

A Forrester Consulting
Thought Leadership Paper
Commissioned By Adobe
February 2020

Unlocking Design's Full Business Potential

Understanding Organizations' Maturity Around
Design Systems And Articulating The Value

Table Of Contents

- 1** Executive Summary
- 2** As Businesses Prioritize Design, Companies Struggle To Keep Up
- 5** Leading Design Teams Have Invested In Design Systems And Are More Effective Because Of It
- 8** Leading Design Teams Reap CX And Business Benefits
- 10** Key Recommendations
- 12** Appendix

Project Director:

Vanessa Fabrizio,
Market Impact Consultant

Contributing Research:

Forrester's Customer Experience
Research Group

ABOUT FORRESTER CONSULTING

Forrester Consulting provides independent and objective research-based consulting to help “leaders” succeed in their organizations. Ranging in scope from a short strategy session to custom projects, Forrester’s Consulting services connect you directly with research analysts who apply expert insight to your specific business challenges. For more information, visit forrester.com/consulting.

© 2020, Forrester Research, Inc. All rights reserved. Unauthorized reproduction is strictly prohibited. Information is based on best available resources.

Opinions reflect judgment at the time and are subject to change. Forrester®, Technographics®, Forrester Wave, RoleView, TechRadar, and Total Economic Impact are trademarks of Forrester Research, Inc. All other trademarks are the property of their respective companies. For additional information, go to forrester.com. [E-45802]

Executive Summary

Digital innovation has heightened consumers' expectations. Companies must create seamless experiences across all of their applications and touchpoints to compete in today's digital landscape. This expectation has evolved the design practice from a "nice-to-have" to a critical business priority. Companies are investing in design at the highest level of the business. But even with the increased prioritization of design, design teams are struggling to keep up, reporting that they lack the talent and tools needed to compete in the current market.

In November 2019, Adobe commissioned Forrester Consulting to evaluate design systems — the principles, templates, components, processes, tools, and people that guide an organization's design efforts. Forrester surveyed 385 design professionals at the manager level or above and conducted a maturity assessment, ranking respondents as "leading," "scaling," or "emerging." We found that organizations that take on the risk of investing in design have reaped the benefits. These organizations are not only more advanced, but they also get products to market faster and create more consistent customer experiences.



“Leading” design teams produce a more consistent customer experience.

KEY FINDINGS

- › **Businesses are investing in design.** Eighty-six percent of respondents said their companies have an established design system, with close to half indicating their systems have been adopted and they are now focused on growing and scaling it. Not only are companies investing in design, but design is also influencing the overall business. Seventy-nine percent of respondents indicated that their design teams impact strategic decisions.
- › **Design teams are struggling to keep up with rising expectations.** Over a quarter of respondents don't feel like their design practices are competitive. As customer expectations continue to evolve, design leaders don't feel like they have the talent or tools to meet their customers' expectations. As a result, they are struggling to create consistent customer experiences.
- › **“Leading” design teams create more consistent customer experiences.** More mature design teams feel more confident in their ability to create a consistent customer experience, by a margin of 16 percentage points.
- › **“Leading” design teams get products to market faster.** Respondents whose companies have more mature design teams indicate they get products to market faster, by a margin of 35 percentage points.

As Businesses Prioritize Design, Companies Struggle To Keep Up

Design enables businesses to create quality customer experiences that build brand loyalty. But design has not always been considered a business priority. In the past, design leaders expressed their struggle to educate stakeholders on the values of design.¹ As studies continued to prove the business impact of design, attitudes have changed.² Businesses now recognize that design is not just about how a product looks; it's also about how it works. Design delivers value through a deeper customer understanding and an informed product strategy, and many businesses are embracing it as a core competency.

Today, many organizations recognize design as a strategic priority: Businesses know that, to succeed, they need a strong design practice. In response, organizations are investing in design at the highest level. Thirty percent of our respondents have design expertise at the executive level, and 50% at the VP or director level. Beyond this, companies are investing in people, tools, and processes to keep up with the demand for design — including design systems. But for some organizations, it's starting to feel like a never-ending race.

