CUA Certification: A Seven-Year Perspective
A case study approach

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White Paper

**Human Factors
International**

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Introduction

Touted by national magazines as one of the "Best Careers of 2009," the user experience specialist is becoming increasingly critical to online success. However, most designers or developers have no formal training in usability or user experience design — and neither do many usability practitioners. HFI's Certified Usability Analyst™ (CUA) program validates a usability practitioner's knowledge and skills in user-centered design.

In the seven years since the CUA program was founded, the CUA designation has become an industry-standard recognition of professional accomplishment in the user experience field. Practitioners have reported that CUA-track training has strengthened their skills and enhanced their careers, while organizations have received measurable ROI from CUA training and hiring, leading to the achievement of significant business objectives.

CUA certification — credentializing user experience expertise since 2002

Since HFI established the Certified Usability Analyst program seven years ago, more than 2500 usability practitioners, designers, managers and business owners all around the world have passed the two-hour, online exam and been certified as CUAs[1]. Many of those CUAs were certified after taking HFI's four-class, ten-hour CUA-track training courses. *(See Appendix I for detail about the certification exam and a description of HFI's CUA-track courses.)*

The CUA has become a recognized and even preferred certification among both user experience professionals and enterprise organizations. The expertise of Certified Usability Analysts has contributed significantly to the expansion of user-centered site and application design both in client/employer organizations and across the profession.

This paper explores the value of CUA certification in

› Building the skills of the practitioner
› Enhancing careers
› Making teams and business units effective
› Meeting organizations' business objectives

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1. www.humanfactors.com/training/cualist.asp

CUA certification and the UX specialist — a higher level of practice

CUAs report high levels of satisfaction with their certification and with HFI CUA-track training. They cite a sharper understanding and vision of user-centered design principles that provide value at every stage in the application design cycle, from initial concept to architecture and page layout; and from the wording of a link or shape of a button to the practice of continuous usability at an organization.

On the job, CUAs, their employers, and clients report increased productivity, fewer releases to fix usability problems and increased satisfaction with design deliverables that result in better conversion rates. That, with the authority they carry in the area of user experience matters, brings greater professional fulfillment, value, and job security to UX specialists who are CUAs.

Becoming a Certified Usability Analyst heightens the efficiency of practitioners, because they approach design with a tested user-centered methodology and enforce design standards. That means organizations' design teams don't have to start from scratch with every new design initiative.

Building your value as a practitioner
Torey Maerz, Principal Financial Group

The value of CUA training and what HFI has brought me is that I learned the critical techniques and processes I need to know to be successful. Without HFI and the CUA track, I think I would have been missing a lot of key tools, a lot of key processes, a lot of insights. That's the biggest value training has brought to me, helping me to know what the key things are that we need to do — the when and where, and a lot of the how. We don't want to re-invent the wheel, but we do want to figure out how to fit it on the car.

The best advice I can give other UX practitioners is that you have to find a balance for what you want to do and how your company actually works. You want your usability process to match the mental model of how people work in your organization. It is up to you, as someone responsible for usability in your company, to make sure your UX strategies fit into your culture and your processes in a way that is going to be successful.

The CUA track teaches you the important things you need to focus on, and gives you a huge toolbox of methodologies to pull from. Without the CUA

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program, you aren't going to have the tools that CUAs have. The training is a great resource. You also need to understand that once you're trained, the job's not over. You need to go back and start the institutionalization of usability within your organization, if that's where you are, and really drive it, and find a way to make it fit into your company.

Because I've been passionate about usability all my life, I've really let intuition guide my design. But, what HFI & the CUA track brought to me was to help me understand why I thought a certain way and to bring new perspectives and additional tools. It really helped to enhance how I design by making my intuition better, and backing up my ideas with a lot of research and tools – the why AND the how.

