



Implementing Continuous Improvement

Professor: Luke Summerfield

WHY IS CONTINUOUS
IMPROVEMENT CRITICAL?



42%

of marketers only make impactful improvements to their website once or less per year.

What is the **continuous improvement stage?**

A repeatable, agile process for the team to continuously collect real-user data, build high-impact items, and generate more and more momentum as they go.



HOW THIS **HELPS**

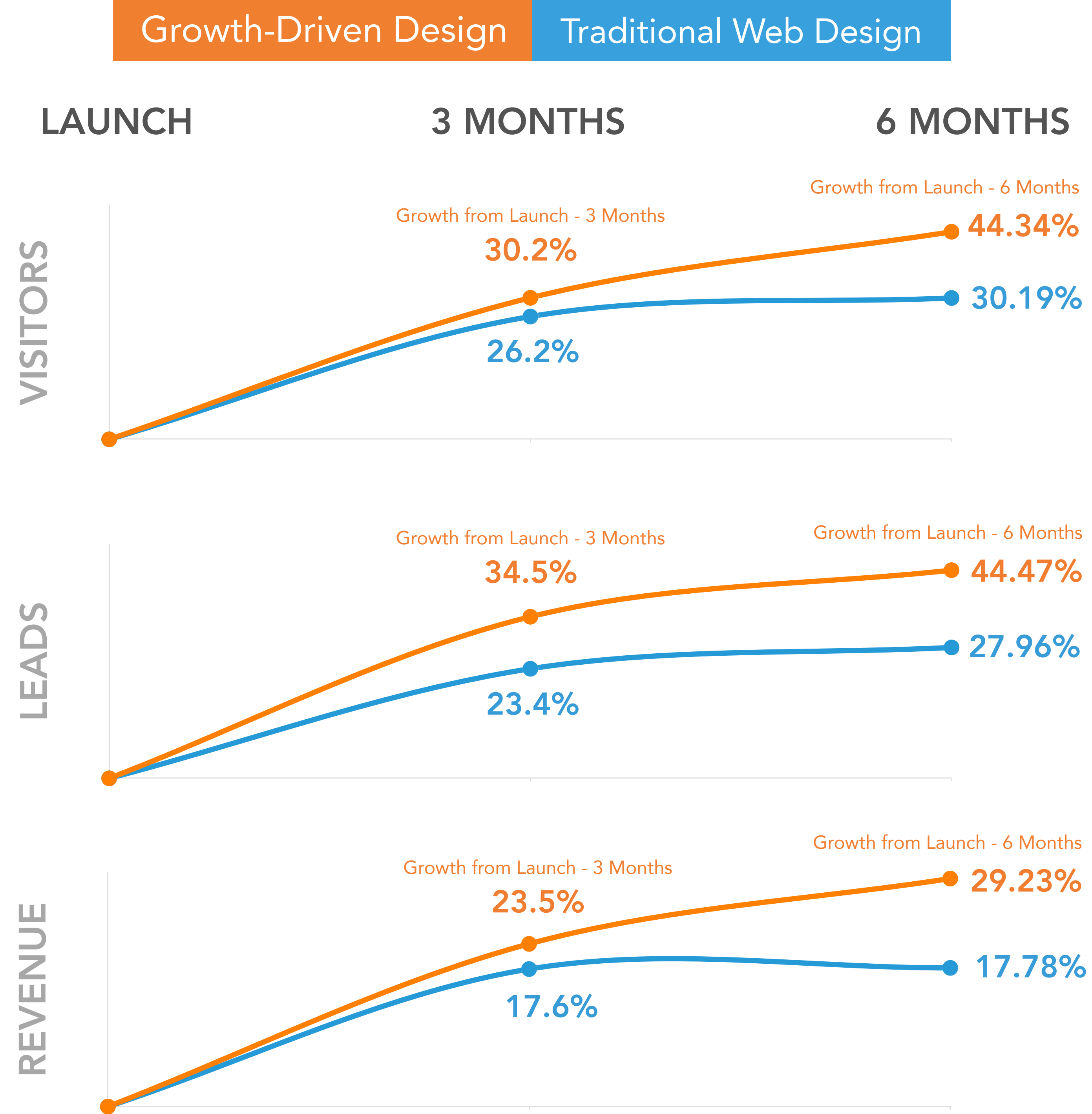
- Data-driven approach to improvement and user learning.
- Discover new opportunities.
- Help other teams accelerate.

YOUR WEBSITE IS
AN **ASSET** TO DRIVE
COMPANY-WIDE GROWTH.

Agencies that used growth-driven design reported seeing:

- ➔ 14.1% more visitors
- ➔ 16.9% more leads
- ➔ 11.2% more revenue

after 6 months with clients.



HOW DO YOU IMPLEMENT
THE CONTINUOUS
IMPROVEMENT STAGE?

1

STRATEGY

2

LAUNCH PAD

3

CONTINUOUS IMPROVEMENT

With a launch pad site live and collecting user data, you can start identifying the high-impact actions you can take to grow your business.

UNDERLYING CONCEPTS

Lean Thinking - A mindset of eliminating waste, reducing risk, and maximizing efficiencies all for the goal of maximizing value to the customer.

Agile Process - An iterative and collaborative process used for deconstructing complex projects with high uncertainty into bite-sized chunks.



STRATEGY



EXECUTION



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QUARTERLY SUMMIT

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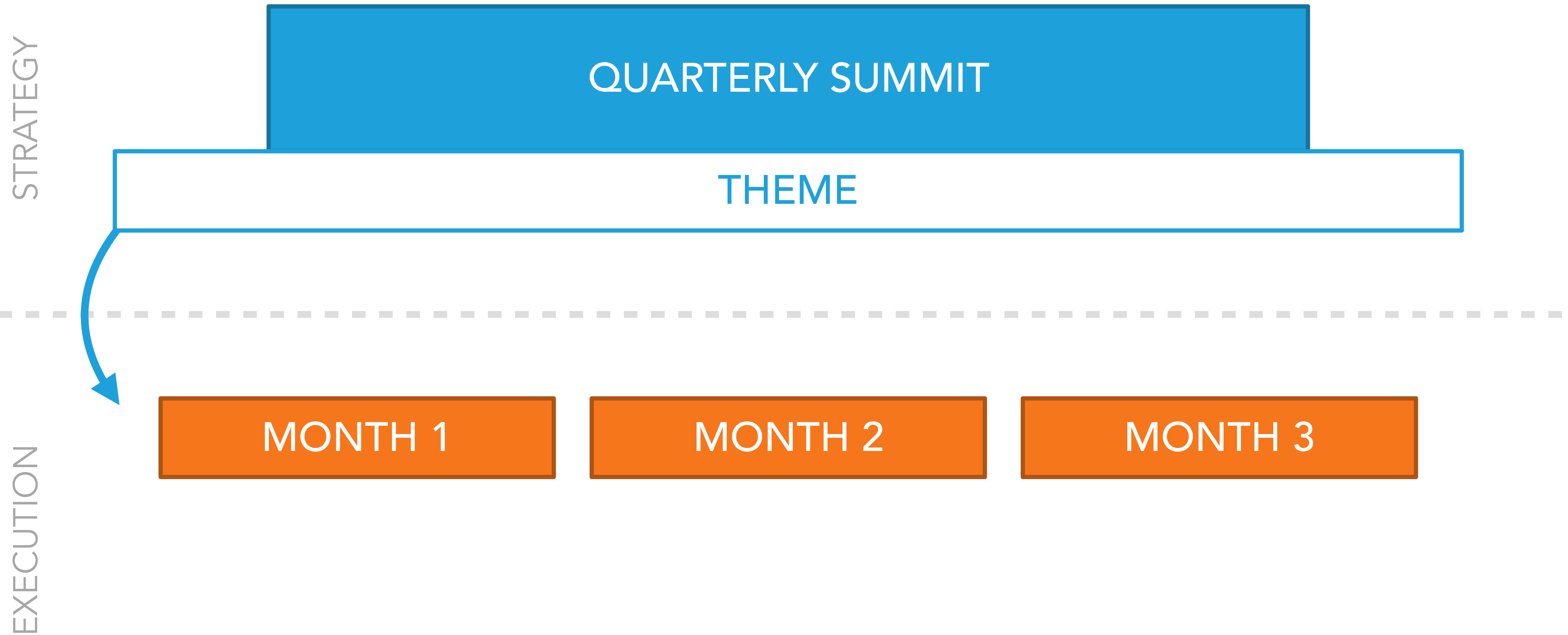


