

## Why you should read this book

Everyone with a driver's licence and the right key can get into a car, start it up and drive away. You know immediately how it starts, how it steers and how it stops.

Why should websites be any different? All too often when we click through to a site, we have little idea what to do next. We can't tell what information it contains nor how to access it.

Most of you have probably already invested a lot on your company's website – but many of your customers may still be trying to work out where the ignition key goes.

Simply throwing money at your website assures you of nothing. Measuring and managing the online experience your customers have with your website is the only way to ensure an adequate return on your investment.

You can build a website and get your customers to come and kick its tyres. But if you invest in the user experience that your customers have with your site, so they can easily get what they need, and do what they want, then they'll get in and drive.

That's when your business will be ready to fly.

**Bruce Russell**

User experience consultant



## Preparing for take-off: a practical guide to getting a return on your online investment

First Edition - May 2010

Copyright B.Russell/Wired Internet Group, 2010.

**No quotation without attribution. If you would like to reproduce any part of this book, please contact Wired at the address below.**

**The Author: Bruce Russell** - User experience consultant  
bruce@wired.co.nz

Bruce manages the user experience process for Wired, delivering this in a partnering role. He is programme leader in the Graduate Diploma of Information Design at Christchurch Polytechnic Institute of Technology (CPIT).

Bruce lectures in user experience and information management, and is currently studying towards a doctorate. He has worked as a writer, archivist, editor, web content manager, information architect, and usability tester.

**The Contact: Keith Lightfoot** - Account Manager  
keith@wired.co.nz Mobie: +64 274 341 034

Keith's background includes programming, systems analysis, management, sales, marketing and business ownership. Keith is also a gifted presenter and seminar leader, assisting organisations with business strategy, website SEO and staff motivation.

His ability to listen, understand and recommend a sensible solution ensures that the product is delivered on time, on budget and in line with client requirements. Contact Keith if you'd like to know more about how Wired can help you.

**The Owner: Mike Baddeley** - Managing Director  
mike@wired.co.nz

Mike started Wired in 1996, having recognised the power of the internet as a marketing tool. He's in charge of marketing and internet consultancy. Mike's key roles are in designing web strategies through consultation with clients, and in managing the development process.

**The Designer: Janet McGregor** - Senior Digital Designer

**Wired Internet Group:** 107 Cashel Street, PO Box 750, Christchurch,  
New Zealand. Ph: +64 3 377 8460 [www.wired.co.nz](http://www.wired.co.nz) [info@wired.co.nz](mailto:info@wired.co.nz)

## How to read this book

Our priority is helping your company get the online presence that will build your business, and give you a return on your investment.

To do that, we will argue that you need a solid IT framework, some seriously smart marketing, a top-line web design resource – and an independent third party user experience team to advocate for your customers' needs.

Your own people may well be the best in the world at what they do – and we're not here to argue the contrary. But each of these teams have a specific area of expertise and an involvement in the nuts and bolts of your company that disqualifies them from doing what we can do.

What we do is provide the kind of fresh and unbiased perspective that will build your site a 'user experience' that is second to none. This extra element will place all the other parts of your online puzzle in their place. So as you read on, don't think we're knocking the other guys working alongside us – we just think they deserve a helping hand.

### We know you're busy.

So we've kept it short, and structured our argument so you don't have to read it all at once...

If you can't spare the time to read our whole argument...

**just read the  
red bits.**

If you'd like more detail on how your website can provide your customers with a great user experience...

**read the green  
case studies.**

And if you want to understand more about what underpins the user experience perspective in web design...

**read the  
blue sections  
as well.**

## Sir Gil Simpson

In every industry, except business software, common sense and usability have triumphed over technology and complexity.

The paying customer demands an interface that is clean, simple, intuitive, and reliable. Automated teller machines have become easier to operate, operating systems provide more visual aids, and cell phones continue to evolve in accordance with user needs.

At the same time, accounting systems have morphed into costly and unwieldy packages that are very confusing and complex to use. And many websites have become a mass of non-productive and confusing design elements, often mixed with audio and animations which are difficult for customers to use.

Wired Internet Group recognises that businesses need to know they are making a return on their online investment, and that the way to do that is to ensure that customer needs are met first and foremost. They have taken the initiative to offer these practical solutions to organisations that may need help.

