

# How to Design Exceptional Digital Experiences

Best Practices for optimizing self-service in an omni-channel world.

*If you're an energy utility about to embark on a website redesign or launch a mobile app, this workshop is for you.*



Usability Concepts, LLC

Making it easy for customers to do business with you.

# The Self-Service Conceptual Model

A comprehensive body of knowledge and design guidelines based on years of customer research.

The key to efficient online self-service is simplicity in design. One of the best ways to achieve simplicity is through task-oriented design.

*This engaging and informative 12-hour seminar . . .*

- ▶ Provides a basis for understanding the needs and preferences of digital users
- ▶ Establishes a common vocabulary for articulating the online experience
- ▶ Promotes consistency in omni-channel experiences
- ▶ Furnishes guidelines and standards for developing self-service functionality
- ▶ Fosters teamwork for more cohesive, cross-departmental self-service development
- ▶ Makes the development process more predictable by providing examples of well-crafted interactions
- ▶ Allows for informed decision-making based on knowledge of the techniques for optimizing digital self-service
- ▶ Improves speed of throughput, adoption rates and customer satisfaction
- ▶ Decreases level of effort and task abandonment rates
- ▶ Prevents web/mobile support phone calls

## Part 1 Introduction: Usability Principles & Guidelines

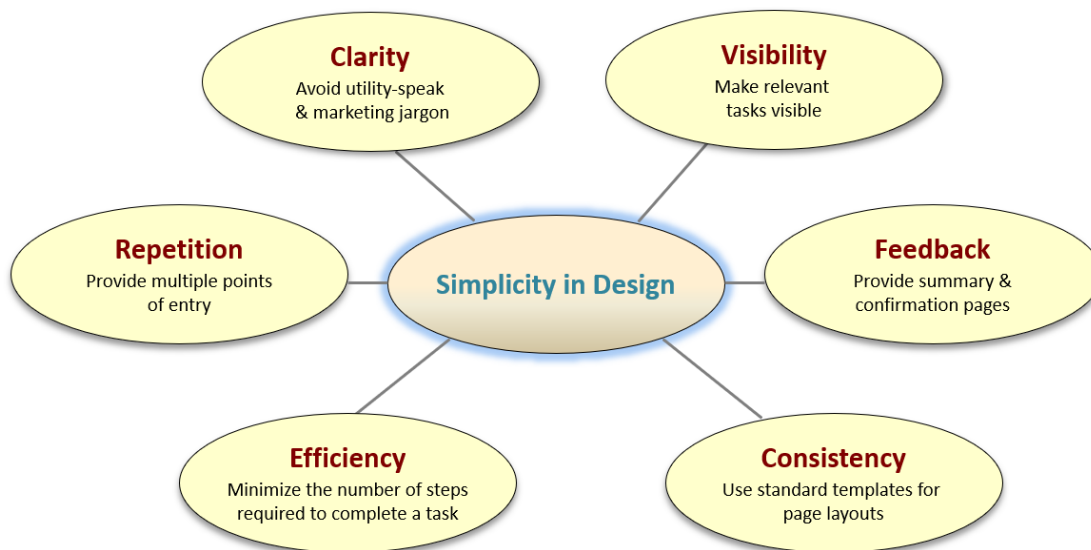
*The foundation for building exceptional digital experiences*

- ▶ Usability principles
- ▶ The self-service conceptual model
- ▶ Deconstructing digital self-service
- ▶ Setting design goals
- ▶ Mapping the task: Inductive User Interface Design
- ▶ Accessibility and the web
- ▶ Integrating UX into Agile Design

## Part 2 Intention: Getting users to self-service

*Use plain English and signage to guide users to where they need to go*

- ▶ Clarity, Visibility, Repetition & Consistency
- ▶ Home Page
- ▶ Registration/Sign-in/Forgot Password
- ▶ Account Summary
- ▶ Start Service
- ▶ Effective Outage Reporting

