



LYONSCG BEST PRACTICES GUIDE

Building an eCommerce Design Roadmap

Design Strategies for
Engagement and Conversion

LYONSCG
Commerce Realized!

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INTRODUCTION

Regardless of size or scope, one of the most common challenges faced in eCommerce is innovating and optimizing site design. Everyone is looking for new ways to improve conversion, and with pressure to demonstrate return on investment (ROI), these decisions can be extremely tricky to make.

Every brand is unique. Design projects require an extremely fine touch to ensure solutions represent the unique values of the brand. Furthermore, platform upgrades and technological innovations are moving forward at a breakneck pace. How then does your business juggle site optimization and cutting edge design while ensuring a robust ROI?

LYONSCG has seen this situation before. What's needed is a strategic plan – a Design Roadmap – that identifies targeted projects and aligns them to your business. This Design Roadmap takes into account present challenges and future goals to outline clear frameworks and workflows for delivering tailor-made solutions that address much more than the look and feel of the site.

STEP 1

Idea Generation

Ideas are the raw material that fuels the success of a Design Roadmap. Having as many as possible is highly recommended.

STEP 2

Prioritization

Variables such as strategic drivers, goals, key events, and dependencies determine which ideas need to be acted on first.

STEP 3

Population

Lastly, the third step in this process is to populate the Design Roadmap with activities and projects. Displaying what is being done enhances collaboration and provides a clear path to success.

Implemented across numerous clients in a variety of industries, the Design Roadmap is a winning strategy trusted by hundreds to drive ROI, please customers, and organize your eCommerce presence.

STEP 1: IDEA GENERATION

The most important part of the Design Roadmap process is the generation of ideas. Design innovation is a truly idea-driven objective: without a wide variety of creative ideas, true innovation can never break through. The goal is to generate as many ideas as possible. They can come from anywhere and everywhere, but a large amount of varied ideas is paramount to driving useful design innovation.

While brainstorming ideas, context is key. This context is what hones ideas into effective targeted projects moving your designs down the road to success.

Interestingly enough, generating truly creative and innovative ideas can be a rather organized and structured process. How do I generate ideas? Where do they come from? What does this process look like? Finding the answers to these questions is the first step in a successful Design Roadmap. In the end, it's about creating a 360-degree experience that's holistic from the consumer perspective—fulfilling the spectrum of consumer needs.

Mike Davidson, Executive Creative Director at LYONSCG, came upon an existing framework for idea generation a few years ago. This framework simplified customer experience improvement into a multi-layer pyramid. Taking this model, Mike tweaked and applied it to the world of eCommerce, tuned specifically for site design. This hierarchy of ideas – the Consumer Experience Pyramid – serves as the foundation of our Design Roadmap process. You can apply this framework to guide your idea generation and provide context for decision-making.



The Consumer Experience Pyramid

1. Basic Functionality

The first element in the Consumer Experience Pyramid is the foundation for every design change, upgrade, and optimization. At this basic level, designs and ideas are trying to serve basic functionality needs. The foundation of eCommerce is the ability to purchase items online. Therefore, the foundation of the Design Roadmap is the basic functionality to go online, find a product, and buy that product. Without functionality, the rest of the pyramid comes crashing down.