### Sir Gil Simpson

Chief Executive Office

Jolly Good Software Pty Ltd  
102 Armagh Street, Victoria Square  
Christchurch, New Zealand

*Jolly Good Software was created by Sir Gil Simpson to profoundly improve the outcomes for clients when implementing information systems. They operate an open door software gallery in Christchurch's Victoria Square and a boutique*

# Contents

Why you should read this book.....	1
How to read this book.....	3
Introduction .....	7
Topic One	
User experience: what it is and why you want some .....	11
Topic Two	
Smoke and mirrors: online success is not about IT .....	15
Topic Three	
Who uses your website? .....	19
Topic Four	
Third-party expertise: why Dodge City needs a marshal .....	23
Topic Five	
You never get a second chance to make a good first impression .....	27
Topic Six	
Website redesign: danger or opportunity? .....	31
Topic Seven	
Here are some 'returns on experience' we prepared earlier .....	35
Topic Eight	
Five key tools for good online investor relations .....	45
Topic Nine	
Five steps to good user experience .....	49
Thinking like your customers is something to think about doing now .....	55



## Introduction

### **Solutions for a cluttered world:**

#### **Meeting tomorrow's challenge today**

Have you ever asked yourself how many times a day someone tries to inform you about something? Email, websites, new media, old media... Can you cut through this clutter, find the information you really need, meet that communication challenge and, more importantly, keep on meeting it?

In business, as in everything else, leadership means having strategic vision.

Leaders need to know what's coming next so that they can be prepared to meet tomorrow's challenge.

And for quite some time tomorrow's challenge has been to clearly communicate your company's offerings online, in an increasingly cluttered world.

To answer the online communication challenge it helps to be able to answer these three questions:

1. Why does it seem you are directed to a website whenever you turn on the TV or radio?
2. Is there an objective 'gold standard' that defines a good website?
3. Why is TradeMe the one site everyone can use?

**Preparing for take-off:** a practical guide to getting a return on your online investment

## Three questions that cut through the clutter

So, here goes:

### 1. Why does it seem you are directed to a website whenever you turn on the TV or the radio?

Global media companies are now facing the reality that the internet is the only means of communication that really matters.

The internet seamlessly encompasses all other forms of communication and delivers them anywhere in the world.

This means every other form of communication depends on the internet, and getting your message right online means getting it right 'full stop'.

### 2. Is there an objective 'gold standard' that defines a good website?

Lots of people will try and tell you every day what your company's website should be like.

The board will tell you it's bad and IT will tell you it's good, marketing will tell you it should be bigger and your ad agency will tell you it should be smaller – or bluer – or greener...

The only people you should listen to are the people who want to give your company their money – your customers, business partners and investors.

They are your website's *users* and their *experience* using that website is the only definition of 'good' that has any real meaning.



### 3. Why is TradeMe the one site everyone can use?

The reason you've never met someone that can't use TradeMe is the reason Sam Morgan is a millionaire.

TradeMe is a website with unbeatable *user experience (UX)*.

Everyone understands TradeMe at a glance. They know **what** it's for. They know **who** it's for. And they know what they can **do** when they're there and **how** to do it.

That great UX doesn't happen by accident. It happened because some serious third party expertise was used to find out what those users wanted, and how to make a website that gave it to them.

### How does this book help you to meet tomorrow's challenge?

This book is based on our own experience at Wired. We've helped many clients over the years and in the process we've learned things that may seem obvious, but which are often overlooked in the clamour of conflicting opinions about online success.

#### Consider these facts:

- In 2003 Forrester Research audited 20 major US business websites and found that 49% failed to comply with basic web usability principles.
- In 2009 the Wired Best Investor Website Award (BIWA) found that 32% of NZX50 sites still failed the best practice criteria used in the survey (scored 60 or less out of a possible 100).

Based on our usability consultancy work and the annual evaluation of the NZX50 websites that we do in the BIWA, we know good UX isn't easy to get right and it's still not widespread. We'd like to help you fix that.



**Preparing for take-off:** a practical guide to getting a return on your online investment

## Topic One

# User experience: what it is and why you want some

If you've ever driven through an unfamiliar city with a big folded paper map, then done the same thing with a GPS, you've seen the value of usability. Both these items contain the same rich information, and can get you to your destination, but only one is really usable while you're driving.

