Task

I was tasked to re-design existed web site of Enviroway.

Research

Design Directives

1. **User Mental, Emotional, Behavioral Model:** Create an onboarding structure and flow that matches what our users need in order to be onboarded and converted.
2. **Success Model:** Clearly show and articulate what we have learned at Enviroway in regards to successfully onboarding and converting users.
3. **Customization & Optimization:** Create the content in this structure and flow to be modular so that it can be customized per user type, easily tested, and easily updated.
When using a goal-oriented design technique, I tried to have as few directives as possible to keep our design impactful and on-point.

User categories

1. Primary: new users entering app for first time
    1.1. 1000+ visitor- users per month
    1.2. 10k returning users per month
    1.3. 1000+industrial collaborators per month
        1.3.1. This just updated to 105k, but for the first few rounds of prototyping and testing, we will stay with the completely new users and then take these learnings to the colabs
2. Secondary: existing users inviting these new users
    2.1. System administrators
    2.2. Team members, managers, workers
3. Focus: enterprise (company has more than 2,000 people)

User categories

We're shooting for these...
1. All Users
    1.1. Have a good first impression in ~10 sec
    1.2. Understand the potential and purpose of Enviroway in first 1 minutes

2.2. Invite minimum 3 people during first 30 days
2.4. Interact with the website at least 2 times during the first 30 days
2. Targets for other user types (free colabs, new licensed users) to come

Please note that more specific metrics will be applied to our goals when we are building our journey maps and metrics matrix.

Sinek's 5 Why's (Helps w/ Persuasion)

1. Enviroway is a company which help to stay clean while not harassing environment, our products can be used in industrial and residential
2. If potential users were able to understand Why #1 during their onboarding process, they would be more likely to convert and use Enviroway website and buy products.
3. When our users use Enviroway website, they are able to save a lot of time and work more efficiently and effectively - by using our products and services
4. When people work more effectively and efficiently, their work culture and the quality of the work they produce improves. Work as a place and work as a product get better.
5. When work as a place and product gets better, life in general gets better. We are nicer to our families, friends, ourselves - because we are less overwhelmed. We are happy. We are satisfied.

How

- Full UX (human-centered) process
  ○ Ready for developer by beginning of Q2 August- Q1 September

Interview with Stakeholders

Definitions

- Onboarding
  ○ The entire experience a user goes through from finding out about Enviroway, learning about what Enviroway' can do for them and how to use it, and eventually deciding to purchase cleaning products or not.
- Onboard
  ○ When a user's curiosity runs out or their expectations are met about what they perceive Enviroway' can do for them.
  ○ When a user understands (correctly) Enviroway potential (the "what") and how they can benefit from using Enviroway(the "why"). They don't necessarily know how (the "how") to actualize that potential, but they are willing to put some time in to learn the how.
- Converted
  ○ A user becomes a paying customer.

○ A free collaborator such as Janitorial service companies become a paying customer.
- Upgraded
  ○ A paid account moves to a get more order from Enviroway.

Current Success Markers

> "There is a window of time in which people are open and willing to learn something new. We have to capture users when they are at that place or else we will lose them."

~ Stakeholder quote

- Website is bright and informative, but less useful information

- It is hard find what kind services we do providing and who we are.
- By looking at this page we can forget about UI attractive
- 24 hours for users to return - <u>No they will not come back</u>
- Our returning customers will bring users because of Enviroway's cleaning products are amazing - but not website

