

Memorable Membership Experiences

HCDE Capstone, Spring 2016

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1

Executive Summary

In today's competitive global market, retailers face a major challenge in differentiating themselves to stand out amongst the competition. Through our literature review, we learned that 80% of a company's future revenue will come from just 20% of its existing customers, yet attracting new customers costs companies 5 times more than keeping the existing ones. These numbers emphasize the importance of stellar customer service, and for companies like REI, the consistent need for improving member experiences.

Accordingly, the app we designed enhances the member experience by enabling members to make reservations with REI experts *when* and *how* they want. Through our app, people can choose whether they want to get expert help through an in-store visit, over the phone, or through online chat. Our app also enables REI experts to follow-up with customers and recap their conversations through in-app notes and notifications. Instead of allowing the conversational story between the customer and REI expert to die at the register, now the story is saved within customer notes. This strengthens the relationship between the retailer and consumer.

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The Team



Jessica Bao

UX Researcher

I am interested in observing people's behaviors and resolving their confusions with technology. My research interests include conducting interviews, surveys, focus groups, and contextual inquiries. Through the capstone project, I would like to strengthen my research skills, public speaking and project management skills.



Chip Connor

UX Researcher

I'm excited about ethnographic research and fascinated by the why's and how's of what people do. Going into the capstone project I have two major objectives: to persuasively communicate my findings about the user experience, and to flesh out my persona as UX Researcher /Project Manager.



Nicole Tilly

UX Researcher

I'm excited about ethnographic research and fascinated by the why's and how's of what people do. Going into the capstone project I have two major objectives: to persuasively communicate my findings about the user experience, and to flesh out my persona as UX Researcher /Project Manager.

3 Design & Research Questions

Design Question

How can REI improve member experiences?



4 Overview of Process

Discovery

- Discussion
- Literature Review
- Competitive Analysis
- Statistical Data Gathering

Concept

- Sketching
- Card sorting
- User interviews
- Storyboarding
- Narrowing our scope

Prototype & Testing

- Paper prototyping
- User testing
- Interactive prototyping
- Video prototyping

5

Landscape Research and Analysis

To learn what drives consumer loyalty and better understand the retail landscape REI operates under, we read 10 papers and reports about consumer behavior, then analyzed 13 companies through a competitive analysis.

6

Literature Review

The Importance of Engagement

Consumers loyal to programs are driven by individual transactions and can be easily swayed by the changing nature of their benefits program or by attractive benefits elsewhere. While consumers can be fickle, **a company can discourage members from switching to other brands by “focusing on stronger affective or emotional bonds with customers, such as through the social aspects of a program or a feeling of community or heightened perceptions of overall value.” (8)**

Value Perception

In order to create a successful loyalty program, **a company needs to “match its design elements to members' individual motives”** in order to contribute to customer value perception (10).

The Concept of Brand

“People...seek to identify with companies that appear to have desirable traits. To enhance these levels of identification, **firms must work to engage organizational stakeholders and increase the visibility of desirable organizational attributes.” (7)**

7 Competitive Analysis

Based on similarities in merchandise, loyalty program features, event activities, or their commitment to the environment, the following companies were selected for review:



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Key Insights from Initial Research

1. Retailers in today's competitive market must offer more than good prices, enticing rewards programs, or the ability to join a "club." In order to ensure long-term loyalty, they must engage with consumers on an emotional level.
2. The design of customer loyalty programs can influence customer motivation and value perception.
3. Modern consumers relate their sense of self to the brands they consume. As such, it is important for brands to cultivate an image that fulfills desirable attributes for its target audience.
4. REI and its competitors largely offer similar merchandise, return policies, and rewards programs.
5. REI is not significantly differentiating itself in the online space.

9 Ideation Process

9 Individual Sketches



3 Big Ideas



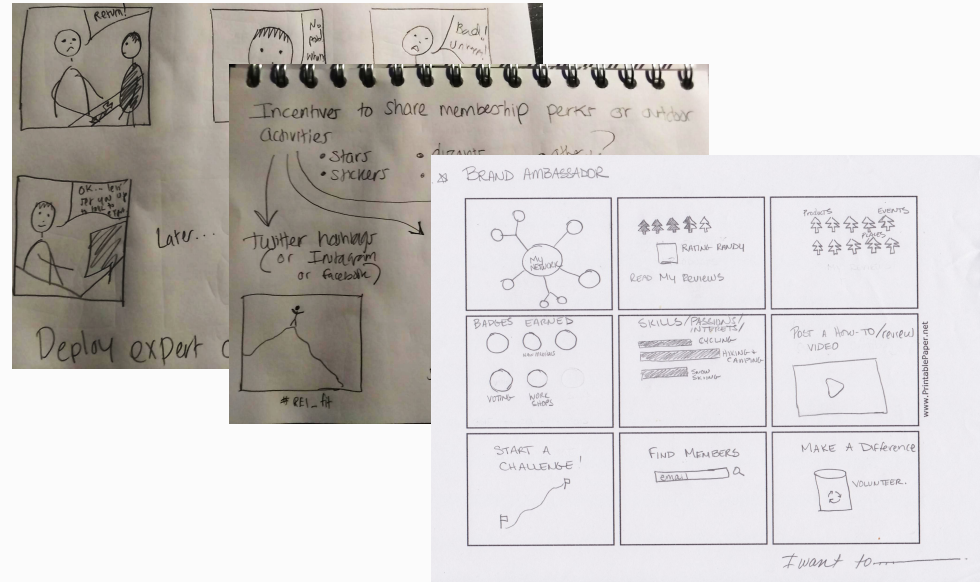
1 Design Direction

9 Individual Sketches

Building upon background research.

Each team member independently brainstormed and sketched rough design ideas. We each proposed 3 designs to the team for a total of 9 potential design directions.

As a group we went back to the insights learned during the lit review and competitive analysis and chose 3 design ideas that best spoke to membership amongst the 9 available options. Those 3 ideas were then further explored through affinity diagramming exercises.