**User experience (UX) measures how well any product meets the needs of the people who actually have to use it, and how easy it is to use in its normal environment.**

This is the gold standard by which you can truly measure the worth of your website. Fundamentally, UX is about two things:

- **perception**
- **credibility**

If the information is in the site but people can't find it, then their **perception** is that it isn't there.

If the information is there and people can find it, but don't trust it, then your website lacks **credibility**.

On the other hand, if it makes sense to the people who want to do business with you and gives them information they can trust to achieve their objectives, then that will provide a better return on your online investment.

**Preparing for take-off:** a practical guide to getting a return on your online investment

In the online space, the sites with the best UX are those which:

- clearly identify and target all their possible audiences
- best communicate the sites' purpose
- contain relevant content and help users find it easily
- use graphical design to communicate information and support brands effectively
- do most to enhance interaction between the company and their customers, investors and business partners.

Don't be reassured if your colleagues say: 'Our customers love us, don't worry that they won't go near the website'. In fact, **your homepage is the most valuable square foot of real estate your company owns**. It is, as global usability expert Jakob Nielsen put it, 'your company's face to the world'.

The online space you occupy is your most important communication portal and is accessible from anywhere in the world. Increasingly it is the pivot for all media and communication – that's why TV networks and newspapers continually drive you towards their websites for more content.

Your investors, customers and business partners all want online access to information that is complete, accessible and up-to-date. So your web presence needs to be designed in such a way that all these audiences are fully satisfied with a user experience that makes their online interactions seamless and stress-free.







↑  
Entrance □



Topic Two

## Smoke and mirrors: online success is not about IT

It's the 21st century and we're embracing technology in every aspect of our personal and business lives. Yet we still have trouble understanding 'IT people'.

They talk in acronyms and sometimes seem unable to separate wishful thinking from reality. 'Over selling' of untested solutions is the rule across the IT sector, as is the re-invention of flash new kinds of wheels that just 'go round' like the old ones did.

This isn't new. In the last 30 years the only thing that has really changed is the move from mainframe computers to personal computers, to networking and communications, and lately anything 'online'.

'Online' isn't just the web, it's your intranet, your financial systems, and your customer relationship management system. Managing your 'online presence' is about managing all the mission-critical business information you have and making it work for you. This is what your IT team do for you, and having access to experienced IT people is an important element in your online strategy – but it is not the only one!

**The key thing to remember is that managing information online is not actually about computers – it's about communicating clearly, purposefully and effectively.**

**And that's not what you pay the IT guys for.**

Every day organisations are spending money, building new websites or enhancing existing ones, often using only the wisdom of their own IT or web teams, or an advertising agency.

**Preparing for take-off:** a practical guide to getting a return on your online investment

None of these decisions are based on understanding what your audiences need from this communication relationship between you and them. That understanding comes from researching user experience – analysing your audiences, their motivations and the way they interact with your website

This concerns the perception of your website, which isn't anything to do with how computers work. It cuts across disciplines and departmental boundaries and requires a new set of skills. One that can provide an accurate snapshot and competitive evaluation of your website, including action points to improve customer perception and effectiveness.

**So the answer to the Ghostbusters question – ‘who you gonna call?’ – isn't your IT department. You need to call someone fully versed in user experience.**









## Topic Three

## Who uses your website?

You will already know that an important indicator of business success today is a successful web presence. When you get your business wrong online, you get it wrong 'full stop'.

Doing more business online instantly gives you a competitive advantage because the costs of transacting online are less.

**How do you do that? By paying attention to user experience – and making it worth everyone's while to interact with you online.**

But who are your online audiences?

- **Customers**
- **Business partners**
- **Investors**
- **Staff**

The online space is an unforgiving place to do business because your **customers** can be in someone else's store with a click of a mouse. To retain your market share, ensure all your customers can easily get what they want from your website.

Increasingly your **business partners** may also use your website as a portal to transact with you. Both suppliers and retailers may want to check the status of their accounts. If you can keep 250 retailers informed about the status of their orders without them having to phone your call centre, how much money will that save you every month? But to do that, they all need to be able to use it easily.



Listed companies are also finding that **investors** and their advisors expect to be able to use websites to access real-time stock prices and up to the minute company reports. They also expect you to be transparent about your general business environment and provide informed commentary around investment choices. Otherwise their money will simply go elsewhere, somewhere that gives them the answers they need.

