

developing a
**Customer Experience
Management plan**
for your web site





The act of making something both effective and beautiful in whatever its form

People go to web sites with specific objectives in mind. Some people come to our sites to buy products and find specific information, others visit for product support and even more log in to apply for services, update invoices and monitor progress on mutual projects. Whatever people are trying to accomplish online, knowing their needs, goals and expectations, allows you to design your sites to provide the most satisfying experience possible.

It's not easy to know your online customers. In retail stores, car lots, office buildings and other settings in which we work, we speak with people directly, exploring who our customers are, what they want from us, our products and our services. Knowing who is coming to our web sites, their objectives while visiting and their satisfaction when they leave demands a more methodical approach to understanding who is visiting and how we can provide the best service possible.

Our web sites are additional environments in which people interact with us. We use them to learn, communicate, buy, sell, inform and entertain. The objectives of our sites are often numerous, and our target audiences range in gender, age, education, income and web savvy. As managers of our web site productivity, we are also responsible for our customers' online experiences. We must create objective criteria that help us manage our site's health and we must continually relate to the people who are our customers.

The Customer Experience Management Plan is designed to help you understand, measure, monitor and improve your sites to optimize both your customers' and your business objectives. The Plan serves as a guideline for iterative site development and centers on customers as the focal point of your business. We invite you to use the Plan to *Determine* your site's effectiveness, *Explore* your customers' needs and expectations, *Merge* your business objectives with your customers' goals in a customer-centered design, and continually *Maintain* your site with your customer in mind.

We at WebCriteria are proud to work with you to enhance the Internet as a highly functional, easy to use space in which people can accomplish multiple objectives, educate and entertain themselves and provide information and services to a wide variety of audiences.

Alistair Williamson, CEO
WebCriteria, Inc.

preface

In this outline, you'll take away the key elements necessary to develop a Customer Experience Management Plan for your web site. As with any plan, the development process is the bulk of its value. Use this opportunity as a means to engage management, customers, and internal and external stakeholders in the importance of focusing on the customer and their experience at your site.

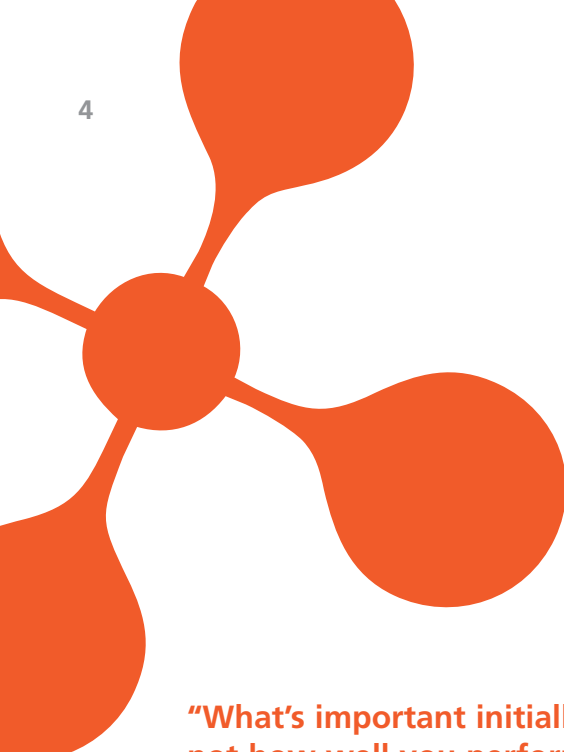
The overall process of customer experience management throughout the web site life-cycle can be visualized in each of the four connected stages:



Each of these sections are designed to be implemented interchangeably and continually through the life of your web site. In each section, the strategic and tactical implications of assessing the customer experience are reviewed.



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“What’s important initially is not how well you perform, but how well you understand the goal for customer experience. If you don’t understand the goal, only luck will cause you to deliver great customer experience.”

