



# **MAKING SENSE OF UX & UI: WHY USER EXPERIENCE AND USER INTERFACE DESIGN ARE CRITICAL FOR CONVERSION**

Peter Troast, Founder & CEO

Energy Circle Webinar Series

*January 30, 2019*

# Energy Circle On The Road

02/05 - 02/06: **Solar Power Northeast** | Boston, MA

02/06 - 02/07: **Better Buildings Vermont** | Burlington, VT

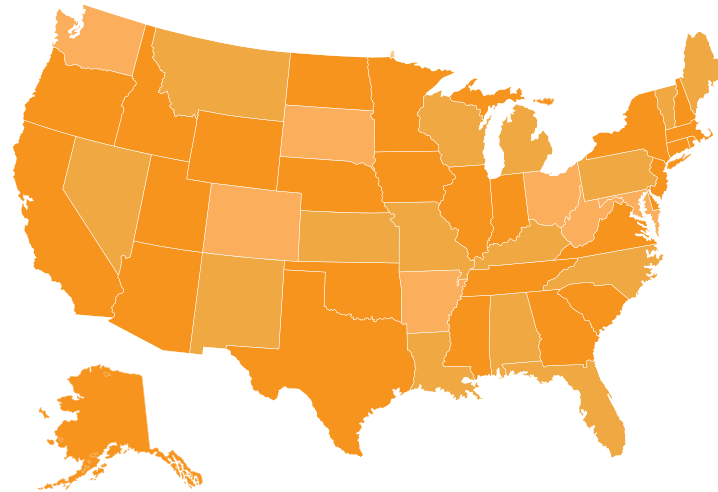
02/11 -02/13: **Dry Climate Forum** | Yosemite, CA

02/11 - 02/12: **Home Performance Coalition NW** | Portland, OR

03/03 - 03/06: **ACCA Optimize** | San Antonio, TX

03/19 - 03/20: **Building Science Conference & Expo** | Bowling Green, KY

04/01 - 04/04: **Home Performance Coalition National** | Chicago, IL



# What We'll Discuss

## 1 UNDERSTANDING THE DIFFERENCE

USER EXPERIENCE (UX)

USER INTERFACE (UI)

## 2 A USER CENTRIC APPROACH

## 3 COMMON CHALLENGES & MISTAKES

Peter Troast, Founder & CEO  
Shawn Cohen, Director of Digital Strategy



**WHAT IS UX?**

**WHAT IS UI?**

(and how are they different?)



# Design Can Be Subjective



# Understanding the Differences

## **User Experience (UX)**

UX refers to how users experience your website. UX is made up of interactions and behavior — for example, the way that visitors on your site engage with its features and functionality, and how they find and consume the content they're most interested in.

## **User Interface (UI)**

UI is an important component of UX and refers to the look and feel or design of your website, as it is displayed to the user (aka a visitor to your website.) All of the factors that contribute to a good UX also aid in a good UI and vice versa; but where UX is made up of components both visible and behind the scenes, UI is made up of front-facing, user focused elements and features.