Finally your own **staff** may be using your website as an intranet portal. Why would you maintain two sets of business information, one facing outwards (the web) and one inwards (the intranet)? There are potential savings to be made using an enterprise content management system to control all your corporate information in one 'silo', while providing differing views of it to different audiences through a web interface.

All this sounds great – but it will only work if you know who your audiences are, what they want from your business and how they want it presented – and who's going to help you do that?







Topic Four

## Third-party expertise: why Dodge City needs a marshal

**Good user experience is based on listening to what real users tell you about what they want and how they want it. Gathering and interpreting this information is best done by someone outside your organisation. Not by members of your team or even your normal web designers – but a third party.**

How many times have we heard someone say: ‘Our team already did user testing – they know all that stuff’? Even the time taken to say it is wasted – let alone the time your people wasted trying to do a task at which they could not succeed.

Your company’s IT department understands the structure and nature of your organisation. They built the ERP systems and the CRM and product catalogue databases and they probably worked alongside the web designers (if they didn’t do it themselves).

This is a ‘can’t see the wood for the trees’ scenario – people who are too close to your site will never be able to see the real problems. There may be aspects of the website that seem clear and obvious to your people, that might in fact be utterly confusing to your customers. You may find that potential investors can even arrive at your site and be unsure exactly what kind of business you’re in.

Your people will never understand how a first-time site user might misunderstand what they see on the screen. If those confused customers ring up your help desk, they’ll probably end up feeling like fools: which isn’t in the best interests of your company.

**The question you have to ask is: ‘Has anyone ever seen our website through our customers’ eyes?’**

**Preparing for take-off:** a practical guide to getting a return on your online investment

Your customers shouldn't have to refer to help screens or make phone calls to learn how to use your website. And most people won't actually take the trouble to tell you how bad it is – they'll just take their business somewhere else.

What you need is someone who can look at your online space with fresh eyes, as if they were a first time user. You need that person to have knowledge of how people really see and use websites, and you need them to be able to explain that simply and elegantly to your team. These people might be called 'user advocates' or 'super users' – though you might also think of them as 'mystery shoppers'.

In the event that your people and the web developers are pointing fingers at each other, the user advocate can act as a third party 'circuit-breaker'. It's not about apportioning blame, it's about making a website that delivers what your users need.







OMG!





## Topic Five

## You never get a second chance to make a good first impression

Getting people to do business with you online can be challenging – whether they're customers, business partners or investors. Even staff can be tough to get working online if they have another option!

Many companies spend considerable amounts of time and money improving their website's look without being assured of a healthy return on the investment. Improvements are often made on the basis that 'someone' thinks it looks good.

**It is no longer enough for an organisation to have a website without considering how it works from the users' standpoint.**

In many ways designing a website is like setting up a retail outlet – and there are some commonsense rules you can follow if you want to succeed without wasting a bundle of money.

Visual merchandising has no absolute rules but there are implicit guidelines that can cause disastrous results if broken. User-centred online design is the same.

Just as we have a mental image of a well-organised shop – what psychologists call a 'schema' – internet users also have a schema of a well-organised website. Understanding the basics of the existing web schema and the way this is constantly developing is the job of a user experience consultant. Their job also includes helping your site conform to this 'best practice'.

You would never open a store with poor signage, confusing pathways, unmarked goods and blacked out shop front windows. Yet often websites are designed with navigation that doesn't reveal content, links that lead to 'dead end' pages still under construction, product catalogues that fail to give all the relevant consumer information and a homepage that doesn't convey anything useful about the company.

All these things defeat reasonable user expectations in a site. And for that reason, we can't tolerate them. Any first time visitor to a website has a struggle understanding and processing all the complex information being displayed. Designing it in unexpected or hard-to-follow ways simply adds to this 'cognitive load'. Users encountering these sites often become confused and quickly give up trying.

Simple commonsense will take you a long way in online interaction design. As a rule, if you wouldn't do it in 'real life' – you shouldn't do it in your website. Once we enter the store, we continue to build our impression based on whether the environment is exciting, clean and well organised or boring, confusing, messy and overwhelming. Your website conveys an impression of your company in a powerful way. It's an opportunity to either create a great impression, or to do your company a disservice.

