729SOLUTIONS

HOW TO SHOW YOUR BOSS THE VALUE OF USER EXPERIENCE DESIGN

A THREE PART FRAMEWORK TO CALCULATE THE ROI OF USER EXPERIENCE DESIGN

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INTRODUCTION

If you're reading this, you may be thinking that it's time to make some improvements to the user experience of your website, app or program. Developing a professional user experience that helps your customers navigate without a struggle is among the most effective ways to position your business as an industry leader.

Now you need to get the rest of your team, and more importantly, your executives on board.

It can often be difficult to get your leaders to understand that design is more about solving problems than pretty shapes and colors. It's challenging to communicate the value of investing in high quality user experience design to longtime managers and business owners—especially if your superiors developed their business instincts in an era when web marketing was barely a theoretical concept.

We've helped hundreds of clients realize the impact that a well-designed user experience can have on their business, so we put together this guide, sharing our process and top tips, so that you can learn to speak your boss's language and effectively calculate the ROI of user experience design. Then use the tools you create from this guide to confidently present the case for your proposed project to your leaders and secure the budget you need to do it right.

OUR THREE STEP FRAMEWORK

The first rule in all of communication is to know your audience. If you want to establish credibility and influence when interacting with executives or senior leadership, what you say, how you say it, when you say it, and whether you say it in the proper context are critical components.

It's important to be concise, using few – but effective – words.

Our three step framework will help you communicate with strategic intent and a solid grasp of context, which can mean the difference between success and failure in convincing your boss to invest in your user experience design.

PART 1
THE PROBLEM

Before you can convince your boss to invest in any project, you'll need to make sure that you all agree there is a problem and have a shared understanding of what the problem is.

PART 2
THE SIGNIFICANCE

You'll need to demonstrate the significance of the problem to the business, the consequences and/or the missed opportunities of not addressing the problem.

PART 3
THE SOLUTION

Introduce the solution and demonstrate how it will effectively solve the problem.

THE PROBLEM

Before you can convince your boss to invest in your project, you'll need to develop a shared understanding of the problem.

From your boss' standpoint, a problem is going to be some kind of roadblock in the way of achieving organizational objectives. So the first order of business is to make sure you clearly understand your organization's objectives and the importance of your user experience in achieving them.

Common Mistake: Presenting a solution to a problem that doesn't exist or presenting the problem at the wrong time.

IDENTIFY GOALS

You'll want to get a clear grasp on your organization's objectives, identify which of the goals relating to your website, app or program are most relevant to your organization.

This is by no means an exhaustive list, but here is a list of ideas to get you started:

- [ ] Increased Sales
- [ ] Increased Visibility
- [ ] Recognized Industry Expert
- [ ] Targeted, Measurable, Trackable Marketing
- [ ] Increased Customer Satisfaction
- [ ] Efficient Employee Workflows
- [ ] Professional and Competitive Aesthetic
- [ ] Other:_____

DEMONSTRATE WHERE THE WEBSITE IS UNDER-PERFORMING

How well is your user experience meeting the goals you've identified? Identify the gap between the current state and the desired state. We've listed some places to look below to help paint the picture.

PERFORMANCE METRICS

Your metrics are a key way to present potential value increases.

These are some of the metrics you should take into consideration when conducting your analysis:

- [ ] Value per visit
  (total sales earnings divided by the number of unique visitors)
- [ ] Lifetime value per customer
- [ ] Total traffic/users
- [ ] The source of your traffic/users
- [ ] Average session duration
- [ ] Number of sessions in a given period
- [ ] Conversion rate
- [ ] Active users
- [ ] Churn rate
- [ ] Customer aquisition cost
- [ ] Net promoter score
- [ ] Feature usage
- [ ] Bounce rate
- [ ] Top pages

Value per Visit
— Last 12 Month — Last 24 Month — Last 36 Month
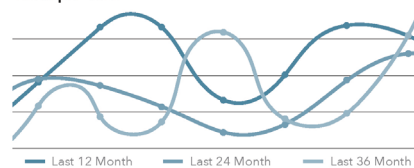
Top Pages
1. .../index.html
2. .../category/product.html
3. .../gallery.html
4. .../shop.html
5. .../contact.html

Total Web Traffic
- North America 104.56
- South America 58.54
- Europe 22.6
- Africa 4518.52
- Asia 15.2
- Oceania 0.28