Many CUAs have also reported forging strong professional bonds in their CUA-track training classes, online CUA study groups, and HFI's CUA Central. Practitioners without other CUAs in their organizations have appreciated the professional resource and peer support that this virtual community provides.
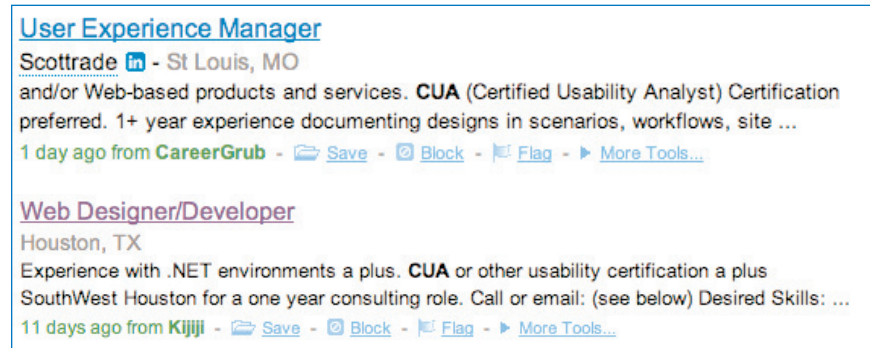
CUA certification and career advancement – standing out in the crowd

With usability becoming more and more critical to online success, *U.S. News and World Report* has identified the user experience specialist as one of the "Best Careers of 2009," carrying a median salary of $96,200. But when most developers practicing usability have no formal training in it, and few companies have a formal usability program, it is critical for UX specialists to distinguish themselves – particularly in a competitive job market. Practitioners have to demonstrate value to prospective employers – as well as to their current employers at a time when budgetary pressures and staffing cuts are common.

"Training is a key professional advantage," says Eric Schaffer, CEO of HFI. "In theory, it gives a UX specialist an advantage over a developer performing usability without any formal knowledge of the field. But any developer or even manager with minimal usability responsibilities may claim UX skills. It's a crowded field. To stand out, a practitioner needs a way to certify completion of training and the mastery of user experience design."

CUA Certification distinguishes the practitioner in the workplace as well as the applicant pool. The CUA credential has become increasingly recognized and sought after by employers as the importance and understanding of user experience has grown across the industry.

Figure 1. More and more frequently, user experience and application development job listings prefer or require CUA certification (source: simplyhired.com)

Credentialing Credibility
Jason Zimmer, Rosetta Marketing

"I'm a big believer in credibility indicators. If you don't know me, how do I go about getting credibility?"

Jason Zimmer, User Experience Design Director at Rosetta Marketing, is a strong believer in the value of CUA certification in a user experience design career. Jason credits his CUA with helping grow Rosetta Marketing from a market-segmentation consulting firm to one of the largest full-service, interactive agencies in the country.

 "If you look at my signature, it says *Jason Zimmer, MBA, CUA*. Those letters after my name give me credibility, one in marketing and business, and the other in user experience. Those two things both help me greatly. With a client, having a CUA on your bio tells them you are qualified to work on their project. When you talk with them they start from the position, 'This guy is qualified. I'm going to listen to him.'

"There's a second audience, an internal one. My company did not start as an interactive agency, and it is still filled with people who don't understand the

thought process behind Web design. But when you have a CUA, they figure, 'OK, well, he must know something.'"

Jason's positive experiences with HFI have led him to prioritize CUA-track training for his user experience design staff.

"Part of my job in being a director is career development for my people. So when I was looking at training I had to think, "OK, what's best for my people, for their careers?" HFI is well known and well respected. They offer good courses, and at the end you have something you can show — a certification.

"Out of the five people on my team now, four are CUAs — the last one is on the CUA track, and will be taking the exam soon. When all of them have gotten their CUAs, I'll send an email around to the whole company congratulating them and touting the value of certification. The CUA gives them a lot of credibility when they go into a meeting. It looks like something. It grants you credibility and expert status."

CUA certification and teams — speaking the same language

In an increasing number of organizations, HFI CUA-track training has been adopted on an institutional level, with whole teams and business groups becoming CUAs.

Application design is a complex process, and often every stakeholder has an opinion. CUAs address design questions with authoritative research, so teams can spend more time on design and less arguing over how to proceed. A CUA can ensure that everyone understands the most effective, best-practice principles. Often, the very *credentials* of a CUA circumvent unproductive discussion.