Patricia Seybold Group,
Customer.com® Quality of
Experience Benchmark ©2000

determine

Determine will begin by asking you to define the business goals of your web site. **What are your primary site objectives? What criteria will you use to determine success?**

Within this section you will be asked to conduct a site assessment where you will evaluate its business effectiveness and gain an understanding of the current site architecture. You will examine the role the site plays in your business plan. Where are we now? Where do we want to be in 3 months? 6 months? A year?

Determine will help you examine conversion and retention rates and define the scope and severity of the site’s challenges. You will also learn when and how to integrate traffic, performance, automated usability, and survey tools and how they fit into your management strategy.

identify business objectives

Outcome: Business goals and objective standards of measurement are clarified. Conversion and retention rates are monitored throughout the entire customer experience management process with special emphasis on customer-centered design.



business objectives of the site

- generate leads**
measure: number of demo requests or registrations
- provide customer support**
measure: online user surveys, customer interviewing
- customer access to products**
measure: number of accesses by registered customers
measure: retention, month-by-month return of visitors
- pre-sales support: gather information regarding products/company**
measure: traffic, page views, online surveys
- investor relations: gather info regarding products/company**
measure: interviews with investors
- editors/press: gather info regarding products/company**
measure: usability testing and interviews with editors and members of the press

commit to a customer experience plan



What

Traffic, performance, usability feedback and competitive comparisons are indicators of a site's success in attracting and converting visitors. The business objectives of the site can be evaluated through these measures.

- Determine the scope and severity of the problems on the site.

How

Objective measures of visitor behavior: traffic, performance, usability testing, comparative user experience

- Monitor customer interaction with the site. Determine key conversion rate objectives throughout the site (registration completion, shopping cart sell through, successful customer support, problem look-up).
- Examine customer drop-off areas. (traffic)
- Measure key tasks to identify customer confusion and irritation. (usability testing)
- Measure the navigational consistency of the site. Assure that pages are easy for users to understand and use and information is easy to find. (WebCriteria's Site and Task Analysis)
- Understand network reliability and speed. (performance)

How**(continued)**

- Identify peering problems between network backbone providers and key geographic regions that are not well served. (performance)
- Assess survey data to gather general customer impressions of the site. (surveys)
- Identify existing customers and understand the revenue and attrition rates for each key customer segment.

When**Ongoing**

- Continually measure the conversion rates of visitors, time and effort required for key tasks, and network performance.

Who**Business Team, Analysts (Usability Engineers), Marketing, IT**

- Based on objective measurements, evaluate business objectives and customer standards and prioritize next steps to improve customer satisfaction and conversion.

Explore focuses specifically on understanding the needs and expectations of your customers. You will learn how to use multiple procedures to better understand your users and create objective, measurable standards for customer experience management.

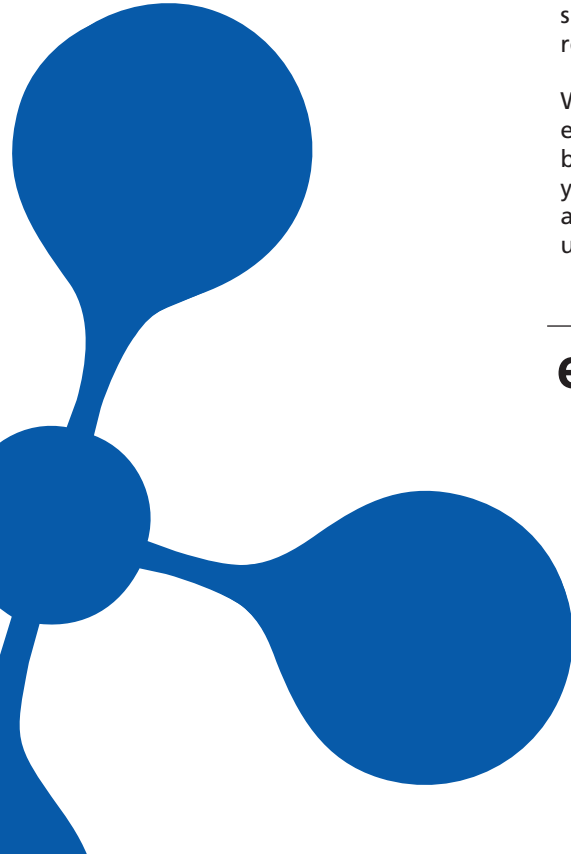
You will gather the information needed to better understand how users want to use your site. This information will help you to create and refine customer personas and user scenarios.

