

Let's Talk About Strategy: Factors in establishing UX strategy

Challenges and opportunities in defining and establishing UX strategy

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UX strategy is an indispensable part of UX management. However, several practical questions exist for many UX professionals: Which levels, departments, and job roles impact UX strategy, and on which of these does UX strategy have an impact in return? Which factors play a role in establishing UX strategy? We conducted a workshop with UX professionals to find answers to these questions. Our results indicate that UX strategy relates business and UX, and thus covers a large variety of areas. However, we also discovered significant uncertainty about how to create and establish UX strategy. From the UX professionals' points of view, there is a high need for creating awareness for UX strategy, both within and outside the UX community, and especially in C-level management. Based on the results, we derive recommendations and follow-up steps for further engagement with UX strategy.

Additional Key Words and Phrases: UX strategy, UX management, interconnections of UX and business

1 INTRODUCTION

With the increasing business relevance of user experience (UX), interest in UX strategy as a discipline at the crossroads of business and UX has been rising in recent years. Numerous definitions, processes, and tools are available. However, research insights and best practices about UX strategy are scarce. This scarcity makes it difficult for UX professionals to learn from each other and build on each others' insights. It is the aim of this paper to contribute to addressing this scarcity.

Given the rising interest in UX strategy, but also the outlined open questions, a working group on UX strategy formed at the German UPA in 2022. The working group currently has five aims:

- raising awareness of UX strategy, both inside and outside the UX community,
- evaluating the status quo, discovering current flaws, and developing guidelines for UX strategy,
- providing opportunities for sharing experiences related to UX strategy,
- working on methods and tools for UX strategy, and
- identifying factors that impact UX strategy.

The present paper addresses the latter aim and is the result of a collaborative workshop at the Mensch & Computer conference 2022. We collected UX professionals' feedback about definitions and aspects of UX strategy, identified mutual influences in UX strategy, and collected factors and experiences for implementing UX strategy. Besides these results, we contribute recommendations and follow-up steps for further engagement with UX strategy.

2 RELATED WORK

UX strategy describes the high-level plan to reach UX-related goals. It is a vital component of UX management curricula, such as in the courses "Strategic Experience Design" (FH Johanneum), "CAS UX Management" (OST Rapperswil-Jona), and the UX manager certification (Haufe Akademie). Besides the term "UX strategy" [1, 8, 9, 15], other terms exist,

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53 such as “Human-Centered Design (HCD) strategy” [14] or “experience strategy.” In the present paper, we will use the
54 term “UX strategy” for two reasons: First, it is widely used, and second, discussing the advantages and disadvantages of
55 different terms is not the scope of the present paper. Furthermore, we will mostly use the singular “UX strategy” to
56 refer to the general concept, although organizations can have multiple UX strategies for different purposes. However,
57 we also want to emphasize that a detailed discussion of terminology would be worthwhile on another occasion, as it
58 might contribute to clarifying various uses of the term “strategy” in the context of UX.
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60 In several meetings, the “UX strategy” working group went through a range of UX strategy definitions to identify the
61 following key ingredients of UX strategy. We used these insights to devise a draft definition and six aspects to further
62 engage with UX strategy (see RQ 1).
63

64 2.1 UX strategy as the plan towards a UX vision

65 Several authors emphasize that UX strategy acts as the plan for realizing a particular UX vision. For example, Anna Kaley
66 and Sarah Gibbons (Nielsen Norman Group) define UX strategy as all the actions aiming to improve an organization’s
67 UX [8]. UX strategy can cover a wide range of application areas and relate, for example, to a single product or an entire
68 organization. The authors provide a UX strategy framework consisting of three components:
69

- 70 (1) A **vision** as the fundamental direction in which the UX should develop,
- 71 (2) **goals** and associated measurements (key performance indicators or KPIs) derived from this vision, acting as
72 guidelines to check whether the organization is moving in the desired direction,
- 73 (3) and a **plan** describing the actions that the organization wants to take, acting as the path towards the vision.
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78 2.2 Iterative UX strategy based on user research

