

Designing Web Marketing that Works for Users: Finding Best Practices through Evaluation and Conversation

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Abstract. Many think of marketing as a separate discipline from user experience design; however, marketing is an integral part of users' experiences in using many web sites. This paper describes methodology and findings of a study aimed at understanding how to effectively use marketing promotions to raise financial advisors' awareness of relevant products and resources on a fund family web site, while at the same time supporting the broader experiences around their intended uses of the site. High-level guidelines for using marketing promotions on a web site are described, as well as tactical best practices to guide design of such promotions.

Keywords: Marketing, web promotion, user experience, best practices, root cause analysis.

1 The Challenge: Creating Effective User Experiences through Balancing Web Marketing and Users' Needs

Web marketing is an important web design area in which a user-centered design approach can be used to create more positive user engagement and support marketing objectives more effectively. Web marketing is often driven by marketing managers and creative agencies who rely largely on intuition, with little or no user research performed to inform the process. In many cases, this has led to ineffective web marketing; banner blindness, a phenomenon according to which users ignore web marketing banners on webpages, is a clear example of how this approach can fail.

In this paper, we will illustrate how to apply a user-centered design approach to improve web marketing, and highlight a number of strategic guidelines and tactical design best practices derived from our extensive experience as user researchers and UX consultants and in particular a user research study that we conducted for a major financial services company. We have mainly two intentions: 1) to help marketing managers, creative designers, and executive decision makers in marketing organizations create more effective web marketing materials by leveraging these best practices; 2) to share ideas with fellow user researchers about how to better conduct web marketing client research.

1.1 Background Information

The research effort and learnings described in this paper were sparked by a fund family's desire to better understand the most effective way to reach and benefit its customers using web promotions. The organization's marketing group was working with a creative services agency, and had realized that they had difficulty providing clear guidelines to the agency to direct the development of promotions. In addition, the web site design team wanted to better understand how these promotions would affect end users' overall experiences with the site.

The research project focused on understanding best practices for marketing promotions on a fund family web site. A fund family is a provider of a set of funds, such as mutual funds or exchange traded funds. Familiar examples include Vanguard, Fidelity, Putnam, iShares, and StateStreet. Web sites provided by these fund families have a number of different objectives, such as: providing information to aid in the fund selection process, providing information and tools that may be of value to users of the site (to encourage return visits and enhance the brand), and promoting new fund products offered by the fund family.

For this study, the fund family focused on their primary user base of financial advisors. Although individual investors may use the fund family site as well, the site is primarily aimed at meeting the needs of advisors who come to the site to research and select fund products. Through work that had been done exploring Personas of different financial advisors [1] and prior research activities, the team had a general understanding of the primary (explicit) goals advisors have when coming to the site – typically tactical tasks such as researching and selecting fund products. They also had an understanding of advisors' latent needs that can be met by the site, which are more often strategic in nature – such as becoming smarter about their investing, and providing information to their clients.

1.2 Marketing as it Relates to Users' Needs

Marketing has sometimes been seen as being driven by a business benefit rather than a user benefit. This perspective can lead to design objectives along the lines of "achieve the greatest business benefit with the least 'harm' to the end user." A counterpoint to this perspective is the idea that the goal of marketing is to raise awareness, and that what the user is being informed of may actually be useful information – so that providing this useful information through effective marketing may actually be beneficial for both the business and the end user.

To create this type of mutually beneficial marketing promotion, it is important to understand what end users' goals and needs are when they encounter promotions, and whenever possible to align promotions with those goals and needs. Here, the distinction between explicit and latent needs becomes important. It's more common for users to come to a site with an explicit goal that is independent of what is marketed there, but they may still have latent needs that a marketing promotion may address. In such cases, the challenge is to satisfy these latent needs while still supporting the primary explicit goal or need that brought the user to the site.

2 The Methodology: Blending Evaluation and Conversation

This study was a blend of generative and evaluative design research, rather than a traditional usability study. Instead of evaluating the usability of the specific designs and web sites shown, the goal was to generate guidelines to aid in future design activities by evaluating effectiveness of and reactions to a variety of approaches to web marketing.