In surveying 385 design leaders, developers, and user experience (UX) professionals at enterprises in the US, Canada, England, France, Germany, and Japan, we found that:

- › **Design expectations are changing with customer expectations.** Customer expectations are growing as digital innovation continues to encourage consumerism. For companies, it is no longer enough to have a responsive website. To be successful, businesses must create seamless experiences across websites, mobile apps, and other digital touchpoints. This requires a design team equipped with the people, processes, and systems to scale the organization's design principles, best practices, and standards across products and experiences.
- › **To keep up with their competitors, companies are focusing more on design systems.** Companies understand that scaling design is mandatory for success and have invested in design systems to advance their practices. Eighty-six percent of respondents indicated their organizations have an established design system (see Figure 3), and over half have a dedicated team for their design systems. The majority of design system teams have invested in designer, developer, and manager roles, and more advanced design system teams have invested in content strategists and accessibility experts (see Figure 1).
- › **Design is a business priority.** Not only are companies investing in design systems, but doing so allows their design teams to impact higher-altitude business decisions. How? By freeing up designer time to solve new challenges. In fact, 75% of respondents said that their design teams impact strategic decisions, such as what unmet customer needs the product should address and how to make more tactical visual and/or user interface (UI) decisions faster.

Figure 1

“What positions do you have within the design systems team?”



Base: 307 respondents at the manager level and above in the design or product side of the business, with multiple people on their design systems team
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, December 2019

COMPANIES STRUGGLE TO KEEP UP WITH EXPECTATIONS

Design has evolved from a “nice-to-have” to a “must-have”; companies are now investing in design and using it to influence business strategy. But as customer expectations continue to rise, design teams still feel behind.

- › **Over a quarter of our respondents do not feel like they have a competitive design practice.** Design teams lack the technology (43%) and talent (40%) needed to succeed (see Figure 2), with 36% admitting that it’s difficult to acquire and keep talent in general. This lack in resources has led design leaders to feel inferior to the market, with 47% of respondents indicating they lack the execution on ideas that would enable them to stand out and 44% saying they lack innovative ideas in general.

Increasing investments in tools and talent would not only equip organizations with a high-performing design team, but it would also help design professionals become more innovative — their top barrier to becoming competitive.

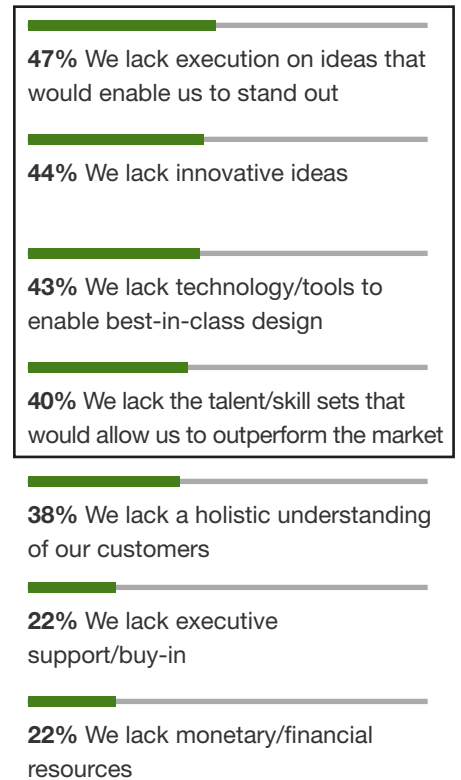
- › **Design leaders are struggling to create a consistent customer experience.** Eighty-seven percent of respondents believe that creating a consistent customer experience is an important role of design. And overall, customer experience is a top priority for companies’ design practices (see Figure 4). However, there is a misalignment between design teams’ goals and reality: Over a quarter of design professionals struggle to create a consistent customer experience.

This misalignment arises when product designers invent different approaches for solving the same problem and proven approaches aren’t well documented for reuse. If a design team wants to create a consistent experience across products, the company needs to invest in establishing a design system that all designers use to guide design decisions.

47% of respondents said they lack the execution of ideas that would enable them to stand out.

