



The Savvy Marketer's Guide to

# Digital experience design strategy

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## IS THIS GUIDE FOR YOU?

You're likely  
a manager or  
director in a B2B or  
B2C organization,  
and your name  
is already associated  
with some  
good products  
or services

You have a golden opportunity to create (or update) a digital asset—maybe it's a website, an app, a product's digital interface or one of your social channels. The budget and timeline are almost reasonable. Your multi-disciplinary project team—some of the best people in the organization—works together seamlessly through the long hours of design and development. And, despite the last-minute addition of “critical” new features, you get the job done. It's built on industry best practices. It looks great, and works great too.

But at the end of the day, it still feels, well, conventional. Worse, it doesn't move the needle in any significant way. It isn't building the brand, improving sales or attracting new prospects. For some reason, it just isn't connecting with its target audience like it should. Sure, all the latest cool tools and features are there but, to be honest, your competitors have those too. It's a sound product, but not a *great experience*.

This document is for you if the above scenario sounds too familiar. You're likely a manager or director in a B2B or B2C organization, and your name is already associated with some good products or services. But what's eluded you is the creation of a knock-it-out-of-the-park great buyer experience. You want to create something that engages your buyers at an emotional level, working like it was tailor-made for them, seemingly anticipating what they want to achieve and intuitively helping them achieve it.

In the following pages, we offer a framework to connect big-picture strategy and shop-floor tactics, helping you design truly game-changing digital experiences. By filling the void between corporate objectives and the nitty-gritty details found in style guides, we will help you give members of your design team—brand strategists, user experience designers, visual designers, copywriters and digital developers—the collaborative framework they need to make better, more consistent choices. So whether you're designing a simple app or a full suite of websites, each touchpoint will build towards a meaningful relationship with each buyer.

Sound ambitious? It is. And it's too important to ignore. So let's get started.

PS: We hope you agree there are lots of tweetable ideas in this Guide. Click the Twitter icon to share any of them with your network.

[Go ahead, try it now if you'd like.](#) 

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# IT'S ALL ABOUT THE EXPERIENCE

Great experiences  
distinguish great  
products and,  
ultimately, create  
highly desirable  
brands

“The customer rarely buys what the company thinks it sells him.”<sup>1</sup>

Peter Drucker  
Management consultant, educator and author

There's a reason why we still quote Peter Drucker. Five decades on, his ideas still resonate. [Companies might think they are selling products. But the truth is, as Drucker said, what buyers really want is the satisfaction of a truly gratifying experience.](#) 

As marketers and manufacturers, we have a tendency to believe that the superior product delivers the biggest list of killer features. That approach to marketing may work well when the product category is young, but as competition increases and the category matures, competing products approach a state of parity. Features become less of a source of brand differentiation.

At this point, the category pivots and it's no longer about products in isolation. It's about how people *interact* with products. Think of your favorite brands and you'll see that what people are often looking for extends well beyond the product into the realm of experience and self-fulfillment or personal achievement.

In mature markets, company success requires a new way of thinking that recognizes that great experiences distinguish great products and, ultimately, create highly desirable brands. The challenge is to develop a strategy centered on delighting buyers and making a meaningful connection with them.

What does all this say about the possible future of your business? If your business relies on buyers engaging with your brand in a substantial way through a digital interface—either through the product itself, social media, websites or digital sales or marketing tools—then you will need to deliver a thoughtful, meaningful digital experience designed to gain competitive advantage.

**Ann Lewnes, chief marketing officer at Adobe, gives this succinct explanation of what digital experience design will mean to your buyers in the coming years:**

[“They expect a story tailored specially for them, a level of trust and transparency with the brands they do business with and, most importantly, a great experience. Brands delivering anything less will ultimately be ignored.”](#)<sup>2</sup> 

1. Peter F. Drucker, *Managing for Results* (Harper and Row, 1964).

2. <http://www.businesswire.com/news/home/20130611006711/en/Global-Study-Shows-Marketers-Missing-Digital-Opportunity>

# WIIFMB (WHAT'S IN IT FOR MY BUSINESS?)

Great buyer experiences...are the result of sound and innovative strategy

**What's the value of a great buyer experience? One analyst decided to find out. Using Forrester Research's Customer Experience Index, he tracked the stock performance of the index's customer-experience leaders and its laggards.**

It turns out that investing in businesses identified as customer-experience leaders would have generated a 43% return over six years. [🐦](#) And the customer-experience laggards? They would have delivered a negative 33.9% return<sup>3</sup>.



Did you catch that? If an investor in customer-experience leaders cashed out at the end of year six, she'd be holding twice as much money as an investor in customer-experience laggards.

Of course, these great buyer experiences don't just happen any more than stock prices *just* rise. They're the result of sound and innovative strategy. And that strategy delivers bottom-line benefits in a number of ways.

**A more engaging experience** - Let's face it: lacking any insight about the buyer, your design team will likely create an experience that makes sense to them, but may totally miss the mark with your target audience. [🐦](#) It's human nature and you can't fault them for that. But give them a strategy that introduces the buyer, the brand and a context for decision-making and you'll give them the framework with which to create a truly engaging experience.

**A stronger, more coherent brand** - A digital experience design strategy is part of a much larger brand strategy. It needs to share intellectual DNA with the broader brand strategy to create and reinforce a coherent, sustainable brand across media and touchpoints. At the same time, the digital experience design strategy doesn't dictate that each experience will be a clone of another. It provides the flexibility to adapt to new scenarios and situations, while fostering the creation of experiences that are consistently meaningful and meaningfully consistent.