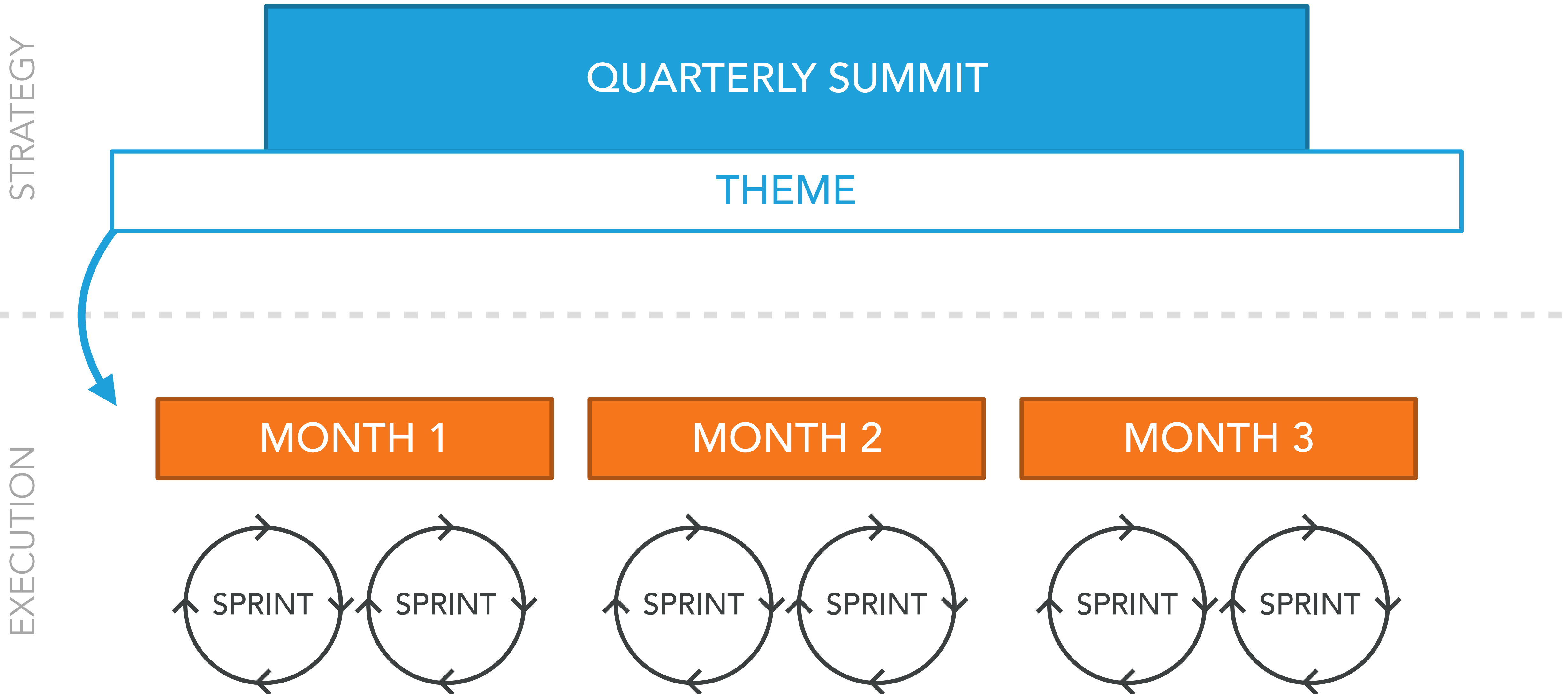
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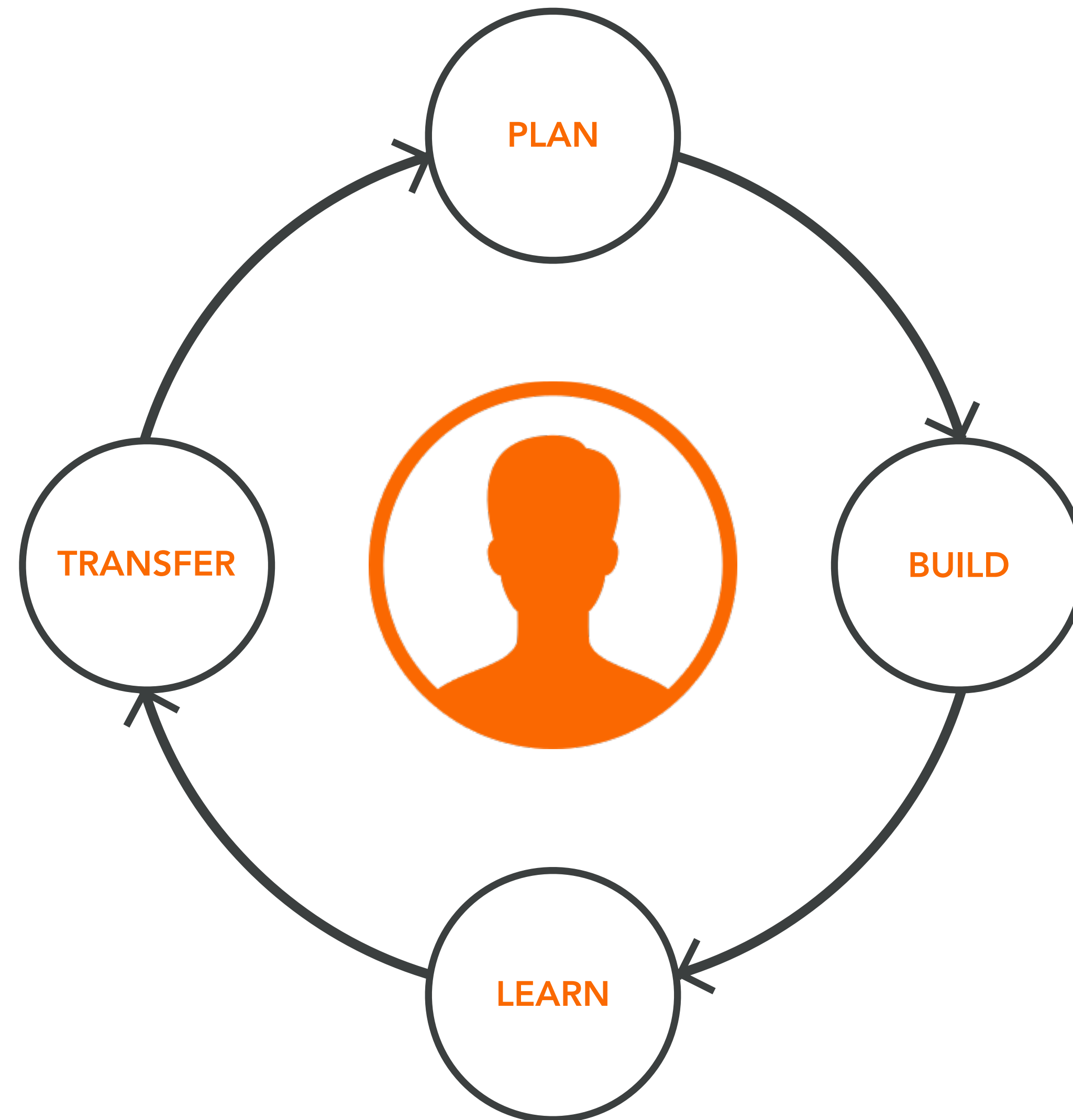
- Refresh the team on strategy and goals.
- Run a retrospective on executed plays, progress, and impact on focus metrics.
- Discuss ideas and pitches for the next quarter.
- Review current theme from the website performance roadmap: continue the existing theme or pick a new theme?







CONTINUOUS IMPROVEMENT: SPRINT CYCLE



SPRINT CYCLE: THE PLAN STEP



STEP 1: **PLAN**

Determine what are the most impactful items to build or optimize at this point in time to drive you towards your goals.



STEP 1: **PLAN**

1. Review the current theme, your progress, and set the sprint cycle's focus.



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2. Write out job stories.