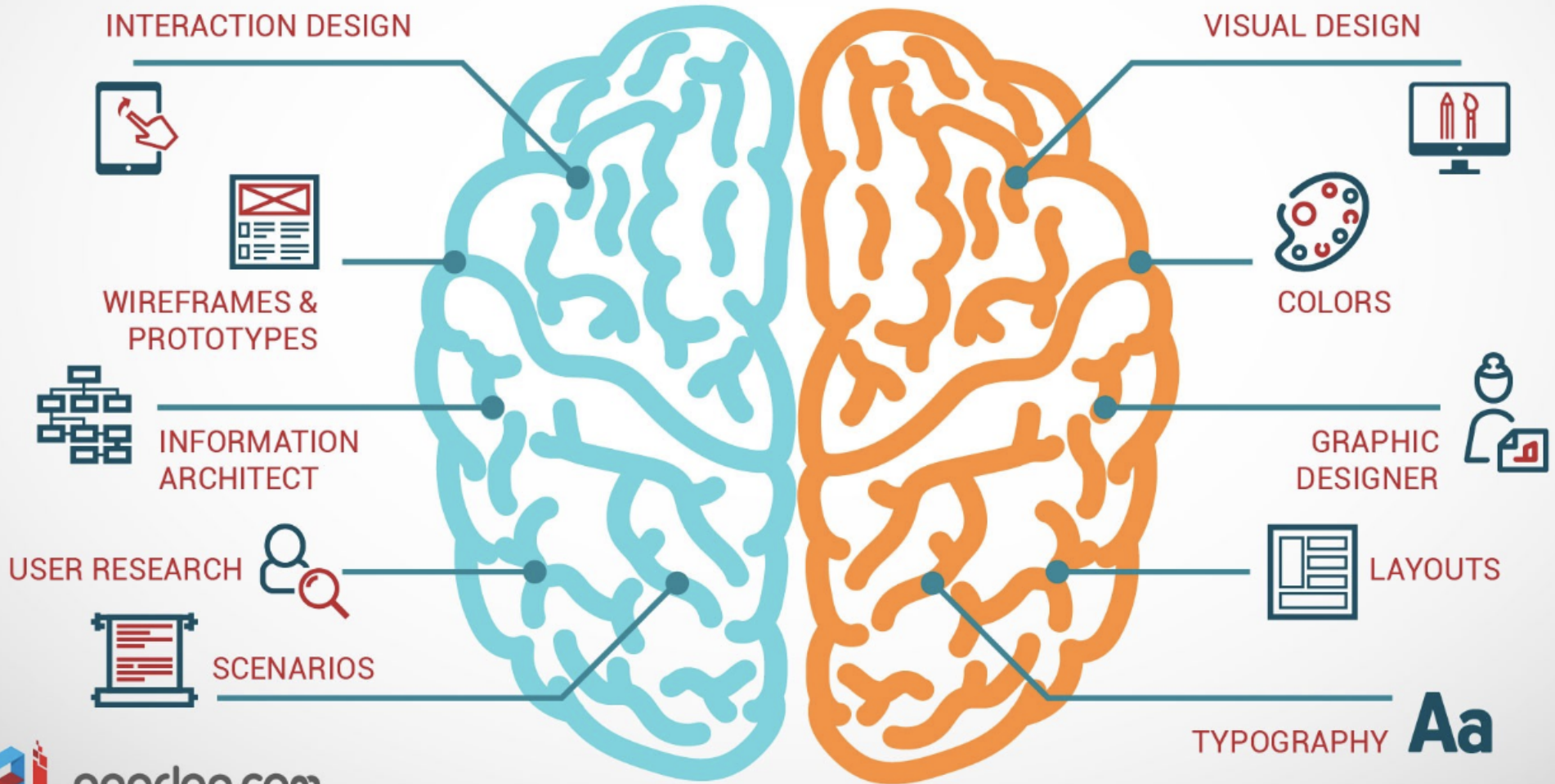
# KNOWING THE DIFFERENCE BETWEEN

# UX

# &

# UI

# DESIGN



# Factors for Good UX

**Navigation:** Easy to navigate, quickly and on any device and/or screen size

**Architecture:** Intuitive organization and structure so content and functions are exactly where the user would expect them to be

**Content & Design Strategy:** Content is helpful and comprehensive. Design is visually pleasing, engaging, and complimentary to (not a distraction from) the content and functionality

**Functionality:** Functionality does no harm! Any features, capabilities, integrations, etc. are straightforward and serve the target user's objective. It makes finding information, viewing content, or accomplishing a task easier and more efficient. It does not have unnecessary negative impacts on the other components of UX or UI.

**Speed & Responsiveness:** The site loads content quickly, and the content is equally as accessible and displays optimally across any device, screen size or operating system. Additionally, elements adjust to accommodate limitations and leverage the advantages of the device or screen size on which they're being displayed. (Links and buttons become more finger-friendly, phone numbers are enabled so users can click to call when using a phone, etc.)

# Components of Good UI

**Thoughtful Style:** The styles, fonts, colors, and graphic elements that make up the design serve the brand, the end user, and the user experience

**Easy on the Eyes:** White (or negative) space is used strategically so as to aid the consumption of content. The goal of properly used white space is to allow the eye to travel easily around the screen, without feeling empty or requiring unnecessary scrolling and navigation to view important content

**Interactive Cues:** All interactive features have visual cues that indicate interactivity. For example — buttons change state when hovered over, or clicked, menus drop down, accordions expand, links underline, images zoom, etc.

**Accessibility:** The site complies with ADA standards so it can be viewed and used by ALL users - including those who may have visual, physical or other impairments.





# **START HERE FOR UX/UI:**

# **YOUR USERS**

(can they accomplish their goals?)

# Personas

## Techie Tom

**Overall Goal:** To save energy and make his house more efficient because it's the smart thing to do, and (secondarily) because it's the right thing to do.

**Level of knowledge:** Very high. Knows what tools are out there, which are best. Up to date on consumer reviews and reports.

**Attitude toward shopping:** I want to buy from people like me, who know their stuff.

**Informational Sources:** Web - blogs, Twitter, Major Media, Green focused media, Renewable media

**What he wants:** I need more information than they have on their site - details, practical experience, proof that they are the experts, and the product will do what I need it to do.

**Motivation for efficiency:** Two-prongs: 1). it's just smarter living. 2). it's the right thing to do for the planet - and (3) soon, people are going to catch on to it, and efficiency is going to be the next big thing. He wants to be at the top of that wave.