Individual rough sketches

3 Big Ideas

Referring to our Milestone 1 findings, we spoke as a group categorize and cull some of our 9 sketches into 3 big ideas:

> Membership Cards

In Milestone 1, we found that people tend to associate positive feelings to groups in which they belong. We also found that consumers become loyal to a brand when emotional bonds are created between the brand and the individual. Thus, we suspected that creating a more personalized membership sign-up experience might increase trust development, build a sense of belonging among members, and create positive affective bonds associated with REI.

> User Profiles

In Milestone 1, we found that a brand can benefit from matching design elements to individual customer motives. We hypothesized that user-created profiles would help REI tailor each user's experience in a way that would leave a positive impression during each user interaction with REI.

> 1-on-1 Expert Advice

A big implication in Milestone 1 was the importance of engagement in creating affective bonds that lead to long-term brand loyalty. We wondered if increasing positive one-on-one interactions between REI's knowledgeable experts and REI members could create positive emotional experiences relating successful outdoor experiences with a great shopping experience with REI.

In our next steps, we practiced brainstorming exercises to help us flesh out what these ideas would look like.

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Affinity Diagramming 1: Membership Cards

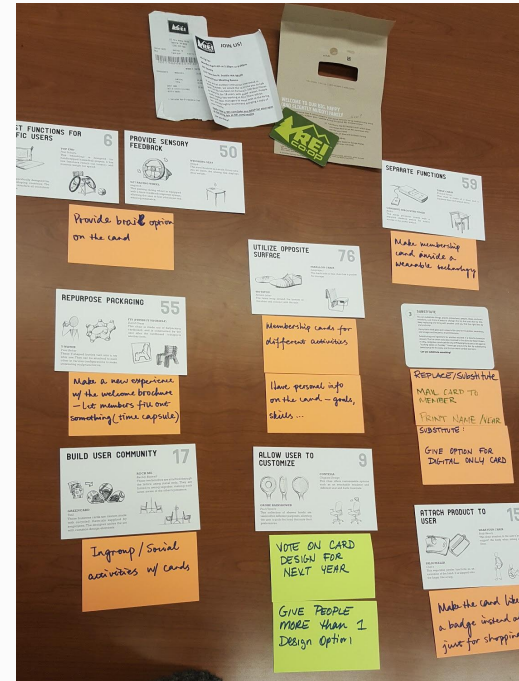


< The Problem

REI membership cards don't make people feel special.

The Possibilities >

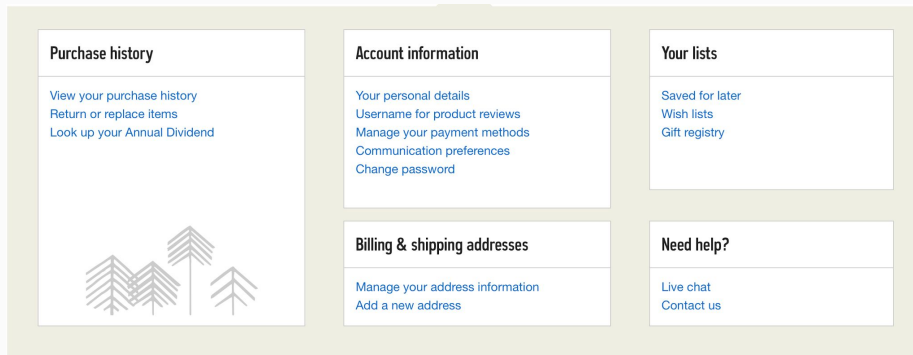
How can REI membership cards be redesigned to make people feel more special?



13 Affinity Diagramming 2: User Profiles

The Problem >

Current REI member account pages are impersonal and don't reflect each person's unique identity.



< The Possibilities

What if people could set up their member profiles on their REI account and tell others about themselves. What would those items include?

Affinity Diagramming 3: 1-on-1 Expert Advice

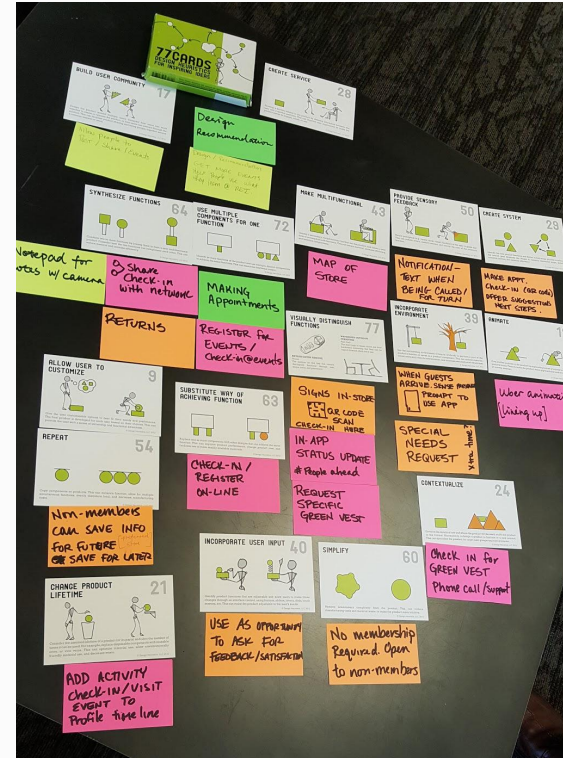


< The Problem

People can't always wait in lines and might not stop into a store because they think there won't be enough time to be helped.

The Possibilities >

What if people could make reservations to meet with an REI expert? What does that process include and what does that experience look like?