- Some of the customer may not find contact information- because it is not visible
- The gallery with photos are poor
- No CTA button on home page
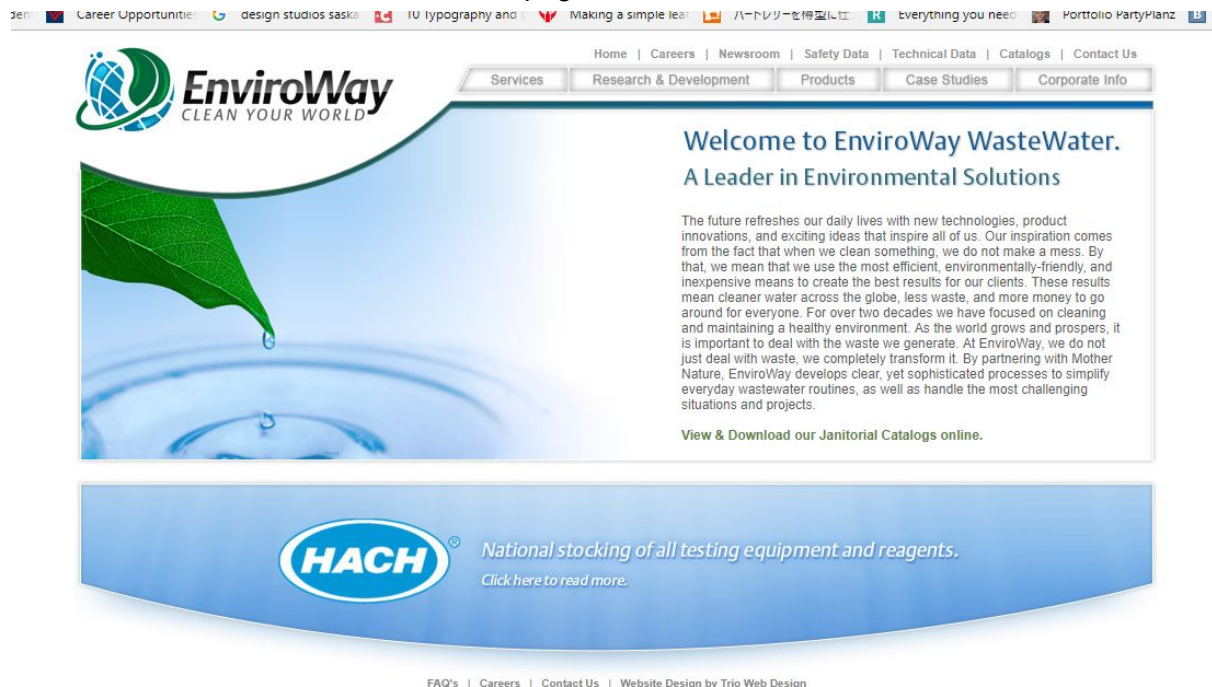
Future Success Markers

"Everyone at Enviroway' feels good about what we put out. We feel confident that our onboarding process matches what the customers wants and needs so they understand Enviroway' and start using it successfully."

~ Stakeholder quote

Markers Analogy for Qualitative

"Onboarding and getting oriented to a product is like orientation for your first day of work or school. You aren't ready to take your midterms or finals, but you know where the library is, where the cafeteria is, where your classes are going to be held, and at a high-level what you will be learning for the first semester."

~ Stakeholder quote

Success Scenario

"A user is thinking through some kind of work process problem, and they decide straight away that they are going to use Enviroway' to help them. They know it will work better than any other tool, and they know it will scale, so they can keep using it as their project grows over time."
~Stakeholder quote

Users

How They Arrive (Worms)

- Paid
  - Low quality
- Partner ○ Low quality
- Other Web ○ Highest quality
- Viral ○ User Auto Provisioning (UAP)
  - Free Collaborators
- Janitorial Training sessions
- Sales representative manager*

Users How They Use

Users Psychographics: "...the study of personality, values, opinions, attitudes, interests, and lifestyles."

Mental Model: "A mental model is an explanation of someone's thought process about how something works in the real world. It is a representation of the surrounding world, the relationships between its various parts and a person's intuitive perception about his or her own acts and their consequences.
Mental models can help shape behaviour and set an approach to solving problems (akin to a personal algorithm) and doing tasks."

Importance: In my career, I have found that key differences in users groups are based upon psychographics more than demographics. One of the main points of UX is to design the system to match the user mental, emotional, and behavioral model and then at key points have the system shift those models to guide and change a different thought, behavior, or emotion.