2. Usability

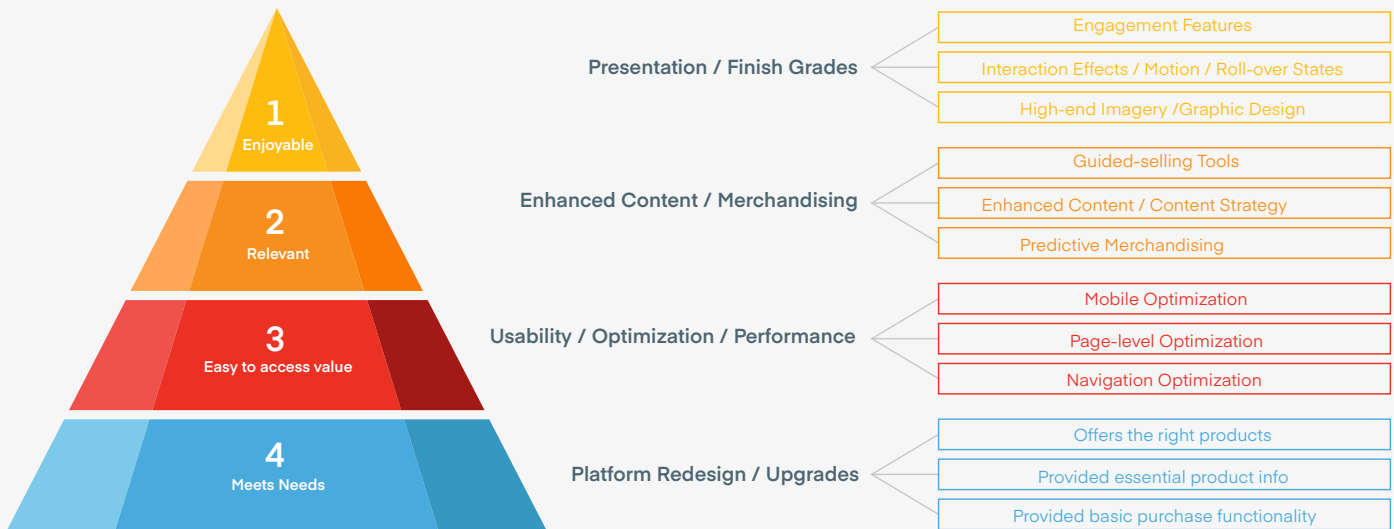
Now that an eCommerce foundation has been achieved – core functionality – it is time to focus on usability and optimization. These are ideas that make it easier for shoppers to get to products, find information, and make purchasing decisions. This second level of the pyramid provides gains in conversion by tailoring the shop flow to persona-based needs.

3. Depth of Experience

Now that your site is functional and easy to use, we can look at ways to deepen engagement and deliver greater value and relevance through content. How can the digital shopping experience rise to the next level, strengthening the connection between consumers and your brand? Localization and personalization tools are great examples of value-added solutions delivered in this layer of the Consumer Experience Pyramid. These ideas elevate the site from a shallow digital shopping trip to an engaging brand experience

Emotional engagement with consumers is extremely critical to your business. Ideas in this layer aim to make the consumer experience as enjoyable and engrossing as possible. Interactive assets and techniques such as high-end imagery, rollovers, animations, and graphics serve to surprise and delight shoppers, delivering an emotional engagement that connects shoppers to your brand.

Ideate Opportunities Across a Complete Experience



The Consumer Experience Pyramid is critical to generating and contextualizing ideas as they sprout and grow. Understanding where new ideas align within the Pyramid simplifies the Design Roadmap process and organizes innovation moving forward.

Consumer Experience Pyramid Example

So, now that we understand the framework for design ideas, how does this process actually work?

A cycle for a complete site redesign is commonly 4 to 5 years– in step with platform development and upgrades – so how do we place our ideas within this cycle in order to maximize efficiency and sustainability? Here’s an example:

Client A is looking to re-platform in 2017. In year one, the majority of effort, resource, and budget will be devoted to the base layer of the Consumer Experience Pyramid: Functionality. This is not to say that Depth of Experience or even Emotional Engagement projects can’t be undertaken – enhancements mid-stream are highly recommended – but ensuring the Pyramid has a solid foundation is critical.