79 Jamie Levy describes a product-centered vision on UX strategy while also acknowledging that the term is often used to
80 refer to processes at the organization level [9]. Levy defines a UX strategy framework with four tenets:
81

- 82 • Business strategy is the foundation of UX strategy, where exceptional UX can differentiate the products or
83 services of one company from the competition.
- 84 • Changing market dynamics require value innovation, for example in disruptive markets. Levy outlines how UX
85 and business models can intersect to create such value innovation.
- 86 • User research is another key component in Levy’s framework. Rather than aiming for a “perfect plan,” UX
87 strategists should constantly check the success of their strategies and adapt them as needed. This includes
88 accepting failure and testing different ideas for solutions.
- 89 • The final tenet of Levy’s framework is creating UX without friction. As Levy puts it, UX enhances the lives of
90 users by empowering them to do something, and a UX designer’s job is to remove friction that might hinder
91 users [9]. This turns UX into a differentiating factor for a product or service, as indicated below.
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97 2.3 UX strategy as a differentiating factor in business strategy

98 Interaction Design Foundation posits that UX should support whatever ultimately differentiates a particular product or
99 service from the competition and puts this thought at the center of UX strategy. Aligning UX strategy and business
100 strategy is vital, and the company vision serves as a check to see whether the UX strategy makes sense for the
101 organization. Ultimately, UX and UX strategy are supposed to contribute to business objectives [1].
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3 METHODOLOGY

We performed a workshop for UX professionals during the conference Mensch & Computer 2022 in Darmstadt, Germany. The workshop was open to all participants, and roughly 40 participants joined the session.

3.1 Research Questions

Our workshop had three research questions (RQs):

- RQ 1 – Definition and aspects for UX strategy: As a step towards further quality assurance, we wanted to collect UX professionals' feedback about our definition and aspects of UX strategy.
- RQ 2.1 – Mutual influences in UX strategy: Which levels, departments, and roles impact UX strategy, and what does UX strategy have an impact on?
- RQ 2.2 – Factors and experiences for implementing UX strategy: According to UX professionals, which factors play a role in the implementation of UX strategy?

3.2 Procedures

Regarding RQ 1, we proposed a definition of UX strategy with six main aspects based on the literature review and members' experience. This proposal was reviewed during the workshop (approximately 30 minutes).

Regarding RQ 2.1 and 2.2, the participants split up into four groups and discussed our research questions 2.1 and 2.2 for 25 minutes each. They recorded their findings on sticky notes with the help of prepared templates on brown paper (see materials). Working group members moderated the discussions and ensured that the key points of the discussion were documented on the sticky notes. Finally, each group shared key findings. All templates were collected and digitized for analysis. Fig. 1 shows an example (in German). Digitized versions of all boards are available as supplementary files.

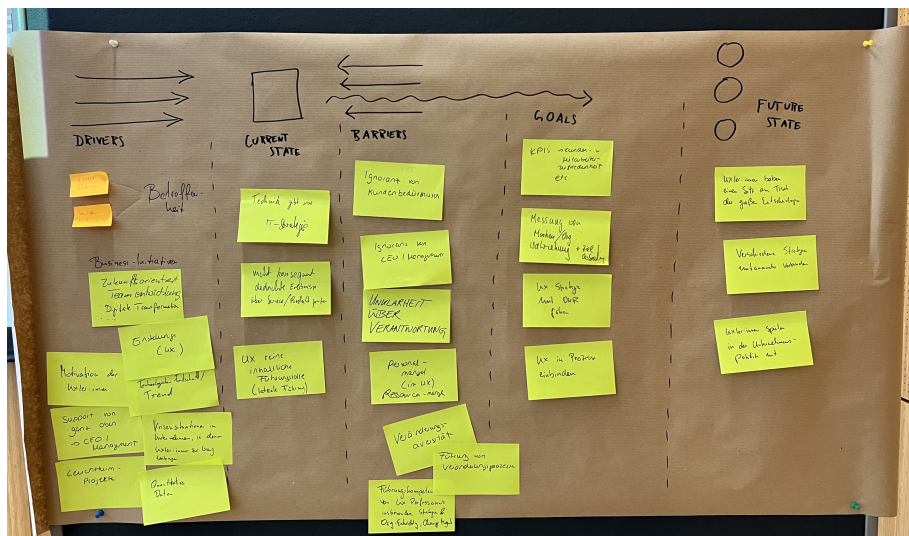


Fig. 1. Example of a filled template with sticky notes (for RQ 2.2)

