly shifted, and what was once a great business can become impossible to sustain. New forms of value can be created, and it's unclear which ones will be successful and which ones are simply novelties with no long-term viability. Some can be very compelling for customers, such as those offered at no cost (or, more accurately, no cost for now). So it's important not only to create, market, and deliver value but also to keep your customers engaged enough that they look to you, rather than a competitor, for value when they need it. (This also means you need to anticipate customers' needs and desires since if you can't provide for them, they will turn to a competitor.) Add more feedback loops to the system, and small mistakes can become amplified very quickly. In one sense, business now must outpace competitors, as well as technology itself.

If it takes more time and attention to understand where technology is taking business and business is not getting the full benefits of design (for example, by creating the right interface to deliver value to customers in a sustainable way that is also capable of growth), then what? Does it make more sense to pull design more tightly into the business? And if design is a horizontal business function, what is the mechanism for ensuring that design within different areas of the business is well orchestrated and that the benefit is greater than the sum of the efforts? What happens when design needs outstrip capacity and you need to outsource some aspects of design, as is the case in almost every company that has a healthy internal design practice and culture? We believe that the answers come from rethinking how business and design work together.

Born from Our Experience

In 1999, we launched a business, Method, Inc., offering design services to help bridge the gap between the process and outcome sides and create more value for our clients. It was our belief that businesses were buying design services based on the outcome they needed (a logo, a brochure, a website, etc.) and then looking for design studios that specialized in producing that kind of output. We believed that businesses should understand that their brands needed to be coherent across all channels and media; otherwise, they ran the risk of diluting the power of their brands. We didn't see a lot of design companies espousing this view at the time, and we believed that this approach would provide more value to our customers and, by extension, their customers.

(Full disclosure: Although the main theme of this book revolves around design, neither of us consider ourselves *practicing designers* in the conventional sense. We both found an appreciation for design, as process and outcome, and even worked as designers. But in the world of design, your success is often largely defined by your output and how celebrated the outcome is. We quickly learned that although we had an affinity for the profession, we excelled more in the process and thinking side and

met lots of very talented people who excelled in the outcome side. We also saw that when those two sides of the design mind worked together, a very different kind of outcome was produced—one that was just as good from a quality standpoint, but even better at solving a problem more effectively.)

One of our first projects involved developing an identity mark (logo) for an Internet start-up. We presented three rounds of design, and the chief executive officer (CEO) of the client company didn't approve any. We spoke with our creative director and cofounder, Mike Abbink, about how the project was going.

According to Abbink, the CEO had initially chosen a direction but, upon seeing it with requested revisions, changed his mind and decided to choose another option—with minor revisions, of course. It happened again with the second choice, on the way to yet another option. It was clear to both of us that the CEO was choosing subjectively and did not have the same understanding of the process or what the real function of a visual identity mark was in building a brand. This was not an uncommon problem. We had seen it while working at other studios and decided to try a different approach. We began to co-create a set of shared business-design criteria with the our clients, before any identity work even started. We then used it in our design approach and whenever we spoke about design with the clients. We were equipping them with the criteria that could help them make a choice. After this change, our clients began choosing the final identity mark from our first-round design presentations all the time.

The takeaway for us was simple. Design and business needed more effective frameworks for sharing, thinking, and addressing needs in order to increase the effectiveness of collaboration.

Around 2007, the concept of brand experience was beginning to gain attention on both the business and design sides of the table. The premise was that broadcasting a message of what a brand stood for and expecting people to take it at face value was the wrong approach. The thinking was that there were multiple touch points that delivered brand message and value, and many of these were shifting from one-way communications controlled by the brand owner to many multidirectional communications controlled by the market.

The common view was that businesses had to better understand the values and perspectives of the customer. Instead of telling customers how to perceive a brand, it was about figuring out where the brand fit in their world and giving them a view into how it should fit. This was about understanding the customer's journey, but it was still focused on the upstream portion of product: marketing and sales.

During this emergence of the importance of brand experience, we began to observe that more and more of our clients were engaging us to develop services, as well as products. And many of these services were delivered through a new generation of networked devices. What was missing from the brand experience equation was that value delivered by a service is different from that delivered by a product. A service requires ongoing perception of value by the customer, or the customer stops paying for it, unlike a product, which is purchased once. And these services that were delivered across devices had to ensure that there was parity of value across the devices. Each device was essentially becoming a service channel, in addition to being a product in its own right.