15

Narrowing Our Scope

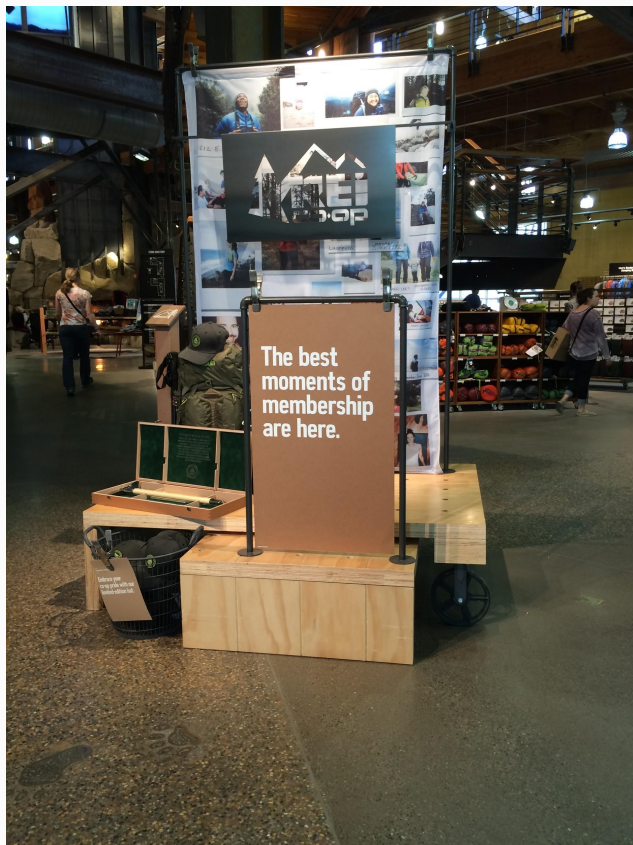
Landing on a design direction

We tapped our social networks and informally asked people with an interest in the outdoors, “which design direction speaks to you personally?”

Amongst the big 3 ideas the majority of respondents favored a one-on-one experience that enabled them to make reservations with REI experts.

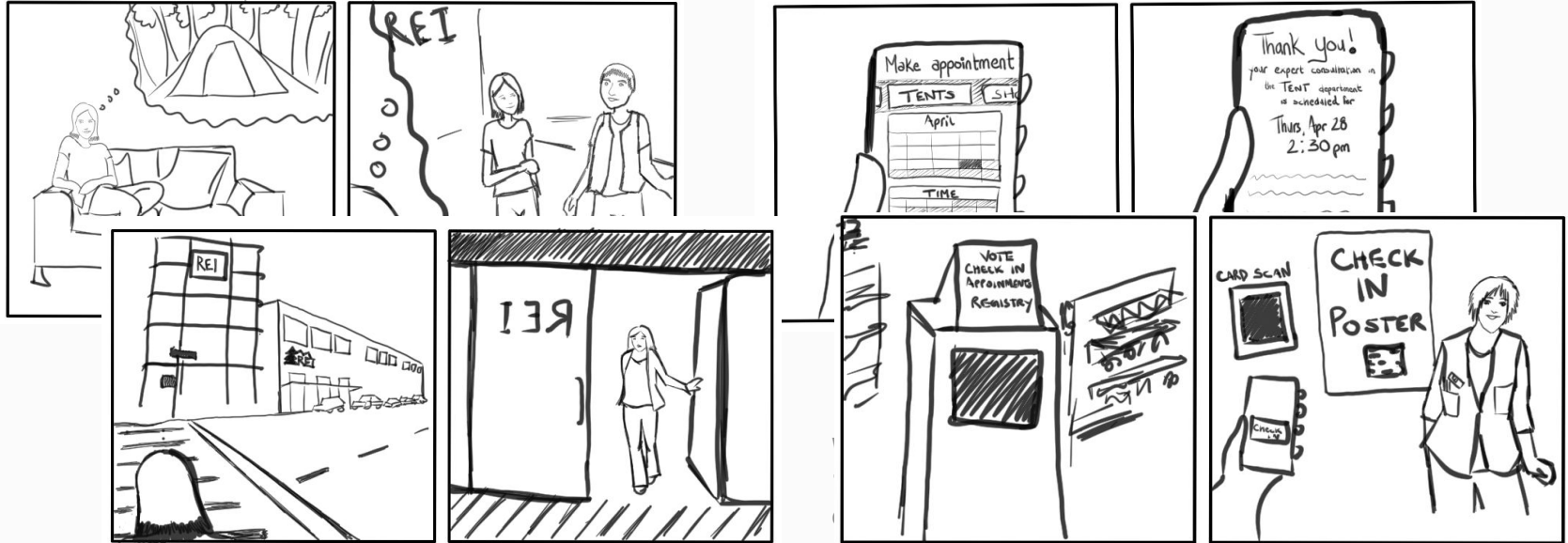
People felt as though they want expert guidance when planning an outdoor activity, but they couldn’t always guarantee they could get helped when they wanted it. They thought they could get more out of this idea, than having a different type of membership card or social setting on their account page.

Given this input, we moved forward with storyboarding to gain feedback on the reservation idea.



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User Journey Storyboards



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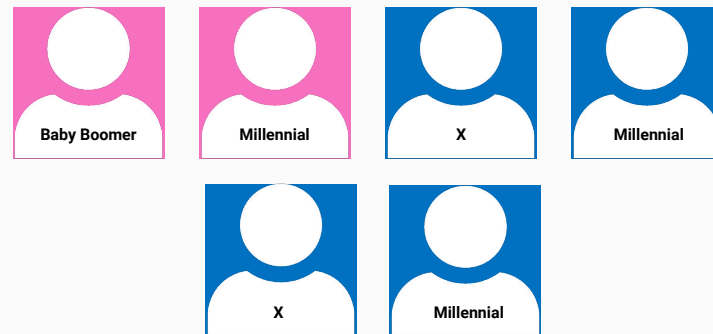
In-Store Intercept

Participants were recruited randomly throughout the store. Scripted semi-structured interviews were used in conjunction with the user journey storyboards to help participants visualize the imagined concept.

Findings

1. Customer satisfaction about products rarely makes it back to REI experts. Thus, experts aren't able to share about other customer experiences.
2. People want to be shown how something works from someone who knows what they are talking about.
3. People don't want to keep repeating their story to each new REI expert they meet.
4. For multi-item visits, people would like a way to share their outdoor plans and list of needed items to a personal shopper who will have their items ready when they arrive.