**Age:** 35

**Profession:** Software developer

**Location:** Boston

**Personality:** Type A. Over- educated energy geek. Likes to feel engaged, to be a part of the process.

**Home Life:** Married. No kids.

**Hobbies/releases:** Mountain biking, long-distance running.



# Personas

## Heather the Greenie

**Overall Goal:** Wants to feel a part of the green community because those people seem cool, and throw good parties.

**Level of knowledge:** Low. Often falls under the spell of green-washing tactics, and "buys green" because it feels like what she should do. Some uncertainty because she's Republican and socially conservative. Not completely at ease with full-on Green.

**Informational Sources:** Reads People Magazine on the sly, reads Vanity Fair, husband Reads Economist, WSJ

**What she wants:** Heather tends toward immediacy - buys when she sees something in the store, or hears about something that is widely appreciated. She wants to buy from either the cheapest place or the recognizable leader in the field.

**Motivation for efficiency:** Green is the new Coach bag.

**Age:** 29

**Profession:** Former professional in banking industry, now a stay at home mom.

**Location:** Suburbs

**Personality:** Heather is extroverted and funny. She likes to be busy, and appreciates a pretty constant buzz of activity. She is smart, and likes to surround herself with bright and engaged people.

**Home Life:** Heather has 4 children and a black lab. They have two houses - a ski house and a house in the suburbs. During ski season, she feels like she is constantly schlepping between the two places. She'd like something, some how to feel her life could be simpler.





# Personas

## Last-home William

**Overall Goal:** Envisions a dream home in a beautiful location where he and his spouse can spend their retirement years living well, at low operational cost.

**Level of knowledge:** High, but willing to take new input. He has read as much as he can and understands the basic parameters. It's not his first time working with contractors or building a new home. If he trusts you, he'll listen and learn.

**Informational Sources:** Economist, local paper, reference books, trusted friends and family members, sometimes a blog or email newsletter.

**What he wants:** A great overall result. Executive decision-making power. A source of pride and a site for family reunions, now including grandkids. Freedom from high monthly bills. The ability to enjoy retirement, travel.

**Motivation for efficiency:** It's a soft investment. He knows it may not pay off entirely in his own lifetime, but he can afford it. The concept of home.



**Age:** 62

**Profession:** Doctor

**Location:** Suburbs or somewhat rural

**Personality:** Thoughtful, active and generally social, but likes his quiet time.

**Home Life:** William has seen his 3 kids through college. 2 of them are married and have homes of their own. The youngest has a job and her own place to live, although she has not completely solidified her finances yet. William and his spouse like to cook and go for walks together. They host a monthly revolving dinner party with about 10-12 friends, also babyboomers.

# Serving Your Target Users

Target	Needs	Content
Techie Tom	Performance Data Transparency Detail	Detailed Case Studies Planning Worksheet
Heather the Greenie	Eye Candy Health Worries	Photo Galleries Healthy Home Info
Last House William	Cost Data Aging In Place Features Process	Predictable Home blog Elements of a Permanent Home page

# For Most Contracting Businesses: Big 7

1. Do you have the service I need?
2. Do you serve my area?
3. When are you available?
4. How much do you cost?
5. Are you a good company?
6. What is first step to engage you?
7. After hire, what is your process?

# Addressing Different Services

## **Energy Audit**

What is it?

Why do I need it?

What do I get out of it?

How much time does it take?

Do I have to be there?

How do I prepare?

Then what?

## **Solar**

Is my house/roof suited?

How much cost?

How much savings?

How will it look on my house?

Maintenance requirements?

Do I have to clean?

Will it hurt my roof?

What happens during power outages?

What if it's cloudy for 2 weeks?