3. In the study, the hypothetical "leader" and "laggard" investors liquidated their positions at the end of each year and re-invested the proceeds in that year's customer-experience leaders and laggards respectively. <http://www.watermarkconsult.net/blog/2013/04/02/the-watermark-consulting-2013-customer-experience-roi-study/>

Good strategy  
reduces risk  
because it's based  
on valid insight

**Faster time to market** – Good strategy provides the framework that ensures your multidisciplinary team is aligned on a common purpose and directed by a shared understanding of what buyers want. Your design team is empowered and enabled to make sound choices. So there are fewer meetings, a less subjective “agenda” and better teamwork. As a result, you achieve outcomes “faster”—with fewer revision cycles.

**Improved likelihood of getting things “right”** – Good strategy reduces risk because it's based on valid insight. It provides clarity of purpose, making decisions less arbitrary and, ultimately, more likely to address the needs of the target buyer. Just as a digital experience strategy specifies to whom you are targeting an experience, it also specifies whom you *are not targeting*. You're focusing on creating digital experiences for a more select audience and making fewer compromises.

**Better conversion rates** – As you distinguish yourself from the competition by offering exceptional buyer experiences, you build affinity, buzz and goodwill that extend across your products and services. Influenced by this halo effect, people are more likely to purchase your products and services at the end of the day.

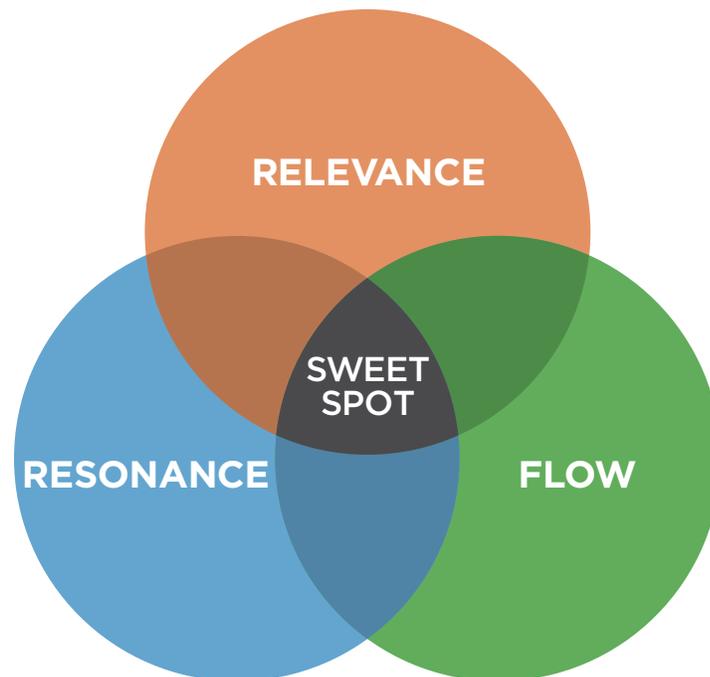
**Foundation for innovation** – By its nature, a digital experience design strategy provides a foundation for defying convention and the status quo. Grounded in buyer insight, it gives you a framework for responding to buyer needs, motivations and goals in a unique way. What's more, because it is strategic in nature, it gives you the courage and resources you need to take bolder steps to achieve a solution and to stand behind your choices.

# THREE DIMENSIONS SHARED BY ALL GREAT DIGITAL EXPERIENCE DESIGNS

“Have you checked this out? It’s incredible.”

As simple as it is, a comment like this from a member of your target audience about a brand touchpoint you created should be your holy grail. When your digital experience design rises above the mundane and generates its own buzz, you know you’ve created something special.

You might be thinking that it takes equal parts luck, magic and a Steve Jobs-like visionary to create this kind of experience, right? No. In truth—and probably to your relief—it really boils down to an experience that achieves a balance of three dimensions: relevance, resonance and flow.





What it means for marketers	What it means for buyers
You are deliberately focusing the design of the experience on a particular group of buyers and their particular set of needs and goals.	“It speaks my language and, in some ways, mirrors a lot of things about me. It ‘gets’ me and understands what I want to accomplish.”
Your goal is to create an experience that connects at both a rational and emotional level with your target audience.	“I actually enjoy using it. It’s satisfying, the kind of experience I’d recommend to a friend.”
Your goal is to create a seamless experience that ushers buyers from their initial action through to accomplishing what they set out to do.	“It felt effortless and intuitive to use. It felt familiar and matched how I thought it would work.”

Relevance, resonance and flow aren't superficial afterthoughts in the design process. You strategically design the experience to achieve these three dimensions in an optimal balance. And when they work together, buyers enjoy a tightly integrated experience that seems tailored just for them. 

Now let's take a deeper look at the methodology we use at Quarry. It will provide your design team with the tools they need to produce a digital experience that achieves relevance, resonance and flow.

## DESIGN FOR SOMEONE, NOT EVERYONE

A good persona  
shows us the  
differences that  
make a difference  
between your  
strategic segments

**You've heard the saying "You can't be all things to all people." The same holds true for your digital experience design projects. By focusing on a key audience (or strategic segment) for your digital experience design, you create a more relevant experience for them.**

### Introducing personas

It's easy to lose the humanity behind the statistics. The flesh-and-blood individuals who are your buyers tend to disappear behind demographics, psychographics and broad market segmentation studies. [🐦](#)

Personas put an end to that. You can think of a persona as a biography of a hypothetical but representative member of your target audience. Personas introduce your design team to the people they are designing for and show the factors that unite the members of the group.

