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MARKETING RESOURCE

UX DESIGN

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INTRODUCTION

UX DESIGN

User experience (UX) and user interface (UI) are used so often together that many people think of them as nearly interchangeable, but the distinction between the two is actually very important. While the two interact and play off one another, they fulfill very different purposes in the software and web development world.

UX, in the abstract, is a way of **designing a product that thinks of the user first.**

We tend to use it in the digital sense, but it can be applied much more broadly than that. The term goes back to the late 1990s, but the whole idea of making things easy to use is much older. Any consumer product, from a car to a sewing machine to a coffee machine, could focus on the experience of the user.

More importantly, UX is not focused on the visual elements of a product – that’s the realm of user interface (UI). The overlap is obvious, but not complete. The shape, color, and phrasing of a CTA on a website is a matter of UI, while the fact that it exists in the first place belongs to UX.



Why is UX So Important?

We live in a world of unprecedented choice and variety, but that can be a double-edged sword. For the consumer, it means they're no longer limited to one or two options based on what's affordable or nearby. But for businesses, it means that it's harder than ever to make your brand known among the competition.

As a result, consumers have grown impatient. If a consumer is looking for a running shoe and clicks on the first website in the search results, only to find that they can't actually make a purchase on the site, they're not going to stick around and find another way. Instead, they'll jump ship and find the next best option.

[What this means is that your product, brand, website, app, and every other interaction that your consumers have with your product will need to be as helpful as possible.](#) You need to answer every question your customer have, even if they don't know they have them. You should guide them toward the information they want, toward making a purchase, or toward getting the help they need.

In short, UX is important because it fulfills the user's needs. By doing so, you create positive experiences, loyal customers, and business success.

C H A P T E R 1

PRINCIPLES OF UX DESIGN

So if UX is the process of making the experience better for the user, and we know why that's so important, then how do you actually go about making it happen? How do you increase the satisfaction of your users — whether they're website visitors, software users, people who downloaded your mobile app, or anyone else interacting with your product — by making it more functional and easier to use?

Some Basic Principles

There's really no end to the level of detail we could go into when it comes to optimizing your UX design, but you don't want to read 100,000

words on the topic, so we'll stick to the basics.

Provide Context

Context is important. You'll have to check your own website's stats for yourself, but we're willing to bet that most of your traffic doesn't come from people landing on the homepage and exploring from there. More likely, they're going to be landing somewhere in the middle of your site, sent there from a social media post or a search results page, and they'll want to know what they're looking at.

Your [users should be able to tell where they are on the page](#), which sections are above and below the page they're currently looking at, and how to get back there in the future. If they're not sending the link to someone else, they should still be able to navigate back to where they were.

Users should never feel lost or overwhelmed on your site, struggling to find their way out of an article or navigating in loops.

Remember, you're guiding them along a journey. You're not forcing them anywhere they don't want to go, but you also don't want them wandering aimlessly. They need a nudge.

Be a Human

For consumers, it's very easy to think of brands as faceless entities and forget that there are human beings operating them behind the scenes. As a brand, you need to remind consumers that you're not just robots.

The best way to do that is to [imbue your brand itself – and, by extension, all the parts of your brand that your customers interact with – with human qualities](#). Choose a voice and tone, then stick to it in all your communications. Be personable and approachable. Use real language that real people use. Don't say “contact us at your earliest convenience,”

say “get in touch when you’re ready to get started.” And so on.

Make Everything Easy to Find

This is similar to the advice on context, but applies more to [people’s ability to navigate and explore without help](#). If someone comes to your site and wants to find a list of features or a pricing sheet, it should be intuitive and obvious where that information is.

That means creating hierarchies that reflect the way people organize things in their head, from large categories to small. There will be internal debates about what should go where, which is where you can start to experiment, but the natural flow of information is something you should be considering at all times.

Simple and Easy

Don’t get overly complicated with your site — it’s tempting to throw everything you have at a site in case some of it resonates with your visitors, but that’s more likely to turn overwhelming and drive people away than to actually help them.

Instead, take the time to think about the processes your users want to undergo and the processes you want them to undergo, then visit the site as though you’ve never seen it before. Is it easy to sign up for the newsletter? Can someone download whitepapers without emailing you for help? Can they find a detailed list of pricing options for their budget? Can they learn more about the product? Streamlining the processes that are most important will help guide visitors along the journey you want them to take.