CREATING JOB STORIES

1. Develop questions to understand the user's challenges.



3

CONTINUOUS IMPROVEMENT

→ PLAN > BUILD > LEARN > TRANSFER →

ESTABLISH

HARVEST | AUDIENCE | VALUE

OPTIMIZE

USABILITY | CRO | PERSONALIZE

EXPAND

PRODUCTS | JOURNEY | TEAMS

“What is preventing **organic** website users, who land directly on the **pricing page** from **requesting a quote**?”

SEGMENT

“What is preventing **organic** website users, who land directly on the **pricing page** from **requesting a quote**?”

SPECIFIC
LOCATIONDESIRED
ACTION

CREATING JOB STORIES

1. Develop questions to understand the user's challenges.
2. Conduct UX research to uncover the answers.



CREATING JOB STORIES

1. Develop questions to understand the user's challenges
2. Conduct UX research to uncover the answers.
3. Write out job story from the user's point of view.



AS [PERSONA/SEGMENT],

WHEN [SITUATION],

I WANT TO [MOTIVATION]

SO I CAN [OUTCOME].

AS Sales Manager Sam, **WHEN** preparing on a tight deadline to pitch next year's growth plans, **I WANT TO** quickly source detailed pricing and comparison information **SO I CAN** gain funding and look like a rockstar to our CEO.



STEP 1: **PLAN**

1. Review the current theme, your progress, and set the sprint cycle's focus.
2. Write out job stories.
3. Host planning workshop.

HOSTING A PLANNING WORKSHOP

- Intro: Warm-up activity and strategy document review.
- Walk through job stories and user challenges.




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- Walk through job stories and user challenges.
- Run individual and then group brainstorming activities to generate possible solutions.
- Pick the best solution(s) and vote how to prioritize them onto the wishlist.



PRIORITIZING WISH LIST:

- IMPACT TO FOCUS METRIC
- EFFORT REQUIRED TO IMPLEMENT
- URGENCY

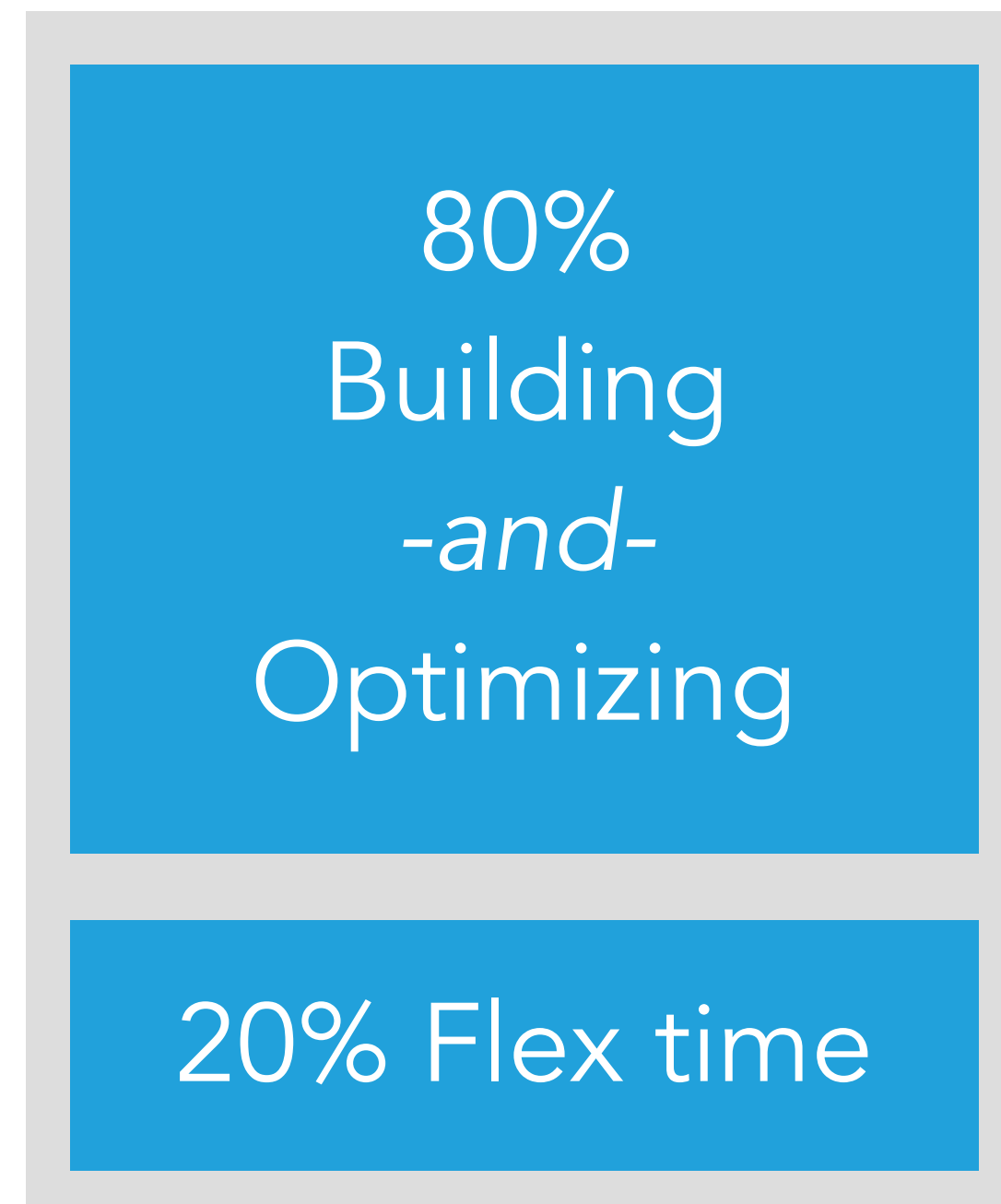
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	GROWTH-DRIVEN DESIGN													
	Action Item Name	KPI Metric	Impact	Effort					Owner	Start	Stop	Prediction	Actual	Outcome
[link to blank action item card template]				Total	Strategist	UX	Developer	Other						
I #	Current Sprint													
53	[web] Interactive Product Graphic on HubSpot.com *example*	KPI Metric 1 ▾	13 ▾	3	1	0	2	0	Luke	5/18/2015	5/22/2015	16% CTR	18% CTR	Success ▾
54	[web] Pricing - Enterprise, call for pricing *example*	- select - ▾	5 ▾	6	4	0	2	0						- select - ▾
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High Priority														
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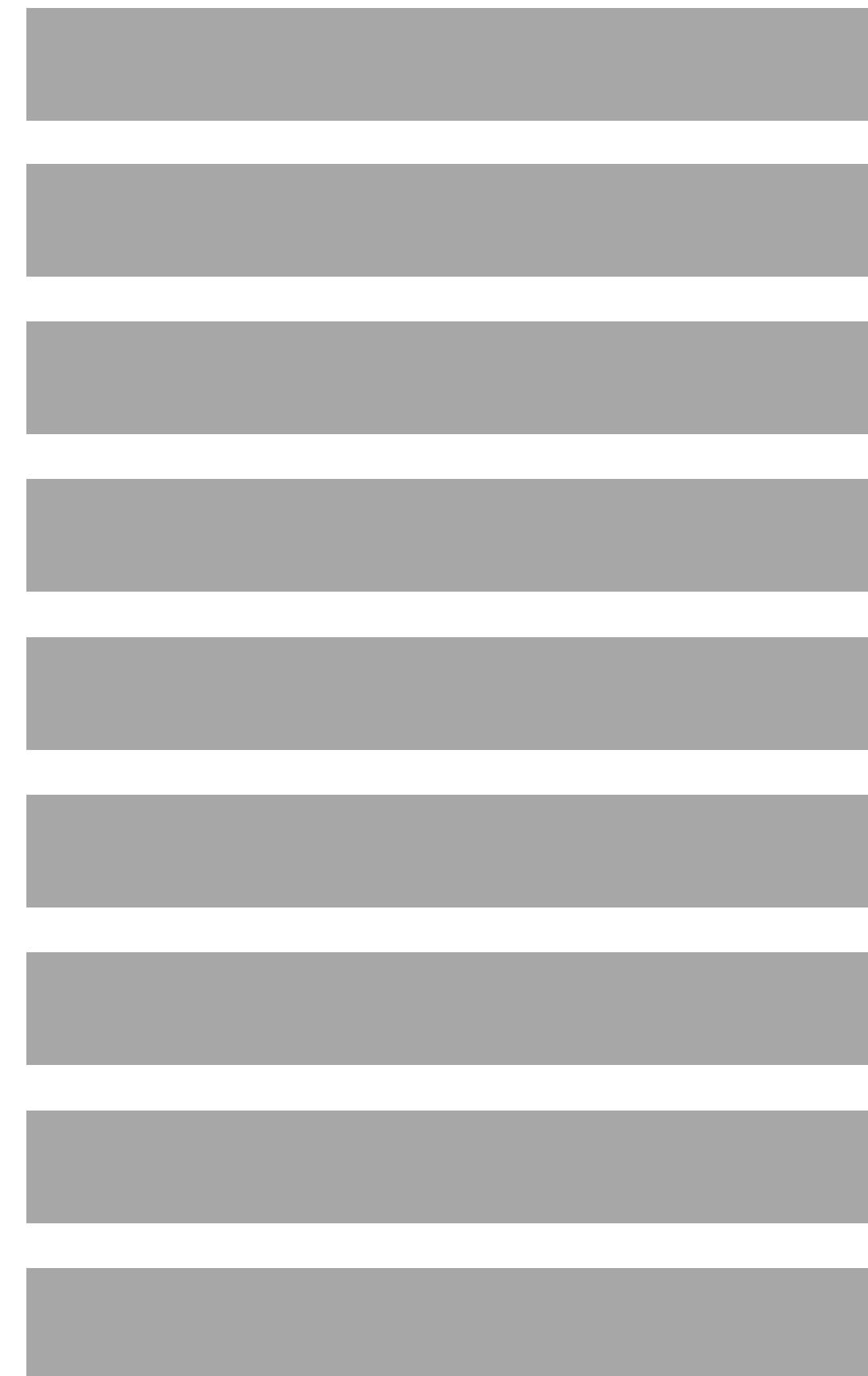
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2. Write out job stories.
3. Host planning meeting.
4. Based on capacity, pull the top items off the wish list for the team to build.

