

Think Experience

Learn actionable strategies for your charity to improve engagement, reach and revenue through your digital platforms.



Foreword - why we did this.

So why have we done this?

After reading about the gap in digital skills in the charity sector in the recent NPC report '[Charities Taking Charge](#)', we decided that we wanted to do something about it. We noticed that despite there being a lot of information out there on UX, digital products and the like, hardly any of it is presented in an approachable and actionable way.

Not all charities can afford to work with a digital experience agency to help them design and deliver their next website or digital product. We believe, however, that many of the techniques, strategies and tools can be used to improve the way they approach these types of projects.

We have created this free eBook series to help debunk some of the fears around digital projects. We always recommend putting the user at the heart of what you do. We have tried to give people some straightforward, plain-talking, accessible, and most importantly, actionable information.

By changing the way charities approach digital products and services, and by giving away the information that big agencies will charge a lot of money for in consultancy fees before a project even starts - we hope to help define a brighter digital landscape for charities in the future. By approaching projects in the 'Think Experience' mindset, you will retain focus, save money and see more success when trying to create engaging and focused experiences for your audiences. And most importantly, you will start creating digital experiences with humans at the centre. Improving their experiences will improve your chances of success.

Over the next 3 months we will be releasing more chapters - and giving charities the digital skills they need to understand how to define and create digital products that deliver on their promises. It will give you the knowledge to work in better ways with your internal teams, or empower you to work with external suppliers in a more efficient and successful way.

But most importantly, it will help to ensure that you and your charity maximise the value that can be gained from digital technologies - and improve the impact you make on a daily basis to the causes and lives you care about the most.

Enjoy and good luck

Jenny Kitchen - Managing Director

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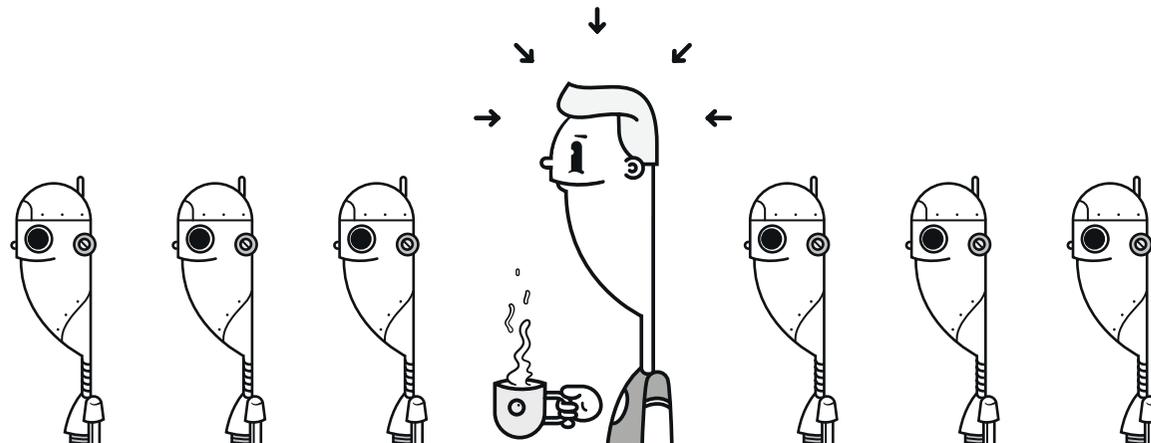
The biggest mistake charities and companies alike make when creating digital products such as websites, mobile apps and other services is forgetting about the people that they are making them for.

99% of the time it's not intentional - exciting new technology, opportunities to push push push for donations and an internal focus on the business goals mean that often the user's experience is the last thing that is truly considered - if at all.

And if it is, it is only normally considered within the constraints of the site or application without the realisation that there is a whole world outside of it - most of which is vastly more important to the people you are trying to engage.

The good news is, there is no better time to change this. This guide will help you transform the way your charity looks at digital. It will give you actionable strategies and techniques to start making those changes today - as well as helping you to better plan those new products over the horizon.

Think beyond the website or mobile app - think about the journey you want to take people on.
Think Experience.



We built it... But they didn't come.

So after months of blood, sweat, tears, debate and debugging, the site is live. Time to sit back and watch those Google Analytics numbers go through the roof, right? In fact, what are we going to do with all those extra donations?

But unfortunately, as is often the case, the views spike and then plateau. Donations don't seem to go up. In some cases, after spending a significant amount of money redesigning and redeveloping your site from the ground up, the opposite happens. Numbers drop off, key content isn't viewed and donations go down. How could this happen? Awkward questions are asked and boards suddenly don't want to invest people's money in more 'risky experiments'.

