Goal-Oriented Design

To me, understanding goals is the single most critical factor in the success of any design project, and fundamental to the Web Design from Scratch approach.

In this section, you'll learn techniques that help you discover your own goals and gain insight into what your target audience really wants.

If you're working on a project, this section will help you get a clear picture of your purpose, understand the key goals of your target users and start to visualise a high-value solution that ensures everybody wins.

All web sites are built in response to many needs

Your site may have information that people want, you may have information that you want them to have that they don't necessarily want, or you may want to get information for them.

Pursuit of goals drives all behaviour

People visit web sites because they want to achieve something, a certain state, usually having got something or having done something.

Using Goals in Web Site Design

The best way to design web sites takes into account the goals of the site and its users. This approach is often called “goal-oriented design”.

All goals are important

Goal-oriented design is a process for creating solutions that enable people to achieve realistic goals.

If your web project is going to succeed, you need to know which goals to shoot for.

Your site's goals

If you already have a web site, or you have a site project in mind, what needs does it fulfil? How many different needs are there? How strong are they?
Your job as a web site designer is to craft a solution that meets all the most important needs.

**Identify stakeholders**

A good way to start to get a complete and clear picture of the full range of objectives a site needs to fulfil is to consider all the people or groups who have some significant interest in the project's success. These are known as stakeholders.

Stakeholders are real people, such as:

- the client who's paying they money and has a commercial interest in success
- the sales guy who follows up leads that come in from the web site
- the person in customer support whose job will be made easier

If you can speak to these people, get them to tell you what will signify success to them. Test each idea by asking: if this doesn't become true, will that constitute overall failure?

**What does your site have to do?**

At this point, start writing down what needs to happen for your primary personas to reach their goals? Also, what must your site avoid to prevent failure?

Examples of imperatives

- "The site must enable Janet to find out what help Scratchmedia can offer to help solve her web site issues, as quickly as possible, and without patronising her."
- "The client area must give Fool enough new information about the best of web design to keep him coming back regularly, and provide an environment where he finds it easy to express his views."
- "The site should enable Fool, Tracy, and Janet to register quickly and easily."

**Users' goals**

Once you've got a statement of purpose you're halfway to being ready to design. The next step is to understand who'll be looking at the page, and why.

The best-designed web sites are sensitive to the needs of the users. They're designed to anticipate what real people are trying to achieve, and then to help them do it with the minimum fuss.

**No-one uses the web for the fun of it**

Every web site is a means to an end. We're all looking to get something out of it, to achieve certain personal goals (states of being).
Why will people use your web site?

Write down each group's typical goals. The goals should be broad enough to be typical of all visitors across the group. Try to cover the full range of different needs and usage patterns.

e.g.

- Prospective customer, whose goal is to understand how our products compare to our competitor's.
- End-user, whose goal is to find timely help using our product.
- Young home buyer, whose goal is to find attractive properties to look around, with the ultimate goal of finding an apartment that suits her lifestyle.

A persona is an imaginary real person who helps give your design process focus. They're handy archetypes, based on everything you can find out about the real types of people who'll use your site. To help make them believable, you'll furnish them with their own realistic likes and dislikes, their own personal agendas, and most importantly their own personal goals.

(The process described here is primarily based on the goal-oriented design process created by Alan Cooper at Cooper Interaction Design. For further insight into using goal-oriented design for all kinds of applications, please read "About Face 2.0".

Creating personas

You should base your personas' characteristics as much as possible on facts you know about your target market or actual user base. The best way to do this is to carry out prior research to interview a number of actual or typical site users.

Personas are more effective when they represent the likely preferences, goals, and contexts that your real users will have. Ideally, you should speak to people who fit the target audience right now, who are in the right position or have the right experience.

Picture what your persona looks like. Are they male or female? Are they working, studying, or out of work? How old are they? Give them a name, because a persona is a (pretend) real person. Maybe find a photo to represent them.
- Think about their cultural background. What's their language? What time of day is it when they access your site?
- What skills do they have? IT skills and familiarity with using computers? What about other technical skills, maybe industry-related?
- Are they likely to be challenged by any impairments, such as difficulty with sight or reading? Do they have any special needs, such as accessibility issues?
- Next, write down what they are trying to achieve in general. What goal, or goals, do they wish to reach? For example, if they're a consumer using the web at home, what are their goals for them and their family? If they're a work user, what are their professional goals?
• What specific goals will drive them to use your website? There may be more than one, if they are likely to use your site at different times for different things.
• What are their personal priorities? What kind of thing will they appreciate? What kind of thing would insult, annoy or upset them? What kind of thing might make the difference between a tolerable experience and a pleasant experience? What about a delightful experience? What do they expect as a minimum? What do they hope for? How do they like to feel? What kind of things help them to feel that way?
• What is their potential value to the site? Could they be a key customer or referrer?
• Do they have prior experience of the brand, the market sector, the proposition, other similar web sites, previous versions, product range?
• Will they get shown, or trained in, how to use the site?
• What's their likely frequency of use: one-off, irregular, regular?
• Where on the web have they come from - and why?
• What do they want to go away with?