3.3 Materials

We created two templates (see Fig. 2). Template 1 resembled a table with two columns to describe what impacts UX strategy and what is impacted by it. For the three rows, we were interested in collecting job roles and departments in the organization (row 1), documents, deliverables, and activities (row 2), and other important considerations not yet considered (row 3). For template 2, we built on a visualization created by Austin Govella [5] with five factors:

- drivers (what motivates an organization to work on UX strategy),
- current state (where the organization currently is),
- barriers (factors that hinder an organization to work on UX strategy),
- goals (what an organization wants to achieve with UX strategy),
- and future state (the vision where the organization wants to go).

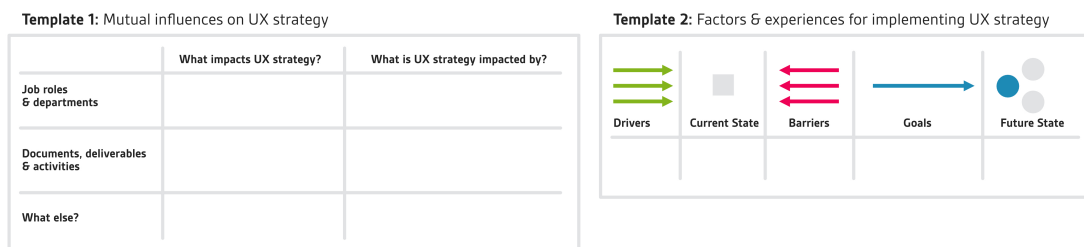


Fig. 2. Visualizations of our templates

3.4 Analysis

We performed three steps for analysis:

- (1) First, the working group went through the results together and collected findings in an affinity diagram.
- (2) In order to explore the results in more depth, three of the authors independently went through the results again and created further affinity diagrams.
- (3) Finally, the three authors presented their affinity diagrams and discussed similarities and differences with the rest of the working group. As an additional quality assurance, we compared our individual affinity diagrams with the prior collaborative affinity diagrams.

4 RESULTS

4.1 RQ 1: Definition and aspects for UX strategy

During several meetings and based on the outlined related works, our working group developed a work-in-progress definition of UX strategy, together with six aspects to define future work on UX strategy. UX strategy (see Fig. 3) is the human-centered orientation of an organization. It considers the organization itself (e.g., error culture), the humans (e.g., users, customers, employees), and the technology (e.g., the product and development), with the aim of creating positive experiences for all stakeholders. The idea of aligning the needs of humans with business objectives is well established in UX strategy, but it is also vital to consider technology to enable true innovation. These areas influence each other,

and the resulting positive experience ideally acts like a loop creating further value. UX strategy mainly addresses “how” to go about creating these positive experiences.

UX strategy is in close relation to the vision and mission. The vision describes “where to go”: the aims of the organization. The mission describes “why” the organization exists: its core purpose, what it intends to achieve. UX strategy is based on empirical data [9], and translated into UX activities with success measurements (“what” is done).

