SEEING THE BIG PICTURE:
The development of an experience scorecard
Introduction

- Clients often focus on design details or usability performance on a few key tasks

- Clients have more difficulty seeing the big picture of the overall experience

- Clients seeking the bigger picture but don’t have a tool to provide this information or the process is lengthy and costly
The Experience Scorecard

- Provides clients with metrics across critical aspects of experiences
- Provides a clear picture of the overall experience
- Lean budget friendly
- Repeatable - progress can be tracked over time
Questions clients often ask

- How are we doing?
- What do we need to improve?
- How do we compare?
Our motivation

- Help clients answer their three fundamental questions and:
  - Make data more accessible
  - Foster cross team buy-in
  - Help clients get a better understanding of the experience overall
  - Help clients identify underperforming areas and opportunities
- Drive change
Our development process

Identify requirements
Develop methodology
Collect Data
Analyze Data
Create Scorecard

This is the initial process - we have not gone through validation yet
Our requirements for a new metric

- Multi-dimensional view – beyond usability
- Data about what users value and how that affects their experience
- Diagnostic with 'at a glance' results
- Comparative (vs. competitors)
- Repeatable - time efficient data collection that will provide performance data over time
Developing the Methodology
Overview of experience

- Personalized
- Usability
- Design & Content
- Emotion
- Brand
- Expectations vs. Evaluation
Four critical aspects of experience

**Usability**

How easy is it to complete tasks, learn the website, and the amount of effort needed to complete those tasks

- Ease of navigation
- Organization of site
- Ease of use
- Usefulness
Four critical aspects of experience

**Emotion**

How someone feels when using the website

- Frustration
- Confidence
- Engagement
- Stress
Four critical aspects of experience

Brand

How a company is perceived, such as trustworthiness, value of the products/services, and likelihood of using the website in the future

- Interest in products/services offered
- Positivity about the Brand
- Desire to use the site in the future
- Trust in the company
Four critical aspects of experience

**Design & Content**

The design and content of the website, as well as the usefulness of the information and images.

- Visual attractiveness
- Usefulness of graphics and images
- Understandability of the content/language
- Usefulness of information
## Overview of experience

<table>
<thead>
<tr>
<th>Usability</th>
<th>Emotion</th>
<th>Brand</th>
<th>Design and Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ease of navigation</td>
<td>Frustration</td>
<td>Interest in products/services offered</td>
<td>Visual attractiveness</td>
</tr>
<tr>
<td>Organization of site</td>
<td>Confidence</td>
<td>Positivity about the Brand</td>
<td>Usefulness of graphics and images</td>
</tr>
<tr>
<td>Ease of use</td>
<td>Engagement</td>
<td>Desire to use the site in the future</td>
<td>Understandability of the content/language</td>
</tr>
<tr>
<td>Usefulness</td>
<td>Stress</td>
<td>Trust in the company</td>
<td>Usefulness of information</td>
</tr>
</tbody>
</table>

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The Scorecard
Personalization

Participants distributed 100 points across these four areas based on the importance to them personally.
Personalization

**NOT PERSONALIZED**

<table>
<thead>
<tr>
<th>Overall Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>80</td>
</tr>
<tr>
<td>90</td>
</tr>
<tr>
<td>85</td>
</tr>
<tr>
<td>75</td>
</tr>
<tr>
<td>70</td>
</tr>
<tr>
<td>80</td>
</tr>
</tbody>
</table>

Avg overall score: **80**

**PERSONALIZED**

<table>
<thead>
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<th>Overall Score</th>
</tr>
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<tbody>
<tr>
<td>95</td>
</tr>
<tr>
<td>80</td>
</tr>
<tr>
<td>73</td>
</tr>
<tr>
<td>60</td>
</tr>
<tr>
<td>65</td>
</tr>
<tr>
<td>75</td>
</tr>
</tbody>
</table>

Avg overall weighted score: **75**

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### Overall Experience Score

**Score Breakdown**

<table>
<thead>
<tr>
<th>Category</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Usability</td>
<td>32.0</td>
</tr>
<tr>
<td>Emotion</td>
<td>15.3</td>
</tr>
<tr>
<td>Design</td>
<td>20.3</td>
</tr>
<tr>
<td>Brand</td>
<td>17.8</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>87.0</strong></td>
</tr>
</tbody>
</table>

### Competitor Evaluation

**Score Comparison**

<table>
<thead>
<tr>
<th>Competitor</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Idea</td>
<td>87.0</td>
</tr>
<tr>
<td>Target</td>
<td>79.9</td>
</tr>
</tbody>
</table>

This score gives an overall picture of participant's experience. It is a weighted average (combination of importance and experience) based on usability, emotion, design, and brand.
Overall Experience Score

87.0
out of 100

0.0 - Excellent
85 - 90.9 Very Good
80 - 84.9 Good
75 - 79.9 Fair
<75 Poor

Appendix

This score gives an overall picture of participant's experience, it is a weighted average (combination of importance and experience) based on usability, emotion, design, and brand.