Even if your website seems simple, effective and usable to you, you can't be sure because you're too close to the 'wood'. You need to ask some fresh eyes what 'trees' they see. You may be surprised.





**RECEIVING**







**Topic Six**

## **Website redesign: danger or opportunity?**

How many of us have realised that the organisation we work for needs a new website and we have no idea what to do about it? Everyone has heard stories about expensive web developments gone wrong and the fear of being caught driving one of these can be paralysing. The key thing is to understand that an objective analysis of your existing website is a critical first step.

### **Don't start without a map**

Imagine starting on holiday with a car full of gear and no idea where you were going or how to get there. Everyone in the car has a different idea and no one has a map.

Everyone in your company – staff, board members, marketing and IT – will have differing ideas about what should be in the website. Their views are important but how do you balance conflicting claims?

The answer is to 'get a map'. A third party user experience (UX) review will provide a road map which tells you where you are, where you want to go and how to get there.

### **Consult early and often**

While it's true that investing in a website makeover requires the involvement of key internal stakeholders you also need a standard by which to assess their competing claims. The way to do this is to appeal to a 'higher court' – the end users of the website.

An arm's length analysis by a UX consultant, written from the user's perspective, with actual user input, is the surest way to ensure you don't waste money on detours and dead ends. All the stakeholders, including the users, need to be interviewed to understand all the things the site will need.

## Build it (right) and they will come

An integral part of the process of designing for users is developing an uptake strategy. By designing the site to showcase what your customers already want, you're giving them a built-in reason to use the site. This will generate the kind of online traffic that will raise your site up the search rankings, and make it more visible. Online, nothing succeeds as well as success itself.

And if you give people what they already know they want, they'll thank you for it. Chances are they will also come back for something else later. Failure to design your site without the 'built in' benefit of ensuring you will meet customer needs amounts to simply throwing good money after bad.









## Topic Seven

## Here are some 'returns on experience' we prepared earlier

What exactly is the difference between good and bad 'user experience'? A lot of it depends on the context, but instead of presenting you with a mass of overly detailed case studies we figured we'd summarize some of our key experience findings.

So here are some examples of what makes for good user experience. These are practical pointers and lessons learnt – examples of the kinds of 'value-added' RoE (Return on Experience) that the UX perspective can provide.

## Example #1

### Too creative!

When considering web design and communication in general, be wary of the 'c' word. It's our experience that people who claim that their 'point of difference' is to be *creative* can sometimes over emphasise the 'form' of the website, at the expense of its actual 'function'. Taken to extremes, this can lead to websites that 'pose puzzles'.

This is a big problem for website design. You should never ask people using your site to do any needless thinking, so websites shouldn't be designed to require 'working out'.

'Splash pages' are a good example of woolly thinking. These are those first pages, often animated, which users have to click through to 'really' enter your site. Some may say that these are branding opportunities. Often only some parts of the screen are clickable to access the actual site and users have to 'guess' how to enter. Their large graphics can also slow access to your site due to their long page-loading time and if repeat visitors can't bypass them, they rapidly become annoying. So they're bad for user experience, and ultimately, that must be bad for your brand.



## Preparing for take-off: a practical guide to getting a return on your online investment

Homepages must also be very carefully designed. If anyone looks at your company's homepage and thinks 'I wonder what the business does?' or 'Where do I click first?' then you know you've wasted money.

There's a ton of research confirming that if you make customers think even for a microsecond about which where to click when doing business online – it can cost you tens of thousands of dollars.

If real users are looking for information about goods or services, they want the website to be easy to use, understand and remember.

Being 'creative' is no substitute for this, On the contrary. A website that poses puzzles for users is rather like the Emperor's new clothes, or as they say in Texas: 'all hat and no cattle'.

**What's the lesson? Getting too clever with site design in the hope of impressing your customers is like offering them a beer but no bottle opener. It's not really hospitable at all.**

## Example #2

**Don't put your customers to work in your warehouse**

When transacting with clients online, don't just lead them to your warehouse and lock them in. Instead, take them to your 'virtual showroom' and make it easy and rewarding for them to transact with you.

Recently I was asked to professionally review an online B2B sales interface and found it wasn't what I expected. There was no shopping cart, the screen layout was confusing, there were no product images and the language was heavy on technical terms. All the members of the review team felt confused and intimidated.