Brand experience was more concerned about the consistency and coherency of the brand and providing an authentic connection with the market. But what was happening after the sale was made? How was a business ensuring that the myriad of points within their value interface were working in their favor?

Working with Robert Murdock, our chief creative officer at that time, we began to look at how product and service design needed to address the entire customer life cycle, rather than focusing only on tactics for winning a sale. More important, we had to find ways to keep customers engaged and to grow the relationship. We were seeing this very problem play out in ways that linked innovative consumer electronics, conventional media services, and start-ups. It was clear that this same problem was moving through every industry.

In 2009, we began sharing our perspectives about our learnings through a series of white papers and salons that we called Method 10×10 (not exactly original but adequate in that we did it to celebrate our tenth anniversary and we originally set out to do just 10 papers). One of the later papers in this series raised the question: Who in today's modern enterprise is really responsible for managing the customer experience? The title of chief experience officer is relatively new and certainly not ubiquitous. It raised the question: What systems and processes do they manage and by what criteria? And if the answer is through top-down mandate, one has to wonder how effective a top-down mandate will be in today's complex, ever-changing business environment.

Our Views on Experience Design and This Book

We believe that the requirements facing businesses today and the role that design can play in helping them meet those requirements are different from the past. We believe that a change in how business and design collaborate will come through a combination of top-down and bottom-up efforts. But to be most effective, there will need to be some common understanding and shared perspectives so that those who are closest to the change can help it thrive. For this to happen, there needs to be some kind of a framework that allows business and design to more comfortably achieve goals and share processes that make it easier for either business or design to implement.

We have therefore decided to share our experiences and thinking in order to advance the conversation and propose a new way to look at the intersection of business and design.

What We Mean by Experience Design

This book is primarily about looking at value through a new lens. We believe that looking through this lens will become increasingly relevant in the future. And although not all businesses have had to use it at all levels of their enterprises, we believe it should now be part of every business practitioner's tool kit. This lens is experience design.

Basic Overview

What do we mean by the concept of experience design? Experience design is taking a more systematic approach to how design and business look at opportunities, frame problems and projects, and evaluate solutions. The goal of this approach is to ensure that customers are receiving and recognizing the maximum value in a way that also keeps them engaged with the business.

Experience design naturally assumes it makes sense to provide adequate levels of

quality in customer service at all stages of a customer relationship. But it goes beyond simply planning for adequate and encourages thinking about delivering value and growing engagement. Experience design's range does not stop at the activities in a specific channel or pertain only to things directly in the business's control. In fact, experience design should help customers get more value from the products and services they buy, not just by improving usability, but by unlocking options and potential.

How It Can Be a More Effective Approach

A fundamental aspect of experience design is realizing that experiences are tied to the passage of time: How we interpret what is happening at a particular time, what it means, how we feel about it, and what the meaning implies in regard to our future actions form our experiences. It's easy to assume that anyone developing or designing a process is thinking through the lens of time, and to some degree, this is true. But a key question is, How thoroughly are they using time as a context, and what are they doing with it? And most important, how are time and value related?

We continually see both business thinkers and designers choosing the wrong frame for using and evaluating time. Most often, time is considered from a very local and short-term perspective, for example, looking at the flow of interaction between different steps of a service or envisioning what a customer's first-time use is going to be like. They rarely think about whether the choices they make still make sense when the customer is using the product or service for the 50th time, 100th time, or even last time. Business thinkers and designers usually consider the minor problems a user may have, but not the major problems. They look at what the marketing campaign needs to say, but they don't necessarily connect it to what goes on when the user first opens the box upon returning home or uses the service for the first time. The proper consideration of time is often precluded by the predefined project scope, and the collective inexperience of the designer and client. The result may be that the project fails to meet its objectives, or worse, that the problems are never addressed, and remain unseen until they are experienced by a customer. When important options are ignored, short- and long-term goals can become disconnected.

Connecting value identification, creation, delivery, and support from brand through to product/service offerings across the entire lifetime of the customer relationship requires thinking about the relationship of time and value. The objective is to build an understanding of how to look at opportunities, issues, strategies, and tactics. And that's precisely what we believe experience design can help business and design achieve.