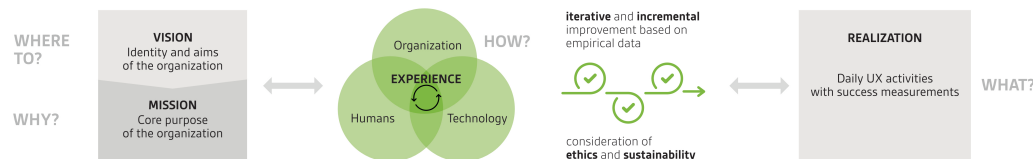


Fig. 3. Work-in-progress definition of UX strategy

During the discussion, participants emphasized that the distinction of different layers of UX strategy is helpful (such as products, teams, and organization). Furthermore, questions arose whether vision and mission should be considered a part of strategy, given their close relation. We discussed six aspects of UX strategy to shape future work.

4.1.1 UX strategy can be part of the product and service level. Various UX strategy definitions highlight its applicability to organizations, products, or services. This involves integrating experiential quality into design, alongside features, and is related to the "experience economy" theory. The theory explains how experiences can become an economic good in their own right along with commodities, goods (or products), and services [11].

The example of "beer" can illustrate the concept of the experience economy. One can buy raw materials to brew beer (commodities), purchase finished beer products (goods), or enjoy beer as a service in restaurants. Moreover, beer can be a central part of events (beer tastings). The experiential quality of a product or service has economic impact, for example when customers decide what price they are willing to pay, when they prefer one beer brand over the other based on better experience, or when they assign emotional value to the activity of "brewing beer" (beyond the mere outcome, such as hobby brewing). Thus, experience becomes strategically important for products and services.

However, this raises questions about the relations of UX and product strategies. Some participants viewed UX strategy more on the level of organizations for this reason. Another point of discussion was whether UX strategy also exists on the level of individual teams rather than an entire organization.

4.1.2 UX strategy acts as a bridge to other disciplines. UX strategy addresses the human-centered orientation of an organization and aims at defining points of contact between UX and other areas. In order to achieve this, UX needs to be firmly established in the organization. UX strategy also needs to translate UX considerations into "business language". In this sense, UX strategy is the "bridge" or connection between people's experiences (whether they come into contact with the organization from inside or outside), the business (and its goals), and other areas (for example, information technologies). During the workshop, the participants particularly emphasized that UX strategy creates a bridge to branding. How far can UX make the brand experienceable and give it a unique voice to the customers? This idea connects to the concept of brand experience [3, 13] and seems like a promising area of further research.

261 4.1.3 *UX strategy is transformative.* Often, UX strategy's goal of human-centered orientation of the organization
262 involves transformation of the organization. The goal of this transformation is to adapt the organization's structure and
263 processes so that positive experiences are more likely to occur for the people interacting with it (UX or HCD maturity).
264 Thus, an organization transforms into an "outside-in organization" [2]. People working in UX strategy need to ensure
265 the buy-in of managers and colleagues for the transformation, and are thus confronted with change management issues.
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268 4.1.4 *UX strategy creates balance.* UX strategy ties in with other disciplines. In doing so, it naturally advocates for
269 UX, but can also become a harmonizing factor for other disciplines. The human-centered organization is key to create
270 this balance. In their daily work, employees often need to decide how they should behave in a specific situation. UX
271 strategy can support consistency in behavior by defining priorities [7]. For example, when employees know that their
272 organization considers customer satisfaction to be more important than revenue, they can infer that providing a discount
273 to a customer is acceptable in case of doubt. As a balancing factor, UX strategy can compare the impact of decisions on
274 the experience of customers and users. Potentially, we could use this impact on experiences to define typical "experience
275 patterns". These patterns could illustrate how certain behaviors affect the overall experience of users or customers, and
276 thus serve as a blueprint to guide employees in their daily work.
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280 4.1.5 *UX strategy is long-term, yet iterative.* UX strategy describes possible ways to make a UX vision become real.
281 This includes continually reviewing UX strategy and learning what is effective. UX strategy is thus both iterative and
282 incremental. Over the long term, UX strategy focuses on lasting value and aims to achieve lasting positive results. In
283 this sense, UX strategy is related to sustainability: Acting strategically in UX means not to neglect future generations,
284 long-term health and well-being, other living beings and natural resources.
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288 4.1.6 *UX strategy acts as a guide.* By pointing out possible ways to realize a vision, UX strategy acts as a guide or
289 compass aiming towards positive outcomes. UX strategy is always related to the question of what these "positive
290 outcomes" actually are. As a consequence, UX strategy has an ethical dimension: it is not just a matter of doing what is
291 profitable, but about the entire dimension of human-centered quality. Such quality can be related to profit, but is not
292 limited to it. "What is worth doing?" as well as "For whom?" are therefore very central questions of any UX strategy.
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295 4.2 RQ 2.1: Mutual influences in UX strategy