C H A P T E R 2

UX DELIVERABLES

So those are the basic principles of how your site or software should work. Now, how do you actually do those things? There’s a lot of prep

work that goes into creating a site with good UX, so make sure you're putting the groundwork in before you launch. Here's where to start.

User Research

User research is probably the most important aspect of creating a user experience. You're trying to make sure that your users have the best possible experience with your product, but every user is different — you can't possibly help your users unless you know who they are.

You need to know what your users want: their needs, tendencies, and motivations. What's most important to them? What features can't they live without? Do they want fast facts or do they want to do detailed research? Are they looking for a discount or are they willing to pay a premium for a better product?

Most of the data you have on your users will come from previous iterations of your site or software — hopefully, you've been paying attention to who uses your site, makes purchases, and comes back for repeat business. If you haven't, or you're truly launching from scratch, this step becomes educated guesswork.

Buyer Personas

[Whether you're guessing or using real data, you need a buyer persona.](#)

You might even need several. A buyer persona is a description of your ideal customer — hopefully, it's not far off from your real customers, but it doesn't have to be an exact match. No customer is truly perfect, so the buyer persona is something to strive for instead.

That description can be as detailed or broad as you want, but it will inform virtually everything you do as a brand, so it should have enough information to be actionable. You should have an idea of your ideal customers' income level, job title, location, age, budget, and pain points at the very least. If you want a more rounded picture, include things like hobbies, which social media sites they use, whether they check email in the morning or at night, and anything else you think might be relevant.

Relevance is key. You can add as many pieces of information to your buyer personas as you want, but the point is that they'll give you useful insights into how to communicate with your customers. If they're not telling you anything helpful, leave them out.

It's also a good idea to create negative buyer personas. These are the kind of customers that you don't want to attract, for a variety of reasons. Maybe their account is too big for your small company to handle.

Maybe they don't have the budget for your services. Maybe they live too far away and the time zones will be a consistent frustration. There will always be customers who aren't worth the effort to recruit, and it's worth spelling out who those people are.

Competitor Assessment

[The next thing to consider is what your competitors are up to.](#) No brand exists in a vacuum, so there's someone out there who is directly competing with you for market share in at least part of the services you offer. You need to be paying attention to them.

First, do your best to find out who's doing well and who's struggling. If your competitors are publicly traded companies, it should be relatively easy to find earnings statements or check their share price, but that doesn't give you the whole picture.

In addition to their hard numbers, get a feel for engagement on their social media accounts. Check out their page rankings compared to yours. Do a Google search for various keywords and see who comes up first. Plug their website into site speed tools or SEO dashboards and see how they grade.

Compare feature sets. Your product won't be a clone of theirs and vice versa, so what are the key differences? Who cares the most about those differences? Why might a customer choose them over you, and are you ok with that? Sometimes, it's ok to let your competitors take the accounts that you're not interested in — that's why we mentioned negative buyer personas earlier.

Finally, pretend to be a customer. Make a list of things your customers might want to do, then try to do those things on your competitor's website. Sign up for a newsletter or a free trial. Search for a blog post. Download a whitepaper. Find out their pricing structure. Make notes on which parts of the experience are difficult and which parts they're handling better than you are.

Plan Customer Interactions

It's a good idea to pretend to be a customer on your own site, too.

Chances are, you haven't really pored over the front end of the site with an unbiased eye — you might have helped design or build it, but **that's not the same as navigating it.**

The whole purpose of your site and UX is to help customers with what they want to accomplish, guiding them in the right direction to meet their goals. So what are those goals? For example:

- Signing up for a newsletter
- Getting someone on the phone to explain the product
- Getting detailed pricing information
- Making a purchase
- Renewing a purchase
- Getting help with onboarding or setting up the purchase
- Inquiring about a problem

This list will vary depending on exactly what you offer, but the point is to think of your website or product in terms of goals, not features. What do your customers want to do, and how can you help them do it?