With the research-based standards they have been trained to use, even the presence of one or two CUAs can help everyone on a team, unit, or department help everyone employ the same methodology, point of view, and language when it comes to design and usability. This can be particularly valuable in a cross-disciplinary setting. Without established terms and standards, it is not uncommon to have a meeting to discuss what every stakeholder means by *use-case scenario*. Clear communication translates into operational efficiencies.

Communicating User Experience Concepts
Steve Kersten, CheckFree

Steve Kersten of CheckFree finds that CUA certification helps him to bridge communication gaps and align stakeholders at CheckFree, even when they aren't familiar with user-centered design principles themselves.

"We have many divisions and groups here with different levels of usability experience. Being a CUA helps to get everyone on the same page. The greatest value HFI training has had is to ground me in a set of usability principles and best practices that you can adapt to your own corporate environment – or even environments."

Steve explains that the comfort level usability certification provides includes business stakeholders as much as end users. "As a CUA, I make business owners confident that they're thinking the right way when they have me on board."

A recent user experience challenge for CheckFree involved merging online bill pay and online banking, which had been two applications handled by two different companies. The project demanded using the entire range of knowledge Steve gained from HFI CUA-track training.

"We had a foundation of conceptual, ethnographic research built over years, from various projects – for the first time we could start with the question, *who* is using this application? And *how* are they really using it? We made no assumptions. So even though this integration product is incredibly complex, having that certification meant I didn't have to guess. It was a huge advantage, and put us ahead of the game."

Teams that have taken advantage of HFI CUA-track training and CUA certification for a substantial number of their members may include managers, business owners, and other stakeholders who are not UX specialists. At Verizon.com (see below), not one of the nearly 30 CUAs on the E-Commerce team are usability practitioners. However, having the skills, methodologies, and research to pass the CUA exam allowed the team to raise the performance of the designers, engineers, and UX practitioners they work with – and achieve significant outcomes.

CUA certification and organizations – an investment in success

The experiences individual CUAs have reported are supported by a wide range of organizational metrics. Faster release cycles, higher click-through rates, decreased customer complaints, greater numbers of call deflections at call centers, and increased online conversions are some of the ways in which enterprise companies and non-profits measure the ROI of hiring or training CUAs.

The business objectives CUAs have helped organizations achieve are as varied as the organizations themselves. The user-centered design skills of CUAs have helped create significant differentiation through a distinctive, customer-centered, online presence.

Team-wide CUA certification nets industry awards at Verizon.com

To differentiate themselves in the tightly competitive telecom market, Verizon.com launched an initiative to become the first telecom provider with "quadruple play" customer service integration – merging online service for phone, TV, internet, and wireless customer in one, seamless interface.

Seeking superior user experience design, Verizon.com chose HFI training for its E-Commerce team. One of the program's most significant features, for E-Commerce Director Mark Studness, was the rigorous exam course participants have to pass to become a Certified Usability Analyst. "The fact that you have to get certified made it very real," Mark says.

Almost 30 business owners from the team became CUAs. "The ROI from getting our team members certified exceeded expectations," says Mark. "They were able to take what they learned in class and apply it immediately, and with almost every release we saw an improved level of performance from the employees."

Using their certification and collective usability expertise, the E-Commerce team helped Verizon.com achieve its breakthrough customer service platform integration. In the process, Verizon.com also won two prestigious industry awards: "Best in Class" from The Customer Respect and "Ten Best Web Support Sites" ranking from the Association of Support Professionals (ASP).

"You can engage an outside firm to redesign a part of your site for you," says Mark Studness, "but at the end of the day, it's your employees who ensure

that the new design will work for your customers. So making the investment in HFI training and CUA certification for our employees was our ticket to substantial and long-term improvements."

Judy Ferrell, Group Manager with Verizon.com eSupport, says other HFI course participants "were intrigued when they found out we were business owners, not usability practitioners. 'Why are you going through this?' they would ask. Well, CUA certification has given us a clear advantage."

"The training taught us not to rush through the design process," Mark explains. "Whenever anybody says, 'I think it should be this or that,' rather than committing ourselves, we step back and ask, 'Well, what does the *customer* think?' and we make time to obtain customer input."