Figure 2

“What parts of your design practice do you think your company could improve?”



*Base: 101 respondents at the manager level and above in the design or product side of the business, responsible for creating design systems

Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, December 2019

Figure 3

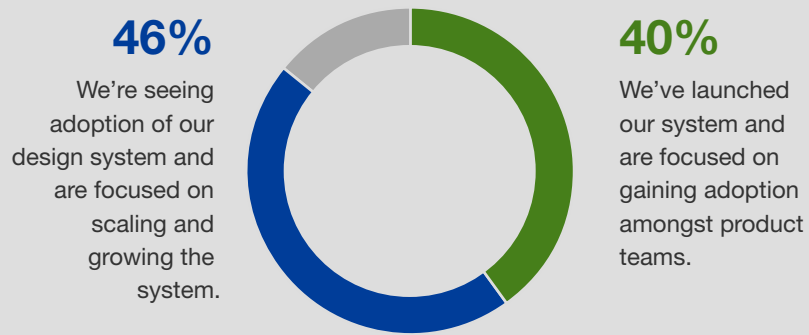
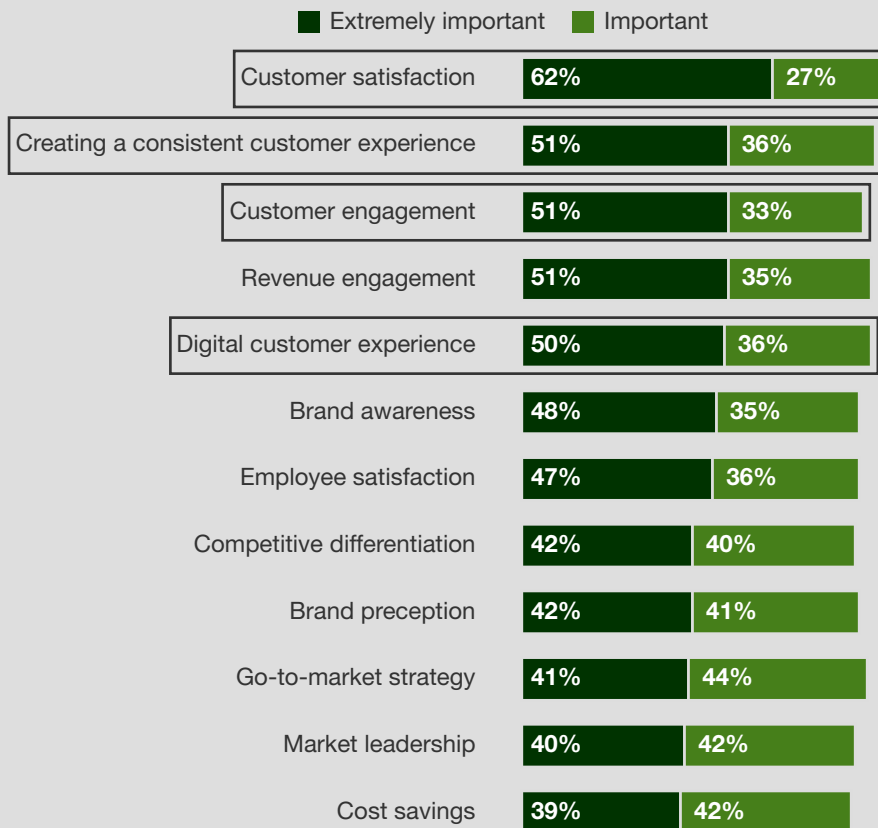


Figure 4

“Thinking about your company, overall, how important is the role of design in the following?”



Base: 385 manager level and above in the design or product side of the business, responsible for creating design systems
 Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, December 2019

Leading Design Teams Have Invested In Design Systems And Are More Effective Because Of It

Design teams, as a whole, have made immense progress by making design a business priority that leaders value. However, their mission is far from complete. Many design teams still struggle to accomplish their main priorities. Our study examined design teams across different maturity levels. We asked design experts a series of questions about their current design practices, including their design systems. The questions focused on four primary factors regarding how companies approach design: 1) the investment in design employees and the utilization of talent; 2) the technology and tools that equip the design program; 3) the approaches that support and implement design; and 4) the availability of the company's design system, both internally and externally. Based on how respondents answered these questions, we classified them as emerging, scaling, or leading regarding their design practices. Our findings found the following distribution: 33% of surveyed companies have emerging design teams, 47% have scaling design teams, and 20% have leading design teams, (see Figure 5).