### What makes a good persona?

A good persona shows us the differences that make a difference between your strategic segments. It provides actionable insight, which is the foundation for a strategic advantage that's hard for competitors to discern and, as a result, duplicate or neutralize. In most cases, this competitive advantage is a deep understanding of your buyers that:

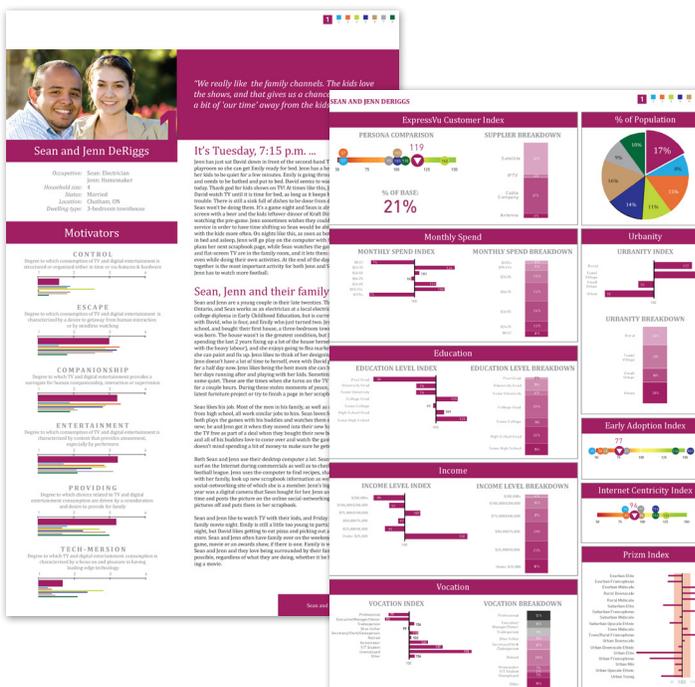
**Distills a particular field of experience** – It reflects the segment's shared beliefs, values and experiences, all viewed within a particular context. Here's an example of what we mean by "a particular context." You could view work-from-home parents as highly disciplined individuals who take pride in balancing and compartmentalizing their work and family lives. Or you could personify them as free spirits whose goal is to completely blend work and family responsibilities. In this case, the field of experience is the same—i.e., working from home—but the view the two personas adopt, relative to that field of experience, is different. A good persona provides this frame of reference—how members of this segment see the world and themselves. It also points to the potential value your digital experience can create for them.

**Reveals a persona's motivations, tensions and contradictions** – It should convey the spectrum of ambitions, inclinations and drivers that spurs the persona to action and, just like in the real world, how these motivations often conflict. Identifying these potential tensions, and figuring out how to help resolve them, is key to designing something truly innovative. In the previous persona example, you can see how the tensions of one potential work-from-home parent persona would be very different from another.

**Has validity and reliability** – Quantitative research provides a statistically reliable outline of how members of a segment collectively behaved in the past. Qualitative research, which is the foundation of most personas, provides a valid basis for forecasting their future responses and behavior. But the real power of personas comes from combining qualitative and quantitative insights to craft an authentic narrative that allows you to look at your buyers in a strategically advantageous way.

### Bear in mind

Like the strategic segments they represent, you'll almost certainly have several personas. You might have one or more primary personas (representing your main target audiences) and secondary personas. Plus, you'll likely have an anti-persona, who you are decidedly not targeting.



## DESIGN THE EXPERIENCE, NOT JUST THE FUNCTIONALITY

An experience compass explicitly defines the emotional responses that your target audience should feel after they've engaged with your digital experience design

Many digital design teams work by categorizing the various features and functionalities of the intended experience, then arrange them into logical menus or tabs within the interface. The result, almost invariably, is a business-centric design that does everything, yet resonates with no one, including the target audience.

To achieve deep-seated resonance, start by defining the nature of the relationship you want to establish with your buyers. [🐦](#)

### Introducing the experience compass

An experience compass explicitly defines the emotional responses that your target audience should feel after they've engaged with your digital experience design.

Experience compasses typically specify three or more emotions. Not only do they reflect the emotions you want your experience to elicit, but they also depict the degree to which you want to emphasize one emotional outcome over another.

### What makes a good experience compass?

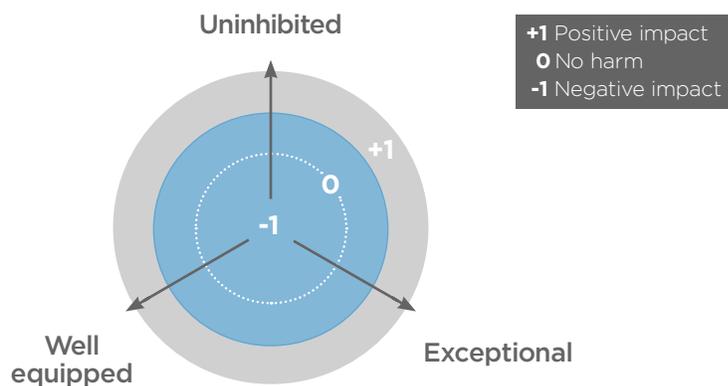
**Branded** - The emotions your experience is designed to elicit need to align with the foundational attributes of your corporate brand. So, start with a deep understanding of what your brand stands for. Then explore these brand attributes from the perspective of your primary persona, with an eye to framing these attributes in an authentic and evocative way.

**Insightful** - The attributes included in an experience compass distill and synthesize the emotional complexity of your primary persona down to three or more key outcomes. So you can imagine that creating an experience compass takes time, rigor and sensitivity. But by making the effort to pinpoint and articulate these shared needs and motivations, you'll maximize the probability that you'll design an experience that resonates with your target audience.

## Bear in mind

It may be hard to imagine how an experience compass will benefit a design team, so here's an example. Quarry was working with a security-software company to renew the company's online presence. While other companies in the category sowed uncertainty by emphasizing hackers and malware, the experience compass Quarry proposed specified "uninhibited," "exceptional" and "well equipped" as the defining outcomes of our client's digital experience design.