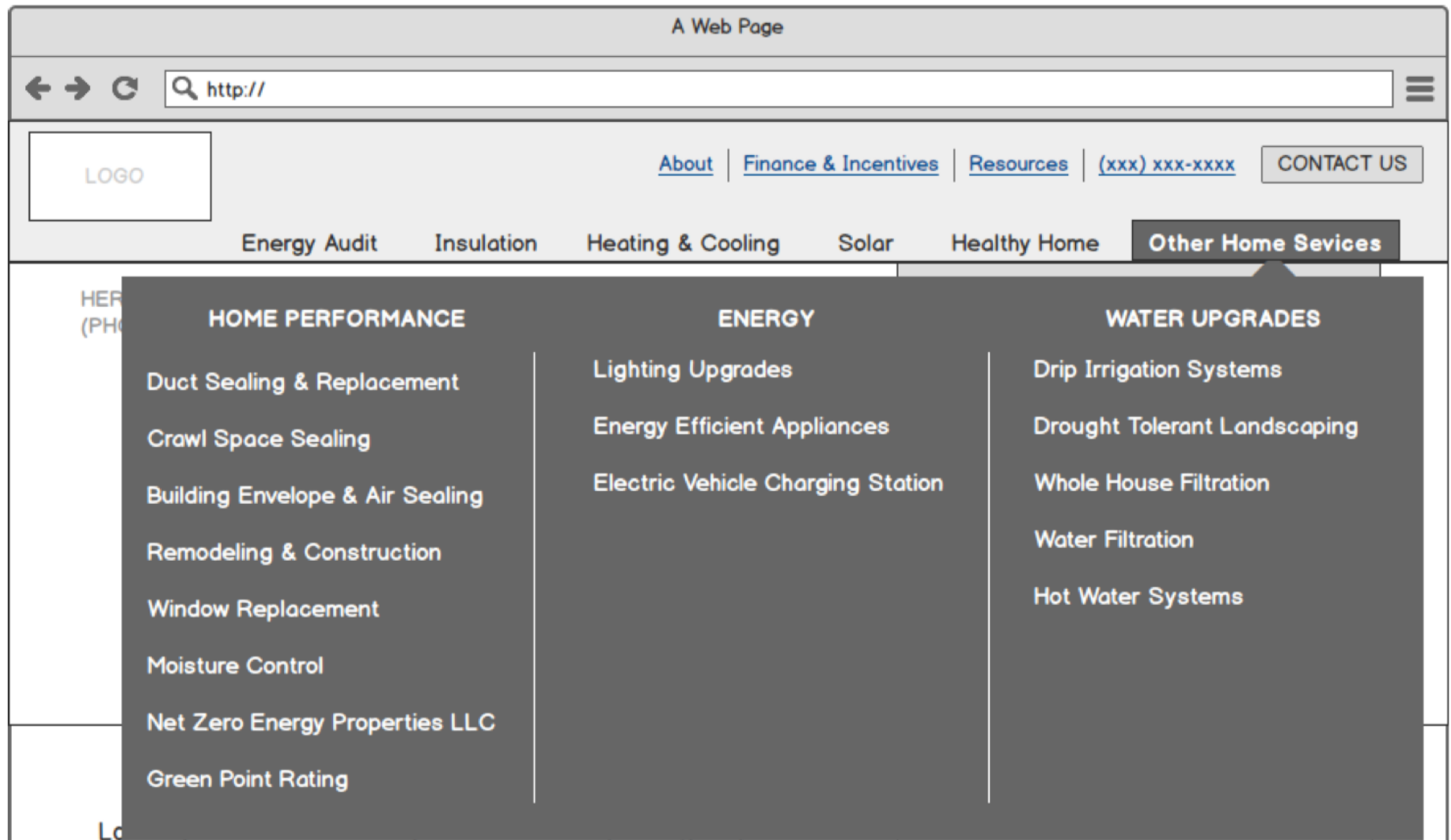


# **COMMON CHALLENGES & MISTAKES**

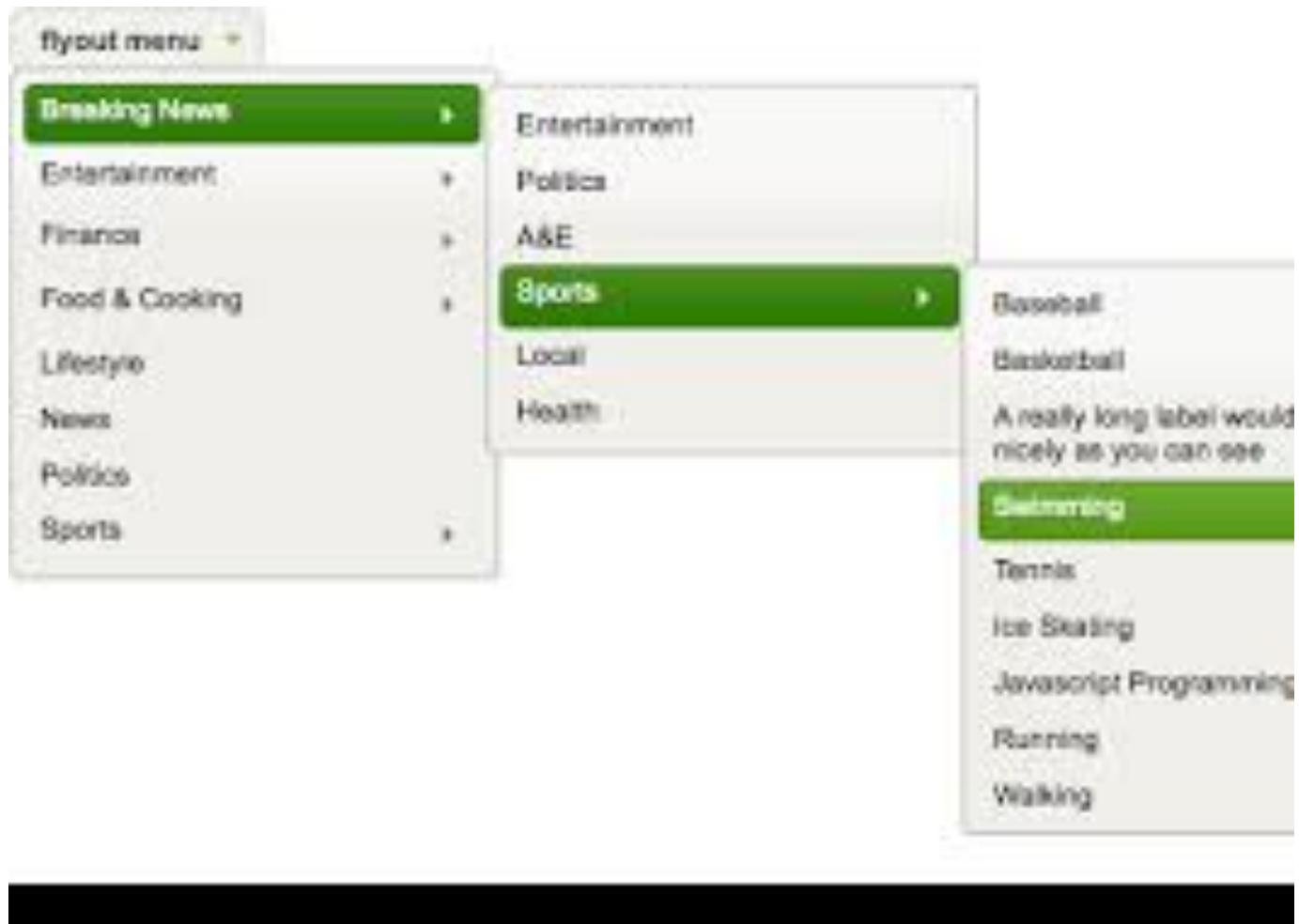
# Navigation: Handling Lots of Services

<a href="#">About</a>	<a href="#">Energy Audits</a>	<a href="#">Upgrades</a>	<a href="#">Heat &amp; Cool</a>	<a href="#">Solar</a>	<a href="#">Net Zero</a>	<a href="#">Other Services</a>	<a href="#">Finance &amp; Incentives</a>	<a href="#">News</a>	<a href="#">Contact</a>
		Insulation				Drip Irrigation Systems			
		Duct Sealing & Replacement				Drought-Tolerant Landscaping (Xeriscaping)			
		Lighting Retrofits				Water Conservation			
		Moisture Control				Electric Vehicle Charging Station			
		Building Envelope & Air Sealing				Whole House Air Filtration			
		Crawl Space Sealing				Water Filtration			
		Pipe Insulation				Saltwater Pool Conversion			
		Window Replacement				Green Point Rating			
		Hot Water Systems				Remodeling & Construction			
		Whole House Fan							
		Energy Efficient Appliances							
		Daylighting							