Participants



REI Employees*

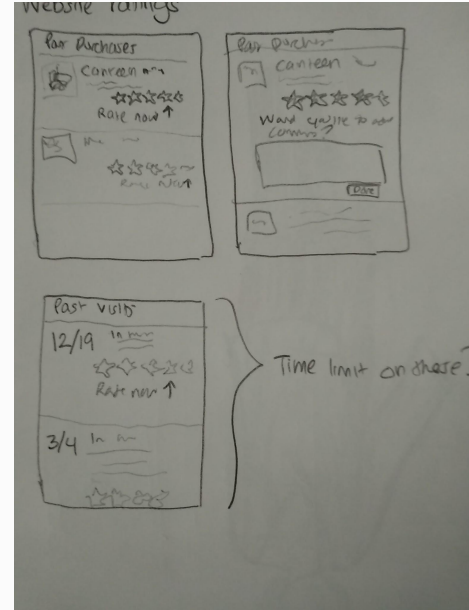
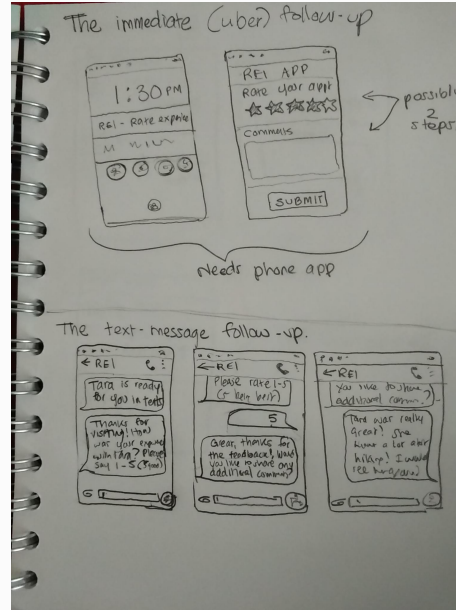
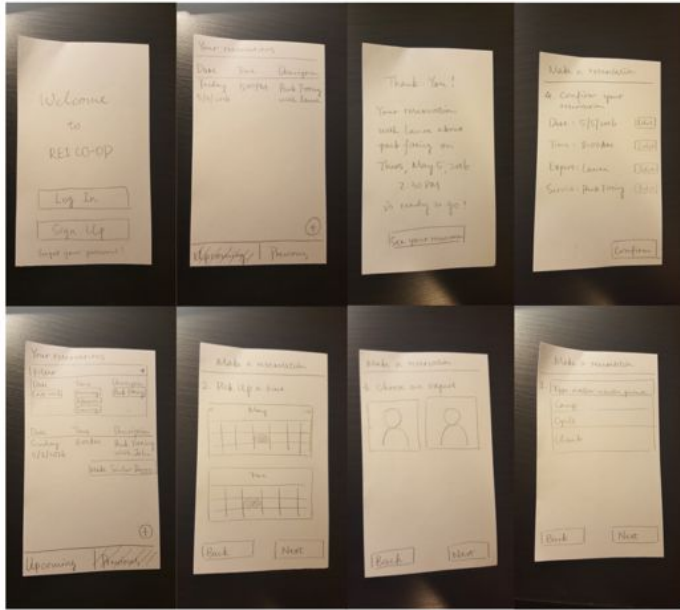


18 Prototyping and Testing



19 Sketches

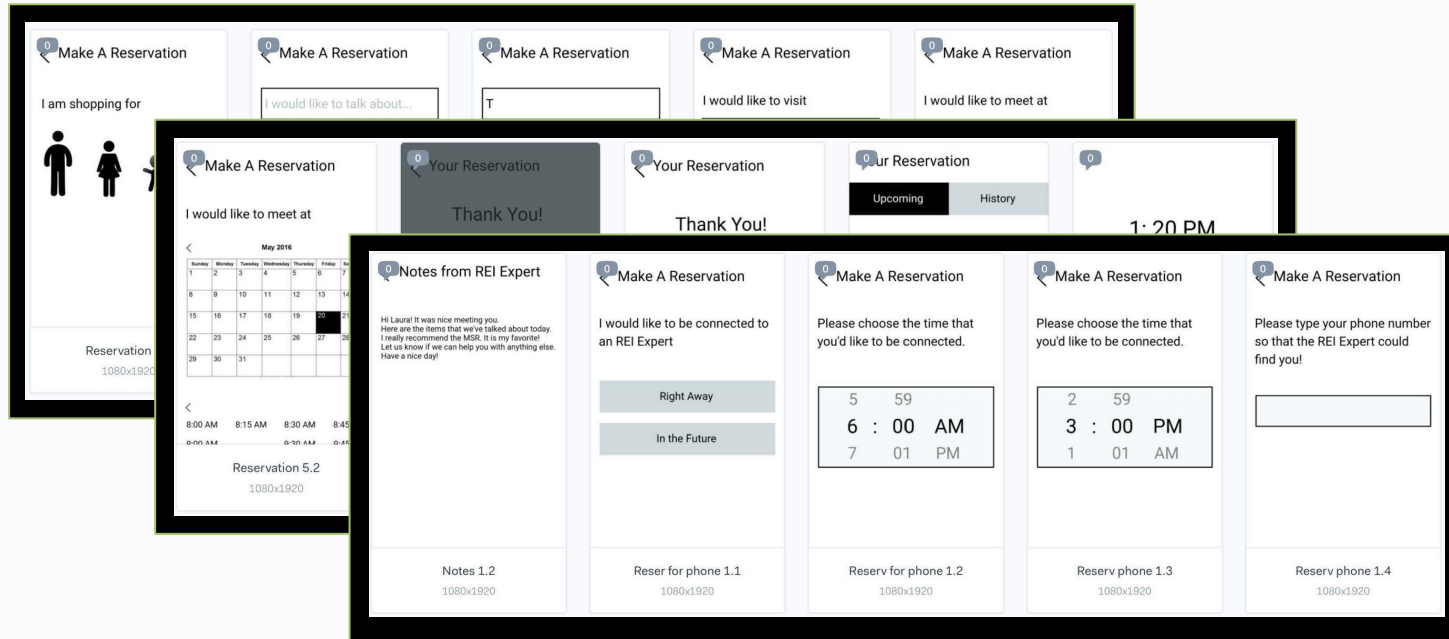
We sketched our design concepts by hand



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The Original Prototype

Our first prototype (black and white wireframes) was based on informal sketching and used during in-store testing sessions.