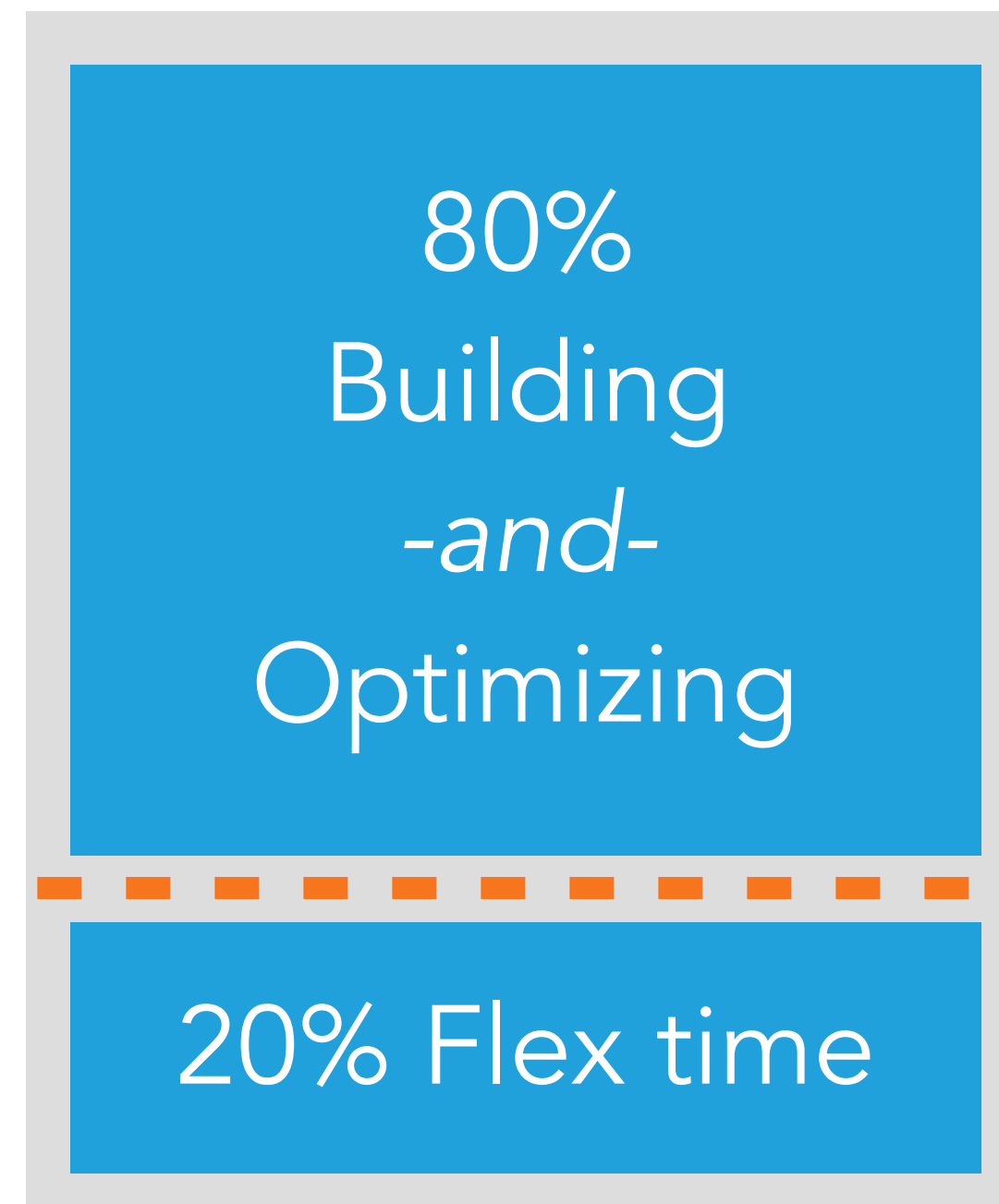
CAPACITY



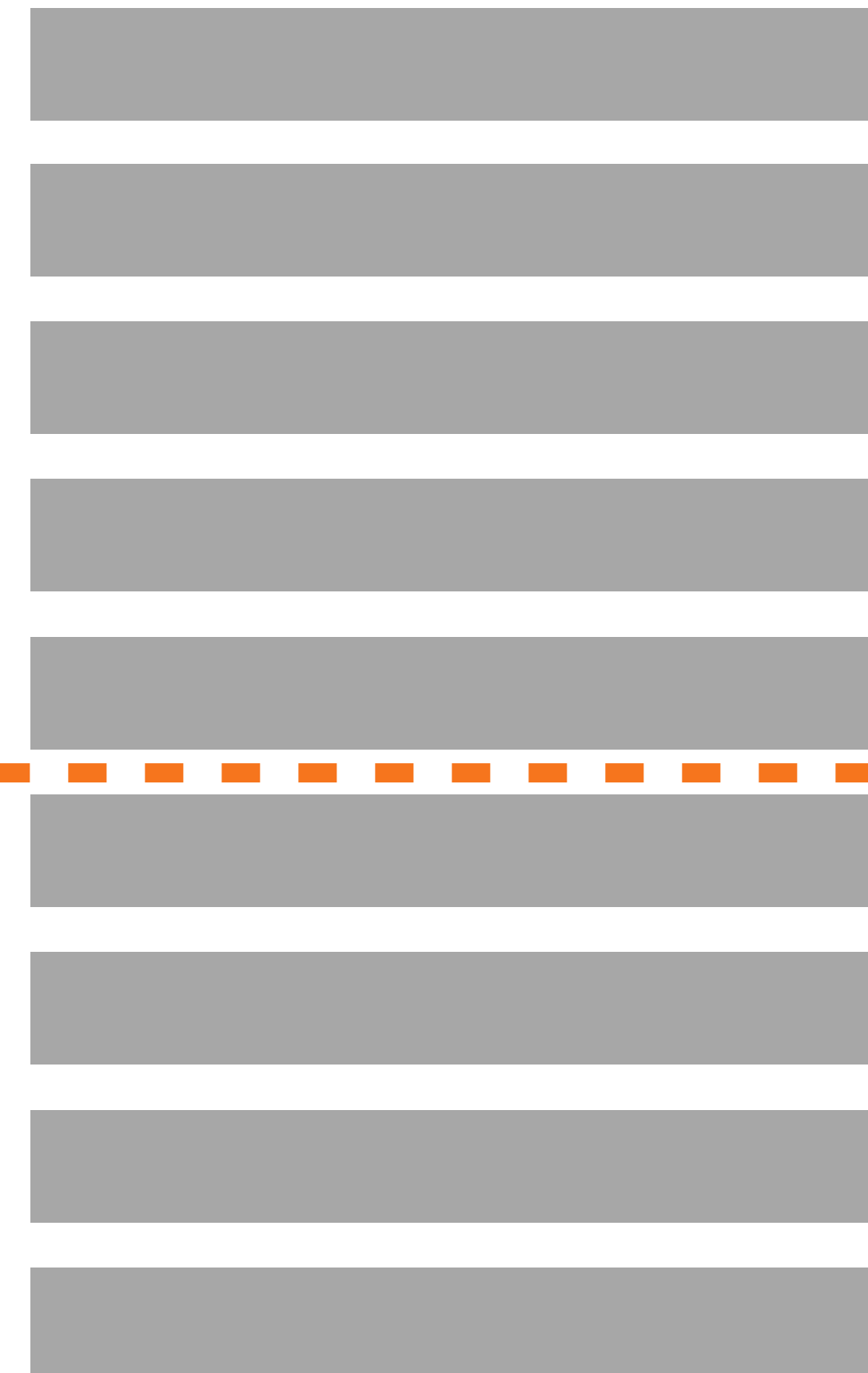
WISH LIST



CAPACITY



WISHLIST



THIS SPRINT
CYCLE

REVIEW IN
NEXT SPRINT
CYCLE

STAY **FOCUSED**

It's common for internal requests to pop up, however, make sure to stay focused on investing the team's time on high-impact items.

- Can we complete this task with flex time?
- Does the proposed task align with your current focus metric?
 - If so, where would it land on the wish list priorities and what would it bump?
 - If not, it can get added to the wishlist for future considerations.





STEP 1: **PLAN**

1. Review the current theme, your progress, and set the sprint cycle's focus.
2. Write out job stories.
3. Host planning meeting.
4. Based on capacity, pull the top items off the wishlist to move to build step.
5. Create an action item card for each item.

HIGH IMPACT - ACTION ITEM 1

JOB STORY

As [PERSONA], when [SITUATION], I want to [**MOTIVATION**] so I can [**OUTCOME**].