2.1 Methodology Overview

For the study, ten financial advisors evenly representing the target user segments were recruited. Each 90-minute session began with a discussion to understand advisors' goals and needs for using a fund family web site, followed by a review of eight to ten live sites and a few targeted mock-ups. In this review, each advisor was asked to evaluate the examples shown using a semantic differential rating system, and engage in an in-depth conversation regarding their reactions.

The study was highly qualitative in nature, with insights primarily extrapolated from the in-depth conversations with advisors. Root-cause-analysis-style probing – understanding the “whys” behind advisors' reactions to what they saw – played an important role in these conversations and the subsequent analysis. Unlike a usability study, this was not task-based, although discussion was grounded in users' goals in coming to the web site.

The study had a number of limitations. The small sample size and multiplicity of examples meant that users did not have “fresh” experiences with most of the promotions. The conversational focus on the promotions added to the artificiality of the experience. However, the deep discussion of advisors' reactions and recognizable patterns when synthesizing across participants gave the team confidence in moving forward with the best practices identified.

2.2 Web Promotion Examples Used for Discussion

The bulk of the study focused on evaluation of eight to ten live sites, some of which are shown below. Mockups of several design directions were tested as well.

In determining which examples to use to aid discussion, the team followed these guidelines:

- *Use real-world / fully interactive examples when possible.* Although a few mock-ups were used to evaluate specific ideas, the most robust feedback came from the evaluation of live sites with fully interactive promotional elements on them. Advisors engaged more actively with the live sites; with the mock-ups, they were somewhat hindered by the reduced interactivity, and were critical of the lack of refinement of some of the concepts. It's worth noting that marketing promotions impact people on a very subjective level, so that the kind of suspension of disbelief that can be looked for in “wireframe” evaluations was less effective for this type of evaluation.

- *Come up with examples incorporating a variety of elements.* Because the team was interested in exploring all alternatives without preconceptions, we found examples that incorporated a variety of promotional elements and techniques – color, size, amount of text, amount of animation, etc. Examples are shown plotted against two key axes below (where static-dynamic includes both interactivity and animation).

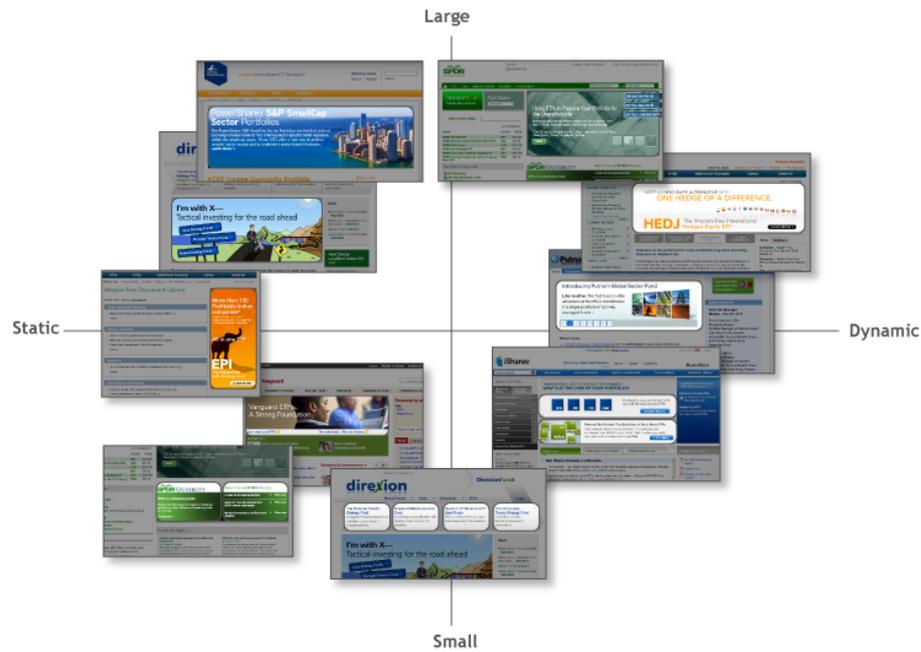


Fig. 1. Matrix of examples based on size vs. interactivity/animation

2.3 Moderation Practices

In moderating the sessions, the research team employed the following practices:

- *Gather initial information to understand users' explicit goals and latent needs.* A preliminary discussion captured specific information regarding how advisors use fund products, how they work with their clients, and what they explicitly come to fund family sites to do. The background information helped the team see potential latent needs, and information about why they go to fund family sites identified advisors' explicit goals. This was used both to interpret their reactions to the marketing promotions presented as well as to help ground the discussion in intended use at the beginning of the session, and at various points throughout.
- *Vary the presentation of alternatives.* In this type of study, only the first few examples being reviewed will get a realistic evaluation, since users will become inured to the effect of promotional elements after looking at many different ones. By ensuring that each type of promotion was seen first and at different points in the ordering, we were able to control for this to some extent.