Eventually we realised this site was really an in-house inventory management application designed for warehouse staff to use 'behind the scenes'. Instead of building a new system for the customers to use, they'd slapped a web interface on the front end so it appeared in a web browser. But the user tasks and interface design still assumed the customers had all the product and system knowledge that only experienced warehouse guys have.

Selling online to your customers and business partners is not just about 'sharing data' about your products, you must also provide a simple and seamless sales experience. In other words: it's about recognizing the difference between data interface and user interface. Doing this shows good audience understanding.

Central to your customers' experience of the ordering process is what they see on screen. This must easily communicate all the information needed for purchasing decisions because a successful online B2B relationship is not just about transactions, it's about managing your relationship with your clients based on giving them what they need.

**What's the lesson? Data is the engine of the commercial transaction but the user interface is the experience. You need to invest in that experience.**

**Preparing for take-off:** a practical guide to getting a return on your online investment

Example #3

**Searching, or navigating?**

Typically a website will offer two ways to find content: navigational menus and a search box. For a good site these need to work equally well because we've found that web users are quite evenly divided between 'navigators' and 'searchers'.

Back in 2003 IBM were preparing to redesign their website. They found that the most popular feature in the site was the search box. This was being used by almost every visitor because the navigation was so poor. No one could find a thing by scanning the navigation headings – it just wasn't intuitive.

But worse was in store when they found that the second most popular feature was the help button. This was getting used by most of their site users because the search function was so ineffective they still couldn't find a thing.

This was unacceptable. They already knew they were losing business from the website but this survey of user behaviour showed exactly why.

IBM hired consultants to find out what their customers wanted from the website experience. This led to an 84% reduction in use of 'help' because both the search and the navigation now worked. The result was a 400% increase in online sales. Because the customer is always right, giving them what they want is always the best idea.

**What's the lesson? You need both clear and intuitive navigation and a comprehensive and usable search function so your site can be usable for everyone.**









Example #4

**'Has nothing happened yet?'****Changes in system status have to be made really obvious**

User experience is about understanding how real people 'experience' a product. In web terms, the important thing is interaction with an interface.

The interface is an onscreen design of 'signs' that communicate content, and tell the users what they must do in the site to achieve their goals.

I've been thinking about this recently in relation to what the textbooks call 'system status'. In layman's terms this is what happens when you click something and the stuff you see on screen changes. Suddenly, all the rules that applied in the previous screen are different. The example I'm thinking of is 'logging in'. Once you've 'logged in' you can see and do things that were not even visible before.

Recently I was reviewing a site selling wholesale products to retailers. In the first 'status situation' retailers could view all the products in the catalogue but they couldn't see prices or make orders. There was no cart function, in other words. Once logged in, they could not only view products but also buy them.

That's a big change in status, and I expected to see a big change to the screen. In fact, when I logged in the first time, I thought I'd made a mistake and nothing had changed.

Actually, a tiny change had occurred in the log-in button up in the top right of the screen. The words 'Log in' now read 'Logged in'. That was the only change I could see. I was still on the same page in the site, and everything else was the same.

I realised that if I then went to the product catalogue and drilled right down to an individual product detail screen, there was now a price and an 'add to cart' button. This proved that the log-in was successful.

**Preparing for take-off:** a practical guide to getting a return on your online investment

But who would go that far, unless they already knew they were successfully logged in? That tiny change was not enough of a signal that the status of the site had changed. If logging in changes everything – make this obvious right away. Don't make your customers have to 'think it out', because that will waste their time and cause them to lose confidence in you.

My recommendation in this case was that when users logged in, they should be moved to a 'logged-in landing page' – a new page where they had never been before. This would make it clear to them what new options were now available. That's an experience of the site that tells your customers what just happened and what they can do next. And that's something that will also tell them that you are thinking of them in designing that experience.

**What's the lesson? Any change in 'system status' must be signalled unmistakably by a clear visible change in the screen interface – preferably one that explains what the new 'status' makes possible.**



17

Ein  
AusST  
Kab. 5/Pankow  
ü U-604

16

Ein  
Aus~~U-604~~

15

Ein  
Aus

Stat. 795



14

Ein  
Aus

Stat. 193



2







## Topic Eight

## Five key tools for good online investor relations

Here is an example of good user experience (UX) practice for a specific audience – current and potential investors.