Sound familiar? Good. That means you have a real opportunity to make some changes that can have a massive impact. In most of these cases, boxes have been ticked from a shopping list of functionality, these amazing areas of functionality have not been weaved together in a way that puts your users (a human - in most cases) at the heart of the experience.

“Time to sit back and watch those google analytics numbers go through the roof, right?”

There is a lack of Experience Design, and to design the right experiences, you need to first understand what you are trying to achieve and empathise with the people you are trying to reach.





CHAPTER 1

Step away from the Functionality Spec

Be goal-focused and make objective decisions



Why are we building this **again?**

The trouble with not having a goal is that you can spend your life running up and down the field and never score.



Before you started your last website refresh or build, did you identify a list of goals you wanted it to achieve?

Most people answer 'yes' to this question. It would be crazy to start a project of this scale without these in mind, right? In truth, I think all projects are started with these intentions, but in a lot of cases somewhere along the line the focus is lost. Bob from marketing is raving about a great instagram API, Julie from IT has been looking at a really powerful CMS and Tim from the graphic design team has been looking for an opportunity to apply a new design trend.

Next thing you know, you have a two page list of functionality spec'd out and out it goes to tender, or design and development starts in-house. 9 out of 10 times what you end up with is a site that ticks the many, many boxes of functionality you asked for but falls short on delivering the value expected. It is then hard to qualify success or failure. Technically the team

has delivered everything you asked for - but it does not seem to have all the impact imagined in those initial meetings.

So how do you counter the distractions and slip of core focus that can easily derail a project? In truth, it really comes down to **defining focused, measurable goals** that can be captured and evaluated post launch. These goals should not only be set at the beginning of the project and evaluated once it has launched, but as a criteria to evaluate and approve any and all decisions during every step of the project. When Bob starts raving about instagram API's, assess the value that can be derived and evaluate this against the defined goals. If your top 3 goals are not helped by this functionality, say thanks to Bob and earmark the Instagram API integration for a second release.

There are no wrong ideas, just a list of priorities that need to be delivered in order.

Clear, concise and measurable goals can be intimidating to define. Some common (and unhelpful) ones you will come across can be the following :

- **Increase revenue**
- **Increase time on pages**
- **Make it look better**

Although these go some way towards helping, they actually are not easy to directly measure, nor completely relevant to what you are actually trying to achieve. Take for example "increase revenue". With so many variables outside of the website that can affect this, it becomes a very subjective goal to measure. Instead, try to define it to be more precise, ie " Increase donation revenue from x target user group via the website". This is clearly relevant, measurable and cannot be misinterpreted - it either does or it doesn't.

Other goals simply measure the wrong things. A good example of this is "Increase the time people spend on pages". Although easy to measure and available in many analytic tools, this is not an indication of engagement or a good experience.

Depending on the goal a user is trying to achieve, spending too long on one page is not always a good thing, and could actually highlight a problem with content or how a user navigates the site (UX). A more focused goal would be to understand what you are trying to get a user to engage with, and the reason that sits behind it. What is that engagement going to translate to? More or higher donations? A higher uptake on signing up to a newsletter?

Once you have these goals, you need to prioritise them. And I don't mean 10 high priority goals and 2 medium priority goals. You need to define what is your highest, what is your second highest and so on.

CHAPTER 1 - STEP AWAY FROM THE FUNCTIONALITY SPEC

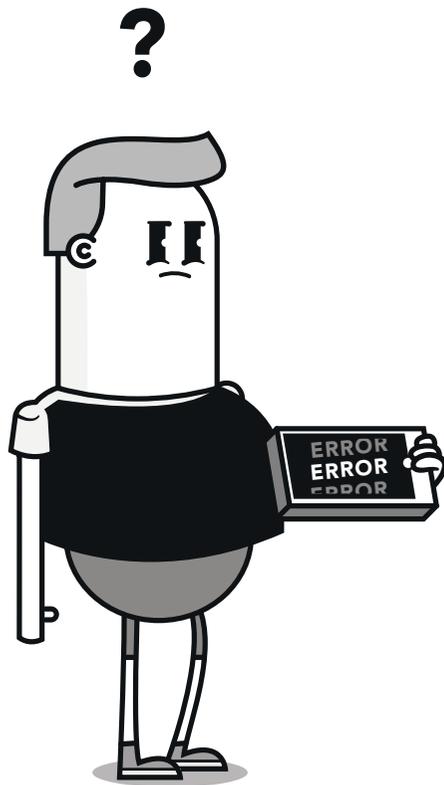
Top tip : A good technique here is to sit in a room with the major stakeholders. Give them a stack of post-its and a sharpie each. Tell everyone to write what they think the website should achieve and give them 5 minutes to quickly write them out and stick them on a wall in any order. Once everyone has completed the task, go through the post-its with them, combining duplications, and refining the goal language if required. A good format is: "we want the site to do x for the charity" ("We want the site to convert more one-off givers to