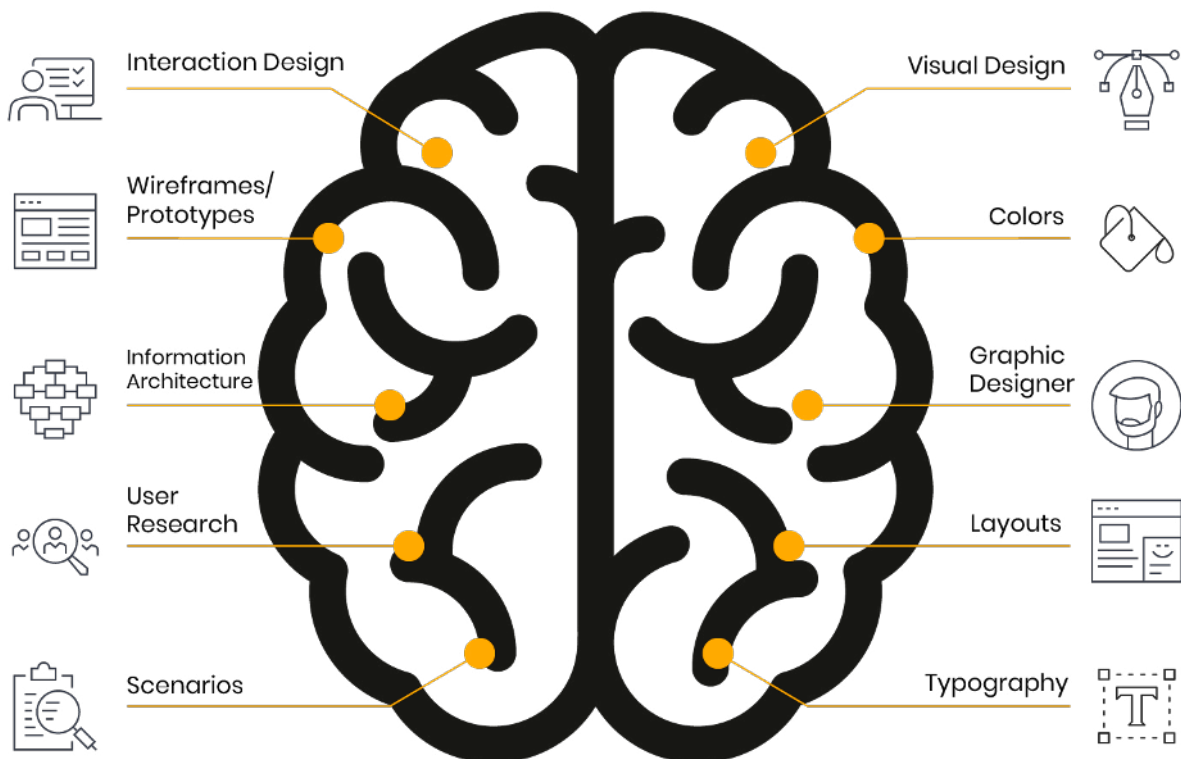
Information Architecture

The final step of the planning process is how your information is laid out.

Some information is more important than others, but there's no hard and fast rule about how to lay your site out. Every brand will be different, and you'll use the information you've gathered from previous iterations and the process we mentioned above to determine what works for you.

Before you build, you should know what's front and center and what can be buried deeper in the site. If beating your competitors on price is your top priority, then a detailed pricing table might belong right on the front page. If you pride yourself on your sales staff, you might focus more on CTAs that prompt visitors to call you.

Remember the “three clicks” rule, which states that no piece of information on your site should take more than three clicks to get to from the front page. That's not a hard-and-fast rule — if you have a massive database of articles or hundreds or retail SKUs, you might want a more complex sitemap — but the principle is sound. Don't make it harder to find important information than you absolutely have to.



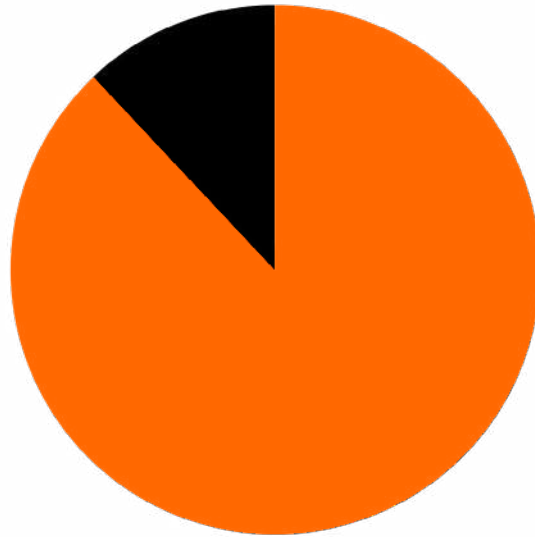
CHAPTER 3

POST-LAUNCH SUCCESS

Everything we've talked about so far is just leading up to the launch of your site or product, but that's only the beginning of your journey. Every digital product is constantly evolving to meet the changing needs of your customers, and yours will be no exception. Here's how to make sure you're keeping up.