What This Book Isn't

The key to higher levels of customer engagement is through experiences that deliver value and provide a reason and a means for further engagement. But this book is not a checklist of tactics to improve key performance indicators or empirically measured ways to improve engagement at collaborative touch points with designers. "Why not?" you may ask. "That would be incredibly valuable!" We agree. We believe that this is a constantly moving target, and any such list would quickly become out of date. We also believe that many of these kinds of tactics become more self-evident when you view options and requirements through an experience design lens.

FYI: We have chosen not to base everything in this book on case studies. We

will cite examples that we think are important in terms of explaining a point, but using case studies to prove a point can be problematic. On one hand, it would be easy to cherry-pick the case studies that support a point and ignore those that challenge it. And in many cases, the relevance or validity of a case study can change over time; what seemed like a brilliant decision and a success story at one point might prove to have been a wrong move in retrospect, despite the sound logic, clear foresight, and suitability of the choices made at the time. If you think that a business book needs real case studies to be valid, consider the fact that several very famous business books are alleged to be based on fictitious case studies or fabricated data.

This book is not a catalog of design techniques that generate an emotional response. There are times when using such techniques is very smart, and it is quite challenging and interesting to keep identifying new ways to do this. But we believe that if there isn't sufficient value to begin with, these techniques by themselves do not create long-term engagement. In fact, they may actually shorten engagement as they become expected and are seen as affectations, distractions, or wastes of time. Many designers and buyers of design services look at these techniques as being what experience design is all about, but we strongly suggest that this is a myopic view and that approaches that target emotional responses be used to increase real value, not as a substitute for it.

What This Book Is

We hope that anyone who finds this book reads it in its entirety with the aim of understanding a view of how business and design can be more successful working together. We also hope that the basic thesis provides an interesting view that can be adopted, adapted, and made better. We don't propose that this is the thing that has to happen or your business is doomed. Nor is it the definitive way to think about experience design. We simply hope that what we are putting forth here provides some insight that is useful for others, even as a reference tool. To that end, we have tried to write it in such a way that allows people to jump in and out of sections that seem most relevant to their needs.

The book is divided into three sections. The first section is intended to set the context for why experience design makes sense when looking at the intersection of business and design. Chapter 1 looks at how the role and purpose of design have been evolving over the past century or so, specifically how and why the requirements and opportunities for design to help business have been changing. Chapter 2 looks at how the notion of value, through products and services, has been changing and what this means for businesses as they think about how to better engage customers. Chapter 3 explores what is changing for business and how business's initial reaction to chase innovation is only a partial solution. The fourth and final chapter of this section presents experience design as a concept and explains the basic principles involved in thinking about things from this perspective. It is our hope that by providing a background to the concept of experience design, we will help readers better consider the need for and potential benefits of the concept, rather than simply seeing it as another flavor of strategy development.

The second section is intended to provide some tools and frameworks that can help business and design begin to apply the experience design concept at strategic and tactical levels. These tools and frameworks are ones that we have either adapted or developed over the years with a focus on establishing shared views on framing

problems and evaluating solutions. We think that both the business-minded and the design-minded will find value in these as they help frame problems in ways that allow you to take an experience design approach to solving them. Chapter 5, which leads off this section, addresses how brand can be integrated into design in ways that go deeper than simply applying a logo or following brand guidelines. The goal is to unlock brand from mere branding and give a rationale for how to plan for reinforcing brand meaning, as well as how brand can help drive innovation. Chapter 6 provides ways of ensuring that products and services deliver upon and reinforce the meaning of the brand and discusses how taking an experience design approach can help identify options that should be planned for, even if they aren't used immediately. Chapter 7 presents a way to look at the entire customer life cycle with the goals of both creating a more holistic and seamless experience and planning how to more effectively engage customers. The section closes with Chapter 8, which suggests how the thinking behind the tools and frameworks in this section can be integrated within an overall experience design perspective.

The third and final section is focused on enabling business to begin to adapt and put experience design thinking into action internally and in their collaboration with design. In Chapter 9, we suggest ways of beginning to educate businesses on how to use experience design thinking in a broader sense than just for design projects. We talk about how to begin to grow internal advocates and get experience design working before design even occurs. Chapter 10 focuses on how experience design can change how and when to engage an external partner and what kind of engagement models work best and why.