monthly donators on a direct debit"). Once you have these in place, get everyone involved to stand up (very important) and go to the wall as a team to organise the goals from top to bottom in order of priority. Be strict - no side by sides, no exceptions. Break up any fights swiftly. No one can leave until it is done. The room need to decide which priority the goals sit in - so make sure that the key stakeholders are there to sign it off afterwards. Congrats - you now have your prioritized goals.

Now you understand what the business needs - it's time to focus on what the most important people want to achieve - your users.



Stupid users?



If you think your experience is simple, I feel bad for you son. You've got 99 problems but your user's not one.

Jay Z - (sort of...)

When people are not viewing your site or making donations, or any one of the other plethora of goals for your charity, one of the first people to be blamed is the user. The irony is that in most cases, if asked specifically who that user is, you would receive very little in the way of detail.

Digital products like websites, mobile apps and beyond are often created as 'must haves' for the business. "We need a responsive website" - why? 'Because everyone has a responsive site these days'. This is not a good approach. In fact, it almost completely sets you up to fail and wastes countless £s.

Consider a different type of response "because we know our audience well, and the highest value persona we have identified is x% more likely to donate using their mobile device given the right motivation." A statement like that gives focus and clarity to the purpose of your site.

And this is one of the simple keys to creating great digital experiences. Understand intimately the goals of both the users that you are creating it for, and the charity itself. With these key goals identified early on, you can build the right product for them and your charity. It's literally a win win.

“But we need the site to be perfect for everyone.” This has never ever happened. **Ever.**

Creating personas does not have to be overly complicated, time consuming or daunting. In fact it is often a fun, enlightening and entertaining process. The purpose of the persona is core to how you create it - it's a representation of a person relative to your goals as a charity. A persona should answer the question “who are we designing this for” and keep their goals front of mind at all times.

The other key thing to realise is that all users are trying to fulfill a job. What job do you help them fulfill? A good example is a company that makes drills. Why do people buy drills? If you think about it in terms of a job, they are not buying a drill - they are buying a hole in the wall. No one (apart from maybe some very special people) want the

drill, they just buy the drill because it is the most efficient way to get that hole. Before electricity they would have purchased a manual drill (those of you old enough will remember those bad boys from woodwork classes many moons ago). When power tools were invented, people bought electric drills not because they wanted an electric drill - but because they made it easier and faster to make all those holes.

A good persona will focus on a specific job a user is trying to fulfill. What task are they trying to achieve, or what gap are they trying to fill? A good persona will help you answer that question from the board about why you are asking them to spend money on a website again. It should help you negotiate those tricky waters when the

highest paid person in the room is insistent that the site should be more purple because they like purple. Or their daughter who is studying web design at uni said it needed more buttons.

A bad persona will basically be a nice profile that is made in a beautiful pdf, but then placed on a server and never referenced again. Focus on solving a specific job for the right group of people and you will start creating focused experiences that delight your users and meet your own specific goals.



To create a simple but effective goal-led persona, you need to answer the following questions.

1. Why does this type of user qualify in the first place? Is targeting them a specific goal of the charity? Do they fit into the goals of the business? If the answer is no to any of these, this is not a type of user you need to prioritise.
2. So they are relevant to the charity goals? GREAT! Next step is to work out their goals in regards to visiting you. Why do they want to come to your site? What are they trying to achieve? What is the context in which they are doing it? Thinking about this will give you insight so far beyond a generic marketing persona - and will help you nail the parts of your experience that can make you stand out from the crowd.
3. Once you have these goals and personas, you can compare them back to the goals of the charity, and look for common ground. Focusing on these areas, or meeting a specific user goal, can have a really big impact.

Some questions on how to define the right type of personas :

- What type of people do you want to appeal to?
- Who are the people that if they engaged with your charity would help you meet your business goals?
- Which of these people are your top priority?
- How do they typically access / engage with digital content? Mobile, tablet, desktop? And in what context would they be looking at your site?
- What service are they trying to hire you for? (what job are they trying to fulfill?)

