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Launching a New Community User Interface

SNAPSHOT

SPEAKERS
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COMPETENCIES
Tools, Strategy

MATURITY PHASES
CMM2, CMM3, CMM4

HIGHLIGHTS

Launching a new user interface is no easy task. Stephanie shared an information-packed case study full sure to be helpful for others engaging in down the same path.

- Interested in best practices for launching a new community interface? Stephanie shared what she believes were the top 5 best practices that facilitated their UX/UI launch.
- Wondering which trait will be a key to success in any UX/UI redesign? Stephanie's team shared that because of this trait, Stephanie proved to the business – and customers – that she was listening and willing to work with them.
- What goals would you measure in a UX/UI redesign? Stephanie shared 3 metrics and an ROI formula.

OVERVIEW

Background Stephanie Field: Stephanie is one of the Community Managers at Carbon Black.

- She has 3 years of community experience.
- She managed a Jive community at athenahealth, which is where she was first introduced to Jive.
- Carbon Black – a security company – is her first experience with an external community.

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CASE STUDY

- **The User Exchange Community (UEX)**: The UEX runs on the Jive-x Club platform. It's a community of 10,000 security professionals with 2 community managers, Stephanie and Ed Sullivan.
  - UEX is quite diverse. It is a place for customers to consumer and share threat intelligence, access support and learn about products.

- **The Problem:** Customers wanted a more user-friendly community. They focused on 3 areas: product segmentation, a smart research area and a support area. Stephanie also wanted to improve navigation.

- **Research and Analysis:** This consisted of a group and space audit in order to understand which places they could phase out, which places needed to stay, who the owners were, etc. There was also a content audit.
  - They knew they needed to do customer interviews to understand customer needs. They also knew they needed to leverage their internal UX team for research and a usability study.

- **Pre-Work Timeline:** Stephanie shared the timeline of the pre-work.
  - ***Space and Content Audit (Week 1):*** They needed product pages, action words on the homepage to facilitate action, and a listening tour around the organization to discover pain points.
  - ***Tiger Team (Week 2):*** This was an open call to invite participation from staff interested in being a part of the new design of the community.
  - ***Design Jam (Week 3):*** Week 3 kicked off the UX research. They held a Design Jam and usability study. The customer interviews were incorporated. The Tiger Team was also brought in to brainstorm.
  - ***Internal Change Management (Week 4):*** Next they went to the design team to beautify their design ideas and keep it on brand by incorporating the design requirements and design requests. Next came the internal change management process.

- **Go-Live Checklist:** This checklist consisted of all the different launch tasks created for the re-design.
  - After assessing all of the feedback, the new UI was created. They knew the most important place in the community would be where members could come to discuss any new security threats. They wanted this to stand out. In line with the use of action verbs, the new UX had a

CASE STUDY, CONT.

- **Communication Plan:** Support and Customer Success were instrumental in rolling out the communications plan and the accompanying internal change management.
  - Every customer has a private group in the community, which is managed by Customer Success. They wanted to make sure that they knew how to answer questions about the new UI as customers would turn to them for answers.
  - New support portals were launched. They house the top articles.
  - They also presented to the sales team to help them to understand its value to their prospects.
  - They met with all the other teams involved throughout the entire process to ensure that they bought-into the new design and could offer any last minute feedback.
  - They posted internally on Jive to inform the UEX customers and partners.
  - They posted this in their Customer E-Zine to make customers aware of the changes.

- **Measure Goals:** They had 3 goals that they wanted to measure: increased case deflection, an increase in the sharing of threat intelligence and to enhance collaboration between users.

> Correct answers + .1* helpful answers + .02* liked answers + .02* views of helpful or correct answers + .005* page views + .02* Knowledgebase views = cases deflected*

- **Threat Research Engagement Program:** Through close partnering with their research team, they ensure that all customer inquiries are answered with 24 hours. This has led to some great successes: a 254% increase in pages views; a 251% increase in unique page views; a 625% increase in content created and a 130% average daily contributing users.