We've run the Wired Best Investor Website Awards (BIWA) annually since 2007. It's a comparative evaluation of the investor user experience (UX) of the NZX50. Here are five of our key findings.

Every site with good investor relations UX should:

1. **feature a live share price data feed**
2. **include an 'investor centre' in the main navigation**
3. **allow users to subscribe online for investor updates**
4. **make the annual report easily accessible in PDF form**
5. **facilitate direct contact between you and your investors.**

UX is important for this audience because more and more investors and their advisers seek up-to-date information on listed companies from online sources. In investment terms this information may be either a deal-maker or a deal-breaker.

**'A homepage's impact on a company's bottom line is far greater than simple measures of e-commerce revenues...'**

**Jakob Nielsen, global usability expert**

The sites with the best UX are those which do most to communicate corporate strategy to potential investors and help them to easily find investor-related content. They also use graphical design to effectively present content and actively enable two-way interaction between listed companies and potential investors.

**Preparing for take-off:** a practical guide to getting a return on your online investment

Based on our experience, you can improve the investor UX of your site by:

**1. Featuring a live share price data feed**

Show a live data feed from the NZX prominently on your homepage, giving your current share price. Make sure this data is also presented somewhere else in the site in a historical price movement graph. This data feed will not only show what your stock is worth now – it also shows that you regard the needs of investors as a priority. In 2009 only 13 of the NZX50 companies did this.

**2. Including an ‘investor centre’ in the main navigation**

Ensure that your main navigation menu includes a clear heading equivalent to ‘Investor centre’ - the word ‘investor’ **must** appear. Link from here to all the information an investor may require, including but not limited to annual reports, corporate governance information, strategic plans, an archive of all market announcements, and press releases relevant to investors. Remember Steve Krug’s advice: ‘don’t make them think’ where to look.

**3. Allowing users to subscribe online for investor updates**

Link from the homepage to up-to-date news items relevant to investment in the company. These should link through to the investor centre for more detail and should change frequently. Changing homepage content improves search rankings and investors will be encouraged by this evidence that you take corporate communication seriously and are timely with it. This part of the homepage should also offer the chance to sign up for email alerts and RSS feeds linking to new announcements, so investors can choose to conveniently obtain more information on their own terms.

**4. Make the annual report easily accessible in PDF form**

Make annual reports easily available and searchable online. The best online annual report PDFs are set to allow search engines to search within them as well as across site page content. They are also 'modular', allowing site users the chance to choose which parts of the report they want to download and/or print - eg: just the board chair's report and the financial statements. Investors will appreciate your making this information really accessible and usable on their terms.

**5. Facilitate direct contact between you and your investors.**

Provide comprehensive corporate contact information that is accessible at one click from any page in the site. A generic email enquiry form on its own is not enough. Potential investors and other business partners will expect a staff directory with names, designations, physical addresses, phone numbers and email addresses for all main categories of enquiry. Information on your share registry is also vital but it's not enough on its own. Investors may also wish to engage directly with your people.

**These key tools may seem simple and basic to implement but currently they are not universally adopted.**

**Adopting these proven user experience (UX) tools creates the perception that investor needs are important to the people who are getting the investors' money. It will also build the credibility that is vital to online communication.**







## Topic Nine

## Five steps to good user experience

If you're starting to think injecting some user experience into your corporate website sounds like a good idea, you may well be wondering 'how can this be done?' The key step at this point is to identify some third-party expertise that can give you and your web designers the benefit of a fresh perspective and some 'blue skies' thinking.

There are five easy steps, some or all of which you may wish to discuss with your newly-identified UX partners:

- **Evaluate your existing site**
- **Analyse your audiences and their tasks**
- **Design a new site with user experience input**
- **Test your new site with real users**
- **Review your new site at regular intervals**

Let's look at each of these in a little more detail:

### 1. **Evaluate your existing site**

The first step is to get an independent picture of your existing site, to objectively evaluate what are the strengths and weaknesses of your current online presence. This is best done by a 'mystery shopper', someone with no particular investment in the site as it stands, who can look with fresh eyes at the site, its audiences and the goals they bring to the site.

These evaluations are usually conducted with reference to a set of best practice guidelines, which identify key topics and known stress points. They may be done with the help of imaginary personas whose site interactions are described by story boards, or sometimes real users may be interviewed and asked to 'walk through' parts of the site. Usually the 'mystery shoppers' will also interview the major stakeholders in your organisation to determine what they see as key goals for the site.