Within this process you will define customer experience metrics and review and prioritize key business goals of your site. *Explore* requires that you integrate user task analysis, usability testing and other testing procedures to better understand the people using your site.

explore

“You have to have a ruthless focus on the customer’s needs and customer’s history to do well. Doing it online means using good tools.”

Paul Inman, Hallmark



refocus on customer needs and confirm business values

Outcome: Customer satisfaction goals are established based on user test analysis, usability testing, refined online surveys, market research, audience analysis and ongoing use of automated usability and task analysis, traffic and performance metrics. Customer understanding is further developed based on usability testing, focus groups and survey data. Each section of the site and its contribution to customer satisfaction and business objectives is prioritized.



Develop Customer Personas

Example: Andrew, Purchasing Manager
Responsible for research, configuration and purchasing of hardware components

- Business professional, net savvy
- Responsible for pricing, quality and shipping

User and Task Scenarios

Example: Andrew, Purchasing Manager

- Pre-sales, investigate whether product/services are of value
- Post-sales, draw value from purchase, customer support inquiries
- Pre-sales, returns to research competitive products and investigate preferred buyer plan

refocus on customer's needs



What

Customer needs are often poorly understood. It is imperative to determine the business and product needs of the site's customers.

- Identify customer preferences through focus groups, user testing and surveys.
- Measure key tasks and navigational tendencies to uncover problem areas.

How

Focus groups, market research, customer service reps, online surveys, traffic and performance analysis, automated task analysis

- Determine patterns of problems based on customer feedback.

When

Bi-annually/Ongoing

- - Update the site's content based upon customer needs and product offerings.
 - Continually monitor conversion and retention targets on the site.
 - Measure current key tasks to assure ease of use for each customer segment.

Who

Ethnographers, Market Research Specialists, Customer Experience Experts, Performance Monitor Services

- Determine the tasks, roles, environments, expectations, limitations and background of each customer persona. Assure that the current and future designs meet the needs of each of the customer types and their primary tasks.

What

If the site is organized from the company's perspective, and not the customers', visitors may struggle to find value and will quickly click away.

- ❑ Define business value of the site for each customer type.
- Define the tasks that customers want to perform on the site.
- Prioritize tasks based on customer needs and business objectives. Focus energy on at least 50% of the tasks users want to perform.

How

User and task analysis, focus groups, online surveys, traffic, ethnographic study, contextual inquiry

- ❑ Key information from human observation is critical.
- Focus groups and online surveys act as additional data to verify observation data.

When

Bi-annually/Ongoing

- ❑ Use the Action Rule to help prioritize: Need + Value = Action
- Most beneficial prior to design or introduction of new product/service offerings.

Who

Usability Engineers, Market Research Specialists, Interactive Designers, Information Architects

define customer experience standards

Determine

Explore

Merge

Maintain

What

Business success and desired customer experience are impacted when key sections of the site are inadvertently ignored, abandoned or hidden.

- Identify and evaluate the key business processes on the site.
- Define sections of the site that are in critical need of improvement.
- Prioritize product groups based upon customer needs.
- Assure that the site provides an easy navigational sequence to key business areas.
- Measure key tasks to assure that customers have an easy time on the site.
- Monitor traffic to identify attrition.
- Identify amount and type of unpurchased inventory abandoned in shopping carts daily.