When comparing responses by maturity group, we focused specifically on leading and emerging organizations and observed the following key differences between the two groups:

› **Leading organizations have invested in more advanced resources.**

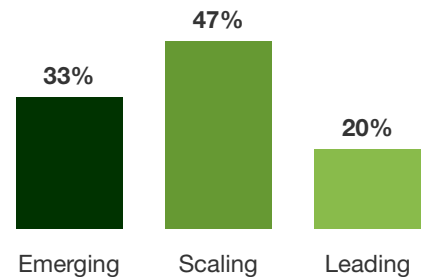
Investing in design pays off: Organizations that have invested more in design processes, talent, and tools ranked more advanced in our maturity model. For example, 72% of “leaders” have a dedicated team for their design systems, compared to 47% of “emergers.”

“Leaders” are also investing in more advanced roles on their design systems teams. Seventy-four percent of “leaders” have a content strategist on the design system team, compared to 27% of emergers, and 72% of “leaders” have an accessibility expert on the team, compared to 17% of emergers.

And yes, “leaders” have also invested in making their design systems more robust by including components such as design tokens (72%), voice and tone features for content design (86%), and motion guidelines (87%). In comparison, less than half of emerging teams have invested in these components.

Figure 5

Maturity Groups



Base: 385 respondents at the manager level and above in the design or product side of the business, responsible for creating design systems
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, December 2019

72% of “leaders” have dedicated design teams for their design systems.



- › **Leading design teams are more collaborative.** Design is a team sport, and leading design teams recognize innovative ideas come not just from professional designers but by engaging many diverse perspectives in the design process through methods like design sprints or cocreation workshops.

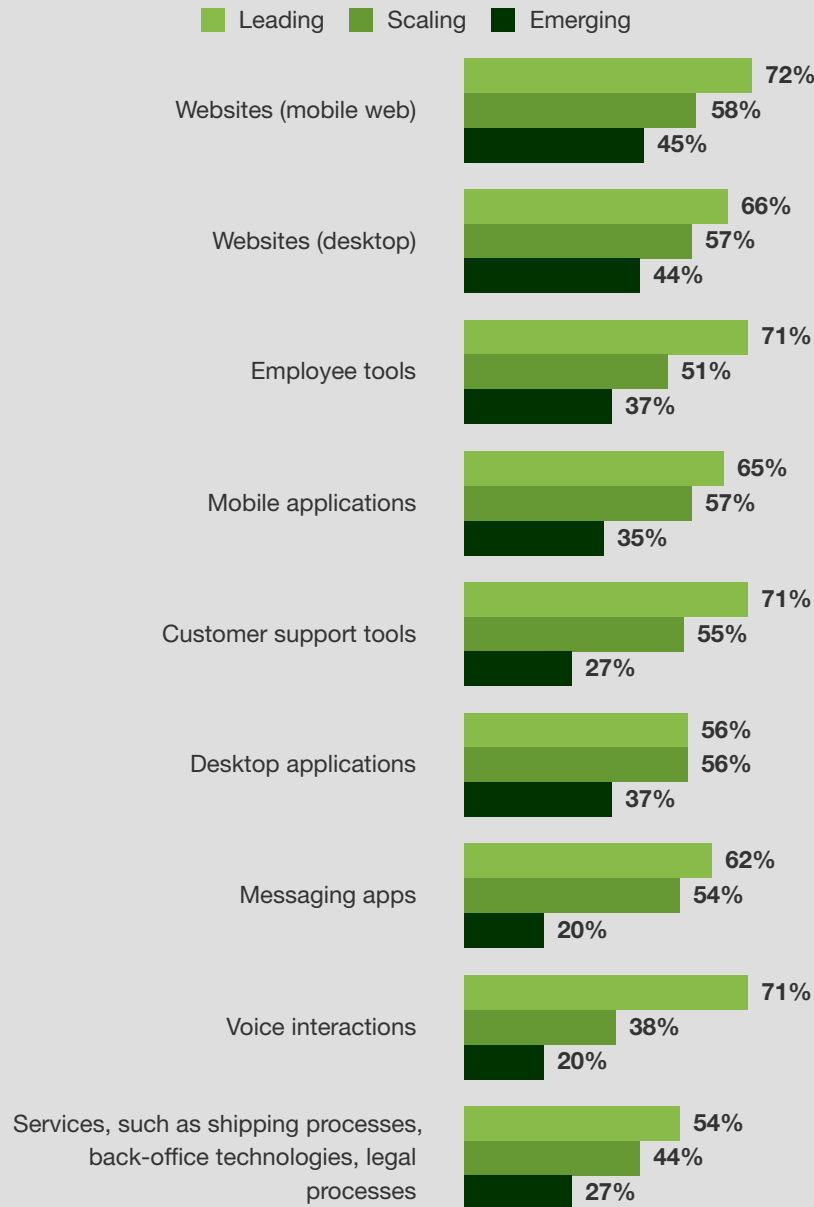
The process of building a design system encourages collaboration across designers as it forces them to discuss and ultimately align on what their standards should be. A successful design system demands collaboration among many roles (designers, developers, content strategists, accessibility experts, and more); simply having a system can strengthen these partnerships and relationships. “Leaders” have invested more in design systems and therefore are fostering more collaboration — 75% of respondents at leading design organizations believe their teams are “very collaborative” compared to only 30% of “emergers.”