# Navigation: Using Mega Menus



# Complicated Flyout Menus

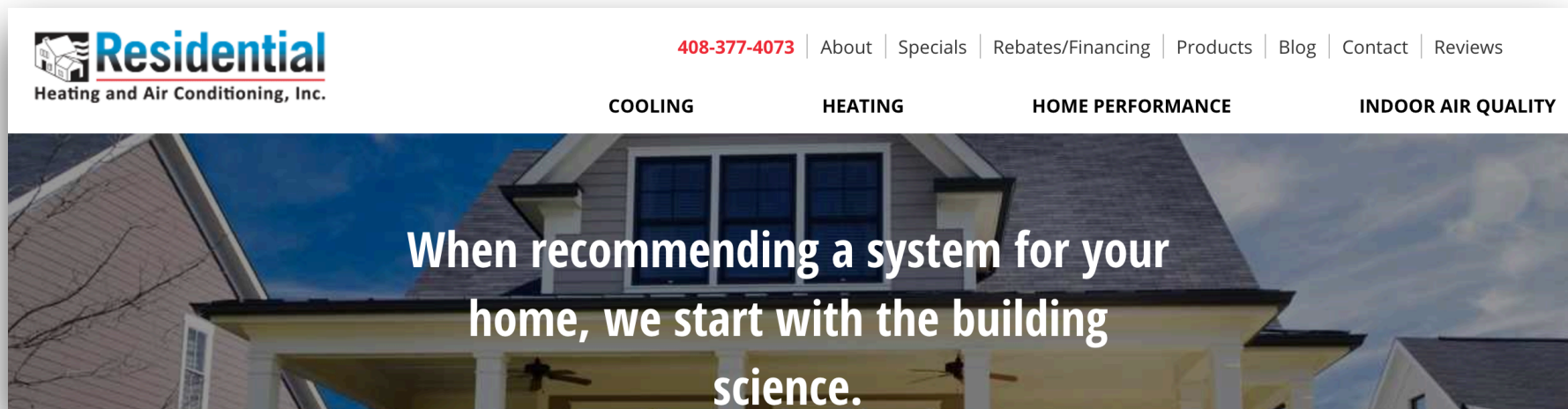
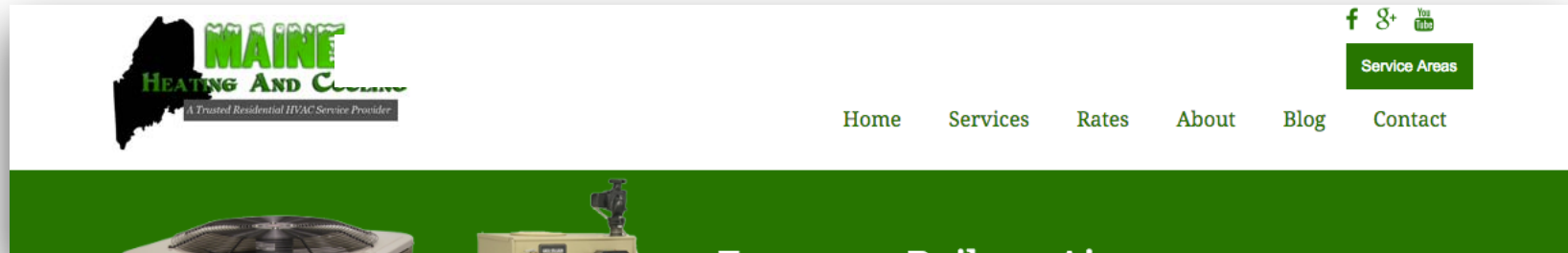




# Navigation: Do You Like Hamburgers?




# Navigation: Generic “Services”





# Navigation: User-Relevant Labeling

HEATING AIR CONDITIONING HOME PERFORMANCE SOLAR ENERGY AUDITS COMMERCIAL SERVICES




Contact us now for expert heating and cooling services.

Heating Air Conditioning Insulation Connected Home Energy Audits



IMPROVE YOUR COMFORT

 SEARCH 🔍 (844)-97-SOLAR FREE QUOTE

For Home For Business For Community About Gallery Learn Contact

# Hidden Content: Good & Bad

The screenshot shows a website header with navigation links: Digital Marketing, Web Platform, Lead Gen Results, Blog, About, Careers, and a phone number 207.618.6470. Below the header is a sub-header for Webinars, Whitepapers & Guides. The main content area is a grid of six orange boxes, each representing a marketing service. The first box on the left is a dark blue sidebar containing a list of services under the heading 'SEARCH ENGINE MARKETING (SEM)'. The other five boxes are arranged in a 2x2 grid (with the bottom-right cell empty) and each contains an icon and a service name: a computer monitor for 'CONTENT MARKETING', a storefront for 'ORGANIC & LOCAL SEO', two people for 'PAID FACEBOOK ADS', an envelope with an @ symbol for 'EMAIL MARKETING', and two hands shaking for 'REVIEW GENERATION'. The bottom row of the grid has two more boxes, one with a play button icon and one with a gear icon, but they are partially cut off.

**Digital Marketing** Web Platform Lead Gen Results

Blog About Careers | 207.618.6470

Webinars Whitepapers & Guides

**SEARCH ENGINE MARKETING (SEM)**

- Data-Driven Industry Knowledge
- Hands-On / Manual Campaign Build & Optimization
- Audience Targeting and Remarketing Lists for Search Ads (RLSA)
- Mobile & Video Advertising
- Campaign Landing Pages
- A/B Testing
- Call Tracking
- Advanced Geo Targeting

**CONTENT MARKETING**

**ORGANIC & LOCAL SEO**

**PAID FACEBOOK ADS**

**EMAIL MARKETING**

**REVIEW GENERATION**


# Hidden Content: Good & Bad

The screenshot shows the Energy Circle website with a navigation bar at the top. The navigation bar includes links for Digital Marketing, Web Platform, Lead Gen Results, Blog, About, Careers, and a Contact button with the phone number 207.847.3644. Below the navigation bar, there are three main service sections, each with an icon, a brief description, and a list of services.

**Digital Marketing** | **Web Platform** | **Lead Gen Results** | **energy circle** | **Contact** | **207.847.3644**


Webinars | Whitepapers & Guides

## SEARCH ENGINE MARKETING (SEM)

 We manage and optimize your Google and Bing Ads for maximum ROI.