- *Employ root cause analysis to uncover deeper reactions and latent needs.* A critical aspect of this research was that we were showing the promotions as a means to understanding the “why” behind advisors’ reactions to different alternatives. Advisors’ initial reactions were useful, but more important information was revealed using root cause analysis similar to the “five why” method originally employed by Toyota for problem-solving [2], and subsequently used by others including Reichheld to better understand customer motivations and needs [3]. This method was used to probe beneath initial responses to get at the underlying information needed to determine best practices – e.g., hearing that an advisor doesn’t like animation is useful, but learning that it’s an issue because they can’t keep up with reading the text or feel distracted from what they came to the site to do is more valuable information.
- *Use rating tools to aid discussion.* Ratings tools such as Likert scales or semantic differential scales [4] can be a useful method for directing conversation. It can be difficult to meaningfully compare ratings numbers, and in fact for this study that was not our intention – instead, we used the ratings as a way to ensure that we clearly understood whether advisors’ reactions were positive or negative, and how strong those reactions were. The ratings also helped us probe on why one promotion worked better than another. We used semantic differential scales based on key criteria such as actionability (likelihood to click on it), usefulness, interest level, understandability, noticeability and disruptiveness. A 5-point scale was used to keep a simple assessment with enough granularity to highlight differences.
- *Avoid using words that suggest “marketing” or “promotion” during review.* Throughout the study, the term “information presentation” was used in lieu of “marketing” or “promotion.” Using a neutral term of this sort avoided bias and also helped the team understand how participants naturally interpreted the promotional elements – as generic information, promotions or advertising. After all examples had been reviewed, we did conclude with a frank discussion to elicit advisors’ thoughts on marketing.

2.4 Generalizability of Insights

We believe that the insights in this paper may extend to other situations in which web site marketing promotions are used as part of campaigns to promote products, a brand, or specific content; however, informed by research conducted by one of the authors in relation to online advertising and merchandising in the eCommerce space [5], we see paid ads or promotional merchandising as significantly different in nature, and would not expect our learnings to apply to these. Based on our experience with other industries (one of us has prior experience at eBay, and the other two have consulted on projects across a variety of industries), we also believe that the principles and best practice generated from this study may be generalized beyond the financial services industry.

3 Findings, High-Level Guidelines and Design Best Practices

3.1 General Findings

The primary goal advisors stated for coming to any fund family web site was tactical: to get information, usually about specific funds. Much of the workflow we observed was focused on this activity – advisors avoided looking at other things on the page, especially prior to completing their intended task. Advisors evaluated the overall effectiveness of a site and the home page on how well it helped them accomplish their primary goal.

Advisors also stated that they did sometimes find useful information they hadn't been looking for. This information helped them with strategic goals such as becoming smarter about their investing, and providing value and information to their clients. When information was highly useful, advisors appreciated it and began to incorporate it into their explicit goals for visiting the site.

Things that were perceived as “marketing” elicited different kinds of responses from advisors, some quite emotional in nature. Some advisors reacted very negatively, assuming that if something was “marketing” it was aimed at benefitting the company rather than the advisor. Some simply ignored it as being irrelevant to their goal in coming to the web site. Still others, as business people themselves, considered it an expected way to attract attention.

Advisors had the most positive reactions to marketing that they thought would benefit them (as opposed to benefitting the company that provided it), leading them to revisit the promotional area and positively impacting the brand overall.

3.2 High-Level Guidelines

Based on these general findings and informed by our previous research experience [5], we identified the following high-level guidelines. Ultimately, these guidelines all support the primary goal the team identified for web marketing that will best serve both users and the organization: to raise awareness of valuable information that helps advisors achieve their goals, in a way that instills trust and reinforces the brand. They are used to ensure organizational alignment when beginning development of a marketing campaign, and to communicate broad intent to those involved in design.