Source of Traffic
A 157.58 (+2.35)
B 4458.5 (+2.21)
C 1487.54 (+1.4)
D 1788.5 (+1.25)
E 7785 (-4.5)
F 15784.51 (+7.5)
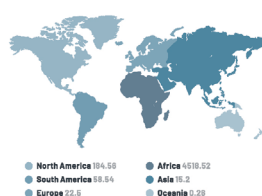
Average Session Duration
- 1788.5 (+87.5)
- 7785 (+17.4)
- 15784.51 (77.5)
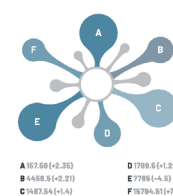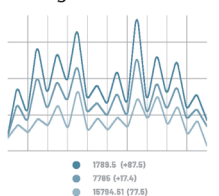
THE PROBLEM (CONTINUED)

USABILITY FEEDBACK

It can be an enlightening and powerful tool to aggregate feedback received from customers and employees.

- ☐ You could conduct a simple survey of internal teams that use or help to manage your website, app or program.

- ☐ Is your team running into any major challenges or roadblocks with the current system?

- ☐ Are there key areas where workarounds are being used because the built in function is too cumbersome to use

- ☐ What kinds of questions is your customer support team getting that a **help center or knowledge base** could help with?

- ☐ Are there challenges integrating different systems and getting them to talk to one another?

- ☐ The best way to capture usability feedback for this purpose is with a bit of **quick and dirty user testing**. We have a guide to help if you don't know where to start.

Here are some questions you can use to get you started:

- ☐ What are the biggest frustrations you have with our current website, app or program?

- ☐ Are there any particular aspects to the website, app or program that make your job harder?

- ☐ Are there any particular aspects to the website, app or program that limit your ability to service your target audiences?

- ☐ Can you suggest any improvements to our website, app or program?

- ☐ I f you could fix just one thing about the website, app or program, what would it be?

> **Tip:** Capture actual quotes or screenshot survey results to include in your presentation to your boss. There's something compelling about seeing things in black and white.

Every business is going to be different and so will the appropriate questions for you. Your User Experience Design Specialist or Consultant will be able to develop the right questions and tests for your unique needs, and will know how to reach your users for maximum responses.

COMPETITOR ANALYSIS

Most if not all senior managers want their organization to be the best in their field. If you can show them that this currently isn't the case with a quick and dirty competitor analysis then this can be a powerful motivator.

For example, if you're comparing your website against competitors, even a quick scan through your top competitors' websites can give you an idea of how your website compares and capture some screenshots that will pique your boss' interest.

> **Tip:** Almost everyone has that one company that, for any number of reasons, they would really like to beat in the market. If you know who it is, make sure to include them in your review. If you're not sure, your Sales and Business Development teams are a great place to get this information. Ask about the companies they come up against the most in pitches.

Set aside 30-45 minutes, pick 3-5 of your top competitors and answer questions like the following, making sure to capture screenshots to share with your boss:

When you look at a competitor's website, consider things such as:

- ☐ Does it offer service and functionality your website does not?

- ☐ Is it more aesthetically appealing than yours?

- ☐ Is the content on the website more engaging, better written and of a higher quality?

- ☐ Is it easier to use?

- ☐ Does it work better on mobile or tablet than yours?

THE PROBLEM (CONTINUED)

Bear in mind that a good design consultant will help you complete further competition analysis and will assure that your new or redesigned site is one of the best in the field.

Additionally, experienced design consultants are able to spot (or help develop) your unique selling point (USP) to help you not only stand out from the rest of your industry but offer a user experience that exceeds the industry standard.

To compare an app, you can look at things such as:

☐ Competitor's ratings
(for example, use the free SensorTower.com search)

☐ Competitor's app reviews

☐ Competitor's strengths and seaknesses

☐ Their web and social presence

☐ Their unique selling proposition

THE SIGNIFICANCE

You've likely heard the assertion "good design is good for business," or a version of it, and for good reason. According to a study by **Hubspot**, nearly

> ❝
> **GOOD DESIGN IS GOOD FOR BUSINESS**

40% of people say they will leave a website if it is unattractive, difficult to navigate, or takes too long to load.

However, when you're asking your boss to make a significant investment in the design or redesign of your website, they're going to want to know just how much this investment is really going to help them achieve their goals for the business and what extent of "good design" is necessary to make the juice worth the squeeze.