The compass guided the design team to create a standalone website that recognized and even fostered the adventurous side of their buyers, all while equipping them with the tools and information they need to securely pursue their interests and passions. It moved the experience away from one focused on fear to one that embraced the joyous side of life online, a more resonant and appealing approach.



## DESIGN, THEN BUILD

A concept model  
is an extended  
metaphor that helps  
the design team  
create a seamless  
experience

**Reality check:** What's logical and intuitive to your main personas may not be to your design team (and vice versa!). Of course, that's because they're coming from different perspectives. So how do you get your design team to see through the eyes of your target audience to create an experience that flows seamlessly from one part to the next?

### Introducing the concept model

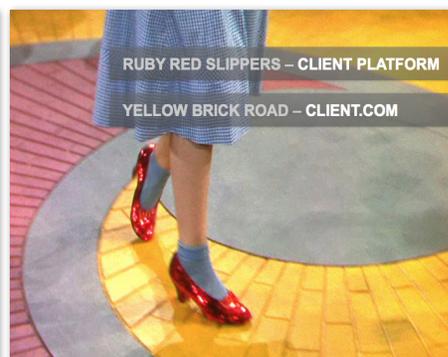
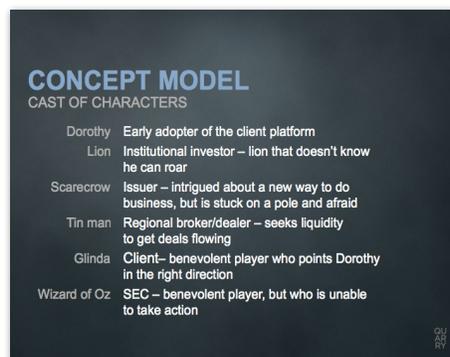
The concept model is an extended metaphor that helps the design team understand both the design challenge and the desired direction of the solution. It helps ensure that individual team members are able to make choices that are consistent with the overall experience strategy. In turn, having a concept model results in a more cohesive design that enables users to have a more seamless experience.

### What makes a good concept model?

At Quarry, we've used a broad range of images and ideas as concept models. We've used characters from the Wizard of Oz to understand the roles and interrelationships of players in a complex financial market place. We've used the idea of an exclusive airport lounge to frame the digital experience design we created for a website. (That was for the software-security client that wanted to make their best customers feel advantaged while they lived their adventurous lifestyles. Makes sense, right?)

Given the endless diversity of possible concept models, here is what we can generalize about good ones:

**They frame the main design challenge** – [Concept models give the design team a context for understanding the task at hand. They provide a perspective that helps shape the direction of the design in terms of its interactions, content, layout and visual style.](#) [🐦](#)



**What they exclude is just as important as what they include** – A good strategy, as we've said before, informs the design team about what to omit as well as what to create. Focusing choices for both the design team and, ultimately, the people they are designing for, helps create a more predictable, efficient experience that flows naturally and intuitively for the user.

### Bear in mind

The concept model may be the central theme that actually appears on screen and guides the user through the experience. Or it may remain as a heuristic tool, never seen by the end user but providing guidance to the design team. (While it was helpful for our team, for example, financial services experts may not appreciate seeing themselves as Dorothy in an unfamiliar landscape.)

# FROM STRATEGY TO EXECUTION

Design preferences and edicts are a set of explicit guidelines that help define what belongs in the experience and what doesn't

Up to this point, we've described three heuristic tools that form the basis of your experience strategy and help your design team make choices that are consistent with that strategy. But, before you start building, there's one more tool that helps bridge the gap between these conceptual tools and tactical execution.

## Introducing design preferences and edicts

Design preferences and edicts are a set of explicit guidelines that help define what belongs in the experience and what doesn't. While they're not pixel-level rules (i.e., not a style guide), they do equip your design team with a richer sense of the boundaries the experience should stay within.

## What makes good design preferences and edicts?

**Make them tactically focused** – Where the heuristic tools provide your team with strategic insight, the preferences and edicts provide actionable rubber-hits-the-road direction.

**Strike a balance between freedom and prescription** – Preferences are top-level guidelines to help your design team choose between two or more good options. Here's an example of how a preference might be worded: "Given the choice of presenting all possible options, prioritize those options that help the customer accomplish their goal more efficiently and effectively." Edicts are more restrictive than preferences and explain what belongs and what doesn't.

**Some examples:** "Do not use pop up windows" or "Use natural language and avoid all industry jargon." Both preferences and edicts have an important role to play in helping your design team translate the strategy into execution.

### Ideas to keep in the experience

- Customers are treated as exceptional to the rule
- In today's society, people's digital lives are integral to who they are and a way they construct their identity and their experience
- The point of relevance for the client is about more than just security and protection – it's about providing a foundation for living an uninhibited digital life
- Aesthetics matter – beauty is associated with art; art with value; value with a premium brand and its related products. Because the client has a premium brand, all elements of the experience should be consistent with the design aesthetic.

Offering valuable customers exceptional value

### Ideas to keep out of the experience

- A persuasive strategy that uses fear to manipulate people to result in a sale
- A utilitarian, sales-focused aesthetic

Offering valuable customers exceptional value

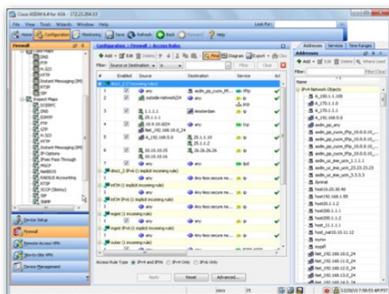
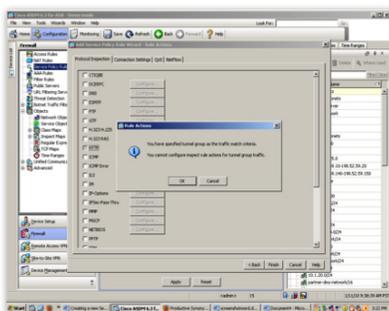
# CASE STUDY

Now that we've described the theory behind creating a digital experience design strategy, let's see the principles put into real-life practice with one of our clients.