Notes on Psychographics

- Show me are spontaneous, they don't read much, they just want to see the what they want to see and find the store

- Let me are either humanistic, competitive, or methodical ○ Humanistic: want to see info about how Enviroway has solved similar problems for others ○ Competitive: want to know how we differentiate from our competitors ○ Methodical: combination of humanistic and competitive

Users Needs / Wants / Expectations

We know many users are looking for:

- Hypoallergenic cleaning products
- A better Laundry, Kitchen, Bathroom cleaner
- Tide, Clorox. Cascade capabilities- which makes everything clean
- Concentrated, non toxic, biodegradable, refill, environmentally friendly

Our users have in common the following:

- They are using competitors products
- Information seekers
- If they sign up for free trial, they have the intention of learning more about the product
- Janitorial companies who wants to switch to economical version that they are currently using

Our users differ in these ways:

- Residential and industrial varies
- Some users have very specific needs that they believe only relates to their health, house and purpose of using
- Some users are more general information seekers

Our users have these PAIN POINTS:

- Overwhelm ○ Allergic ○ Caring environment ○ Current cleaning product doesn't work ○ Did find anything like our products (Gum and Tar remover, Peel power, Septic tabs)
- Time ○ They don't have enough of it, they are pressed for it
- Funnel vision (too much personalization) ○ If users come through a particular funnel, like Tide, Clorox, they often think this is all that Enviroway' is about and miss all the potential and benefits
- Enviroway' isn't "visual enough" (and the following are my explanations from digging into this with users)
  ○ UI/IA/IxD refresh / update / modernization
  ○ We tell more than show (diagrammatic vs. sentential representation)

Competitors

- Actizyme

- TIDE
- Clorox

Strategy / Rollout

- See Conway's Law

"...organizations which design systems...are constrained to produce designs which are copies of the communication structures of these organizations"
~M. Conway

This collaboration and communication has to be **fun, functional, and help us build strong relationships** with each other
- My extension of Conway's Law states (this means that I state) that the emotional tone of our communication ends up in the design, as well
- If we are characterizing good onboarding as welcoming, inviting, considerate, helpful, then we have to model this behavior while we are redesigning

Where do responsibilities start and stop?

1. UX design, on a very simplistic level and at our company, onboarding experience beginning as soon as users are going further than home page and ends when users convert to check call or sending emails and convert to paid customers.
2. As UX designs and tests concepts / prototypes / experiments / surveys, etc., I share this data with the greater team, which will influence the work the greater team is doing.

WARNING

- Through practicing the complete UX (human centered) design process, we are going to uncover data that will prove a lot of what we hope is right...well...wrong. I will be wrong a lot. We all will. Keep moving.
- We must maintain a culture of experimentation, truth seeking (from a user's perspective especially), and openness to new ways of doing things.
  - Care more about having a deep understanding of the problem.
  - Test possible solutions as much as you can - and let the winner win.

BIGGEST WARNING

- What we uncover in the onboarding project is going to expose potential problems with our website in total, marketing site, ads, emails, messaging, and marketing.

Thus far & upcoming

- Week 1: Project set up, identify and schedule stakeholders for interviews, begin literature review

- Week 2 : Stakeholder interviews and continue literature review
- Weeks 3 & 4 : Stakeholder interview and literature review wrap-up (for now), usability testing first impressions
- Weeks 5 & 6 (Web developer, Tristan, will come after his vacation, but still August): Persona hypotheses, journey maps, metrics matrix, competitive / comparative analysis
- Week 7 Septemberish 2018!!! : Design studios for quick concepting leading to usability testing
- Weeks 8 & 9 Q2 September 2018: Prepare for usability test
- Weeks 10 & 11 Q3-4 September: usability test & wrap-up, plan for next phase

UX's initial goals

- Peace of mind to onboarding stakeholders that this project is in good hands
- Regular, useful check-ins with stakeholders that move the project forward and build relationships ○ Clear, automated reporting for stakeholders (using Enviroway', of course) ○ Participatory design with stakeholders and other Enviroway' folks ○ Stakeholders getting to observe research / usability testing
- Will focus on brand new users with potential to become an paid customer

Future Considerations

- Predict by beginning of Q2 September that we will know enough about the problem and possible solution for a dev
- UX r&d for all types of users
  ○ Many onboarding stories are multi-user
  ○ Explore sharing, collaborating, inviting legs of onboarding

- Globalization and localization
  ○ "Globalization is the process of designing and developing applications that function for multiple cultures. Localization is the process of customizing your application for a given culture and locale. ... So you can think of globalization as a strategic venue, where as localization is tactical." ~Stack Overflow