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HYPOTHESIS STATEMENT

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Why Do You Believe This? | Expected Impact | Effort Required | Experiment Design

SPRINT CYCLE: THE BUILD STEP



STEP 2: **BUILD**

Run a hyper-focused, collaborative attack on implementing the high-impact action items as quickly as possible while maintaining quality work.



STEP 2: **BUILD**

1. Deconstruct each action item.
2. Coordinate schedules to work together.
3. Host daily stand-ups.

HOSTING A DAILY STANDUP

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- All other discussion should happen offline after the standup.
- How can the team swarm together on tasks or impediments.

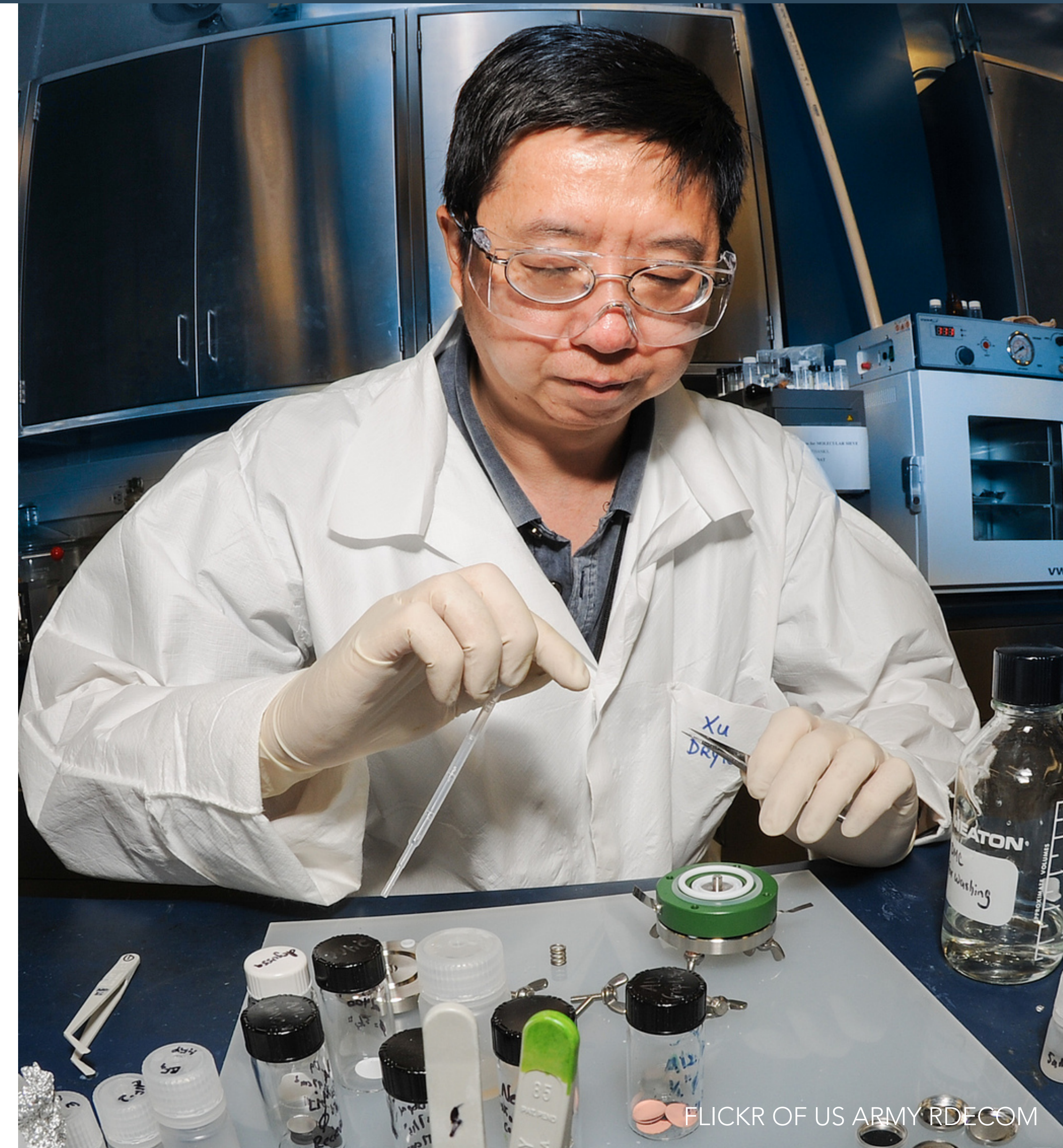


STEP 2: BUILD

1. Deconstruct each action item
2. Coordinate schedules to work together
3. Host daily stand-ups
4. Outline and set up the experiments