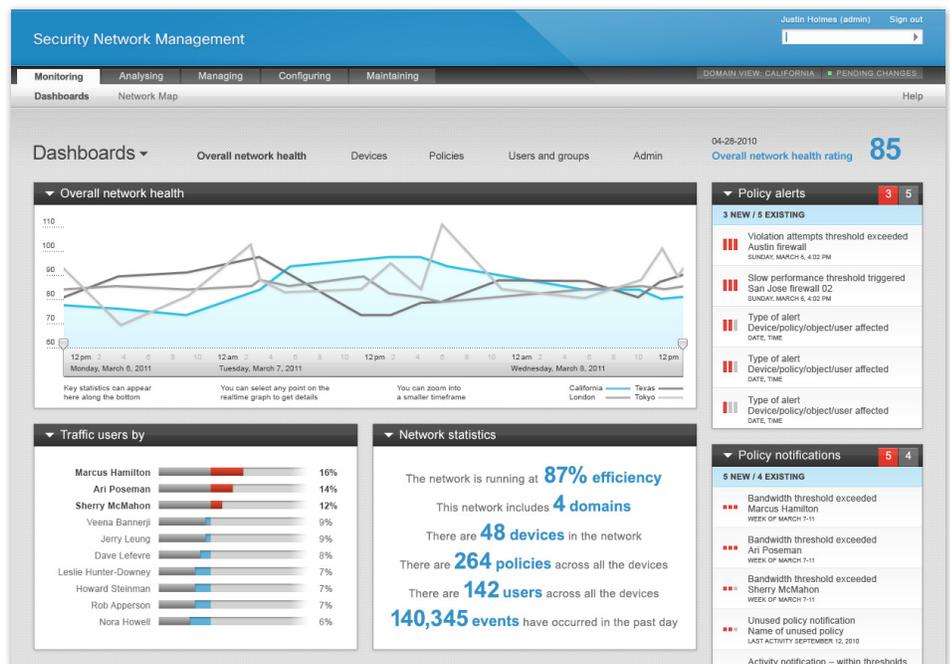
The client, a manufacturer of networking equipment, had dominated its industry for years. But nimble, disruptive competitors had entered the scene and started to eat the incumbent's proverbial lunch. It became clear that the company's leadership position was in peril and that its traditional, feature-based approach to market competition lacked the marketing clout it once held. The manufacturer turned to Quarry to help it transform the user experience to one focused on the needs and goals of system administrators and, as a result, reclaim their industry leadership.

The result was simplification, an intentional move away from an overly complex and tedious management process—the inevitable outcome when manufacturers engage in a features-based arms race—towards an elegant design that reduced the mental demands placed on system administrators.

## BEFORE



## AFTER



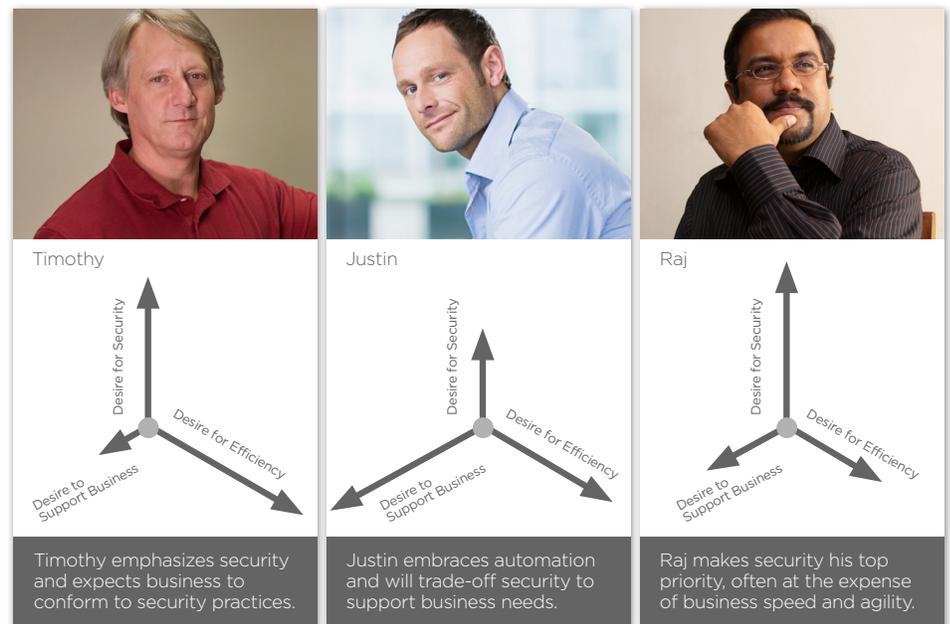
Follow along as we walk through the development of the digital experience design strategy that enabled this radical redesign.



## BUILDING RELEVANCE WITH PERSONAS

We worked with our client to develop a comprehensive assessment of the competitive landscape. This analysis included extensive interviews with systems administrators and business decision makers. Based on this insight, we designed a set of personas that gave our client a deeper understanding of their buyers. This new perspective shifted their thinking from one based on demographics and conventional assumptions to one based on a rich sense of motivations and goals.