Systemic organizational support for CUA certification is a significant step towards the institutionalization of usability, when user-centered design becomes a routine practice within the enterprise. From strategy and training, to methodology and tools and even a showcase project — like the customer service integration initiative at Verizon.com — the institutionalization of usability and user experience design is a long-term differentiation for an enterprise.

In a recessionary environment, organizations and practitioners must spend money prudently and look closely at "non-essentials." For 2400 UX specialists and hundreds of teams and organizations, however, HFI CUA-track training has been a key investment that has yielded consistent returns. CUA certification is a proven foundation to a user-centered design practice, and an essential first step in the institutionalization of usability.

Appendix I
Becoming an HFI-Certified Usability Analyst

In 2002, Human Factors International addressed the "credentialing gap" in the user experience design field with the establishment of the Certified Usability Analyst™ (CUA) program. Usability practitioners earn the CUA designation by passing a comprehensive examination demonstrating mastery of research-based principles of interface design from the perspective of the end user. That includes methods of data gathering, task analysis, and usability testing, and knowing how to pinpoint usability problems and offer design solutions. The usability analyst is able to design for the user throughout the development life cycle — the critical success factor in successful, productive, Web and application design.

While the certification exam can be taken without having to take any HFI training, HFI does offer the following, two-day courses to provide a foundation in the knowledge and practice of user-experience design. Each course is two days long:

Course 1. User-Centered Analysis and Conceptual Design
Course 2. The Science and Art of Effective Web and Application Design
Course 3. Practical Usability Testing
Course 4. Putting Research into Practice

Appendix II
The next step in certification — Certified Advanced User Experience Analyst™ Certification (CAXA)

While user experience specialists will always have work, usability is no longer the differentiator it once was. CUAs have helped build a strong foundation of user-centered design across the industry, making possible a new dimension in the user experience.

The upcoming Certified Advanced User Experience Analyst (CAXA) Certification track trains user experience specialists in persuasion engineering. CAXA-certified practitioners can help organizations design for desired outcomes.

As HFI CEO Eric Schaffer explains, "classical usability has to do with being able to do things online. Can you find information? Can you complete transactions? The CUA program was geared to that kind of performance engineering. Now the usability playing field is more level than it once was. We're looking further, beyond 'can do' to 'will do'."

Schaffer points out that coursework in the CAXA certification track extends well beyond persuasion-based techniques for individual customers.

"The Certified Advanced User Experience Analyst will be thoroughly trained in breakthrough innovation. That requires looking beyond the needs of an individual user to the entire ecosystem. In the online environment of any enterprise, whole sets of people are interacting. By understanding that ecosystem, that culture, the CAXA can develop ideas for breakthrough innovations — including new business strategies, digital strategies, and new product ideation."

CAXA certification will document a UX practitioner's grasp of the advanced user experience design skills beyond classic usability. The CAXA track is under development as of this writing, but projected courses are:

Course 1. PET Design™ — How to Design for Persuasion, Emotion and Trust
Course 2. Still Do — Engineering for Customer Retention
Course 3. Advanced Visual Communications — How to Use Visuals to Convey Persuasion and Retention Strategies
Course 4. Design for The Big - User-Centered Innovation and Strategy

The first course in the series, PET Design, is now being taught around the world and offers advanced techniques to motivate users to explore, discover, interact and return to an organization's website. PET design techniques can achieve met-

rics-based business objectives by engaging customers and influencing them to make decisions leading to conversion, whether the site/application is informational, functional, or transactional.

About the author

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Jay has been at HFI for 17 years, initially as VP of Marketing and Sales, and since July, 1999, as President. HFI is Jay's third consulting company. His entire career has been focussed on how to consistently grow consulting companies.

Jay's favorite endeavor is the promotion of usability and improving the user experience. He is a great proponent of HFI's technical team and is very supportive of innovative marketing initiatives. Providing HFI's customers with strong customer service and sales support is a top priority.

Jay has an MBA from San Francisco State University, and a BS in Chemical Engineering from University of California, Berkeley.

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