Competitor Evaluation

Score Breakdown

<table>
<thead>
<tr>
<th>Competitor</th>
<th>Usability</th>
<th>Innovation</th>
<th>Design</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>IKEA</td>
<td>12.8</td>
<td>15.3</td>
<td>20.3</td>
<td>17.8</td>
</tr>
<tr>
<td>Target</td>
<td>12.8</td>
<td>15.3</td>
<td>20.3</td>
<td>17.8</td>
</tr>
</tbody>
</table>

Target Score: 79.9

Expectations & Experience

+0.57
Change in Expectation

On a scale of 1 (low) to 5 (high) the actual experience was rated better than the expected experience by an average of 0.57.

Competitor Evaluation

Expected vs. Actual Experience

Actual experience exceeded expectations, more notably on usefulness, organization, and look & feel.

Experience Comparison

IKEA: 4.5
Target: 3.5

The actual experience on both IKEA and Target exceeded expectations.
Overall Experience Score

87.0
out of 100

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On a scale of 1 (low) to 5 (high) the actual experience was rated better than the expected experience by an average of 0.57.

Task Evaluations

4.3
Average Task Rating

On a scale of 1 (low) to 5 (high) task average was 4.3. Tasks were rated on ease, time satisfaction, & design.

Competitor Evaluation

Score Breakdown

Usability 12.8 15.3 87.0
Emotion 20.3
Design 17.8
Brand

Score Comparison

Usability 12.8 14.1 13.9
Emotion 17.8
Design 14.2
Brand 18.9

Brand

Click to expand

Experience Scores

28.6 26.4 29.9 16.0

Experience Scores

+0.57
Change in Expectation

Expected vs. Actual Experience

Easy to use 3.7 3.3
Usefulness 4.5 4.3
Engaging 3.3 3.2
Look & Feel 4.1 4.3

Experience Comparison

Actuals vs. Target 1.5

Expected

Actual

Task Category Ratings

Branding or Viewing Products 4.42 4.22
Specific Product Information 2.76 3.04
Services 4.9 4.3
Store Information 4.3 4.3

Task Comparison

Easy to complete
Time reasonable
Satisfaction
Design

Tasks involving viewing were rated lower.

The task evaluations were comparable across the two sites, HIA and Target.
Overall Experience Score

Score Breakdown

Score Comparison

Competitor Evaluation

Expectations & Experience

Expected vs. Actual Experience

Competitor Evaluation

Experience Comparison

Task Evaluations

Task Category Ratings

Task Comparison

Level of Importance

Priorities Snapshot

Participants indicated that they care most about usability. Design, emotion and brand have approximately the same level of importance.

First priority for improvement should be the emotional & usability aspects of the site, based on the combination of relative importance and experience ratings.
### Overall Experience Score

**87.0**

This score gives an overall picture of participants’ experience. It is a weighted average (combination of importance and experience) based on usability, emotion, design, and brand.

### Expectations & Experience

**+0.57**

Change in Expectation

On a scale of 1 (low) to 5 (high), the actual experience was rated better than the expected experience by an average of 0.57. Appendix

### Task Evaluations

**4.3**

Average Task Rating

On a scale of 1 (low) to 5 (high), task average was 4.3. Tasks involving services & store info were rated lower.

### Customers vs. Prospects

<table>
<thead>
<tr>
<th></th>
<th>IKEA Prospect</th>
<th>IKEA Customer</th>
<th>Target Prospect</th>
<th>Target Customer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target</td>
<td>17.0</td>
<td>16.8</td>
<td>16.7</td>
<td>13.5</td>
</tr>
<tr>
<td>Mean</td>
<td>40.0</td>
<td>30.0</td>
<td>19.0</td>
<td>30.0</td>
</tr>
</tbody>
</table>

While customers on both sides had a similar experience, IKEA prospects had a better experience than Target prospects.

### Other Segments

- Participants age 26-44 reported a better experience (87.4) than younger participants age 26-24 (83.4).
- Those with an income of $50,000 a year reported a better experience (89) than those with an income of $50,000 - $99,999 (84) or those with an income of $100,000 - $199,999 (80.6).
- Participants who visited the site more frequently reported a better experience (88) than those who visited it less frequently (85).*

*Hypothetical data
Overall Experience Score

87.0

out of 100

90.0 + Excellent
85.0 - 89.9 Very Good
80.0 - 84.9 Good
75.0 - 79.9 Fair
<75 Poor

Score Breakdown

Usability | Emotion | Design | Brand
--- | --- | --- | ---
32.8 | 15.1 | 20.3 | 17.8

This score gives an overall picture of participant’s experience. It is a weighted average (combination of importance and experience) based on usability, emotion, design, and brand.

