

This is an automated transcript without any guarantee of accuracy

there with Adaptive Path so we did not  
Adaptive Path did not start as a strategic company  
we were a web user experience firm  
we were design firm um  
but when clients would come to us uh to do design work  
we often asked a lot of questions  
and they didn't have answers to those questions  
and so  
we had to then get those answers to those questions  
and that was often through things like user research  
and prioritization exercises and  
and other things and we kind of backed into strategy  
because we realized that you couldn't do good design  
without having the strategy  
well articulated or else  
you were just gonna be throwing stuff against the wall  
and hoping that it sticks  
fifteen years later  
a lot of people still throw stuff against the wall  
and hope that it sticks  
and not everyone's Learned that lesson but  
but again this is kind of when I mean by accidental  
that wasn't the goal  
the goal was never to be a strategist  
the goal is to put something out in the world  
but it turns out  
in order to put good things out in the world  
you need to step back  
and you need to have something of a strategic bent  
the first one is around prioritization  
probably  
the single most important thing a strategist can do  
is help an organization prioritize  
I have not been in an company  
since I left Adaptive Path  
nor have I had a client when  
I was at Adaptive Path  
that wasn't trying to do too many things  
with the people resources that it had  
and so prioritization becomes key  
if you don't wanna spread folks too thin  
uh and  
and this is a lesson  
I just relearn over and over and over again uh  
and I think that's one of the areas where strategy  
and strategists and UX strategy in particular  
can be extremely value

valuable is helping organizations  
is informing that prioritization  
so  
the way that we ended up doing a lot of prioritization  
in Adaptive Path was a simple 2 by 2 grid  
when we started this was an actual  
it's an actual one from an actual client  
um uh  
it's a little bit hard to see  
but we had this uh  
the y axis was importance  
low importance to high importance and the X axis was  
we called it feasibility  
low feasibility to high visibility  
basically what were you know  
so importance to the business  
and then how likely were we able to make a real change  
for that thing in this project or in this space right  
so this was for we were redesigning the website  
for a financial services firm  
and one of the things that we realized is  
there's things that were important retaining uh  
in financial advisors retaining high value clients  
that we weren't gonna  
actually have a lot to be able to impact  
those are those are  
those are relationships that happened  
outside of the website  
and so while it's important to the business  
we had to recognize  
we're not gonna design to try to support that  
because that's a fool's hand  
what we're gonna do is work on the things  
in this upper right hand corner  
where we think not only is it important  
we can actually make a difference  
one of my my  
actually my last project Adaptive Path was uh  
for Disney working on their uh website  
their uh  
Disney Store uh site  
um and throughout our time in the afterpath  
we did a lot with design principles  
and experience principles um  
and my the  
my favorite ones it turned out was the one I  
the last ones I ever delivered an adaptive path uh  
I was looking for others but this  
these were the ones that held up best  
and you

probably all are familiar with experience principles  
right a set of statements that you try to uphold as you  
as you uh  
kind of then execute on the design  
um and it's a  
for me a key point of strategy  
right because it helps bring a team together  
helps orient them not just your team  
in this case for us and the client team  
but also as as you go from design to development  
etc you always check back on these principles  
to make sure that you're living up to them  
so we had six don't break the spell  
which was basically like it has to stay up  
it can't be broken  
no 4 o fours no weird errors all those types of things  
um deliver uncommon service and improve specialness  
this was a key to the experience  
because they wanted Disney  
Store to feel more like Nordstrom's  
and less like Toys R Us uh  
uh uh distinct personality  
this was uh this was something that I don't often  
this isn't a principle that you get to do a lot of  
but because it's Disney  
and they have all these amazing characters  
you can kind of take advantage of those personalities  
and and do something with them  
and then finally this came out of our research um  
we realized that people buying products in the Disney  
Store was not about buying the products right  
it's mostly moms occasionally other um  
um like grandparents or aunts and uncles etc  
usually a relative buying it for a child and they're  
they're not interested in the product  
they're interested in a relationship  
that they have with this child  
that the product can help kind of manifest right  
and so kind of  
providing that fulfillment  
and connection between the people was important  
one of the ways this pour out  
I forgot to  
to grab the screenshots from this and I apologize  
um but you know  
with this set of principles  
we then went on and we did a bunch of ideation  
and one of the concepts one of the stories we ideated  
was around a grandmother  
who lives kind of far away from her grandchildren

goes to a store tries to find a product  
doesn't know what to what  
doesn't know what to buy for grandson  
doesn't know what he likes  
take some pictures we use the  
the Disney website in order to have a back and forth  
between the grandmother and mother  
and the mother the mother says you should buy this one  
so the grandmother buys it  
ships it to the mom to be delivered on Christmas  
the insight that we were able to do  
to have around this kind of fulfillment and connection  
was that you know  
it's kind of unfortunate  
the grandparents can't be with their grandchildren  
on Christmas Day when they're receiving their present  
but we now have cameras in each of these gizmos  
and all of our phones so what we did  
what we realized is why don't  
as part of the checkout process  
checkout process  
allow the grandparents to record a video  
branded video  
but then there's a little short form URL that you can  
uh type in Christmas morning and you can be there right  
the grandparent can kind of be there Christmas morning  
whenever that present is open and  
and wish the child a Merry Christmas  
um this is one of those  
kind of  
goofy ideas that you develop in concept generation  
but the client really loved it  
and so we kept kind of designing for it  
and the client kept loving it  
and then when they launched it a year and a half later  
it was still there  
they actually created the technology  
in order to support this connection  
because they realized how important it was  
and I actually think these experience  
principles were key to making clear  
how important it was to to again  
not be about the product but be the  
be about the connection between people  
another exercise that I've had a lot of success  
and happiness with  
this actually doesn't come from Adaptive Path  
this comes from the first company I was at  
after I left Adaptive Path  
called with the company was inflection

and this was a product called archives  
is the design the box exercise  
um and this is kind of filling in  
for any of those kind of big team  
co creation exercises  
I find design the box to be a particularly powerful run  
right and that's idea of  
if your thing that you're designing was in a box  
on a shelf what does that box look like  
and I find that this activity really uh  
is great for getting a lot of things  
that are buried in people's minds  
out of their heads uh  
you break up into teams so each team designs a box  
so you have a set of conversations at that team level  
and then you bring it all together  
and you have the whole team  
and have a set of conversations about these boxes  
and then you have this physical artifact that is there  
that you can't forget that kind of manifests uh  
what it was you were thinking about the reason I  
I'm pulling this one up is  
you know we were working on archives  
com was kind of like ancestry like a cheaper ancestry  
com it was a family history site  
and we had a project that we were launching called  
we called it Super Awesome Family Tree  
you can still see it on that box over there  
and this idea was to create a really great  
family tree experience uh  
which frankly there are none uh  
if you go to genealogy sites  
they're all clunky and slow  
and they're all using outdated technology  
and it's like  
wouldn't be great if it kind of used the latest and  
web standards to take advantage of it  
so we broke up and we did this box exercise  
and something very interesting happened  
I don't know if any  
if anyone recognizes it looking at these three boxes  
what what  
what did we realize going through this process  
that we didn't know beforehand  
there's no family fucking trees haha