So you have identified 3 key personas. Know them intimately. Give them a name, debate features, functionality and design from the point of view of what they are trying to achieve - not what you are trying to achieve. Take them into every meeting with you and fight their corner. They will thank you for it in the end.

Less - but better.

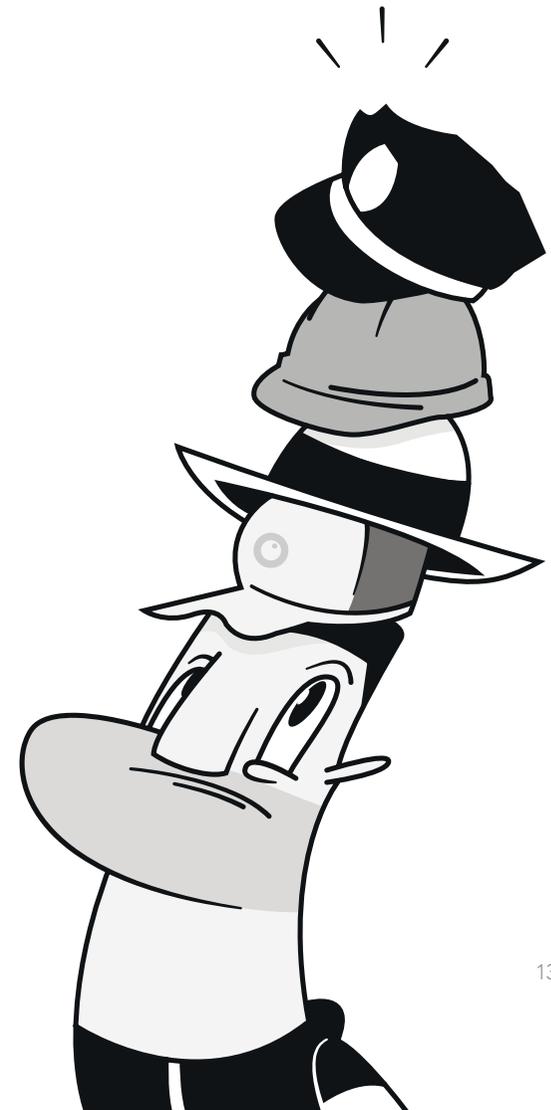
My wife is a fashion stylist and one of the first services she offers her clients is something called a 'wardrobe detox'. This is a nice term for her to come to your house, find out about what you are trying to achieve with your look, then go through your existing wardrobe to find pieces that are under-utilised and those that you bought and either have never worn, or never should wear (p.s. she is much more diplomatic than me).

**...those pieces of clothing
you bought and either
have never worn, or never
should wear**

At the end of it, the recommendation is to throw out the items you don't wear, and keep the key pieces that you can build upon, or wear in different ways depending on the situation.

The key takeaway from this is that a large, underused wardrobe of clothes can be cut down to only contain those items that work well for the goals of that client (great for their body shape, good look for work, etc). The lack of distraction and symphony of clothing de-stresses the decision process, and helps the client feel more confident about their choice of clothes.

The same theory applies to your website or other digital product. By removing unnecessary content and functionality you make it easier for users to make decisions. By focusing their attention in this way you are more likely to give them a better experience, as well as influence them to interact with your content in a way that meets your goals.



Section 1 summary.

So you've made it this far.

By now you should have stepped away from the Functionality Spec and focused on the goals of your charity and the people you are trying to engage with. You have stopped focusing on the 'what you are going to make', and have now shifted your attention to the 'why'. You have taken subjectivity out of the room (that never actually happens, but you are conscious of it, and have the tools to overpower it).

You should have the following:

- **Your top 10 goals for the charity** - what you want to get out of this - prioritised from 1 to 10.
- **Your 3-5 personas**, and their associated goals. It might be scary to not create something which appeals to everyone - but by focusing on the most important people to help you meet your goals, you will see real impact.
- **You have been through your existing site/app**. You have audited it, worked out what you need to bring across and what can be dropped. And you have identified areas which need more thought.

Now comes the fun bit.

Feeling great? Awesome. In chapter 2 we see how you can take that happy fuzzy feeling and realise...