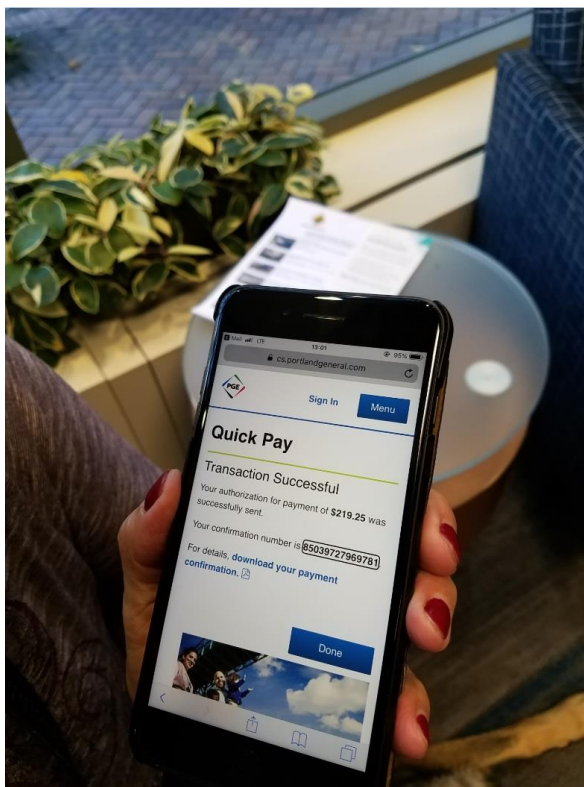


### Part 3 Action: Getting users through the self-service form *Eliminate visual noise and page clutter. Design for discrete tasks.*

- ▶ Principles of forms design
- ▶ Essential components of forms
- ▶ View bill/pay bill
- ▶ Automatic monthly payments
- ▶ Paperless Billing

### Part 4 Evaluation: Providing completion and closure *Increase user confidence with meaningful feedback.*

- ▶ Feedback & error handling
- ▶ Summary pages
- ▶ Confirmation and feedback
- ▶ Cross-selling and up-selling



### Part 5 Mobile Apps: Best Practices *A minimalist approach for designing micro-interactions.*

- ▶ Mobile App Design Guidelines
- ▶ A tale of 2 apps (case studies)



Course Instructor  
**Chris Bond**

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### 35 years as an employee of Portland General:

- ▶ IVR, Web, CIS, Outage, Intranet design
- ▶ Last 6 years, integrating usability into Agile software development process
- ▶ Mobile app design, two-way texting

### 19 years as an independent consultant:

- ▶ 2006 - 2007 Conducted Comparative Usability Study for 22 energy utilities
- ▶ Developed and participated in Market Strategies IVR Energy Utility Evaluation for 3 years (over 100 utilities)
- ▶ Provided usability design, testing and evaluation for several utilities throughout North America and outside the utility sector for Apple, Microsoft, Virgin Mobile, etc.
- ▶ Guest speaker at over 50 conferences and author of over 35 articles

## Workshop Deliverables

Participants will receive a **60-page workbook** that includes over **200 design guidelines** for the key self-service tasks that really matter:

- ▶ Registration
- ▶ Sign In
- ▶ Forgot Password
- ▶ Account Summary
- ▶ Start Service
- ▶ Outage Reporting
- ▶ View/Pay Bill
- ▶ Auto Pay
- ▶ Paperless Billing

Over **300 slides** with best-in-class examples and hands-on exercises.



# Endorsements

**My main goal was accomplished** in that 3 of my colleagues from IT “got it” (which is going to be a huge thing for our development). They actually apologized for giving me such a hard time on the usability concepts.

Woody Fowler  
NV Energy

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I’ve attended Chris Bond’s usability sessions, and they are part revival meeting, part master class. Not only is Chris passionate about usability and design, but his passion is infectious. You and other members of his session start feeling passionate about design. You gain renewed respect for how good design really makes a difference. But Chris’ real money pitch is providing fundamental principles that you can apply the second you go back to the office. The lessons I learned from **his sessions generated immediate improvements**, best practices guidance, and ideas for long-term improvements. Students in his usability classes should be prepared for a continuous “Aha!”

Ted Humphrey formerly with  
SoCal Gas

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**This should be required training for all web developers.**

Maureen Russolo, formerly with  
Union Gas

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At Southern, we implemented Chris’ recommended approach to home page design and layout with phenomenal success - **a 300% increase in site traffic** to business self-service functions with a resulting 50% increase in online service requests from this audience.

Chris is truly a visionary leader in the usability space and is both informative and entertaining in his approach. I would highly recommend attending.

Sonia McCollum  
Southern Company