All personas shared the same contradictory demands of their jobs but they dealt with them in different ways



All personas shared the same contradictory demands of their jobs but they dealt with them in different ways. For instance, Timothy, who represented our client's traditional target user, focused his efforts on maintaining the most secure environment possible, often sacrificing or neglecting the needs of the business as a result. Raj took similar pride in a secure firewall system based on rigorous industry standards, with the added motivation of achieving recognition and status from his management team. On the other hand, Justin placed nearly equal emphasis on being efficient (getting the job done fast) and meeting the needs of the business (for instance, recognizing that security might need to take a backseat if the sales team needed remote access to centrally secured data).

Through collaborative workshops with the client, we selected Justin as our primary persona, Raj as our secondary persona and Timothy as our anti-persona. With an eye to creating significant change in the industry, our client viewed Justin as someone who would embrace an innovative new approach earlier in the technology adoption curve.

Why did we view Justin as an early adopter? Because he's a naturally inquisitive and creative guy. He likes to understand how things work and, just as importantly, how they can be made to work even better. What's more, he's also the kind of guy with the skills and ingenuity to make those improvements himself, for the benefit of the company and the particular situation.

This earlier adoption was an important consideration given the client's need to demonstrate early signs of market acceptance. Raj's quest for technical perfection and concern for his reputation made him more of a version 2.0 kind of guy. And Timothy, with his desire to stick with the status quo, would be even slower to adopt new technologies.

### Justin's Story

Justin is in the middle of his career. He is well educated with significant experience in both Operations and Engineering within the Enterprise security space. He enjoys his work and gets a lot of personal satisfaction from his career although he works to live and does not live to work. By nature, Justin is a linker and optimizer. He loves the challenge of learning new things both inside and outside his discipline. However, he does have a high preference for learning pragmatic things that improve his life versus learning purely for the sake of growing his knowledge -- to show off at parties for example.

Justin feels good when projects move forward and he gets things done. He values his time immensely and has a distain for anything that wastes it. This always leads him to look for efficiencies in everything he does. At work, compliance is important. He has set up good processes and automated tools such that providing auditors with reports is not onerous. However, he still feels there are many areas for improvement and efficiency. He would be very open to looking at new tools (ideally a single tool from his hardware vendor). For example, tools that track and document historical changes and tools that graphically show key attributes would help not only in auditing but also in simplifying troubleshooting and educating new staff. Justin feels there is a lot of institutional knowledge inside the minds of his team and scattered across numerous unconnected software platforms. An automated way to capture and share this information would reduce the current burden of documentation. Although very useful and important, he acknowledges that few people document changes appropriately.

While Justin is focused on technical responsibilities, he really considers the needs of everyone. He considers himself to be bright and innovative and doesn't like being told what to do and how to do it. He prefers to understand what his internal and external clients are trying to achieve in order to develop a suitable solution that takes into consideration its ramifications in the network before implementation. Often, the best solution may not involve changes to security infrastructure. On the other hand, if a security change is the best solution, he is more than willing to take considered risks in order to move the business forward. Justin does not have an emotional connection to the network, nor does he feel he is the chief protector of his company's information. He recognizes and accepts the strengths and weaknesses of the security network he works with.

Justin believes Cisco makes great routing products and has strong feature-rich firewalls. Over the years, Justin has seen numerous versions of Cisco's management systems, and his experience with them has almost always been very poor. He is aware of the syning issues and the fact that you can't do everything from the management console, not to mention bugs and UI issues. When using Cisco products, he uses both the GUI and CLI on a regular basis to manage his network. CLI is used almost exclusively to troubleshoot issues and he would be reluctant to give up CLI altogether. On the other hand, when using products from other vendors' CLI is almost never used. Overall, he feels Cisco's management system is either unreliable when compared to other vendors' products, and while he would love to try something new from Cisco, he would do so cautiously.



### Justin Holmes

**PROFILE**

Justin is in his mid 30's, married with young children, and he drives a hybrid Camry. He has a sophisticated home entertainment system which includes a gaming console and a lower end universal remote. He lives in a nice suburban townhome.

*"Efficiency and organization is important in everything I do. I prefer working smarter to working harder and really hate wasting time doing repetitive things. I will invest in and try new tools to see if they are useful."*

**GOALS**

**EFFICIENCY IN EVERYTHING.**

Doing things faster, smarter and automatically keeps life interesting for Justin. He knows how things need and should be done and is willing to spend time to do things properly.

**TO TRY NEW THINGS.**

Justin is modest and open to being shown a better or new way as long as it doesn't break the bank. He doesn't mind and, in fact, enjoys the challenges of learning new things.

**SUPPORT THE BUSINESS.**

Justin understands his business and is not there to constrain it. He is willing to make the necessary changes and compromises to minimize the burden of security to ensure he is not a bottleneck.

**MOTIVATORS**

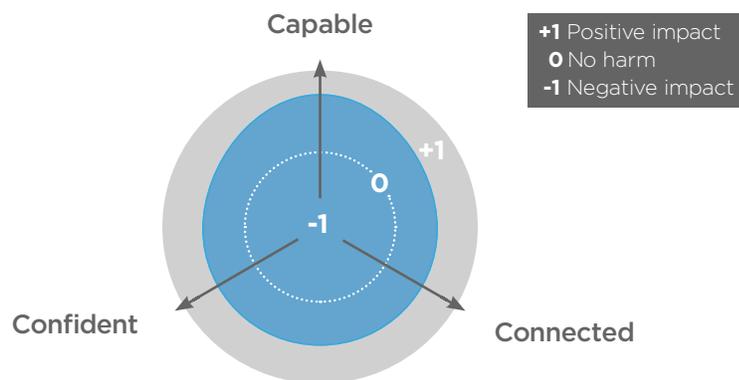
<p><b>DESIRE FOR SECURITY:</b></p> <p>LOW —●— HIGH</p>	<p><b>DESIRE/ABILITY TO CHANGE:</b></p> <p>LOW —●— HIGH</p>	<p><b>LONG-TERM VISION:</b></p> <p>LOW —●— HIGH</p>
<p><b>DESIRE TO MEET THE NEEDS OF THE BUSINESS:</b></p> <p>LOW —●— HIGH</p>	<p><b>DESIRE FOR RECOGNITION:</b></p> <p>LOW —●— HIGH</p>	<p><b>DESIRE FOR EFFICIENCY:</b></p> <p>LOW —●— HIGH</p>



## INSPIRING RESONANCE WITH AN EXPERIENCE COMPASS

Given our understanding of the personas, we explored different scenarios of how a system administrator would interact with our new user experience and then articulated the emotional responses we were trying to achieve through the experience.