The Impact of Good User Experience
When a person gets online, they typically have one of three objectives:

• They're looking to execute a transaction – for example, "buy books" or "purchase an iPhone"

• They want to visit a specific site or find a certain vendor– for example, "YouTube" or "Apple".

• They are looking for certain information – for example, "how to make coffee".

In the pursuit of these objectives, the user's goal is not to figure out how to navigate your site or app in the hopes that maybe they find what they're looking for. They're goal is to get things done quickly.

Poor usability makes it difficult for users to find what they're looking for and complete the task they set out to do.

Now that you are armed with the intel gathered in step one, you can begin to paint a picture of how user experience design will improve usability and quantify the impact of those improvements on your company's marketing and other organizational KPIs.

> 💡
> **Tip:** This is where it is especially helpful to know how your boss is being measured, because this is the part where you help them understand why these problems are big enough for them to worry about. So, if you didn't identify this in step one, make sure to do that now.

DEMONSTRATE WHY USER EXPERIENCE DESIGN SHOULD BE A HIGH PRIORITY

User experience design can impact various areas of your business, so which areas do you need to improve based on your findings?

What is your boss going to be most interested in?

☐ Increased productivity

☐ Reduced reliance on help desks

☐ Increased conversion rate

☐ Reduced costs on formal training

☐ Decreased drop off rate

☐ Reduced learning curve

Productivity

Conversion Rate

Learning Curve

Help Desk Reliance

Drop Off Rate

Training Costs
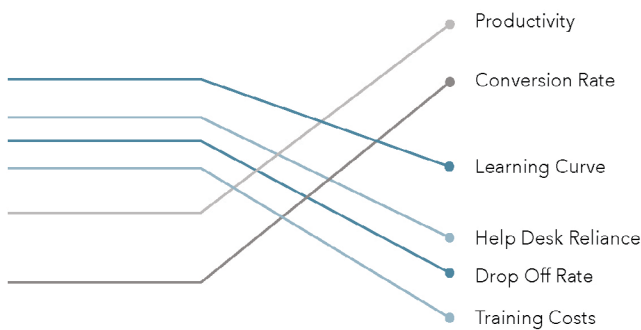
For both internal and external users, a solid design update can fix issues like:

- Frustrating experience, resulting in negative perception towards your company.

- Increased support calls.

- Loss of users. If they find your site too difficult to use, they will go somewhere else. Likely to your competitor.

- Increased errors in operations.

- Loss of employee morale.

Improvements in these areas can therefore:

- Save costs by increasing deflection through improved customer self-service

- Reduce user error

- Increase efficiency

- Improve the perception of your company for both internal and external users

Track down the figures you need to calculate the actual impact for your business. For example:

- If your boss needs to see an increase in revenue from sales, and would therefore be concerned with capturing more customers from your website, calculate how an increase in the percentage of visitors who convert to customers can improve the ROI for usability.

- For applications where usage rates are very high, saving a few seconds on a screen can mean quantum leaps in returns. Calculate how an increase in user efficiency impacts the ROI for usability.

- If customers can locate information easily, they will rely less on your help desk. If the number of calls to your help desk reduces, help desk costs can also be reduced and improve ROI.

THE SOLUTION

Now that you know why you need to invest in good user experience design and the positive ROI you aim to achieve with your investment, how do you go about convincing your boss to invest in the right kind of designer? A designer that can actually deliver on your newly outlined ROI goals.

> "
> ## TO KNOW THE WORTH OF A GREAT DESIGNER, YOU HAVE TO UNDERSTAND WHAT MAKES GREAT DESIGN.

To know the worth of a great designer, you have to understand what makes great design. Great design and investment-worthy user experiences don't begin with pretty mockups—they are founded on strategic planning and a design vision that focuses on company goals. The primary objective cannot be, "Let's make a prettier website or app."

User experience and user interface design specialists are responsible for making sure that users have an optimal experience interacting with the interfaces we design, and this requires thorough planning right from a project's conception.

DEMONSTRATE WHY YOU NEED TO INVEST IN USER EXPERIENCE DESIGN

A user experience design specialist or consultant will focus on the overall website or app strategy and develop a clear design and technical roadmap, outlining every step that needs to be taken to create a high performing website.

By walking your executives through the phases of a design project and how each phase impacts your ROI target, they will be able to clearly see how hiring a user experience design specialist or consultant as you have recommended to them can help them directly achieve their goals.