Do Not Divert Customers from their Primary Goals. A key finding along the lines of “avoid harm” is that web site promotions should not divert customers from their primary task of getting fund information. Advisors had negative reactions to this type of promotion, and reported less interest in visiting these sites. Examples of such diversion include animations that are highly distracting, and eliminating or minimizing important functionality from the home page in order to enhance visibility of promotions.

Add Value by Helping Users Achieve Latent Needs. From the perspective of adding real value, web promotions are most beneficial for customers and ultimately the company brand when they help users achieve latent needs aligned with their strategic goals of becoming smarter about investing and providing value to their clients. This is a perfect opportunity for marketing techniques, as it is necessary to raise awareness of ways these latent needs can be met on the site.

Avoid Looking Like an “Ad.” When marketing promotions come across as advertisements, advisors lose interest and ignore them. We saw this happen when promotions were used to promote information that benefits the company or that is of no interest to advisors, and also when they looked like an advertisement, with meaningless “benefits” language, stock graphics and “gimmicky” presentation.

Add Visual Appeal and Reinforce the Brand. Because marketing promotions may have high visibility within the site, they should be used to add visual appeal to the site, and to reinforce the brand attributes.

3.3 Design Best Practices

Eight web marketing design best practices were uncovered. Unlike the high-level guidelines above, these are tactical and actionable. The goal was to be specific enough that they could be used independently to guide design efforts and assess effectiveness.

It is important to note that the success of web marketing depends on having an optimized combination of many design best practices, not just one or two. In this sense, these are similar to the patterns in Christopher Alexander’s *A Pattern Language* [6] – together, they holistically create an experience that can have tremendous appeal, but combined with less effective practices, they can lose their impact. For example, we saw many examples where clear headlines and supporting text were combined with content that was simply focused on setting up, leading to a lack of attention or comments that these promotions were intrusive. The one promotion that stood out as a true winner, receiving positive feedback from all the advisors in the study, employed almost all of the best practices.

Below are the best practices identified from this research study.

Provide Only Useful Content. When content is of interest to advisors or gives the impression of benefiting them, they are more likely to attend to it and see it as being valuable information.

When advisors weren’t interested in a topic, they were more likely to dismiss it as “marketing” or “advertising.” When advisors perceived that content was benefitting them, they were more likely to see it as informative or useful; if they perceived it was aimed at benefitting the fund company, they saw it as marketing or advertising and more often discounted it.

Importantly, it isn’t just the specific promotional item that is impacted by usefulness – seeing a single useless piece of information can “taint” a promotional display area so that advisors would ignore it in the future as well.

Use All Elements to Reinforce a Coherent Message. Promotions with a strong, clear message that is reinforced by all of the elements and imagery (photos or graphics) within the promotional area get more mileage out of each element and create a more impactful, satisfying communication.

Study participants tried to find connections between elements on screen and across screens to create a coherent message. In some cases, they “read into” what was displayed in order to do this – even if those connections were not actually intended (e.g., story-telling around photographs and graphical elements, as well as linking of headlines adjacent to messages even when there was no linking intended). Lack of relevance or disconnection was one of advisors’ largest negative comments in evaluating graphical elements and content within message areas.

Use Large, Clear Headlines and Succinct, Useful Text. Headlines that are easy to scan and supporting text that provides useful information without “fluff” catch users’ attention and encourage action. The headline should be written using clear straightforward language that is direct and to the point. Supporting text is most effective when it provides useful, non-repetitious information.

Advisors paid more attention to headlines they could process quickly. If headlines were difficult to understand or were not noticeable, some advisors simply ignored them. Advisors stated that their method of processing information on the page was to scan the headlines for key words that they found interesting.

When supporting text simply restated the headline, advisors were likely to consider it “fluff” and not read it. As a side note, when supporting text had a marketing focus to it, some advisors found it intriguing, while others were turned off.

When buttons are provided, a general term such as “Learn More” is not as effective as a link that more specifically describes the action the user will be taking, such as “Get Fund Info” or “Explore Sectors.”

Make Visuals Professional, Attractive and Contrasting. Visuals that draw attention in a way that is not “ad-like” are more likely to be noticed, and reactions to them are generally more positive.