- Data-Driven Industry Knowledge
- Hands-On Daily, Weekly Optimization
- Audience Targeting and Remarketing
- Mobile & Video Advertising
- Campaign Landing Pages
- A/B Testing
- Call Tracking
- Google Certified

## CONTENT MARKETING


 We produce custom pages, posts, images, infographics and videos just for your business.

- Content Strategy & Production
- Audience & Keyword Research
- Content Distribution & Promotion
- Social Media Distribution
- Flexible Pricing System
- Image Optimization

## ORGANIC & LOCAL SEO

 We optimize to drive visibility and search rankings.


- Google My Business & Google Post Optimization
- Technical On-Site SEO





# Hidden Content: Collapsing Panels

Careers Email Sign-up 617 477 8495 Refer-A-Friend Free Quote

 BOSTON SOLAR

[Residential Solar](#) Commercial Solar Roofing Services Solar Blog & Resources About Us

- How much do solar panels cost in 2019? +
- How much will it cost me and my family to solar power my home? +
- How much will I save with solar panels? +
- Is solar energy more expensive than utility rates? +
- Is solar financing available? +
- What is the latest news in Massachusetts solar energy incentives? +
- How long will it take to install my system? -**

For residential customers, the solar panel installation is typically a one or two day process. From the moment you sign a contract, it typically takes between 90 to 120 days to install the system and get it turned on. [View our average installation timeline by clicking here.](#)

- What kind of maintenance do solar panels require? +
- Will I still need to use the electric utility? +
- Is there a warranty on my solar system? +

# Conversion: Information Hierarchy

**boobie**

## Your Primary Headline

*your secondary headline*

**Introduction**  
Add some more descriptive content here to describe your product or service in a more detailed way. This could also be an explanation of the details of your offer if you are running a promotion.

**1 Very Important Point**  
This is the first and best key benefit or feature that describes the value of your product.

**2 Another Key Point**  
This is the second best key benefit that talks about a different aspects of your product.

**3 Another Key Point**  
This is the second best key benefit that talks about a different aspects of your product.

A Practical Guide to  
**Conversion Centered Design**  
by Author Name

**Name\***

**Email\***

**Company**

**Phone**

\*Required Fields **Download Now!**

We will never sell your email address to any 3rd party or send you nasty spam. Promise.

**Author Bio**  
This is the authors biography for the ebook. This biography will deliver detailed insights into the authors background. This ebook is full of variety and great instructional methods. The knowledge and expertise displayed in this ebook will allow you to grow your business.  
- Author Name  
Author, A Practical to Conversion Centered Design

**Testimonial**  
*"I have found this ebook to deliver detailed insights into a great topic. This ebook is full of variety and great instructional methods. The knowledge and expertise displayed in this ebook has allowed me to grow my business."*  
- Mark Wright  
Founder & CEO, Another Great Company

Copyright 2012 ThatGreatCompany

# Conversion: Information Hierarchy

**boobie**

## Your Primary Headline

*your secondary headline*

**6** Preview Chapter One

### A Practical Guide to Conversion Centered Design

by Author Name

#### **4** Introduction

Add some more descriptive content here to describe your product or service in a more detailed way. This could also be an explanation of the details of your offer if you are running a promotion.

**1** **Very Important Point**  
This is the first and best key benefit or feature that describes the value of your product.

**2** **Another Key Point**  
This is the second best key benefit that talks about a different aspects of your product.

**3** **Another Key Point**  
This is the second best key benefit that talks about a different aspects of your product.

**1** Name\* \*Required Field

John Doe

**3** →

**2** Email\* Privacy Policy

john@doe.com

**2** Download The Guide Now

We will never sell your email address to any 3rd party or send you nasty spam. Promise.

**7** Downloaded 2375 Times

**5** Free For A Limited Time Only

**7** A VALUE OF ~~\$14.95~~

#### **Author Bio**

This is the authors biography for the ebook. This biography will deliver detailed insights into the authors background. This ebook is full of variety and great instructional methods. The knowledge and expertise displayed in this ebook will allow you to grow your business.

- Thomas Day  
Author, A Practical to Conversion Centered Design

**7** "I have found this ebook to deliver detailed insights into a great topic. This ebook is full of variety and great instructional methods. The knowledge and expertise displayed in this ebook has allowed me to grow my business."