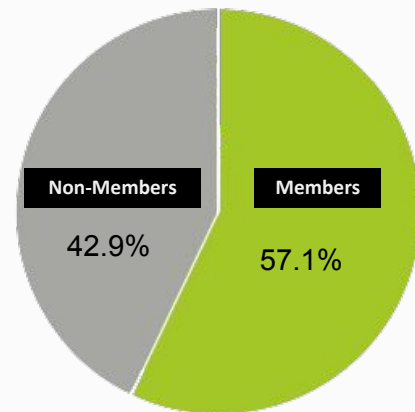
In-Store Testing

The image displays 20 mobile app mockups for REI Co-op, arranged in a grid-like fashion on a wooden surface. The mockups represent various screens from the app, including reservation booking, account management, and product browsing. The screens are designed to look like physical devices, with rounded corners and a realistic shadow effect.

The mockups are organized into several rows and columns, showing different stages of the user experience. The central screen features the REI logo and the text "REI CO-OP EXPERT VISITS". Other screens show reservation details, such as "Your Reservation" and "Make a Reservation", with fields for dates, times, and locations. Some screens also display a calendar or a list of items, such as "Test Backpacking" and "Test Family Camping".

The mockups are designed to be visually appealing and functional, with a clean and modern aesthetic. The use of a wooden background adds a natural and rustic feel to the overall presentation. The arrangement of the mockups allows for a comprehensive view of the app's interface and layout.

The diagram illustrates the distribution of Millennials across four generations. The top row shows four generations: Gen X (pink), Gen X (pink), Baby Boomer (pink), and Millennial (blue). The bottom row shows three Millennials (blue) and two Gen X (pink).



Key Findings

Clean and Simple Design

People had a preference for clean and simple design elements with less text.

Follow-ups

All participants appreciated getting a follow-up message after visit, particularly if it were personalized and would help them remember what was talked about. However, they were particular about how the message would be sent. Many said they would ignore an e-mail or turn off notifications.

Department Names

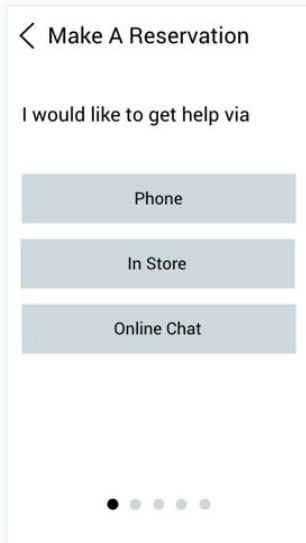
In our original designs, we worried that users might not know official department names and would prefer to search by item, sex, or feature, but we found that many would prefer to choose from a departmental list instead.

Calendar Colors

Though a grayscale calendar is intuitive, many participants offered the idea of color coded dates to signal availability or events without having to click on the day.

Redesign 4.1 - Progress Indicator

Old Version

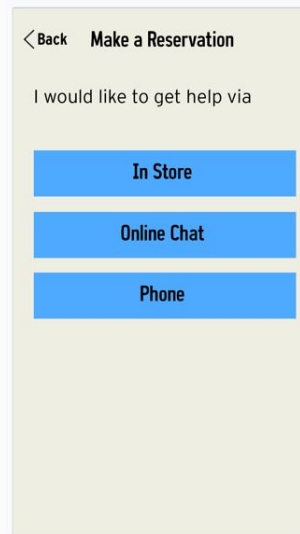


We originally introduced a dotted progress indicator at the bottom of the 'make a reservation' screen.

Rather than making the process more transparent, we actually found that the majority of participants were confused by this feature. They questioned whether they could swipe left or right without making any selections in order to go to the next screen.

We also introduced a BACK text next to the left-point arrow to make it more clear that users could move 'back' to previous screens. This is consistent with the design of the existing REI shopping app.

New Version



Redesign 4.2 - Who Users are Shopping for

In our original design, we included a step for users to select who they were shopping for. While we envisioned this as a way to guide users to the right department, we found in practice that this introduced a lot of confusion about gender-neutral items and was interpreted as insensitive to individuals outside of a binary heteronormative.

As a result of this feedback, we decided to remove this feature from our design altogether and allow users to choose their department through other methods. Subsequently, it had the benefit of shortening the reservation process by reducing the number of steps required.



Redesign 4.3 - Availability of Date

Old Version

< Make A Reservation

I would like to meet:

< May 2016 >

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

< >

8:00 AM 8:15 AM 8:30 AM 8:45 AM

9:00 AM 9:30 AM 9:45 AM

● ● ● ● ●

Although our original calendar was intuitive to participants, suggestions included adding color to show availability of dates for open reservations or the lack thereof.

We used muted colors in the text to communicate unavailability. Color also indicates special events, such as an REI sale in which members would be given priority.

New Version

< Back Make a Reservation

Choose the date and time

< June >

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

< >

2:00 pm 2:15pm 2:30pm 2:45pm

3:00 pm 3:15pm 3:30pm 3:45pm

26 Redesign 4.4 - Availability of Time

Old Version

< Make A Reservation

I would like to meet:

< May 2016 >

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

< >

8:00 AM 8:15 AM 8:30 AM 8:45 AM

9:00 AM 9:30 AM 9:45 AM

● ● ● ● ●

For the time options, users were mixed between the desire to conserve screen real estate or see everything. One said “I don’t want to see the things that I can’t use.” Another said “I would like to see all the options, even if they’re ‘greyed out,’ so I know that time might be available on another day.”

Several participants suggested providing all times (even if they weren’t available) and changing the color of the text for those times that no longer an option.

Our redesign implements muted colors for those dates that are no longer open for new reservations.

New Version

< Make a Reservation

I would like to meet

< June 2016 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

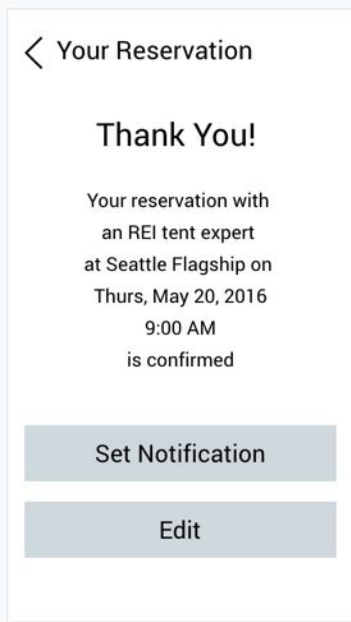
< >

2:00 pm 2:15pm 2:30pm 2:45pm

3:00 pm 3:15pm 3:30pm 3:45pm

Redesign 4.5 - Confirmation of Expert Specialty

Old Version



< Your Reservation

Thank You!