Collecting Feedback

User feedback is information collected both from and about your users to see how they're reacting to and interacting with various aspects of your site and product. [User feedback is one of the most useful pieces of information you have](#) – it drives decision making and planning by UX designers, researchers, web developers, and marketers to make sure the users are having the best possible experience.



A single bad experience on a website makes users 88% less likely to visit the website again.

There are a few different types of user feedback. Proactive feedback comes when you go out of your way to get information back from your customers. That could come in the form of a point-of-conversion survey right after a purchase, a Customer Effort Score (CES) survey after they've had a few weeks to get familiar with the product, or a Net Promoter Score (NPS) survey on a regular basis for your regular subscribers.

Then there's reactive feedback, which comes after a specific interaction with the brand. Usually, that's the result of helping the client with something. You might have an onboarding program or education materials that you use to get them set up, after which you ask how the process went. You might have a survey that you send out when someone closes a support ticket or when they downgrade their account. You might even ask them why they unsubscribed from your email list.

Finally, there's on-demand feedback, which is the feedback that customers can leave at any point during their experience. Any email you get from a customer, a complaint about features, or a review left about your product — any time a customer goes out of their way to tell you about their experience — is on-demand feedback.

For all three types of feedback, your focus should be on qualitative, not quantitative feedback. There's plenty to be gleaned from hard numbers like customer lifetime value, renewal and churn rates, and usage numbers, but you can't forget about how your product or site made your customers feel in their own words.

Quantitative User Testing

Part of the reason that qualitative testing is so important is that it gives you context for quantitative testing that you do later. Let's say you add a CTA at the bottom of a page that leads customers to a pricing sheet, thereby pushing them farther down the buyer's journey toward a purchase. Of the people that click on that CTA, 10 percent go on to get a quote and become a sales-qualified lead.

But is 10 percent any good? It's impossible to say without context. It's possible that your UX is laid out perfectly and 10 percent is the best you

could hope for, or it might be that the funnel isn't intuitive enough and you could be getting 30 percent conversion if you fixed it. Without asking your customers or A/B testing (more on that in a second), you won't know whether you're optimizing your users' journey through the site.

So what quantitative data should you be collecting? As with everything else, the answer is "it depends." Every company and brand will find that certain KPIs correlate more strongly with sales than others, and it'll be up to you to find out what those are. Here are a few to start with:

- **Task success rate:** the percentage of correctly completed tasks by users. Which tasks will vary, but as long as it has a clearly defined finishing point (like filling out a form to get a quote), you can collect data on the percentage of users that finish it.
- **Time on task:** simply put, this is how long it takes for a user to complete a task. You might not know how long a task should take, but you can certainly judge whether time on task is getting longer or shorter.
- **Search vs. navigation:** if you have a relatively simple site, you want people to be able to navigate to the page they want. If you have a complex ecommerce site, you want to make sure your search function gets people where they want to go. Tracking how people find the page they want can give you valuable information about your UX.
- **Error rate:** if people are consistently filling out forms wrong, it probably means you need to make the form more intuitive. Tracking the rate at which users commit mistakes can tell you where they need the most help.

A/B Testing

A/B testing is one of the best tools you have in your arsenal for finding out where your UX could use improvement.

The basic principle is simple: when a user clicks on your site, they're served either version A or version B, at random. The user has no idea that there are two versions. You can then track, behind the scenes, whether the users who saw version A or version B did better at certain quantitative or qualitative metrics. If A wins, you make that the default version going forward and test something else.

There's nothing you can't test. The two versions could be completely identical except for the wording of one CTA or the spacing of the lines in your body copy. Alternatively, you could create two completely different landing pages that serve the same purpose and see which one gives you more leads. Some popular options for A/B testing might be:

- **Headlines:** you want a headline that clearly communicates the purpose of the page and inspires people to keep reading. Testing headlines that are long and short, positive and negative, assertive and inquisitive, feature- and benefit-oriented, and so on can give you insights into what your customers like.
- **Layout:** should the CTA be at the bottom or on the right? Should your hero image be above the headline or below it? Should your customer reviews be front and center or tucked to one side? A/B testing is a good way to find out.
- **Copy:** don't go overboard typing up two completely different versions of your site, but you can experiment with the tone, formality, and level

Research shows that, on average, every **\$1 invested in UX brings \$100 in return**. That's an **ROI of a whopping 9,900%**.

of jargon in small blocks of copy to see which ones your users prefer.