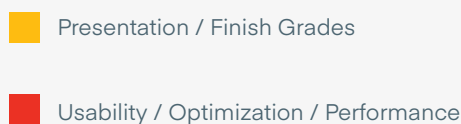
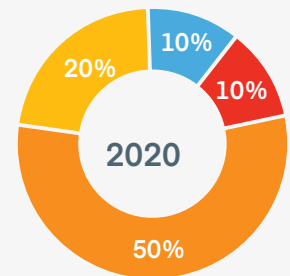
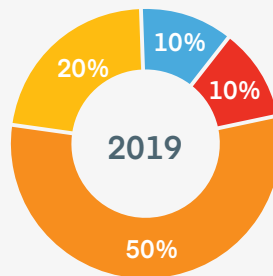
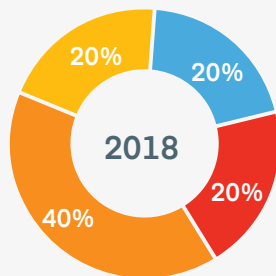
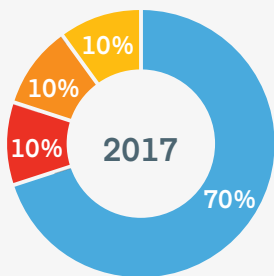
Moving into year two, basic functionality needs have been met, so we can reduce the amount of time, hours, and money being invested into Functionality, and focus on Usability and Engagement enhancements.

Our site is functional, so ideas in the layers further up the Pyramid can be executed.

As the years tick by, the site is functional, easily navigable, and new projects and ideas are continually upgrading the engagement and emotional aspects – the items that build connections between consumers and your brand. Without a functional, usable site, these connections are impossible to build and maintain.

This approach is obviously unique for each individual company, as resources, timing, goals, and objectives will vary. What the above example displays is how to strategically categorize, plan, and execute various design ideas in a rational, forward-thinking way. The gold at the end of the Design rainbow – brand engagement, customer retention, and emotional connections with customers – is impossible to acquire unless the base layers of the Pyramid are addressed first.

Experience Design Spend Year to Year



Plan Smarter, Not Harder

So, now that we understand the importance, framework, and hierarchy of the Design Roadmap, how do we decide what to do and when? A successful Design Roadmap clearly lays out business priorities, and aligns the ideas generated in Step 1 to these priorities. This process is successful because ideas work hand-in-hand with overall business goals.

Thorough research and data assessment is the key to strategically plotting a Design Roadmap. Below are some various sources and data strategies that LYONSCG utilizes to best prioritize ideas.

- › **Web Analytics:** It cannot be stressed enough how important it is to be aware of traffic and utilization analytics. Where are shoppers clicking? How are they interacting with the site? Where are we trying to point them? Having the data to answer questions like these makes prioritizing design projects much simpler. After all, the customer is always right.
- › **Heuristic Assessment:** Above the raw traffic data, heuristic analysis drives insights and learning opportunities around the current state of your site, as well as where it needs to be in the future.
- › **Competitive Assessment:** Like anything else in a competitive marketplace, it is critical to ensure that your business is ahead of the game and best in class. Analyzing competitor and industry vertical sites can lead to important insights and ways in which to execute better than anyone else.
- › **Consumer Research and Testing:** People are often misled into thinking that consumer research is some arduous, nine-month process. That is not really the case. What LYONSCG does is integrate

small batches of research and testing into quarterly sprint cycles. This drives short, targeted, and meaningful activities that go live and produce results sooner rather than later. These shorter cycles enable more frequent and targeted testing, and more frequent optimization. Simplifying consumer research decreases complexity and fatigue and creates focused and actionable short-term solutions.

- › **New Platform Features:** Always be aware of your platform features. Leveraging the latest and greatest from your platform is a quick and easy way to remain relevant and forward-focused.
- › **Emerging Technology:** LYONSCG is at the forefront of emerging eCommerce technology, and always looks to make the market aware of these innovations. Working these into your Roadmap is a strategic way to remain on the cutting edge of eCommerce no matter what the design cycle stage.
- › **Strategic Partnerships:** In the extremely interconnected world of eCommerce, success is driven from collaboration. Ensuring you have the right partners who are willing to work and communicate with you to achieve long-term goals can drive success.

Honing in on these areas can dramatically simplify the Design Roadmap process. Instead of throwing spaghetti at the wall and seeing what sticks, this framework drives a strategic, systematic approach to generating ideas and aligning your Roadmap with your short-, medium-, and long-term eCommerce goals.