Your reservation with
an REI tent expert
at Seattle Flagship on
Thurs, May 20, 2016
9:00 AM
is confirmed

Set Notification

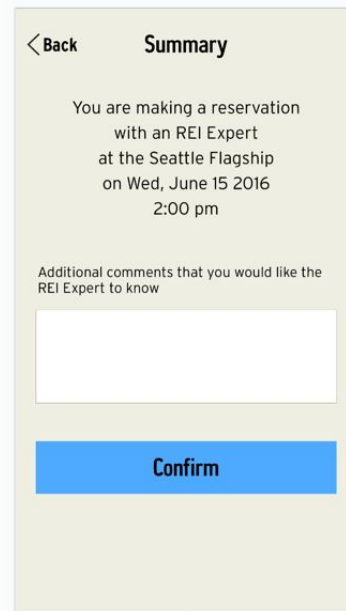
Edit

This screenshot shows the 'Old Version' of the confirmation screen. It features a back arrow and the title 'Your Reservation'. The main message is 'Thank You!' followed by reservation details: 'Your reservation with an REI tent expert at Seattle Flagship on Thurs, May 20, 2016 9:00 AM is confirmed'. At the bottom are two buttons: 'Set Notification' and 'Edit'.

Although the confirmation screen was generally well received, some participants said that it might be hard to implement because it's too specific. As shown on the left, the REI Expert reservation is set with a tent expert.

In the new version, we eliminated the product category and reworded the summary to "an REI Expert..."

New Version



< Back Summary

You are making a reservation
with an REI Expert
at the Seattle Flagship
on Wed, June 15 2016
2:00 pm

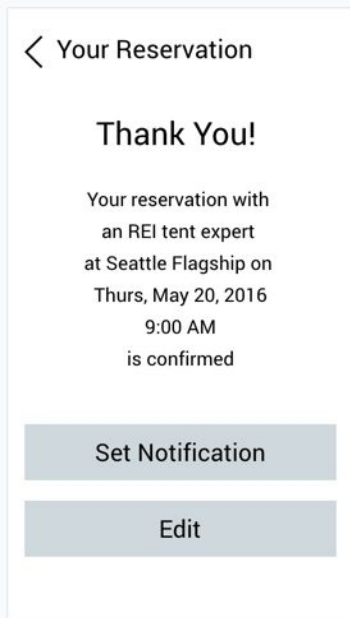
Additional comments that you would like the
REI Expert to know

Confirm

This screenshot shows the 'New Version' of the confirmation screen. It features a back arrow and the title 'Summary'. The main message is 'You are making a reservation with an REI Expert at the Seattle Flagship on Wed, June 15 2016 2:00 pm'. Below this is a text input field for 'Additional comments that you would like the REI Expert to know' and a blue 'Confirm' button at the bottom.

Redesign 4.6 - Confirmation/Opting out

Old Version



< Your Reservation

Thank You!

Your reservation with
an REI tent expert
at Seattle Flagship on
Thurs, May 20, 2016
9:00 AM
is confirmed

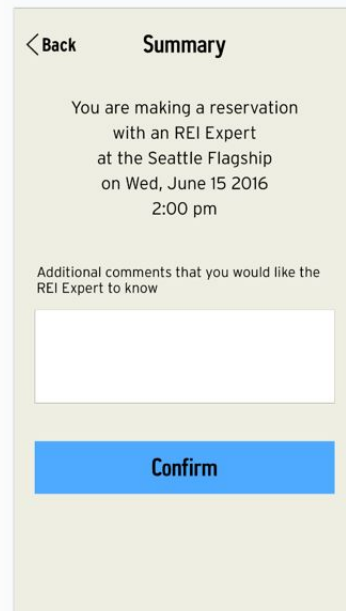
Set Notification

Edit

In the previous design, participants were not provided with a preliminary confirmation screen/button prior to submitting the reservation. This did not allow participants the opportunity to opt-out before making a final commitment.

The new version includes a **CONFIRM** button to provide users with an opt-out option for this task.

New Version



< Back Summary

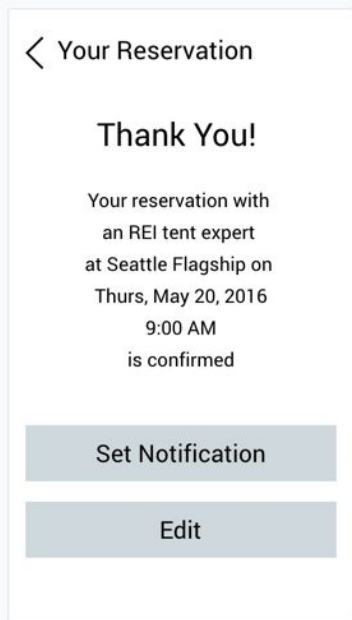
You are making a reservation
with an REI Expert
at the Seattle Flagship
on Wed, June 15 2016
2:00 pm

Additional comments that you would like the
REI Expert to know

Confirm

Redesign 4.7 - Wording of Notification Button

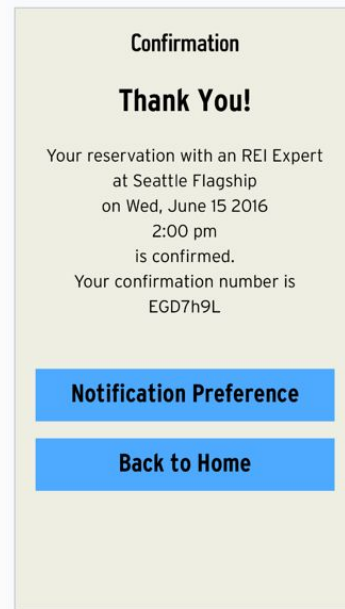
Old Version



Participants were confused by the SET NOTIFICATION button. Some wanted to know if this was what prompted an alert about the reservation. They also wanted to know who gets the alert - the customer, the REI Expert, or both?

A NOTIFICATION PREFERENCES button has been implemented. The expectation is that users will click this button when they wish to adjust their notification preferences.