Removing Bloat
Nobody wants to spend more money or time on a project than they need to. Starting with a preliminary inspection and analysis of your current digital landscape, your design consultant helps to determine the scope and purpose of your project to ensure that no sticking point goes unaddressed and to prevent ambiguous or bloated budget estimates that result when designers try to guess what issues might pop up later in a project.

Know Your Users
In order to design a good user experience, you need a solid understanding of the users you are designing for. This is where User Persona research is needed. Your design consultant will collect data about your audience through a number of different means including interviews, data analytics and market research. They will define the needs, goals, selling-points and expectations of each persona category in order to create an efficient strategy to cater to each.

Usability Compliance and Discoverability
Your sitemap will also need to be reviewed or redesigned to efficiently plan the structure of your website, software or app and assure all pages from user flow are accounted for. A fully optimized site map will assist with accessibility and industry standards and has SEO benefits such as higher placement in Google results.

Remove Friction
To help users achieve their specific goals with minimal friction, it's necessary to map and optimize your user's journey through your site (called a "**user flow**"). This process involves documenting the current step-by-step processes users go through to complete a task, considering different scenarios and possible solutions to streamline the site and removing unnecessary steps or complications.

Content Worksheets

For website design, once you're clear on what your users goals are and how they aim to achieve those goals on your site, you can catalog the existing pages of your website and determine what content should be on what page. This process also helps developers clearly understand the purpose and intent of site elements, leading to development that has your unique users in mind.

Visual Structure, Prioritization and Consistency

Wireframes are early design demonstrations with low fidelity and no functionality that help you to quickly and easily ensure the design direction aligns with your goals and values. It's not always immediately clear how much value there is in the wireframing process.

- Wireframes connect your site structure to its visual design by showing paths between pages.

- Clarify consistent ways for displaying particular types of information on the user interface

- Determine intended functionality in the interface

- Prioritize content through the determination of how much space to allocate to a given item and where that item is located

Wireframes have a big impact on your site's usability.

Ensuring Site Usability

Prototypes can be created during many stages of the design process with both high-fidelity mockups and low fidelity wireframe demonstrations. Desktop and mobile prototypes can help visualize the final intent of product pages and allow user testing .

User testing and user interviews are critical to ensuring your product is moving in the direction of your goals and helps to ensure your success in the design of your site.

Remember, users are searching for a purpose and they don't have much time, so if your product helps people achieve their goal, they will love it, they will continue to use it, and they will recommend it to others. So, you need to know how they use it. And that's where user testing comes in.

User testing provides incredibly valuable insights from your users regarding why and how they use your product. Your design consultant should test your site or app with real-life users from your user persona categories and develop a report with recommendations to improve functionality, accessibility and ease of use.

Consistent Design

Your designers and consultants will use brainstorming sessions, workshops, mood boards, sketches and more to help you develop a brand system that contains a collection of unified elements such as logos, fonts and color schemes that help solidify an easily identifiable look and feel for your brand.

Consistency is about using common rules and elements to accomplish similar tasks, thereby reducing learning and eliminating confusion, which leads us back to better usability. Therefore, consistency will also contribute to saved time and money through improved usability.

Measure Twice

In construction projects, you'll often hear it said "measure twice, cut once." In design projects, reviewing mockups is like taking the final measurement before making the cut, or in this case, sending designs to development.

Before development, high fidelity **mockups** can be used to reflect the final product allowing for flexibility in the final steps of the design process so you can request last-minute changes without the costly consequences of making changes during development.

GREAT DESIGNERS BUILD ON A FOUNDATION OF CAREFUL PLANNING

Looking back at the **design process**, it's apparent that the majority of time was dedicated to organizing and planning. Only 30 percent of the project was spent designing the site.

Jumping straight into mockups without the research and planning to back up your design decisions is using hope for a strategy. If you ask your boss, I guarantee you that he or she does not believe in hope as a strategy for success.

We hope this guide will help you prepare for your presentation to your boss.

Check out the **process used for Sundance Institute** to supercharge their website's user experience.

Learn more about each of the **design phases**.

Reach out to our Creative Director if you have any questions, or if you found this to be useful. We love getting feedback!

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> "The 729 Solutions team possesses a very deep understanding of software development and agile methodologies."

Noopur Shankar

> "Overwhelmingly, the feedback from our whole team was excellent."

Hillan Klein

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