- › **Leading design teams get products to market faster.** Compared to “emergers,” “leaders” see the payoff of their investments, as they have launched or updated more digital platforms in the last two years (see Figure 6). Most notably, leading design teams create mobile applications significantly faster than emerging design teams.

And the leading group is not just faster at creating benchmark platforms like websites and mobile applications; they are also more likely to have designed experiences such as voice interactions and internal-facing experiences like customer support tools.

Figure 6

“What types of digital platforms have you or your team created or significantly updated (i.e., full redesign) in the last two years?”
(Select all that apply.)



› Leading design teams are more likely to have created/updated platforms in the last two years.

› Emerging design teams take significantly longer to create mobile applications for a phone or tablet compared to leading design teams.

Base: 385 respondents at the manager level and above in the design or product side of the business, responsible for creating design systems
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, December 2019

Leading Design Teams Reap CX And Business Benefits

While “leaders” take the risk of investing in design and design systems, their big bet pays off with greater business benefits. For example, “leaders” reported higher ROI by a margin of 17 percentage points for every benefit category we asked about in the survey (see Figures 7 and 8). The top benefits of investing in design are:

- › **Higher customer satisfaction.** At the core of design is the customer. This is why design teams are so focused on creating a cohesive customer experience. Notably, high customer satisfaction is also a huge business benefit, providing bottom-line revenue for the business. Leading design teams are more confident in their customer satisfaction and believe that their investments in design systems have yielded higher customer satisfaction and higher customer engagement (see Figure 7).
- › **A more consistent customer experience.** Sixty-one percent of “leaders” indicated that their investments in design systems have created a more consistent customer experience (see Figure 7), solving one of the top challenges discussed by design leaders. While investments in design systems alone are not the full solution, it is a great start, as only 45% of “emergers” feel like they have achieved the same.
- › **The ability to get products to market faster.** In the end, one main purpose of design is to get great products to market, and “leaders” feel that their investments in design systems have done just that. “Leaders” reported their design investments have yielded an increased development velocity (68%), an increased velocity of design (61%), and an improved speed-to-market (66%). In comparison, roughly 33% of “emergers” have accomplished the same (see Figure 8).

“Leaders” reported a higher ROI on design investments by a margin of 17 percentage points or more.



“Which of the following benefits has your organization seen from its investments in design systems?”