The Roadmap Survey

As LYONSCG develops a Design Roadmap with a client, there are a number of questions we ask to clarify the client's goals. This Roadmap Survey is what discovers and defines all the unique inputs and variables that will drive prioritization and structure.

Understanding the answers to the following questions provides deep insight into how this partnership can tackle challenges and deliver a holistic design solution.

- Are there any specific KPI goals for the next four quarters to three years?
- What are the friction points in your conversion funnel?
- Are there specific customer pain points with your site?
- Will this new design be addressing any new strategies?
 - New consumer targets
 - Enhancing content
 - International expansion
- What are the specific site areas you are focusing on optimizing?
- What can be simplified or removed from the site?

These questions create a productive, forward-thinking dialogue, highlighting critical business and consumer needs and identifying areas to improve in the short, medium, and long term. The conversation is not around products or tools, but rather goals and challenges. The focus is on getting your eCommerce design to the next level.

This first step in the Design Roadmap process is critical. Understanding the multitude of variables,



STEP 2: PRIORITIZATION

Now that we have strategically generated a host of ideas, it is time to prioritize them. Sorted and categorized around the Consumer Experience Pyramid and aforementioned variables, these ideas now need to be prioritized.

Strategic Drivers

The first order of business is to reference the aforementioned strategic drivers and align ideas with these goals. Coupling design ideas to strategic goals helps to optimize both internal processes and external results.

Most of the work is done by making a simple distinction in the prioritization process: Business Priorities and Consumer Priorities

- › **Business drivers tend to revolve around operational goals:** efficiency, savings, content management, logistics, ordering, etc.. Essentially, this boils down to ideas that have the internal business at heart, and seek to optimize the processes of the client.
- › **Consumer drivers focus more on the experiential aspects of design:** usability, brand engagement, guided selling, etc. These ideas are presented from a customer's point of view, and are driven out of traffic analytics and customer feedback.

These seem like rather obvious distinctions, but the ability to divide and categorize ideas around your business goals makes the Design Roadmap process much more effective. The point isn't to have a 50-50 split between these goals; rather it is to ensure that your idea set is well balanced and that design solutions are viewed from a holistic, high-level vantage.

Key Events

The next level of prioritization needs a calendar: key events dictate roadmap design and timing. One sample variable is peak selling periods: it is not wise to launch a ton of new features or experiences during these peak seasons. Big changes could distract shoppers and risk sales. These peak sales periods represent times for a strategic code freeze, but also great times for future planning, roadmapping, testing, and research.

This is just an example of one key event, but other events such as marketing campaigns, technology events, and physical expansion are some other examples. Integrating new tools could create dependencies on launching a new experience. Launching stores in a new region may drive an opportunity to tailor your eCommerce experience in a more localized fashion. Taking advantage of these key events in your Roadmap provides strategic foresight to mitigate risks and unite experiences to create a dynamic eCommerce presence.

Resources and Dependencies

Bringing ideas to fruition requires resources. Ensuring staff has the bandwidth to work on a project is critical to actually getting the project done. Incorporating resource bandwidth into a Design Roadmap ensures projects can be completed on time, therefore enabling new projects to begin.

Graphic content assets are so important to the consumer experience, so availability must also be considered while prioritizing ideas. Information around content production, brand transition, and asset creation

allows projects to be prioritized around existing assets, allowing asset creation to be a Design Roadmap project itself.

Roadmap Priority Template

Below is a sample of the matrix LYONSCG utilizes in order to display a holistic view of ideas and their priority to the Design Roadmap. The variables highlighted earlier are present, and this matrix provides further detail around timing as well as category.