New Version

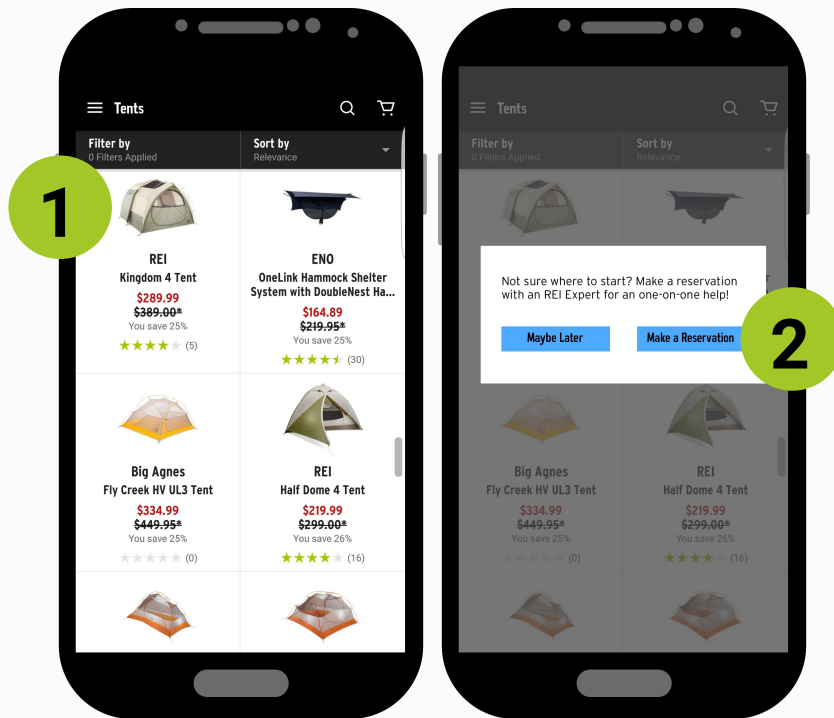


30

Final Design Workflow

Browsing the REI items

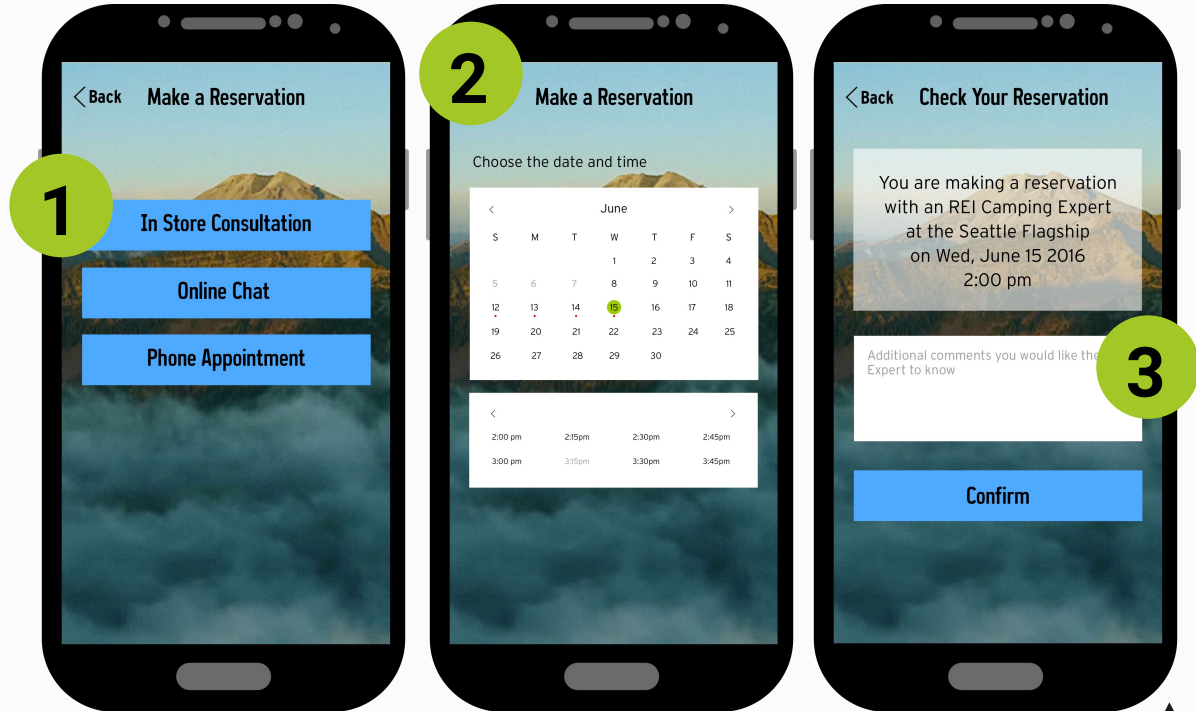
1. People are browsing items on the current REI mobile app.
2. The pop-up window gives people an option to make reservations with REI expert when they feel they need expert help deciding what to buy.



Final Design Workflow

Making a reservation with REI Expert

1. Reservations can be made for in-store, online chat, or phone appointments.
2. The app values people's time by letting them choose their own availability.
3. The app allows additional comments before confirming to help the expert better prepare for their visit.