- CTAs: there's an endless amount of debate over what a CTA should look like, so do some experimentation. Try different sizes, colors, copy, text vs. buttons, contrast, and location.
- Forms: it's easy to measure the conversion rate of a form, which means it's easy to A/B test them, too. Try long forms with lots of fields of short forms with few fields but multiple pages. Play with the design, structure, and layout. Change which fields are required and which ones aren't. Mix up the copy that invites people to the form in the first place.
- Media: every site and piece of software will have a visual component, so experiment with what your users respond to. Try images vs. video, sound vs. silent, product- vs. benefit-based, autoplay or not, slideshows vs. static images, and so on.
- UGC: user-generated content can be extremely useful in recruiting new users, so try putting reviews, testimonials, endorsements, influencer content, and media mentions on your page and seeing if they make a difference.

Examine Short Sessions

One of the most basic metrics for website or app usage is session length. If someone comes to your page from an external link, lingers for 60 seconds, and leaves, you probably haven't made any impression on them at all. The same goes for users who download an app, open it, and never come back. You might not know exactly what turned them away, but something definitely went wrong.

Using your analytics tools, you can start to tell where and why users are leaving. If users are leaving right after a big interstitial screen pops up telling them to subscribe to your newsletter, that screen is probably the culprit. If users are getting all the way to checkout and balking when asked to register, you might want to add a guest checkout option.

In some cases, you can even use a session recording tool to track the exact steps that people take between their initial visit and the end of their session. Look for correlations and patterns that might help you understand why people end their sessions and how you can get them to stick around longer. You can also compare successful sessions to find out what constitutes a good user experience, then try to guide other users in that direction.

Audit Your Conversion Funnel

Your conversion funnel is simply a way to visualize the process by which visitors become customers. It's called a funnel because you're guiding users in a specific direction, narrowing down the pool of visitors until you find the ones that want to make a purchase (or whatever else the desired action might be).

This is the main goal of UX design — to point people in the right direction, helping and encouraging them to take the right steps that will result in a conversion. What that conversion means is up to you, but that process is what we've been building toward throughout this article.

Based on everything we've talked about so far, you should be able to see where the speed bumps are on the road to conversion. Where are people getting lost, failing to find the right next step to take? Where are they hesitating, second-guessing whether they want to continue? What features can you improve to make sure that your prospective customers have all the information they need to make a purchase decision?

C H A P T E R 4

A NOD TO GROWTH DRIVEN-DESIGN

You might have noticed throughout the length of this article that we've talked a lot about iterating, testing, and adjusting your site's UX to find the optimal layouts and formats for your customers. You might also be thinking, "why would I spend tens of thousands of dollars and months of time on a site if I'm just going to change everything about it?" That's not by accident.

[Growth-driven design \(which you can read about more at the link below\)](#) is a new and somewhat controversial system of designing and launching websites. The old system is that you try to come up with everything your site will possibly need, build dozens of pages and features, take months to design everything, and then launch.

It's not a good system. It takes a long time, costs a lot of money, and you end up with a huge, unwieldy site that's difficult to alter – not to mention the fact that you don't want to alter anything after spending so much on the site in the first place.

Worse still, it's not based on what your customers actually want. How could it be? You designed it before they ever got a chance to use it. That's what makes growth-driven design (GDD) so different.

GDD proposes that you launch your site as a minimum viable product. It will contain your core product, your core messaging, and your core features, and nothing else. It's not a final product – in fact, we'd argue that there's really no such thing as a final website – it's a launching point for all the changes you're going to make in the future.

Once the initial website is created, you can start gathering data like we mentioned above. You can examine how your users interact with the site, what features they might need, and which ones they don't use. You can find the sticking points in the funnel and fix them. You're not paying for a completed website, you're paying for the constant tweaking and adaptation so that your website never falls behind the shifting whims of your users.

The Future of the Web

There was a time when using the internet required technical skills that were only accessible to a small portion of the population, but that time is long gone. The internet is in constant use by the majority of the population, all over the world.

With popularity comes competition. There are more and more websites, software products, and apps every day, with wider and wider swaths of the population using them. They have so many options that they're not

going to stick around for a product that's unintuitive, slow, or confusing – they're going to leave and find something else.

That's why the user experience is so important. You simply can't have a digital presence that creates any friction in the process of guiding consumers toward a purchase. You have to be thinking about the best possible experience for the user at every stage of the process, from the first moment they hear of you to the moment they make a purchase and beyond. UX isn't an exact science, but it's an area you can't afford to ignore.



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