2017 Website Design Roadmap						
Item	Business Priority	Consumer Priority	Experience Type	LOE Design	LOE Develop	Quarter
Product Tile Image Rollover	H		4	M	M	1
Paralax Content Scrolling	H		4	H	H	2
Button Rollover Animation	L		4	L	L	3
Licensed Web Type Font	M		4	L	L	4
Guided Selling Quiz		M	3	M	M	3
Predictive Merchandising		H	3	L	H	4
Article Gallery		L	3	L	H	1
Integrated Social Feed	M		3	L	M	2
Category Landing Page	H		2	H	M	4
Global Shipping Selection		H	2	L	H	1
View Product Browse (as List View)		H	2	L	H	2
Mobile Menu Refinement (Icon-based)		L	2	M	L	3
Color Slicing		M	1	H	M	1
Content Slots in Menu	H		1	H	M	2
Product Sets	L		1	L	H	3
Expanded Viewport Options		L	1	M	L	4

In summary, we generated ideas in Step 1, and now here in Step 2 we are prioritizing these ideas. Variables such as strategic drivers, key events, and resources all work together to help identify the ideas and projects that must be completed. There is no magic formula for categorizing and classifying these ideas, but the benefit is in the holistic viewpoint of your eCommerce business.

STEP 3: ACTIVITY POPULATION

Building the Roadmap

Now that ideas have been generated, classified, and prioritized, all that is left to do is plug them into our Design Roadmap and build out a timeline. Here at LYONSCG, we are extremely process-oriented. What this allows is the ability to have multiple teams working in parallel with one another. This “one team” approach is what drives Design Roadmap success.

Our Digital Strategy team (yellow) drives insights, which are then leveraged by the Experience Design team.

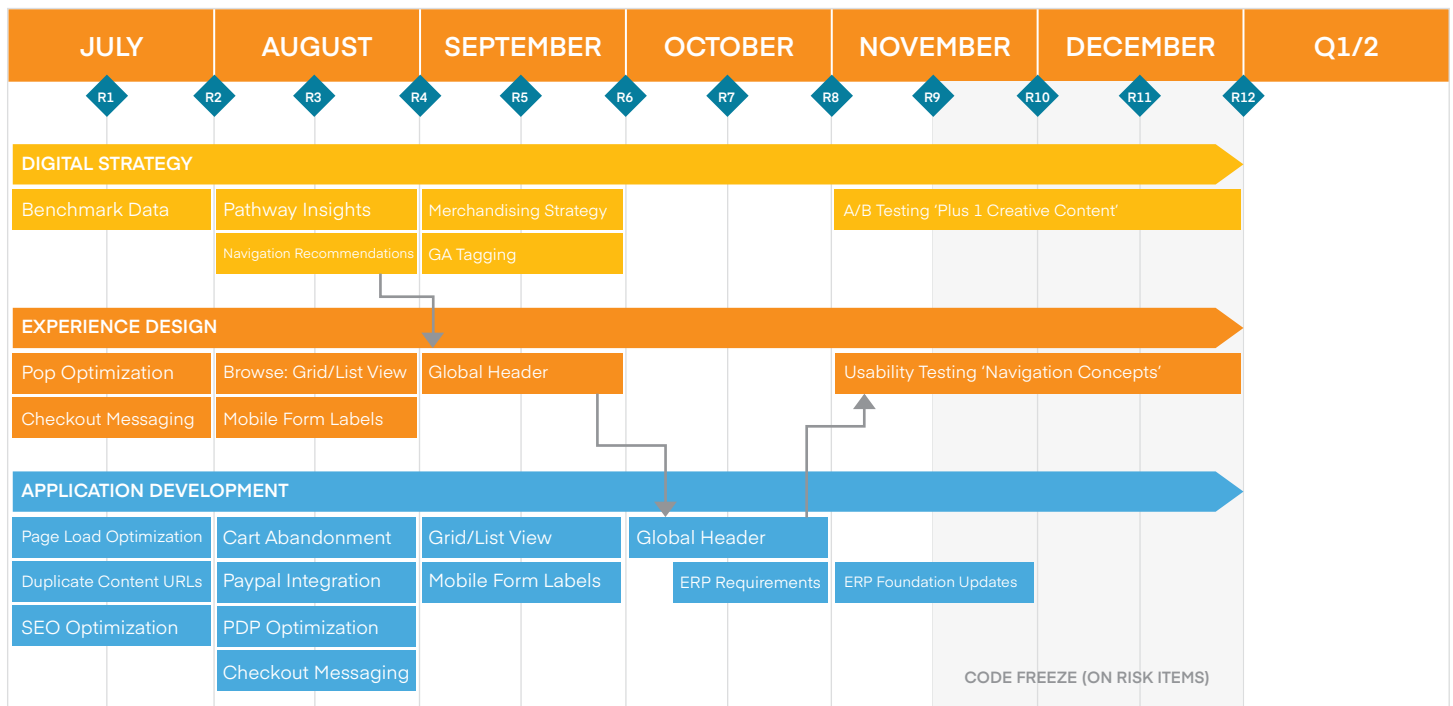
Our Experience Design team (orange) uses these insights to create the artifacts, wireframes, and creative assets that deliver a polished look and feel for the goals at present in the Roadmap.