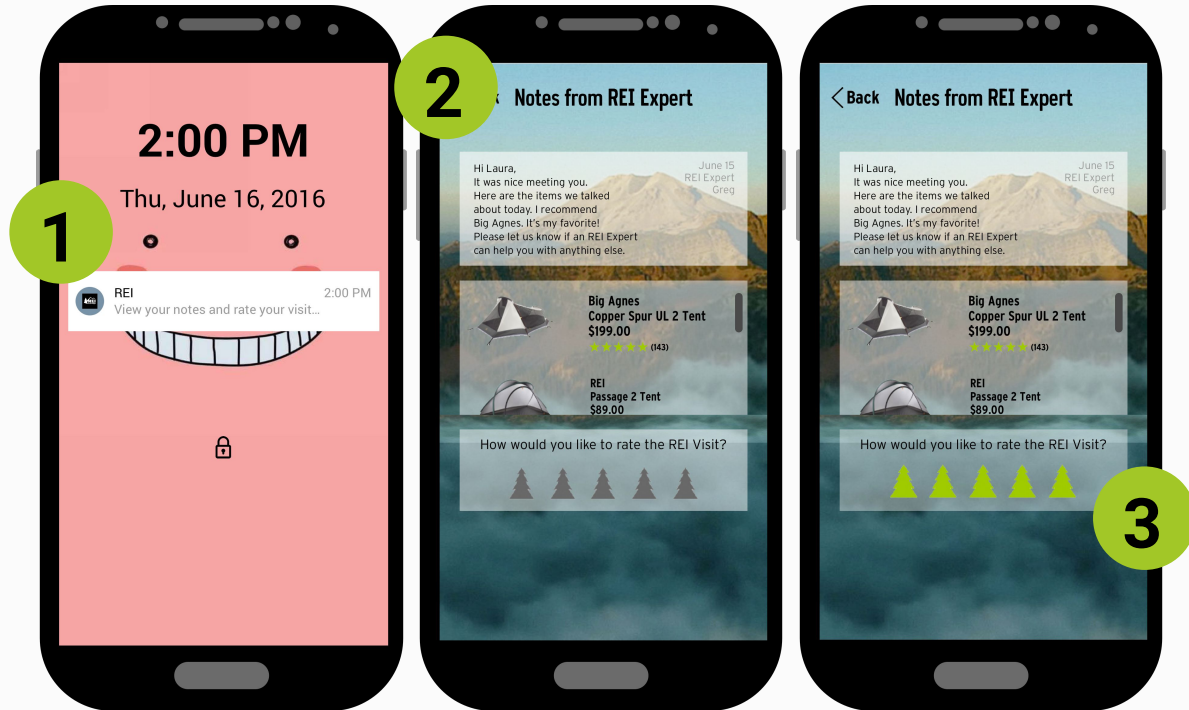


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Final Design Workflow

Receiving the notes from REI Expert and rating the store visit

1. People receive the notes from REI Expert after their in-store visit.
2. The notes include each item they've gone over during the reservation as well as recommendations from the REI expert.
3. People have the chance to rate the in-store visit.

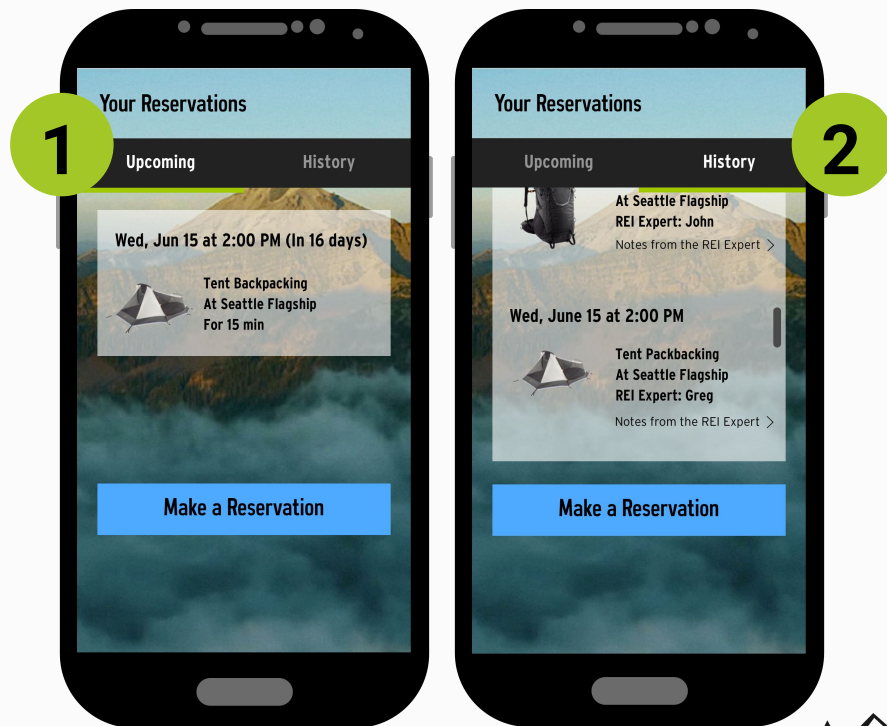


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Final Design Workflow

Viewing the upcoming and history reservations with REI Expert

1. People can view the upcoming reservations to check time or prepare for them beforehand.
2. People can view the history reservations to view notes and ratings at any time in the future.



Future Work

What would we work on if we continued the project?

Following-up

Participants were mixed on when and how their post-visit follow-up would occur. Some people thought it would be great if immediately after they ended the conversation with their Expert they would receive a message. Others said they would prefer a few days later. Also, some people wanted a text message, other said they'd prefer an email.

Checking-in

Once participants made a reservation, most were confused on how to let someone know they arrived at the store. How does this process work and how might this affect the design of the app?

Notification when 'up'

Although people are liberated from congregating around counters and waiting to be called when it's their turn, the next thing to learn is how does 'being notified' work? How can people be notified? How do they want to be notified?

Reflections

Looking back on our process to date, we can see that our biggest challenges were rooted in the lack of clarity in our problem statement. The goal of our project was much too ambiguous and continued to be open-ended long into our allotted timeframe. We spent about half of our project trying to pin down a clear problem to explore and this wasted valuable time. In hindsight we should have insisted on either a solid question to build upon, or access to data about REI's members' behaviors. In short, we learned that ambiguity leads to trouble, both in terms of hampering group decision-making as well as robbing ourselves of precious time for design and testing.

One thing we would have done with any extra time would have been to conduct AB testing of multiple designs within each sprint. This is because we may have gotten more honest or critical feedback if participants saw multiple ideas side by side. As it was, we repeatedly received conflicting feedback on our designs and A/B testing would have ultimately helped determine which design direction was best to move forward with it.

Some of the things we would do again in the future are affinity diagrams, guerilla recruiting, and group discussions after every interview phase. We found Basecamp to be acceptable as a communication application but we wish we had something with more utility. Thankfully, we found that Google tools - such as Google Calendar, Google Hangouts, and Google Drive - did a great job in filling the gaps to keep us on track with all of our milestones.

Other than that, we feel that we have learned valuable lessons about group work, leadership, and communication during this project. Despite occasional conflict, we feel that what we have learned during the past months will make us stronger UX designers and researchers as we enter the working world.

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