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297 Our workshop revealed several factors that influence UX strategy or that are influenced by UX strategy. Regarding
298 job roles and organizational areas, our participants identified multiple stakeholders who impact UX strategy, as the
299 stakeholder map outlined in Fig. 4 demonstrates. These stakeholders include both internal (e.g., CEOs, HR, Legal
300 departments, designers, PR, etc.) and external stakeholders (e.g., customers, business angels, journalists, etc.). This
301 finding underlines the importance of considering the external perspective on UX strategy.
302

303 Regarding documents, deliverables, and activities, the workshop participants emphasized that UX strategy is closely
304 related to the "DNA" of an organization and needs to be aligned with business strategy. Consequently, business strategies
305 appeared frequently as relevant documents. However, the product-centered view of UX strategy was also put forward,
306 for example by referring to product visions, product strategies, and other product-related documents like epics or MVPs
307 (minimum viable products). The business relevance of UX strategy led to a strong emphasis on metrics, user feedback,
308 tracking data, Key Performance Indicators (KPIs), and conversion rates, although the discussion revealed insecurity
309 about defining appropriate success measurements for UX strategy.
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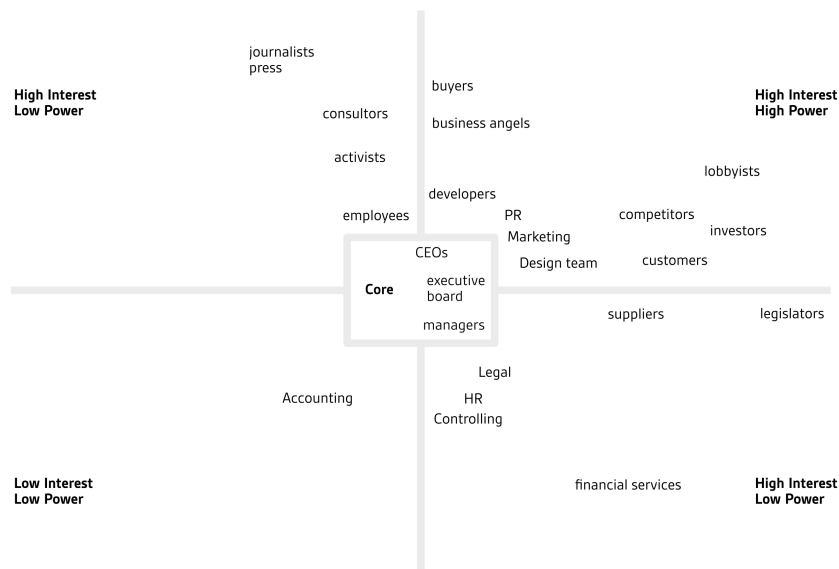


Fig. 4. Stakeholder map

Similar to discussions for RQ 1, some participants established a relationship between UX strategy and branding (e.g., brand experience). Two aspects were interesting: First, not all groups established this relationship. This makes us wonder whether the topic might not be established enough to create sufficient awareness in the UX community. Second, while the topic was mentioned, groups rarely elaborated on it deeply.

Regarding other factors, participants discussed the role of employees, for example their motivation, training, autonomy, and collaboration methods. Organizational culture, processes, and budgets were other important factors.