Anything the Experience Design team finalizes needs to then go into development, so now we have an Application

Development team (blue) beginning to align with the original two teams.

These three groups work in parallel and their workflows are intertwined: the Experience Design group tests, and then transforms insights from the Digital Strategy group into assets finalized by the Application Development group.

These tactics are performed over a span of months – July to November in this example – and this is just for one stated goal in the Design Roadmap. The goal is based on priority and resource availability, beginning at an appropriate time per the Design Roadmap. The process almost self-perpetuates itself, moving consistently forward and is always open to site or plan optimization.



Workshop

To produce the roadmap as explained above, LYONSCG engages in a workshop with clients and all key stakeholders. This workshop focuses on the following four objectives:

- 1. Multidisciplinary Collaboration:** who are the key stakeholders in your design decisions? Having these minds in one place helps to clearly articulate a vision for the future and ensures consistency
- 2. Provide New Ideas:** this cross-disciplinary approach delivers a variety of points of view on current goals and challenges, and seeks to develop creative projects and solutions
- 3. Sounding Board for ROI-Driven Decisions:** LYONSCG brings a consultative client-centric approach to these workshops. Decisions based around this Design Roadmap need to be successful and profitable for your business, and we are here to lend our experience, knowledge, and successes to deliver consistent success

- 4. Plan Activities for Execution:** here the goal is to define granular tasks and requirements for the Roadmap, identify risk factors such as milestones or dependencies, define required resources and assets, and define cost and timeline objectives

These workshops are fantastic tools to quickly concentrate significant brainpower, effort, experience, and intelligence into a tangible plan. What started as a miasma of design ideas is now coming together into a detailed, seamless timeline for eCommerce success.

After the workshop, there is a period of reflection and refinement, where the broader plans can be drilled down into actionable bits and pieces. These pieces can then be prioritized and refined, enabling final estimates to be made. Items such as hour and dollar values can be put towards specific, granular tasks, and now we are beginning to move on our Design Roadmap.

Conclusion

From generating ideas to kicking off a project, the Design Roadmap is a holistic plan for driving eCommerce success. Implemented across hundreds of clients, dozens of industries, and various platforms, the Design Roadmap process and one-team collaborative approach LYONSCG implements is a proven winner. Years of experience with this framework have driven conversion, engagement, and success for our clients.

At the end of the day, that is what the Design Roadmap is meant to do: ensure design efforts are innovative, ROI-focused, and targeted to your specific needs.

Contact us today to discuss
your next project.

About LYONSCG

Lyons Consulting Group (LYONSCG) is a leading global commerce service provider, combining field-tested methodologies, deep technical expertise and award-winning design to create immersive brand experiences that engage and convert consumers and buyers. Hundreds of leading B2C and B2B brands trust LYONSCG to realize their commerce vision and continually optimize it to drive revenue and profitable growth. LYONSCG is a strategic partner of Salesforce Commerce Cloud, SAP Hybris and Magento and is the recipient of Salesforce Commerce Cloud Global Sales Partner and Delivery Partner of the Year awards; and Magento Partner Excellence and Magento Innovator of the Year awards.

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