Your site's goals

Of course, the ideal solution is a win-win, where you achieve your goal at the same time as enabling your visitors to reach theirs. This section of the site introduces some tools to help find win-win situations.

Key facts to help you find win-wins

2) The 'Scent' factor

Don't assume that you must design exclusively to get your visitors to their goal as quickly as possible, with no compromises along the way. Good win-win solutions find creative ways to get the publisher's needs met without getting in the visitors' way too much.

Studies have shown that, as long as visitors remain confident that they're on track to their goals, the experience will feel successful and smooth. This is often referred to as giving visitors the 'scent' of the goal, and it allows additional scope for the site to meet its objectives.

Win-win theory case study: Supermarkets

Consider a real-world supermarket. They're great examples of balancing consumer's goals (to be home in good time with your shopping, getting good value, and not spending too much) with the owner's goal (to maximise profits by gaining customer loyalty and cross-selling alternative products). They're also a goldmine of insight into how to influence the behaviour patterns in a highly competitive market space.
Supermarkets could be designed to make your weekly shop even quicker: for example by putting all the most common items (milk, bread, beer, nappies) together near the entrance. But there are loads of ways they attempt to get shoppers to buy more than they came in for (thus hitting the goal of maximising profits).

- Arranging items by category promotes choice. If they arranged all products by price, many people would go down the 'cheap' aisle and proceed to the checkout with a smile on their face. Placing regular beans next to premium beans makes the cheap beans appear less attractive, and some people will buy the beans they didn't come in for.
- Promotions on aisle-ends and special offers are designed to get you to purchase more than you intended (e.g. "buy one, get one free").
- Placing milk and bread at the far corner of the store makes you wander right through. A typical family grocery shop will take you down most of the aisles.
- Piping air from the bakery to vents over the store entrance stimulate customers' appetite, which influences us to buy more food (the 'Scent' factor again).

Using Personas & Scenarios in web design

Personas are an extremely powerful design tool, which help you to visualise an end-product that you can be confident will suit your users' needs by helping them achieve their goals, and help you test your success.

Why detailed personas work for web site design

Fleshing out your personas with names, desires, attitudes, prejudices and goals stops them becoming 'the elastic user'. The elastic user manifests different priorities at different times.

Designing for personas is a great discipline, because it (at the very least) forces you to focus your design process on something realistic, instead of an infinity of possibilities. It also helps you to go beyond a site design that is only functionally complete, and visualise the qualitative factors that will really make a difference to success.

Another positive aspect of using personas is that they give you a way to empathise with your end-users and care about their experience, which can lead to key insights that improve the experience for everyone.

Designing with Scenarios
In goal-oriented design you play through a full set of usage scenarios for each persona. A scenario is a complete journey from first point of contact with your system, right through to a goal being achieved (hopefully).

Site Personas and the Dialogue Process

Site Personas are analogous to User Personas. Whereas User Personas represent typical individuals in your target user base, together with goals and motivations, the Site Persona represents the site, embodying its brand and its goals.

I often find it helpful to picture my web sites as information flowing both ways between the site and users. The Dialogue Process is a way to optimise your web site interactions by scripting them as conversations between your two types of persona.

Information in motion through dialogue

The key to designing websites for people to use successfully is to design them for the way people use websites. Because people use dialogue to communicate, a good way to plan your site is consciously to design it to be effectively usable through dialogue.

The site persona

A site persona is your model for the site's personality. It helps you visualise how a site should respond to user input and to exceptions, what tone of voice it uses to communicate, how much assistance it offers and when.

Pierre

One model for site personas that I use frequently is Pierre, who is an imaginary concierge at a high-class hotel. He's the complete professional, completely devoted to one simple goal: his visitors' satisfaction.

Who's your site persona?

Other site personas might be based on:

- A trained counsellor
- A personal assistant
- A bookstore salesperson
- A customer service representative (who's also a domain expert)
• A best friend

The most important thing about your site persona is that they can represent the characteristics of the site's brand.

Overview of the dialogue process

1. Start with a primary persona and one of their scenarios.
2. Play the scene featuring your primary persona and the site persona, which starts at the persona's entry point, and finishes when the persona reaches her goal.
3. Write a scenario script that details each communication by the visitor persona and the site persona, including the visitor persona's mental commentary.
4. Repeat for your other scenarios, and other personas.
5. Review and refine, asking:
   o How can the interaction be made more succinct?
   o Can any dialogue be anticipated and avoided (site intelligence)?
   o Is there any scope for confusion? How would the site persona help the visitor make it through smoothly?
   o What errors could possibly occur? How can the site persona best respond, in a way that increases the visitor's trust?

The "Review and refine" step above is the pinnacle of the entire design process. This is your opportunity to make the greatest breakthroughs, gain the maximum competitive advantage, and discover those wonderful ideas that make your site that bit easier and more pleasurable to use.