It took a lot of discussion, but here's how the desired emotional dimensions mapped out on the experience compass.



**Capable** – When Justin is performing firewall management tasks he should feel like he's getting somewhere. His sense of task accomplishment should be strong and reinforced by feedback.

**Confident** – Monitoring with a traditional firewall solution left Justin in a constant state of vigilance and uncertainty. There's just too much data, all of it unfiltered and dispersed. With the new experience, Justin should feel that the software is presenting him with the right information at the right time, enabling him to make good decisions.

**Connected** – When Justin is getting his head around an issue, his attention should be concentrated on the task at hand. He should be connected to his task, and his task should be connected to the relevant information.

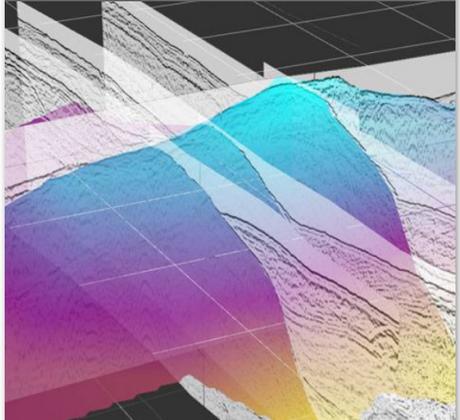
The blue shape of the compass indicates that it's most important for the experience to reinforce Justin's sense of capability without negatively impacting the other two desired emotional outcomes.

## CREATING FLOW WITH A CONCEPT MODEL

Given our client's desire to make a huge shift in the user experience for network security and firewall management, we needed a way to convey the significance and direction of this shift to the design team. Let's take a look at one of the concept models that we used to communicate the shift.

It turned out that the petroleum-exploration industry had undergone a comparable transition. Oil companies used to take a hit-and-miss approach to drilling wells, knowing that if they drilled enough wells, a few would pay off. However, this was a time-consuming and expensive approach with unpredictable results. System administrators would take a similar approach to managing and troubleshooting their firewall systems. Using conventional interfaces, administrators would receive an alert—either from the system itself or from frustrated end users. From there, they'd have to use their experience and knowledge to troubleshoot the problem by “drilling down” and analyzing reams of unfiltered and unsorted data. With time, persistence and luck, they'd find the problem.

Today's approach to petroleum exploration is based on high-quality geological information and automated data analysis that improves the likelihood of finding oil. This geological modeling is akin to what our client wanted to achieve. Less searching. More rewards.

FROM	TO
	
<p><b>Exploratory Drilling</b></p> <ul style="list-style-type: none"> <li>• Fewer predictive inputs</li> <li>• Begin search at ground level</li> <li>• Manual analysis</li> <li>• Knowledge more isolated</li> <li>• Many “dry holes”</li> </ul>	<p><b>Geological Modeling</b></p> <ul style="list-style-type: none"> <li>• More predictive inputs</li> <li>• Begin search where the oil is</li> <li>• Automated analysis</li> <li>• Knowledge more integrated</li> <li>• No “dry holes”</li> </ul>

## Guiding the design with preferences and edicts

To emphasize the desired degree of change within the user experience, we prepared design preferences and edicts that provided guidance and set boundaries. We struck a balance between giving the design team an appropriate level of freedom while identifying more clear-cut and prescriptive guardrails.

In this specific case, the desired shift was so far removed from the conventional experiences that it called for relatively radical do's and don'ts. Initially, many designers responded with a degree of disbelief about being able to achieve the defined design goals. But after we demonstrated concrete examples of how to stay true to the preferences and edicts, the client's design team internalized them and became advocates for abiding by these terms. Equipped with this design tool, the design team was able to weigh options, arrive at better choices and, ultimately, create an experience optimized for Justin.

### Dig deeper

To see how the work we described in this section catalyzed our client's design team and created an innovation in the firewall industry, [watch this short video](#)

#### Design preferences THE STYLE OF THE EXPERIENCE

**Focus** - provide focus to the information that's important at that time

**Clarity and context** - understand how the information (or a change in information) affects the whole or parts of the whole network

**Continuity and flow** - understand where you are within a process

**Feedback** - provide responsible feedback to all interactions

**Centralization and integration** - make connections between actions and information across different features and sections of the application

**Ability to problem solve** - appeal to the admin's knowledge of the system to make meaning out of the data

**Responsible flexibility** - providing flexibility when it benefits the user but never to the point that it would degrade the experience

**Intention-based navigation** - create a navigational structure that maps to the tasks the admin needs to accomplish (rather than a feature-based, most popular, or corporate structure)