Figure 7

Leading Design Teams Have Higher Customer Satisfaction

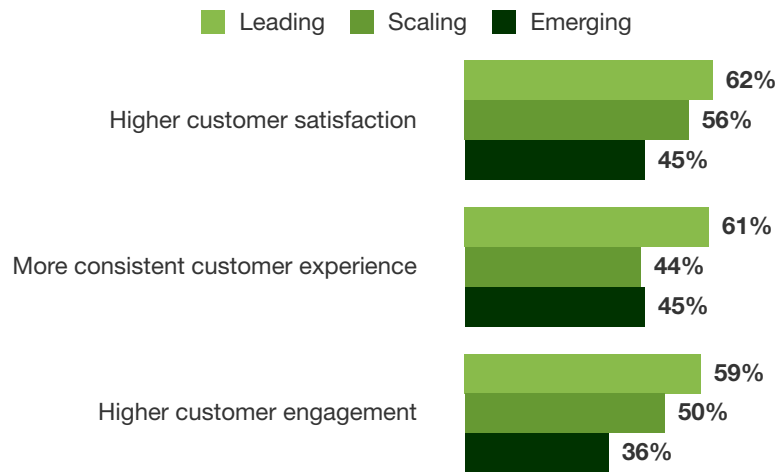
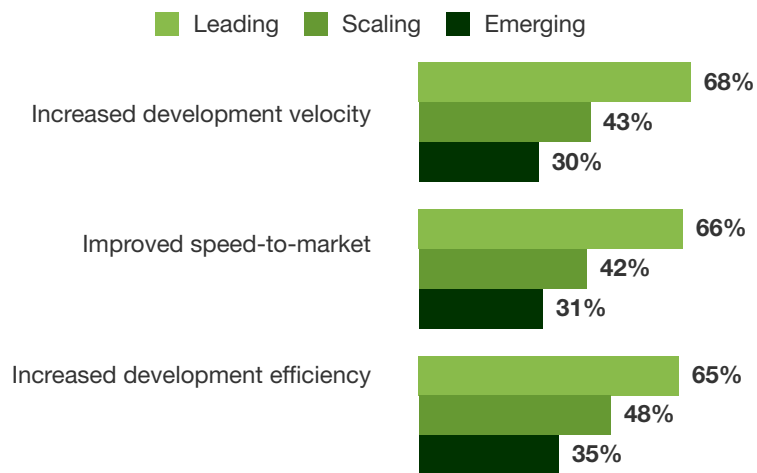


Figure 8

Leading Design Teams Get Products To Market Faster



Base: 385 respondents at the manager level and above in the design or product side of the business, responsible for creating design systems
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, December 2019

Key Recommendations

While design teams that invest in design systems help their companies get products to market faster and achieve higher customer satisfaction, creating, maintaining, and encouraging adoption of a design system takes time, resources, and tenacity. But design teams that invest the time and follow a best-practice approach to create and mature their systems reap benefits including impact at higher altitudes of decision making within the business and happier team members. Insights from this study, coupled with Forrester's existing research into how organizations scale their design practices, yielded several key recommendations:



Prioritize where a design system will have the biggest business and customer impact. Leading design teams successfully use design systems to solve the challenge of consistency at scale but are strategic about where they start. To identify where to invest, ask yourself these questions:

- Where are the biggest pain points in our customer experience due to inconsistent experience design?
- What product/design/development teams are receptive to — and ideally excited about — working in a new way?
- Where do we have the most to gain from getting product updates to market faster?
- Where do we have the most waste, due to repetitive work, in our design and development process?

Manage your design system like you would any other product by establishing a roadmap, specifying what products you'll focus on first and a plan for scaling the system to other products and teams over time.



Invest in a core design system team supported by an extended team of experts and contributors. Piloting a design system to establish a proof of concept often starts as a side project for one or two individuals. To fully capitalize on the benefits, design leaders must invest in dedicated roles to support the system. Start with a small team of designers and developers who are excited about the system so they will serve as evangelists, not just creators, of the system. Then, develop a process for engaging the rest of the experience design and development ecosystem so everyone has a path to contribute, ask questions, and even challenge elements in the system. Recruit an extended team of experts in content strategy, accessibility, and design research to contribute to the guidelines, components, and other features of the system. While your core team may remain small, think of your design system like any other product where employing a cross-functional, multidisciplinary team is key to attaining desired outcomes.