How

Usability testing, automated task analysis, traffic, performance, heuristic evaluations, usability testing

- Determine if the problems are related to function, graphic images, content, merchandising or branding.

When

Quarterly/Ongoing

- Continual monitoring of conversion rates, key tasks, business and customer objectives.

Who

Usability Engineers, Interactive Designers, Information Architects, Senior Management

- Contract when necessary. Requires the active participation of the CEO or senior decision makers.

What

Customer experience metrics for the site are seldom well-defined. Effective management of the customer experience requires a core set of metrics.

- ❑ • Business needs and customer experience metrics must be interwoven.
- Based on automated usability testing, traffic, performance, user testing, and focus groups, define the critical elements of the site and the factors of customer satisfaction and effectiveness.
- Describe customer standards using objective, repeatable data (WebCriteria's Site and Task Analysis, traffic, performance) to assure that the site's efficiency is managed and enhanced.
- Define improvement standards to be implemented twice quarterly.
- Define standards to dovetail customer experience standards into the overall business plan for the enterprise.

How

Usability testing, WebCriteria's analysis, traffic, performance, focus groups.

- ❑ Usability metrics defined and then tested will help shape the requirements of time, effort and overall success with the site and specific tasks.

When

Monthly/Quarterly

Who

Usability Engineers, Interactive Designers, Information Architects, IT, Business Managers and Marketing

- ❑ Metrics and standards will help justify time and budgeting issues.

review key business objectives

Determine

Explore

Merge

Maintain

What

Business goals from which to evaluate customer experience management are necessary. Review key goals of the site and prioritize them.

- • Implement plans to leverage the web site to reduce business costs and improve efficiency over the next quarter (call center, fulfillment, information).
- Determine the site's impact on brand.
- Implement a more robust tool for gaining "real-time" market feedback.
- Determine actual and needed conversion rates to succeed next quarter.

How

Review and prioritize action based on qualitative and quantitative data.

- Use the Action Rule: Need + Value = Action

When

Ongoing

Who

Senior Management

- Usability issues should drive business direction at this stage in the business plan.

www.webcriteria.com

conversion rate

=

completed transactions

total number of visitors



“The average industry-wide conversion rate is only 1.8%.

By converting 1% more visitors, to a 2.8% conversion rate, you will increase revenues by over 55%”

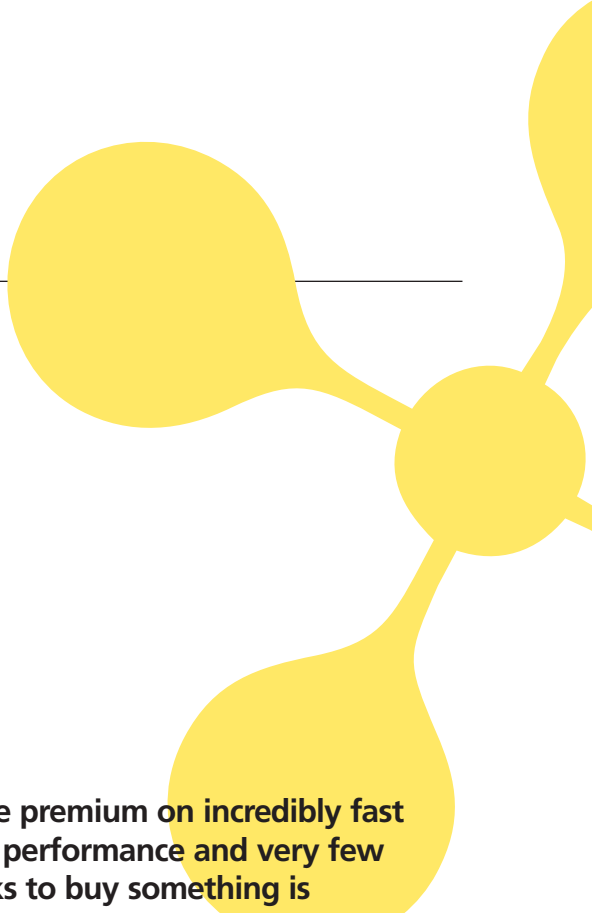
Shop.org
The State of Online Retailing 3.0

merge

Merge, in conjunction with *Explore*, is vital to developing the most positive web site experience.