Finally, we want to comment on aspects that UX strategy impacts and those that it is impacted by. A striking observation is that UX strategy is impacted by internal processes or actors (like business strategy and management). In turn, there are four main areas that UX strategy impacts: product-related job roles (e.g., UX, development, content teams, product teams), Human Resources (HR) and related processes (e.g., training plans), organizational culture (e.g., its ability to learn, collaboration), and growth. These insights underline UX strategy's role as a bridge.

4.3 RQ 2.2: Factors and experiences for implementing UX strategy

In the following, we will identify the factors following the framework of Austin Govella [5] outlined above.

4.3.1 Drivers. We identified four main clusters of drivers. First, workshop participants emphasized the importance of a specific context for supporting UX strategy. Higher UX or HCD (Human-Centered Design) maturity was identified as a key factor [14], along with CEO and C-level management support. Having a clear general business strategy is essential, as well as a solid understanding of the value of UX strategy. Second, external drivers, such as shifts in economic markets, increased competition, technological progress, and user feedback, can encourage work on UX strategy. Third, internal factors include that organizations need to recognize the necessity for UX strategy, which often arises during crises, where UX can prove its problem-solving potential. Hence, UX professionals should take a leadership role and advocate for UX strategy, regardless of official appointments.

365 4.3.2 *Current state and future states.* As UX strategy defines the path from a current state to an envisioned future
366 state, the participants emphasized that UX strategy needs a baseline measurement of the current state. However, this
367 baseline measurement raised open questions, mainly regarding adequate metrics and industry benchmarks. Similarly,
368 numerous questions appeared regarding success measurements for the future states, such as “How to select appropriate
369 Key Performance Indicators (KPIs)?” or “Are there relevant standards for measuring the success of a UX strategy?”
371

372 4.3.3 *Barriers.* Barriers for UX strategy often appear when the necessary context outlined above is not given. For
373 example, a major barrier for UX strategy is when organizations have low UX maturity. When the value of UX is not
374 generally established in an organization or when other areas take precedence, UX strategy is difficult to implement.
375

376 However, numerous barriers appeared that also apply to situations where the necessary context for UX strategy is
377 given. For example, the participants shared that UX-related projects are often too short-term. This short-term focus can
378 make it difficult to integrate a longer-term strategic perspective. A barrier is also the need to involve all stakeholders,
379 which is often difficult because UX professionals often do not have the formal authority to drive changes. This raises the
380 need to develop leadership and motivation skills. Change management is a further key aspect of UX strategy, especially
381 when the composition of a team changes. Change is difficult and evokes aversity, and incentives are needed to motivate
382 people to follow the path outlined in the UX strategy.
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385 4.3.4 *Goals.* As a main goal of UX strategy, the participants outlined the vision of a human-centered organization
386 where UX is deeply embedded in all processes. Such an organization is driven by the needs of customers, users, and
387 other stakeholders, giving them equal weight like internal business considerations.
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390 5 DISCUSSION

391
392 In our workshop, we found a strong interest in UX strategy. Participants emphasized that UX strategy relates business
393 and UX, balancing humans, organization, and technology. UX strategy covers a large variety of areas and connects to
394 different departments, job roles, and stakeholders. Beyond these results, the workshops revealed numerous aspects
395 worth discussing. In the following, we will first concentrate on open questions about the definition of UX strategy, then
396 outline recommendations, and finally collect opportunities for further research.
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399 5.1 Open questions about definition of UX strategy

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401 Although we received positive and helpful feedback for our definition and aspects (RQ 1), the discussion also revealed
402 several open questions with different opinions. These include, for example:
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- 404 • Are vision and mission parts of UX strategy or separate from it?
- 405 • What is the relationship between product strategy and product-related UX strategy?
- 406 • To what extent does UX strategy differ based on whether they relate to individual products or services, teams,
407 or entire organizations? Are there different kinds of UX strategy?
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409 Further theoretical discussion is needed to clarify these and similar questions.
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412 5.2 Recommendations