Measure the business impact of investing in your design system.

While industry studies have proven the business value of design, design leaders need to be prepared to prove how investments in design have yielded benefits within their own organizations. If you're not getting questions like, "How has investing in a design system helped us make or save money?" yet, you will. Here are a few tips to measure the impact of design work:

- Start by aligning on the goals for your design system — like getting products to market faster or increasing designer happiness. To get to these goals, apply design methods like jobs-to-be-done and journey mapping to understand business stakeholders and what drives value for them — which in some cases may be reducing costs by creating efficiencies.
- Then, identify the metrics — such as, design time spent per feature or design employee engagement scores — that gauge whether you've achieved those goals. Uncover where the data lives that you'll need to capture each metric and what partners — like analytics or data science — you'll need to engage to get access to it.
- Collect baseline data on those metrics and create a dashboard to regularly report on the status of your design system efforts. A typical dashboard might track things like projects completed using the design system, user engagement, user contributions, and the impact on metrics like customer satisfaction over time.

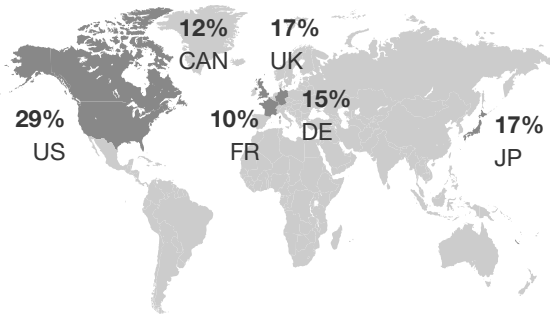
Further set yourself up for success by hiring designers who are analytically minded, can express how their work contributes to business goals, and are strong collaborators.

Appendix A: Methodology

In this study, Forrester conducted an online survey of 385 design professionals at the manager level or above in the US, Canada, England, France, Germany, and Japan to evaluate the business impact of design system maturity. Survey participants included decision makers in design or UX. Questions provided to the participants asked about the components, processes, and outcomes of their current design systems. Respondents were offered a small incentive as a thank you for time spent on the survey. The study began in November 2019 and was completed in December 2019.

Appendix B: Demographics/Data

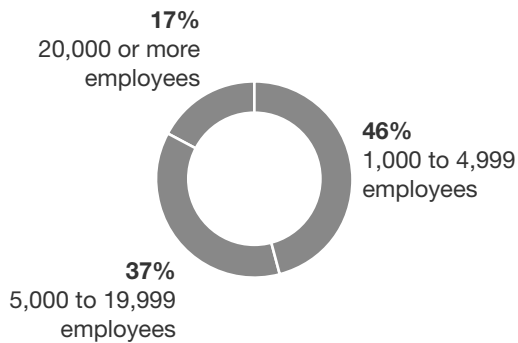
“In which country are you located?”



“Which of the following best describes the industry to which your company belongs?”



“Using your best estimate, how many employees work for your firm/organization worldwide?”



Base: 385 respondents at the manager level and above in the design or product side of the business, responsible for creating design systems

Note: Percentages may not total 100 because of rounding.

Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, December 2019

Appendix C: Endnotes

¹ Source: “How To Scale Your Design Organization,” Forrester Research, Inc., October 18, 2018.

² Many studies have demonstrated the impact design has on business results. See “Improving CX Through Business Discipline Drives Growth,” Forrester Research, Inc., September 11, 2019; “The ROI Of Design Thinking: Part 1, Overview,” Forrester Research, Inc., May 16, 2019; Benedict Sheppard, Hugo Sarrazin, Garen Kouyoumijan, and Fabricio Dore, “The business value of design,” McKinsey & Company, October 2018; and “2015 dmi: Design Value Index Results and Commentary,” Design Management Institute.