**The key outcome from this evaluation is a written report, clearly presenting all this information, illustrated with screen shots and mock ups. The report will include action-oriented recommendations for improvements in the overall user experience of the site.**

## **2. Analyse your audiences and their tasks**

If the decision is made to progress to a complete redesign of the site from the bottom up, a possible first step may be a review of all the probable audiences likely to use the site. This will establish their shared characteristics and likely goals. Most importantly, the UX consultant will develop a matrix incorporating audiences and their possible tasks while visiting the site.

This kind of analysis can provide a better guide to structuring your website than your organisational chart or your business taxonomy (two frequently adopted options). This is because a user/task analysis shows what is most important in your site to your customers and key business partners, not just to you and your staff.

**This is the first step in turning the site round to 'face the customer, not the company'.**

### 3. Design a new site with user experience input

Once you're ready to redesign (whether it's a make-over or a complete blue skies rebuild), it makes sense to seek feedback from your UX partners early and often. Redesigns frequently run over budget when too much work goes into a concept without first checking if it aligns with what your users will be wanting.

**Bouncing design concepts off a third party user advocate can help keep the plan targeted on making a better outcome for the folks who want to give you their money, rather than for the ones you already have on your payroll.**

### 4. Test your new site with real users

Once things have progressed to a working prototype with interactivity and basic graphics, it's time for 'discount usability testing'. This involves testing your new design with up to six representative users. It is a powerful way to discover what real users think of your site.

The 'UX guys' will recruit people matching the profile of one or more of your main audiences and write scenarios that set realistic goals for these users to try to accomplish in your site (setting up an account, buying a book, whatever). By observing real people using the prototype site and discovering how they expect to use it, problems can be identified and put right, before the new site 'goes live'.

**User testing is the 'gold standard' by which you'll learn if your site is fit for purpose or not. Done at the right moment in the development process, this can save money and ensure the result satisfies everyone concerned – including your customers.**

### 5. Review your new site at regular intervals

The bad news is that, like the Auckland Harbour Bridge, web user experience needs ongoing painting and maintenance. The good news is that by making your user experience (UX) more satisfying, more traffic will use your website, more people will purchase your product and more referrals will be made.

Because the internet changes rapidly, customer expectations also develop rapidly. What will 'do' one year, may not be good enough the next and what is 'too hard' one year, will be easily do-able twelve months later.

The only way to keep up with this is to regularly review the UX of your site and those of your competitors. In the same way you check up on their products and services, it pays to get a competitive evaluation of your rivals' sites done from time to time.

**There are always plenty of new things you could be doing to enhance your online offering. But the only way to know which ones are really going to work is to consider them from the point of view of the people who are actually going to use them – whether they are your customers, your business partners or your investors.**









## Thinking like your customers is something to think about doing now

You may already have spent a small fortune on your website, intranet, and related online initiatives. But are you getting the best return on the investment?

If there's only one thing you take from this book, it should be this:

**Your website is about you, but it's not for you – it's for your customers.**

To get an idea of how your website measures up, try this simple test. Open your homepage and try looking at it as a potential customer.

**Now answer these seven questions:**

1. Does the homepage make the site's purpose obvious – is it clear what the business actually does?	YES	NO
2. Can you tell from the homepage content who the site is for and what they can do there?	YES	NO
3. Is the navigation clearly visible and is it obvious what is in all the main sections?	YES	NO
4. Is there a full range of contacts available one click from the homepage (not just an email form)?	YES	NO
5. Is all the important content above the 'foldline' (i.e. you don't have to scroll down to see it)?	YES	NO
6. Do the graphics support the brand, look great, and assist the use of the site?	YES	NO
7. Does the homepage clearly invite people to engage with you, to ask you questions, and to conduct business with you?	YES	NO

**Preparing for take-off:** a practical guide to getting a return on your online investment

If you answered 'Yes' to all of these questions, congratulations! You're probably giving most of your customers the basics of a good user experience.

If you seriously considered answering 'No' to three or more of these questions, then you should be concerned about your website and its effect on your business.

But don't only take your word for it – take ours!

Wired is offering a free homepage evaluation to the first 10 businesses that contact us. We look forward to hearing from you!