- Mark Wright  
Founder & CEO, Another Great Company

Copyright 2012 ThatGreatCompany



# Conversion: Is Shorter Always Better?

**Høstvarmerisolerings - spar op til 3-351 kr. på varmeregningen**

Med gratis, uforpligtende isoleringstjek får du:

- ✓ En gratis, uforpligtende isoleringstjek af dit hus
- ✓ En gratis, uforpligtende isoleringstjek af dit hus
- ✓ En gratis, uforpligtende isoleringstjek af dit hus

**Hvad vil af lever meget, du kan spare?**

Med gratis, uforpligtende isoleringstjek får du:

- ✓ En gratis, uforpligtende isoleringstjek af dit hus
- ✓ En gratis, uforpligtende isoleringstjek af dit hus
- ✓ En gratis, uforpligtende isoleringstjek af dit hus

**Hvad vil af lever meget, du kan spare?**

Med gratis, uforpligtende isoleringstjek får du:

- ✓ En gratis, uforpligtende isoleringstjek af dit hus
- ✓ En gratis, uforpligtende isoleringstjek af dit hus
- ✓ En gratis, uforpligtende isoleringstjek af dit hus

**Hvad vil af lever meget, du kan spare?**

Med gratis, uforpligtende isoleringstjek får du:

- ✓ En gratis, uforpligtende isoleringstjek af dit hus
- ✓ En gratis, uforpligtende isoleringstjek af dit hus
- ✓ En gratis, uforpligtende isoleringstjek af dit hus

**Hvad vil af lever meget, du kan spare?**

Med gratis, uforpligtende isoleringstjek får du:

- ✓ En gratis, uforpligtende isoleringstjek af dit hus
- ✓ En gratis, uforpligtende isoleringstjek af dit hus
- ✓ En gratis, uforpligtende isoleringstjek af dit hus

**Høstvarmerisolerings - spar op til 3-355 kr. på varmeregningen**

Med gratis, uforpligtende isoleringstjek får du:

- ✓ En gratis, uforpligtende isoleringstjek af dit hus
- ✓ En gratis, uforpligtende isoleringstjek af dit hus
- ✓ En gratis, uforpligtende isoleringstjek af dit hus

**Hvad vil af lever meget, du kan spare?**

Med gratis, uforpligtende isoleringstjek får du:

- ✓ En gratis, uforpligtende isoleringstjek af dit hus
- ✓ En gratis, uforpligtende isoleringstjek af dit hus
- ✓ En gratis, uforpligtende isoleringstjek af dit hus

**Hvad vil af lever meget, du kan spare?**


Med gratis, uforpligtende isoleringstjek får du:

- ✓ En gratis, uforpligtende isoleringstjek af dit hus
- ✓ En gratis, uforpligtende isoleringstjek af dit hus
- ✓ En gratis, uforpligtende isoleringstjek af dit hus

**Hvad vil af lever meget, du kan spare?**

Med gratis, uforpligtende isoleringstjek får du:

- ✓ En gratis, uforpligtende isoleringstjek af dit hus
- ✓ En gratis, uforpligtende isoleringstjek af dit hus
- ✓ En gratis, uforpligtende isoleringstjek af dit hus

 **63% more conversions**  
Statistical Confidence 98%

# Conversion: The Trap Page

**WOLFGANG'S**  
COOLING & HEATING  
Doing What It Takes to Get It Right!

24/7 EMERGENCY SERVICE

CALL NOW & SCHEDULE TODAY  
**(480) 360-6672**

**#1 A/C Experts in Phoenix**  
THE RIGHT CHOICE FOR THE ULTIMATE COMFORT & VALUE SINCE 1982 | 5-STAR RATED

CALL NOW & RECEIVE  
**\$50 OFF**  
A/C Service Repair  
Cannot be combined with any other offers

Schedule A Service  
Submit form to schedule your service.

**What Your Neighbors Are Saying...**

*"Very, very pleased with Wolfgang's. We were dreading replacing our 19-year-old units. But Ish walked us through the process, from the logistics of installation to the ease of financing. We couldn't be happier. Khris and his installation team were fabulous. Khris took the time to familiarize us with the equipment and made sure we were comfortable with operation. Everyone was accessible, polite, hard working, and delivered a high-quality product. We will use these guys every time."*

Michelle H.  
Client

**Prompt, Professional Service. Guaranteed.**

- ✓ Upfront Pricing
- ✓ Family Owned and Operated
- ✓ Licensed and Insured
- ✓ Emergency Service
- ✓ Satisfaction Guarantee

# Conversion: High Value/Non-threatening

**We help you capture the money-saving benefits of clean solar energy**

Is solar right for you? Will solar work on your roof or land? How much would solar cost for you? How much could you save? We make it easy to get the answers to all your solar questions.

Simply fill out the form to schedule a call with one of our non-commissioned solar experts.

Residential or Commercial (Choose One)\*

First Name\*

Last Name\*

Phone\*

Email\*

Zip\*

GET STARTED



# QUESTIONS?

Peter Troast

[peter@energycircle.com](mailto:peter@energycircle.com)

Shawn Cohen

[shawn@energycircle.com](mailto:shawn@energycircle.com)