The goal of *Merge* is to help you create a site that is simultaneously business focused and second nature to your users. Within this stage you will concentrate on developing a customer-centered design that fulfills your customers needs and desires. *Merge* is based on the culmination of your findings throughout the *Determine* and *Explore* phases of your plan and focuses the organization on the commitment to improving customer experience.

Merge is premised on the idea that it is easier to satisfy customers' needs when they are fully understood, establishing the inherent foundation for business success.



“The premium on incredibly fast site performance and very few clicks to buy something is extremely important. If it’s going to take more than three clicks, you’re history.”

Mary Modahl
Research Vice President
Forrester Research

implement a customer-centered design

Outcome: Develop and implement a customer-centered design. Customer Experience Standards are defined and integrated into site design specifications. Review and approval process is followed regularly.



What

Once business and customer data and metrics are interpreted and prioritized, integration into existing or beta designs is now possible and necessary.

- • Create Customer Experience Standards.
- Establish a review and approval process.
- Establish benchmarking practices against best practice sites on the web in multiple industries.
- Create functional architecture that supports business and customer needs.
- Assure that design conforms to technology constraints.
- Conform graphical design and content to usability standards and business objectives.
- Perform usability testing to further shape new design and Customer Experience Standards.
- Automate the usability measurement of the site and key tasks to monitor adherence to Customer Experience Standards.

review key business objectives



How

Test navigational soundness, search, labeling systems, interaction techniques, information organization and usability

- Assure that the design complements database and network structures and enhances performance.

When

After thorough fulfillment of the *Explore* stage. Business objectives are clearly defined. Customer needs, wants and interaction with the site are all clearly understood.

- Senior Management recognizes and appreciates the significance of the online customer experience and recognizes its critical nature in business success. Senior management also recognizes the need for a cultural shift from a techno- or company-centered view to a customer-centered design and flow.

Who

Interdisciplinary team composed of: Interactive Designers, Usability Engineers, Technical Writers, Senior Management, Programming Team, IT, Graphic Design

the consequence of poor customer experience

65% of on-line shoppers give up because they can't find what they're looking for.

40% won't return after a negative experience.

6% quit patronizing the physical store.

Source: Boston Consulting Group (February 2000)



“The bottom line: increasing customer retention rates by 5% increases profits by 25% to 95%.”

Harvard Business Review
August, 2000

maintain

Maintain provides the infrastructure to sustain a long-term strategy with ongoing diagnosis and iteration. Within *Maintain*, you will continually re-visit the *Determine*, *Explore*, and *Merge* phases of your plan, assuring that customer needs are designed into the site, that your Customer Experience Standards are met and that the business effectiveness of the site meets your monthly and quarterly goals.

sustain a long-term strategy with ongoing diagnosis and iteration

Outcome: Implementation of a long-term strategy with ongoing diagnosis and iteration. Site is continually managed based on correlation of key metrics and Customer Experience Standards.



What Site re-design is accomplished based upon the *Determine*, *Explore* and *Merge* phases. Conversion and retention rates are to be monitored continually. Customer standards are developed and clearly defined based on customer testing.

- • Monitor key tasks and business objectives continually.
- Re-visit *Explore* stage to verify that implementations fulfill customer needs.
- Monitor conversion rates and revisit the *Determine* stage.