Score Comparison

Ikea | Target
--- | ---
32.8 | 26.5
15.1 | 14.5
20.3 | 19.9
17.8 | 19.0

Competitor Evaluation

Overall Experience Score 87.0

Score Breakdown

Usability | Emotion | Design | Brand
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32.8 | 15.1 | 20.3 | 17.8

Score Comparison

Ikea | Target
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Target vs. Competitor

Brand | Design | Emotion | Usability
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Ikea | Target
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Experience Score

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Change in Expectation

On a scale of 1 (low) to 5 (high) the actual experience was rated better than the expected experience by an average of 0.57.

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Actual experience exceeded expectations, most notably on usefulness, organization, and look & feel.

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<th>Usefulness</th>
<th>Organization</th>
<th>Look &amp; Feel</th>
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</thead>
<tbody>
<tr>
<td>3.7</td>
<td>3.9</td>
<td>4.2</td>
<td>3.9</td>
</tr>
<tr>
<td>3.5</td>
<td>3.5</td>
<td>3.9</td>
<td>4.1</td>
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**Competitor Evaluation**

On a scale of 1 (low) to 5 (high) the actual experience was rated better than the expected experience by an average of 0.57.

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<tr>
<td>Expected</td>
<td>Actual</td>
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The actual experience on both Ikea and Target exceeded expectations.
Task Evaluations

4.3
Average Task Rating

On a scale of 1 (low) to 5 (high), the task average was 4.3. Tasks were rated on ease, time, satisfaction, and design.

Tasks involving services & store info. were rated lower.

Competitor Evaluation

The task evaluations were comparable across the two sites, Ikea and Target.
Participants indicated that they care most about usability. Design, emotion and brand have approximately the same level of importance.

First-priority for improvement should be the emotional & usability aspects of the site, based on the combination of relative importance and experience ratings.
While customers on both sides had a similar experience, IKEA prospects had a better experience than Target prospects.

Other Segments

- Participants age 35-44 reported a better experience (87.4) than younger participants age 25-34 (83.4).
- Those with an income of < $50,000 a year reported a better experience (90) than those with an income of $50,000 - $99,999 (84) or those with an income of $100,000 - $199,999 (80.9).
- Participants who visited the site more frequently reported a better experience (86) than those who visited it less frequently (83).*

*hypothetical data
### Task Evaluation Breakdown

<table>
<thead>
<tr>
<th>Task Category</th>
<th>Easy to Complete</th>
<th>Time was Reasonable</th>
<th>Satisfaction</th>
<th>Design</th>
</tr>
</thead>
<tbody>
<tr>
<td>Browsing Products</td>
<td>4.33</td>
<td>4.58</td>
<td>4.42</td>
<td>4.33</td>
</tr>
<tr>
<td>Product Info.</td>
<td>4.82</td>
<td>4.82</td>
<td>4.64</td>
<td>4.64</td>
</tr>
<tr>
<td>Services</td>
<td>3.89</td>
<td>3.89</td>
<td>3.78</td>
<td>3.44</td>
</tr>
<tr>
<td>Store Info.</td>
<td>3.75</td>
<td>4.00</td>
<td>4.50</td>
<td>3.50</td>
</tr>
</tbody>
</table>

#### Task

- **Find the set of ENTUSIASM tumblers.**
  - Avg. Rating: 5.0
- **Find the measurements for any VIMLE sofa.**
  - Avg. Rating: 4.8
- **Find assembly instructions for any of the KALLAX shelving units that you can print out.**
  - Avg. Rating: 4.7
- **Find the address of the IKEA store closest to where you live.**
  - Avg. Rating: 4.3
- **View all the filing cabinets available.**
  - Avg. Rating: 4.0
- **Find out if IKEA can deliver a dining room table to your house.**
  - Avg. Rating: 3.9
- **Find out if IKEA has any service that could assemble a product for you.**
  - Avg. Rating: 3.6
- **Find the weekend hours of the IKEA store closest to where you live.**
  - Avg. Rating: 3.5

The tasks specifically around design, that scored the lowest were “find the weekend hours of the IKEA store closest to where you live” and “Find out if IKEA can deliver a dining room table to your house.”

The tasks that scored the highest were “find the set of ENTUSIASM tumblers” and “find the measurements for any VIMLE sofa.”
Would you like an experience scorecard for your organization?

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Thanks!

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