A well-known issue that can impact web marketing is the phenomenon of “banner blindness,” in which users ignore elements that come across as ads due to appearance or placement [7]. Advisors commented that images create more of a marketing feeling; although this is not always a negative, they must be used very carefully to avoid being perceived as an ad. Stock images should especially be used with care as they are often used in ads.

Visual contrast helped draw attention, specifically via contrasting colors and distinct visual elements (e.g., a colorful photo stands out better than an illustration in the same color that is used throughout the website). Large images drew attention, but some advisors were sensitive to the space they took and they may be perceived as more marketing or advertising oriented. Smaller images in a colorful field may be more effective. Advisors’ reactions to specific types of visuals varied, but in general advisors preferred visual elements that were relevant to the message being conveyed, professional, high quality, “sophisticated” (not “gimmicky”), and colorful.

Due to their high visibility, visuals should be used to reinforce the professionalism and brand identity of the site.

Apply Movement with Caution. Animation and movement can effectively draw attention, but if not implemented carefully can alienate users.

Animation drew a range of reactions from advisors – some loving it, some hating it, and some neutral. Animation and movement did tend to draw advisors’ attention initially, although whether they read what was in the promotional area had much to do with their reaction to the animation. Although a few advisors liked dramatic animation, most ignored it as being marketing or advertising, or found it distracting and upsetting.

Timing and selection of animated elements is especially important, as advisors found it frustrating if the timing did not line up with their processing speed. Animating background elements rather than the primary text can help allow maximum processing time for the core messages being presented, while still providing movement to draw attention.

When an animated “slideshow” of messages is presented, labeled tabs provide the most obvious way to get to specific items and also help highlight content that the advisor may not have seen in the slideshow (i.e., these tabs function as mini headlines). Tabs or controls without labels were less noticeable as clickable, and did not expose the content associated with them. Even with labeled tabs, a few advisors did not realize they could click on these tabs to control the display of a message. Having tabs control the message area on hover instead of on click would more effectively support discoverability.

Avoid Cluttered Promotional Elements. Simple presentation of messages with adequate white space makes it easier for users to see the information being presented.

In general, advisors responded well to simple presentations with single messages or a layered message area with simple controls. When multiple messages shared a space, simple treatments (such as links or identical treatments without graphics) were easier for them to process than more visually complex ones. Layered messages worked best when the tabs for them were clearly presented.

Keep Home Page Design Clean. Reactions to web promotions are highly impacted by the design of the home page surrounding them. A clean home page design with strong, simple themes increases visibility of promos as well as advisors’ receptiveness to them.

Many in the study combined their comments on the promotional information on the home page with the design of the home page overall. In general, advisors said they liked home pages that were not busy, and that had simple, clean composition. They complained when information was too dense, or there were too many different types of elements or colors on the page. Advisors commented favorably on sites that had consistent color themes and simple layouts.

Promotions tended to be less noticed on pages that had many other competing elements. Furthermore, to gain attention for promotional items on such pages, more intrusive visual design and animations may be required.

Leverage Secondary Pages. Locating promotions on content pages is viable if done well. One potential advantage of locating a promotion on a content page is that those pages tend to be less busy than home pages, so there is less to distract from the promotion.

Only one content page promotion was evaluated, but we found it very effective to generating user engagement and supporting the campaign message relative to all other promos evaluated.

5 Impacts

The learnings generated significant impacts on the fund family marketing and web teams through our efforts of involving in the research process and communicating the findings on multiple occasions. Below are the key outcomes:

- *Web promotion successes.* The design of a major campaign for this fund family has adopted many best practices that we mentioned and based on web metrics, this campaign has generated far greater user engagement than previous campaigns that featured design practices inconsistent with our suggestions.
- *Improved design process.* The best practices have helped to create “shared vision” [8] regarding web promotions within the organization. In particular, a process has been established according to which web marketing promotion designs need to be reviewed against the design best practices outlined in the paper. We use this process to encourage marketing managers and creative agencies to have conversations around how to incorporate these best practices into their designs.
- *Continuing learning.* One way of leveraging qualitative user research is to generate design ideas based on the learnings and then validate the effectiveness of these ideas through quantitative testing. Based on our suggestions, the business is beginning to conduct A/B tests to field test web marketing design alternatives that are informed by learnings from this research.

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