#### Design edicts

No icons

No pop-ups

Use natural language

Progressive disclosure

No gratuitous design elements

Consistent interactions

Logical filtering

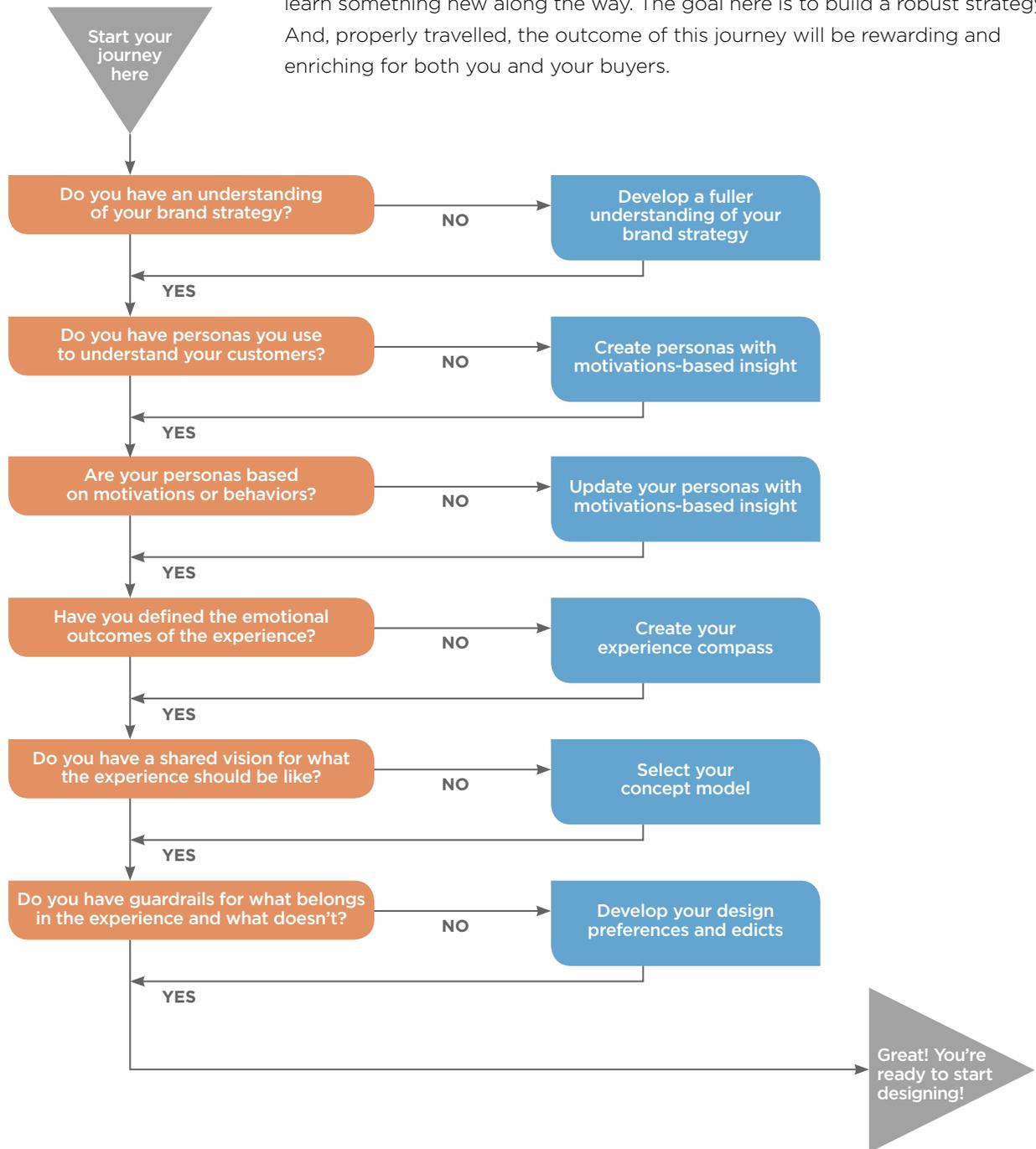
No "speedometers" in dashboards

No left nav

No in-page scroll bars

# GETTING STARTED

You've got your head around the theory. Now it's time to put that theory into practice. So where do you begin? Fortunately, the journey of creating a digital experience design strategy is relatively linear. So start at the top. And remember that there's no harm in looping back to a previous stage in the process if you learn something new along the way. The goal here is to build a robust strategy. And, properly travelled, the outcome of this journey will be rewarding and enriching for both you and your buyers.



## NOW IT'S YOUR MOVE

We know that great buyer experiences drive exceptional results. And the best way to realize a great buyer experience online is to have a sound and deliberate strategy—one that achieves a balance between relevance, resonance and flow.

Along the way, should you need guidance or advice, don't hesitate to contact us. We're passionate about this stuff and have extensive experience successfully collaborating with our clients to re-envision and re-energize their digital buyer experiences.

## ABOUT THIS GUIDE

This Guide was written by Diana Wiffen, Tony Mohr and Mo Oishi, with important contributions from Glen Drummond and Jennifer Donahue.

We would love to hear your feedback about this Guide, and we'd welcome the opportunity to discuss your strategy for digital experience design or the broader challenges of building your brand using the philosophy of BrandErgonomics® in today's buyer-centric universe.

**Follow us on  Twitter @Quarry or start the conversation by emailing Tony at [tmohr@quarry.com](mailto:tmohr@quarry.com).**

## ABOUT QUARRY

Quarry is a buyer experience agency with a 40-year history of converting branding into buying for B2B marketers. Our focus on the buyer's perspective enables us to design and deliver experiences that are aligned with how buyers want to engage. This philosophy—which we call BrandErgonomics®—spans the traditional disciplines of effective marketing and communications as well as all newer forms of engagement, such as mobile and social media. It's a defining concept in the digital experience design strategy we've explained here.

Quarry offers extensive expertise in buyer insight, brand strategy, demand generation, marketing automation (Eloqua® Level 1 certified partner), user experience design, buyer and stakeholder communications and sales enablement.