How Integrate Business Information

- • Integrate traffic analysis with a cookie or page-tagging mechanism that allows you to do all of the following:
 - identify individual visitors
 - classify individual visitors by customer segment
- Know the dollar volume of business transacted daily at the site.
- Link purchase-related URLs to price and volume information.
- Determine the rate at which each customer segment is purchasing.
- Revise marketing targets based on actual experience.
- Study the average length of a visit to the site.
- Know the percentage of incoming users that make pages critical destinations.
- Target the expected dollar value of a visit from a customer in market segment X.

sustain a long-term strategy with ongoing diagnosis and iteration

Determine

Explore

Merge

Maintain

What

When metrics and processes for managing the customer experience are in place, discipline and consistency for ongoing assessment will guarantee long term e-business success.

- ❑ • Quantify the expected dollar value of abandoned shopping cart merchandise for each visit from market segment X.
- ❑ • Determine the top geographic locations from which existing and potential customers are accessing your site by using the customer segments you identified.
- ❑ • Run location-specific performance analyses to assess connection difficulties at key locations.
- ❑ • Run a general performance analysis on pages with key business tasks. Identify and fix any performance problems such as:
 - Slow DNS lookup
 - Slow connection / redirection
 - Excessive latency in the return path
 - Pages that take too long to load
- ❑ • Combine traffic and usability data to identify behavioral sequences that constitute visitor activities with the highest business value. Search the traffic log for instances of visitors embarking on these paths. Identify key attrition points. Compare with page usability data.
- ❑ • Correlate traffic and usability to identify pages with both a high traffic rate and low usability. These are high priority candidates for reworking.

What (continued)

- Identify behavioral sequences from traffic and audience measures that indicate given reasons for attrition and abandonment. Search the traffic log for these sequences to determine relative frequency and impact.
- Prioritize geographical regions for optimization by the percentage of target users who access the web via each region.

How

Integrate automated usability and task analysis, performance, traffic and survey data. Adhere to standards defined in previous phases of the Customer Experience Management Plan.

When

Quarterly/Ongoing

- Be proactive. Review each quarter.

Who

Senior Web Managers, Business Managers, Metrics Analysts, IT Managers

- Refine business objectives and Customer Experience Standards.

bringing it all together

WebCriteria brings a customer experience focus to each iteration of your Customer Experience Management Plan and will partner with you to make sure your site is designed for mutual achievement of customer and business goals.

WebCriteria Site Analysis and Task Analysis provide the objective standard for assessing and comparing online usability and customer experience, giving you the information you need to monitor and improve your customers' interactions with you on your site.

The WebCriteria Solution Services team brings usability, technical and business expertise to your Customer Experience Management core team and works with you to integrate important web site metrics, perform user testing and task analysis and develop your customer-centered design.



next steps

Concept to reality. Theory into practice. The first iteration of a Customer Experience Management Plan for your site is only an outline away. Your first draft begins a process that will lead to improved conversion and retention for visitors to your online environments. WebCriteria is happy to help answer any questions you may have, via phone or email.

Please contact us at info@webcriteria.com or 503-225-2991 with any feedback, suggestions or testimonials. Let us know how you put the Plan into action and improved your business results based on improving your online customer experience.



customer experience management plan

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WebCriteria Solutions:

Site Analysis
Task Analysis
Data Integration

User Behavior Profile
Usability Testing
Task Analysis
Customer Centered Design
Design Recommendations

Site Analysis
Task Analysis



notes



about WebCriteria

WebCriteria helps companies increase sales and customer retention to their web sites by providing answers on how to improve online customer experience. Through its innovative technology and expert analysis, WebCriteria objectively and consistently compares the experience of web site visits to corporate competitive sites and industry peers. Representative customers benefiting from WebCriteria's services include IBM, Verizon, Honda, Lexmark, Chase Manhattan, Marriott, U.S. Bancorp and many web development agencies and consultancies, including Agency.com, Imagio, Cap Gemini Ernst and Young, and PricewaterhouseCoopers.



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