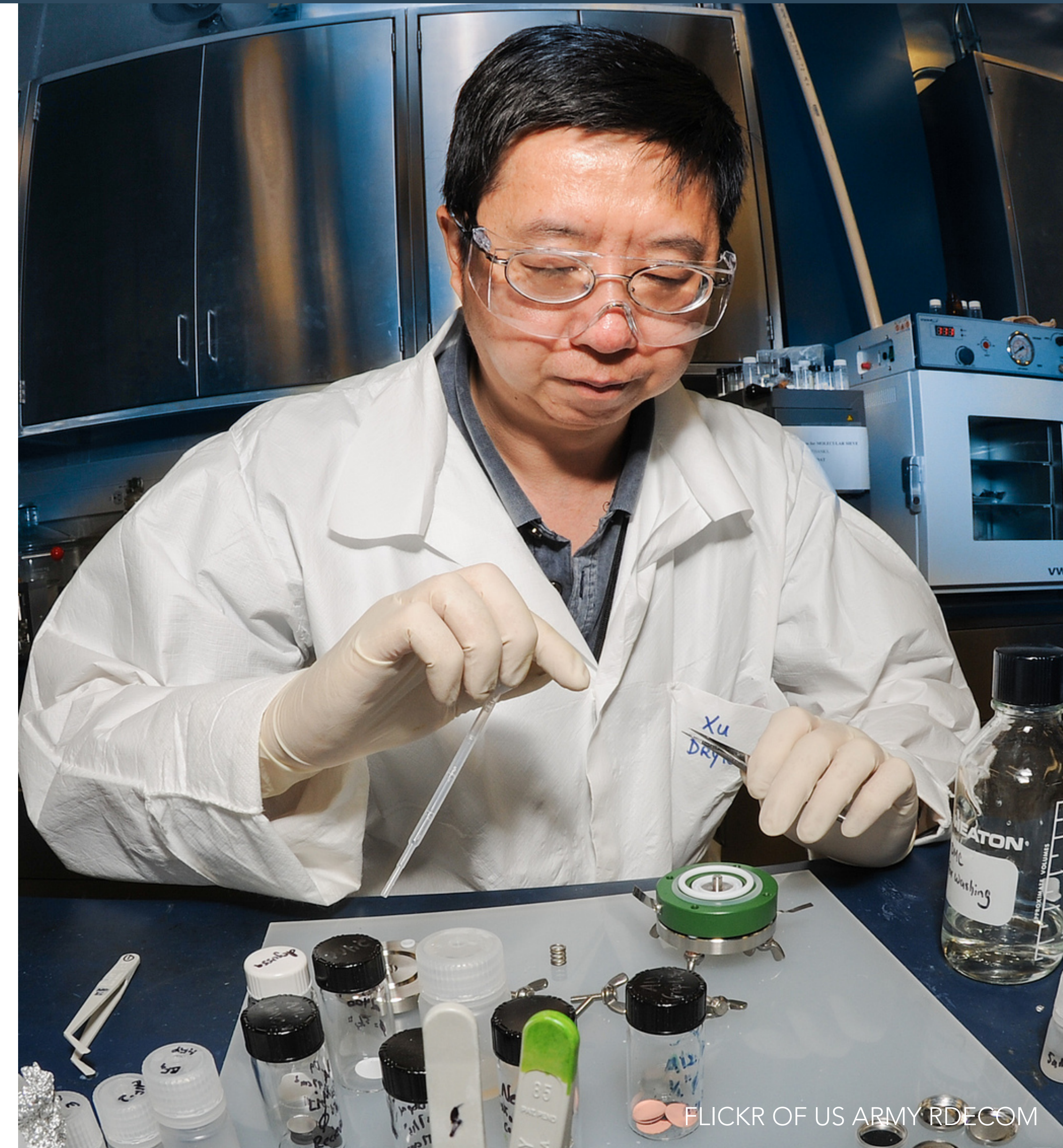
WHY RUN EXPERIMENTS

The goal of running experiments, especially in the beginning, is simply to learn about your users and how the business can interact with them.



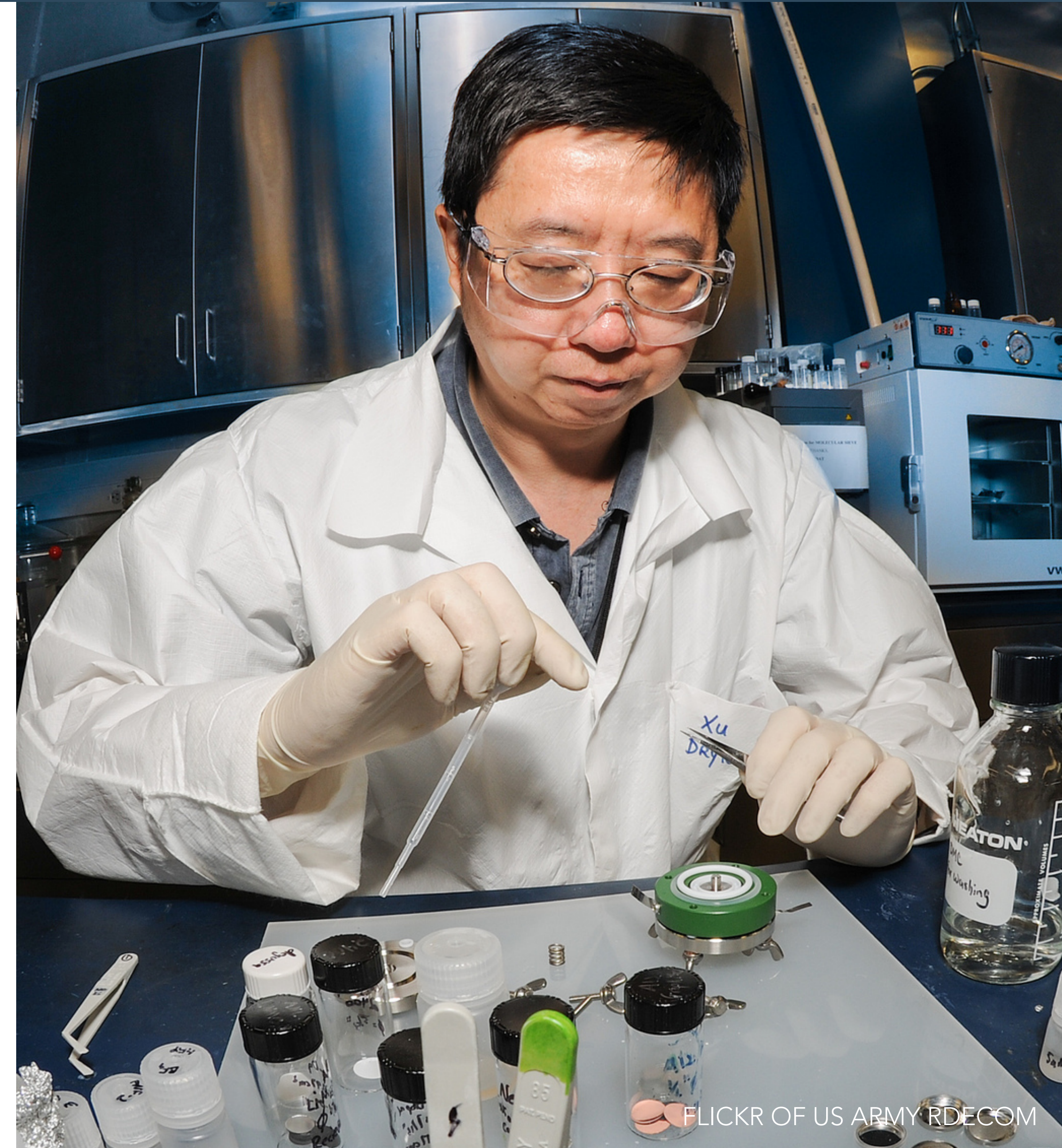
PRO TIPS: RUNNING EXPERIMENTS

- Incorporate learnings into the next cycle for a higher chance of success.



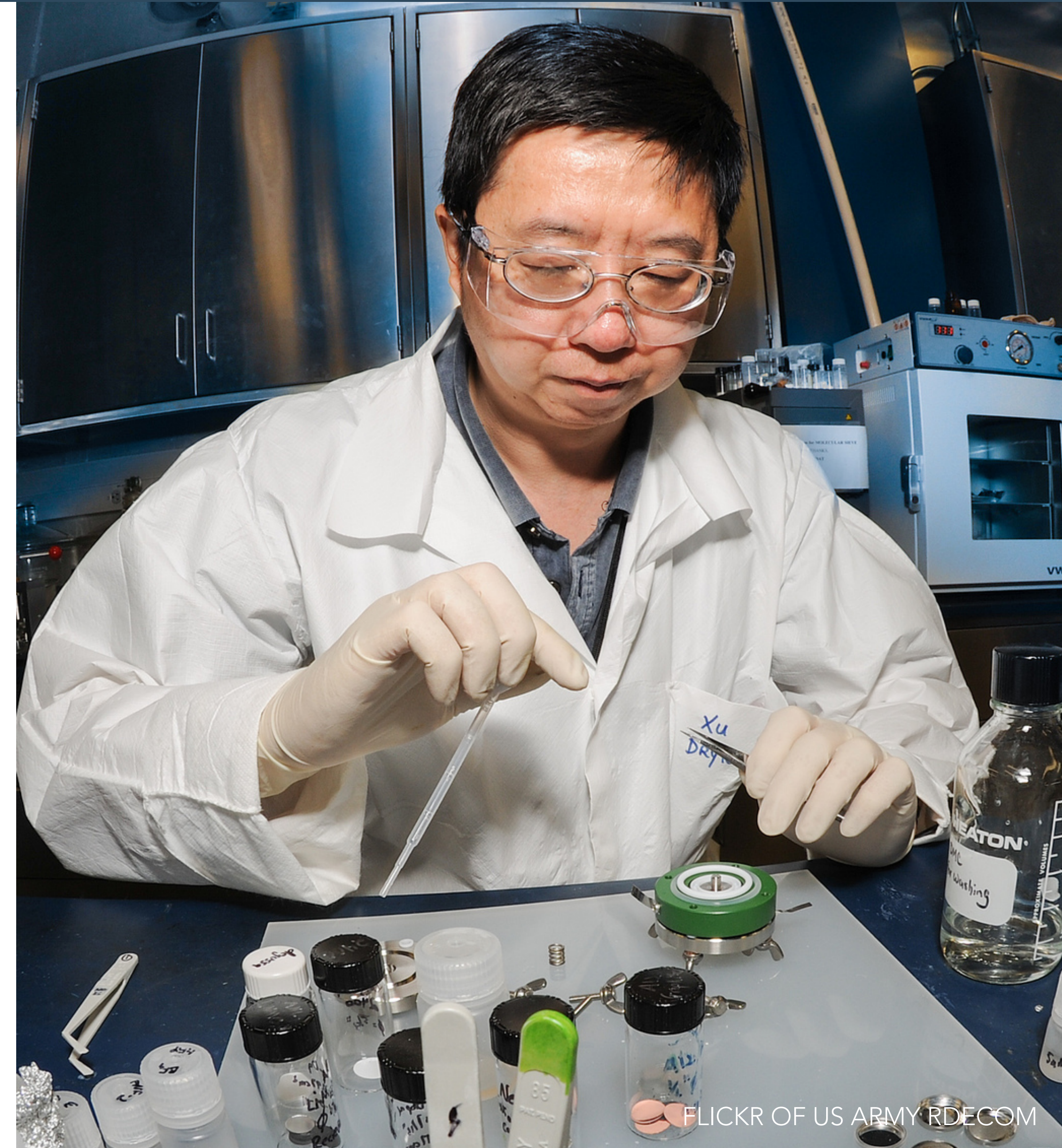
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- Run the full process, avoid jumping directly to experimenting.
- Not everything needs to be run as a strict experiment.