413 While our workshop identified several barriers and challenges for working on UX strategy, there are also several
414 recommendations available based on our and the participants' experience:
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- When working with or on UX strategy in or for a company, it is important to have a core team from relevant departments and the UX team. This helps to create acceptance and a broader mass of advocates who spread the topic throughout the organization. Ownership is a key component in UX Strategy Thinking. Over the long term, everyone should think like an owner, and by democratising ownership and empowering stakeholders, organizations move from task-driven to a more goal-driven approach [10, 12].
- Evangelize UX strategy and work with success stories and flagship projects to demonstrate the value of UX strategy. Focus on documents that are promising for your individually defined objectives. Once that the management is convinced, it is possible to extend UX strategy to other projects or even the entire organization.
- Know the business and IT strategy/goals of the company. Compare them to your UX goals and strategy, and talk to responsible stakeholders about synergies and discrepancies.
- Orienting oneself to a uniform process model can be helpful in developing a UX strategy and also pave the way for newcomers. Such a process model could contain the following rough components, which need to be further elaborated in a next step:
 - Start with an analysis of the current state of the field of UX and its interrelationships in the organization and an analysis of the existing pain points.
 - Translate the pain points into necessary measures/steps that would lead to a significant improvement.
 - Derive a target view of the subject area of UX in the organization.
 - Check how the target view and the defined initiatives pay off against the business and IT goals of the company and/or where there are discrepancies.
 - Iteratively introduce a UX strategy that is in line with the business and IT goals along a defined roadmap.
- Training activities can raise awareness of UX in general and UX strategy in specific. In this regard, it is especially vital that knowledge about UX is firmly established throughout the organization, including non-UX roles.

5.3 Ideas for further engagement with UX strategy

Our workshop confirmed that UX strategy is a timely and relevant topic, but also that substantial additional work is needed to push UX strategy forward. Specifically, the following topics emerged as key aspects:

- **Setting up a UX glossary:** The creation of a UX glossary could be a first step. Goal-oriented communication and exchange can only take place if all stakeholders speak the same language.
- **Documenting UX strategy:** As UX strategy needs support from C-level management, work is needed on documents to convince them of its value (e.g., case studies, presentations, white papers).
- **Capturing the “status quo” of UX strategy:** Our workshop revealed limited knowledge about the current state of UX strategy: How many organizations have UX strategies? On which levels do these UX strategies apply? Who is responsible for defining UX strategy? How is success measured? A study would be worthwhile to find answers to these and similar questions.
- **Methods, tools, and best practices:** We identified substantial interest in implementing UX strategy. Consequently, work on methods, tools, and best practices for implementing UX strategy is needed to provide guidelines and help for orientation of UX professionals during their strategic work.
- **UX strategy and branding:** The relationship of UX strategy and branding was interesting because some (but not all) groups established it, while still keeping it mainly underdeveloped. This indicates that further work is needed to define and spread awareness of branding and its relation to UX strategy.

- **Leadership skills and change management:** There is a need for UX leaders who push their organizations towards UX strategy. In turn, these UX leaders need appropriate skills, as well as reasonable expectations, to succeed. Work on such leadership skills could, therefore, substantially push the area of UX strategy forward, as it would allow a larger portion of UX professionals to convince organizations to implement UX strategy. Given the complex changes required for implementing UX strategy, further work on change management is also needed. This work connects to related areas, such as agile and digital transformation or UX/HCD maturity.
- **Measurements:** Given their importance and UX professionals' insecurity about them, work on success measurements for UX strategy is needed, for example regarding emotions or engagement [4]. Measurable metrics would be an important precondition to construct mental models for UX strategies [6]. Working with sufficiently reliable, yet iterative, heuristics might be an appropriate approach.

6 CONCLUSION

UX strategy is a relevant discipline of UX work, and our workshop was able to shed light on UX professionals' experiences and pain points regarding UX strategy. It contributed to defining the term, identified factors that influence UX strategy, and provided useful recommendations. However, it also highlighted the need for further work on UX strategy. The UX Strategy Working Group is currently working on several of these issues and is setting up follow-up studies and workshops to further engage with UX strategy. We will continue to share these findings with the UX community.

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