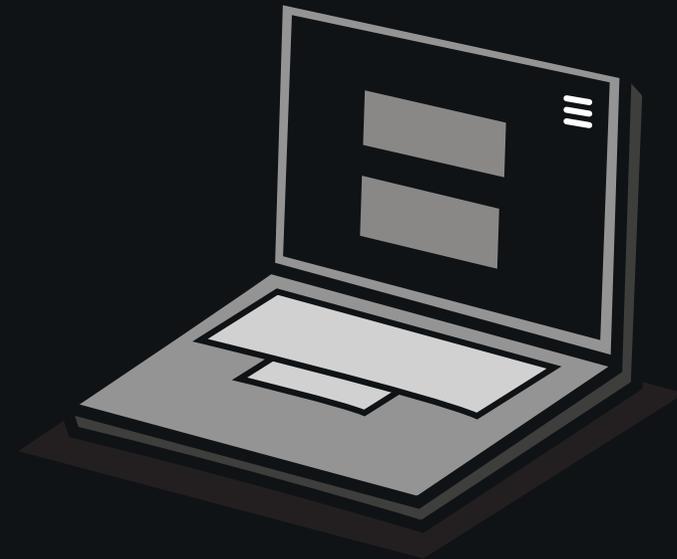




CHAPTER 2 - TEASER

Users don't care about your website

Creating focused experiences for the goals of your users, not you.





"Today I really want to explore a website" Only ever said by people who make websites.

People are motivated by things they want to do.

These might be 'jobs' they need to complete or they might be completing an impulsive urge - but I can almost guarantee you their key motivation is not to spend time exploring your website. Think about it - did you get up in the morning and think 'oh, today I want to explore amazon's website'? You might want to spend some time browsing, but you are browsing the products, not the site itself. The more common case is that you go to amazon because you know it is the quickest, cheapest and fastest way to get 15 Kilos of Dog food delivered to your house the next day.

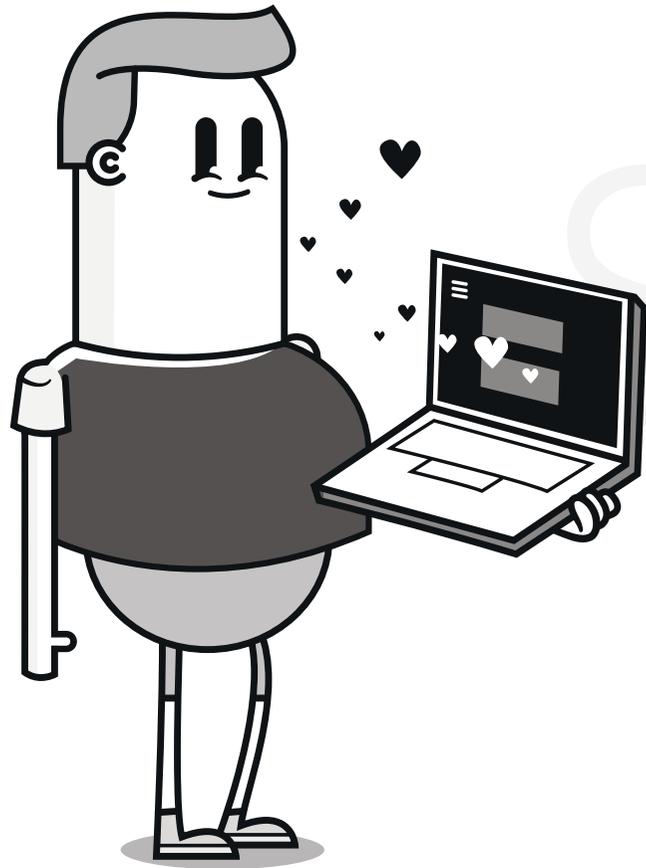
Amazon is a very good example of a company that understood how to create and simplify its user journeys through their site. They quickly worked out that by reducing the number of barriers to purchase it could massively increase the number of sales they made. This led to the 'one click' purchase model that has been copied by many other online retailers since. They basically worked out that the less a customer had to interact with amazon and the quicker they could complete their purchase, the happier they were.

This next section is going to help you understand how to take the goals of your users and the business to map out the most effective user journeys through your site, so everyone's goals can be met - and hopefully exceeded!

These journeys will not only give you greater context of why your users are interacting with your digital products or services, but also help to give you a place to start when it comes to designing your experience, and make sure you focus on the most important things first.

By taking the time to fully flesh out and understand these journeys, you will gain a much deeper insight into the motivation of your users and uncover ways to engage and delight them that would not be obvious any other way.

And once you realise they don't really care about your website (and that's not a bad thing), you will then be able to give them exactly what they need and focus on making them care about your product or cause.



Chapter 2

→ [Click here to sign up for the next chapter](#)