HOW TO TEST EXPERIMENTS

When running an experiment, your job is to try to disprove the hypothesis, not prove it.

If you cannot disprove it under similar circumstances and with enough data to be confident in the results, you can consider your hypothesis valid.



OVERVIEW: **RUNNING EXPERIMENTS**

A/B OR SPLIT TESTING

MULTIVARIATE TESTING

COHORT AND EVENT REPORTS

QUALITATIVE PATTERN MATCHING

OVERVIEW: RUNNING EXPERIMENTS

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A controlled test between two (or more) variations with a **single** changed variable.

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WHAT IF WE HAVE LOW
WEB PAGE TRAFFIC?

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CONTINUOUS IMPROVEMENT

→ PLAN > BUILD > LEARN > TRANSFER >

ESTABLISH

HARVEST | AUDIENCE | VALUE

OPTIMIZE

USABILITY | CRO | PERSONALIZE

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COHORT AND EVENT REPORTS

Tracking behavior of different user groups over time. Identify a change in group behavior before and after an experiment is launched.

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COHORT AND EVENT REPORTS

Tracking behavior of different user groups over time. Identify a change in group behavior before and after an experiment is launched.

QUALITATIVE PATTERN MATCHING

Using multiple qualitative sources to identify a clear pattern of behavioral change from before and after an experiment is launched.



STEP 2: BUILD

1. Deconstruct each action item
2. Coordinate schedules to work together
3. Host daily stand-ups
4. Set up the experiments
5. Run quality assurance
6. Launch

SPRINT CYCLE: THE LEARN STEP



STEP 3: **LEARN**

Gain a deeper understanding of your users so you can make smarter future decisions and drive more value.



STEP 3: **LEARN**

1. Host a team retrospective.
2. Reflect on both the action items implemented and team performance.
3. Discuss learning questions.

USER LEARNING QUESTIONS:

- Was our hypothesis correct? - Why or why not?
- What might this teach us about the user?
- Did different segments (ex: *personas*) behave differently?
- What behavior was unexpected?
- How might this impact future ideas or teams?

TEAM PERFORMANCE QUESTIONS:

- What were the biggest setbacks for our team this sprint cycle?
- On a scale 1-10, how happy are you with the team's overall performance this sprint?
- How happy are you with your personal contributions this sprint?
- How might we complete the same work in half the time?
- How might we update our process or software to ensure future work is even better?



STEP 3: **LEARN**

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4. Finalize user learnings and team kaizen.

KAIZEN

A Japanese word that means
“change for the better.”



STEP 3: **LEARN**

1. Host a team retrospective.
2. Reflect on both the action items implemented and team performance.
3. Discuss around learning questions.
4. Finalize user learnings and team kaizen.
5. Document and share your findings.

SPRINT CYCLE: THE TRANSFER STEP



STEP 4: **TRANSFER**

The goal of the transfer step is to share learnings across departments and find opportunities to better align to create a better user experience throughout the entire customer journey.

1. Host a “Learning, Alignment, Collaboration Meeting” (ACL)
2. Transparent, shared documentation

ACL MEETING

Routinely get together with other departments to help each other achieve their goals while creating alignment and an amazing customer experience.



ACL MEETING

- Host at the end of each sprint or month.
- Include department leaders, each will:
 - Explain the goal they are working on and what have they completed since last ACL meeting.
 - Present learnings and recommendations.
 - Ask questions to inform the next cycle.
- Find collaboration and alignment opportunities.