- **Increase Product Discussions within the Product Pages:** This was another UI redesign goal.

- **Next Steps:** Now that Ed has joined the team, he will be able to focus on a self-service model. This will help to shape and restructure the product pages and point them in the direction of any new programs that might be needed. They would also like to launch different industry and regional groups within the community, as well as facilitate customer engagement within the Threat Research Program with improved UX/UI enhancements.

BEST PRACTICES

- **<u>Consider these Top 5 Best Practices to Facilitate the UX Transition:</u>** Stephanie relayed what she believed were the top 5 practices that made this change easier.
  - ***Tiger Team:*** Company buy-in and a team in place to manage the change internally were immensely helpful. The Tiger Team helped them implement these changes from beginning to end. It was reassuring to know that they weren't alone in this process and that they could help out when needed.
  - ***Re-Directs:*** Stephanie admitted that she didn't know about the re-direct feature until 2 weeks before the Go-Live step. She's glad that she found it because it helped make the process run more smoothly through bookmarks and helping to redirect people to where they needed to go. As a result, they didn't get as many questions as they had anticipated about where different spaces went or where they were located.
  - ***Get Customer Advocates on Board:*** It helped with the buy-in because the advocates felt that they were part of the process, since they were brought in early with the customer interviews. Consequently, they were in the community advocating for the change and spreading enthusiasm for the upcoming changes. They helped to shape the community conversation.
  - ***Challenge the Customer Advocates to Find the Bugs:*** To further spark buy-in, they offered a challenge for customer advocates within Influitive. If there was anything wonky or a link didn't work, the advocates would receive points for letting them know.
  - ***Use out of the Box Features in the Beginning:*** A majority of the changes to the UI were out-of-the-box features, except for the last tile. That was custom made.
    - Currently, the homepage consists of several pictures that are linked. The goal is to clean it up over time and add more HTML to make it more dynamic. However, for the first phase, out-of-the-box offered a much easier rollout.

- **<u>Be Open to Feedback:</u>** The feedback process used various touchpoints. It wasn't all in-person interviews:
  - The Influitive Bug Challenge garnered a great deal of feedback. The Customer Success Team helped show the new UI to customers for feedback in the course of their daily activities.
    - Feedback helped to generate productive changes. For instance, they were told that their support button looked like an ad and, therefore, people weren't clicking on it. It was an easy fix to improve engagement.

LESSONS LEARNED

- The community uses a mix of both widgets and tiles. The homepage uses widgets. Widgets help to filter product documentation and knowledge-based articles through the "Watch it" tag throughout the community. Tiles are used on the support page.

- The first step in the content audit was to manually change a few of the product names. Stephanie looked through the areas of high importance and relevance to customers, made name changes where needed and then added appropriate tags to filter up into the desired product gauges.
    - They wanted product documents for defense products to filter up into a "Watch it" tag.
    - Stephanie is planning an additional tag for product documentation. Accordingly, she went through the different types of content to ensure they were tagged properly. In conjunction with this, she also created a style guide for tagging new content in the new UI. This way, the product team could ensure that the content was filtered correctly.
        - Adherence to the style guide has been fairly strong because it is high-level and simple.

- Stephanie was asked if she needed to make any governance changes with the new UI. Stephanie replied that the community used to be closed in that customers and partners couldn't see each other's conversations. This was so that their partners wouldn't be tempted to sell. In time, they saw that they could open up some of those areas. Now customers and partners are able to engage with each other in the same discussion. This is very helpful because partners are knowledgeable about the products.
    - The only other change made was to allow employees more access to create and contribute content in different areas within the community.

- There wasn't any pushback from members with the new UI design until the night before the launch. Then there was a flood of questions and concerns. Some were credible questions and concerns and they were able to incorporate the changes literally the night before launch.

- Adaptability is a key to success with any UX/UI redesign. Stephanie demonstrated this trait when she had to literally make changes overnight prior to launch. It was no small feat, either, as it involved the navigation bar. However, it showed the business that she was listening and willing to work with them.