Final Thoughts before Starting

We didn't set out to write this book with the hope of it being the next big thing, nor do we believe that business needs to understand what we are saying and implement immediately (or not—at its own peril). This isn't a justification for why our company is the logical design partner for your next design project or an annotated historical overview of the work we've done for our clients.

We were drawn to the design profession because we loved how form and function could be balanced and how doing this successfully also reflected the application of natural curiosity, empathy, and appreciation for the power of systems. It's a very humanist profession—in our eyes, the perfect balance of the rational and the creative. Perhaps best of all, there is never a shortage of problems against which one can apply oneself.

This book is not meant to be an argument for business to hand the keys of the kingdom over to design. In fact, we think that would probably be the exact wrong thing to do, because design is just beginning to become aware of the changes in thinking and approach that it needs to take. But we've also become aware that for design to make this change, we need to help our customers understand why this change also makes sense for them, and need both sides—design and business—to start a new conversation that reflects the times we live in and the future we currently see ahead.

Section I

Context

The execution of an action by no means proves that we know, even superficially, what we are doing or how we are doing it.

If we attempt to carry out an action with awareness—that is, to follow it in detail—we soon discover that even the simplest and most common of actions, such as getting up from a chair, is a mystery, and that we have no idea at all how it is done.

—Moshé Feldenkrais¹

Moshé Feldenkrais was a Ukrainian-born, French-educated physicist who helped the British improve sonar during World War II and later developed an approach to physical therapy that he practiced after moving to Tel Aviv in 1954. Feldenkrais therapy is a form of physical therapy that begins with raising self-awareness in how movement is occurring and then using this awareness and a gentle guiding of new ways of moving to overcome physical problems. Modern understanding of the relationship between the brain and the body acknowledges that the body is capable of much movement, completely independent of conscious thought or even any awareness of what is actually going on. To some degree, there may even be aspects of movement that are hardwired outside of the “thinking” brain.

Before any change can begin, there needs to be an awareness of a current state from which one is changing. A lot of what we see as customer experience, and how business approaches it, seems to be based on a response that is largely going through the motions. It’s something that everyone does, and often you simply improve what you did before or look around and see what others are doing and adopt aspects of it. The nature of the relationship between business and design that this creates also seems to occur without a real awareness of what’s actually going on. Much of our thinking about experience design is based on the belief in the appropriateness (and necessity) of asking, “Why?” Why do we do things the way that we do?

There’s a story we heard about a behavioral study in which five monkeys were put in a room with a banana hanging from the ceiling by a string. The only other thing in the room was a chair, which was high enough that a monkey standing on the chair could reach the banana. There was also a way for the observing team to spray the monkeys with ice-cold water if they tried to stand on the chair to reach the banana.

A short time after the monkeys had been trying to get the banana and after all had been uncomfortably soaked, the monkeys started to get wise. They stopped climbing on the chair. The researchers would then remove one of the monkeys and bring a new one in. Whenever the new member would try to go for the banana, the others would prevent it from getting on the chair. After a period of rotations, all of the monkeys who were in the first round had been replaced, yet the remaining monkeys would prevent any newly introduced monkey from climbing on the chair, even though none had firsthand experience of being sprayed with the cold water.

This story is based on a real research experiment, although the way the experiment was conducted was slightly different and the results weren’t quite as dramatic as the version of the story we heard led us to believe. But when we first heard the story, it was easy to laugh with a sense of recognition and acknowledgment—we have all seen analogies of this kind of behavior in people (including ourselves). We sometimes ask clients why they believe a particular line of thinking is appropriate to follow and how they know that the situation they’re in is the same as the one in which the original thinking was applied. Often, they can’t really answer (in most cases they recognize the fallacy of assuming that it does).

The purpose of this section is to provide some context around the influences that informed our approach to experience design, followed by the basic components of experience design itself. This background will help bring meaning to the frameworks and tools in Section II, which will help ground your efforts as you begin to experiment with integrating brand, experience, value, and changing the way that business and design collaborate within a given situation. By providing a solid understanding of how we arrived at our approach, we aim to make these frameworks and tools both accessible and effective to use.