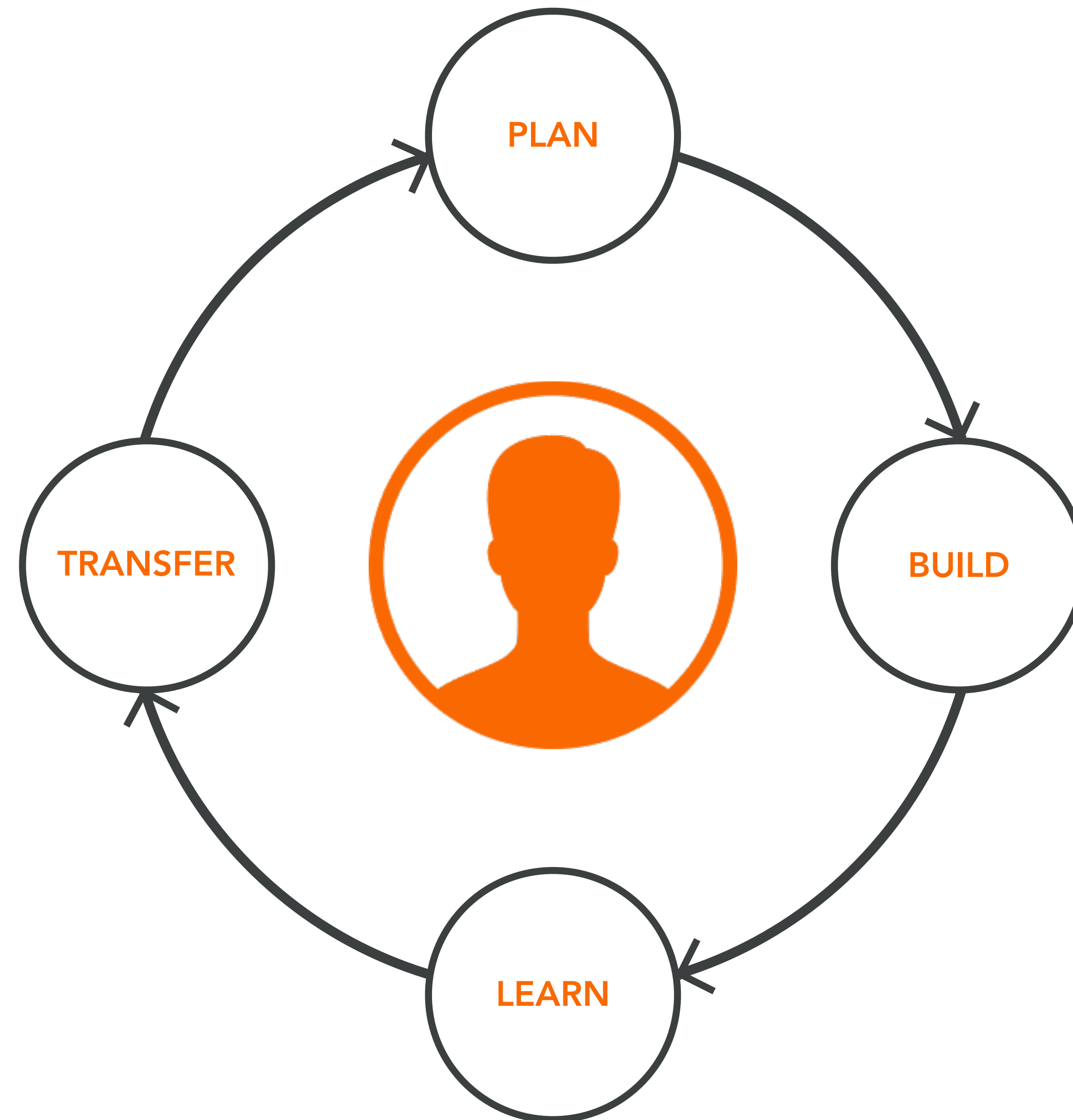


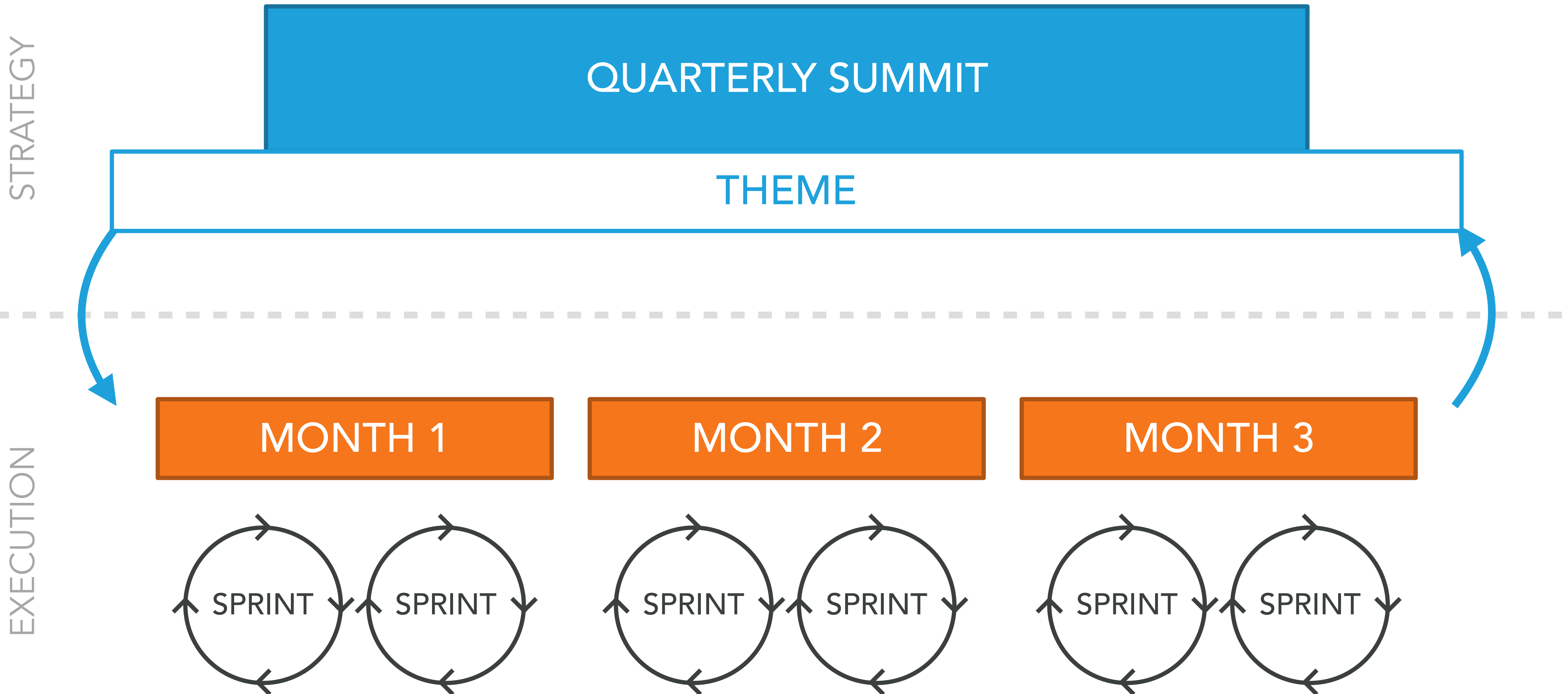
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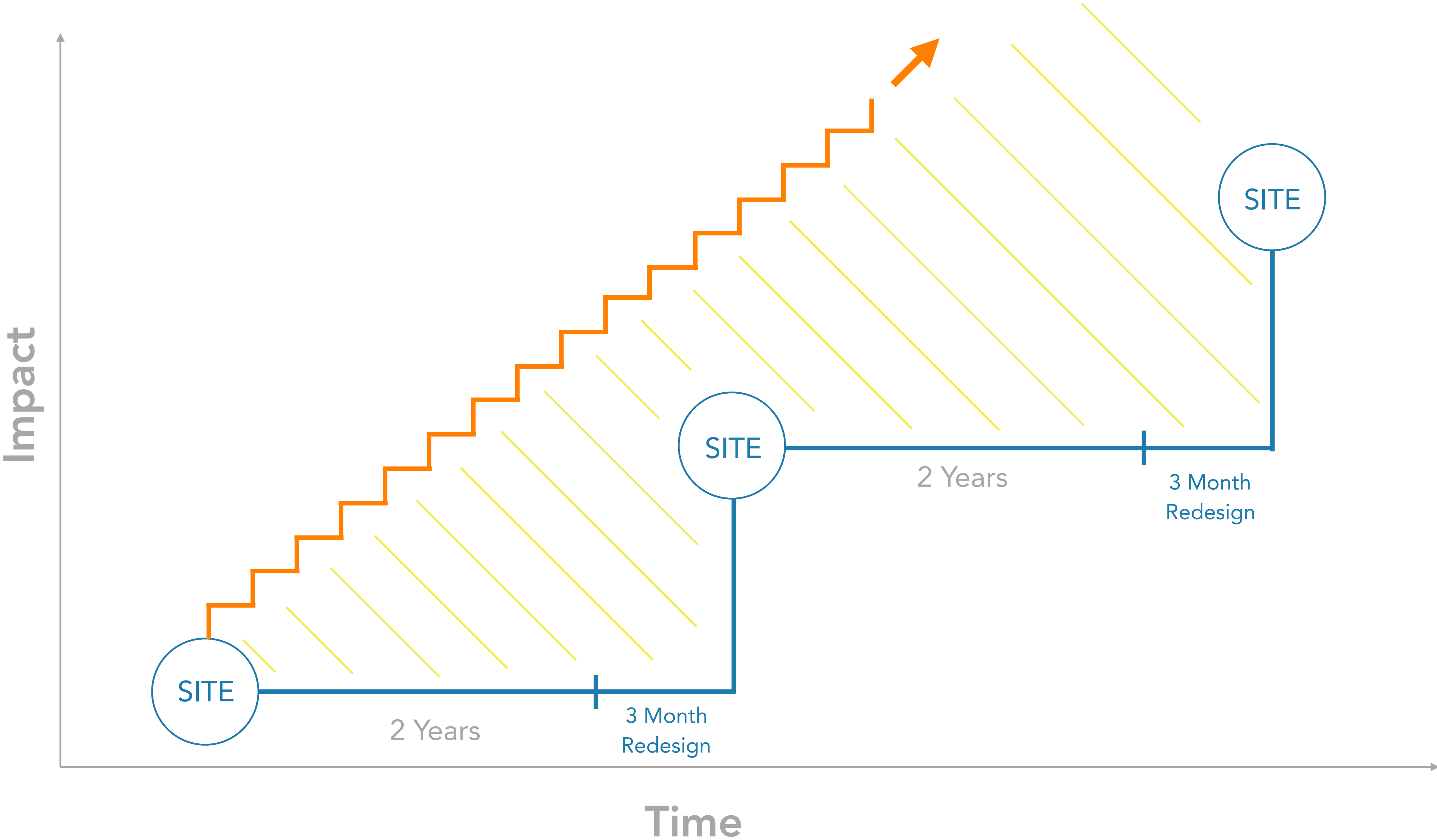
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CONTINUOUS IMPROVEMENT: SPRINT CYCLE





Traditional Web Design vs. GROWTH-DRIVEN DESIGN



THANK YOU.

