



AGENDA

- ▶ Kick off and Road Map
- ◆ Design Thinking Workshop
- ◆ Data Driven Approach
- Design Process
- User Test
- Visual Identity
- Final achievements



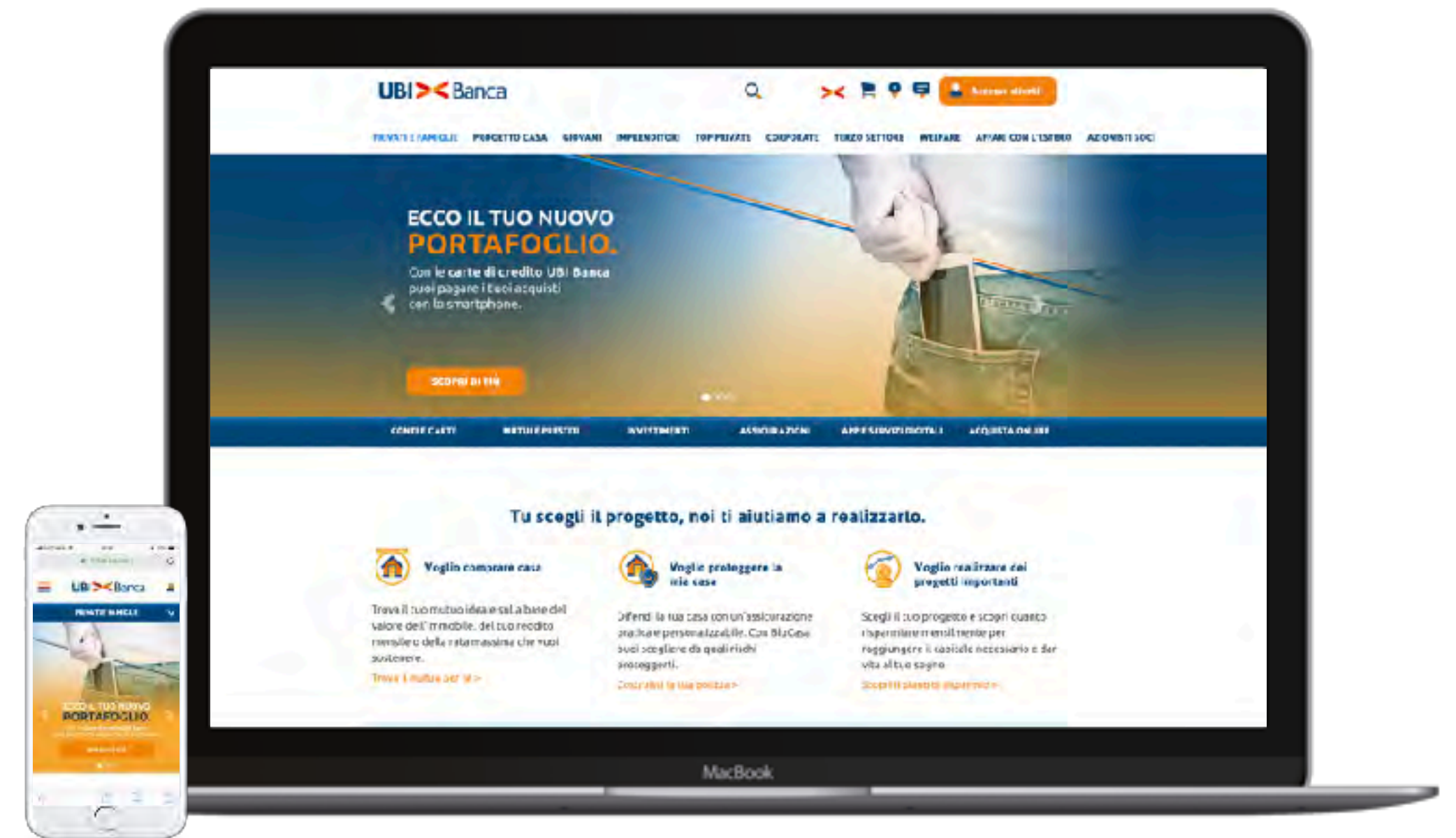
KICK OFF AND ROAD MAP



PROJECT GOAL

EXPECTATIONS

The main purpose of the project was to renew the UBI Banca Web Identity, using the site as a Lead generator and sales channel to support the Business objectives, improving the cross device User Experience and user involvement thanks to the customization of the content.



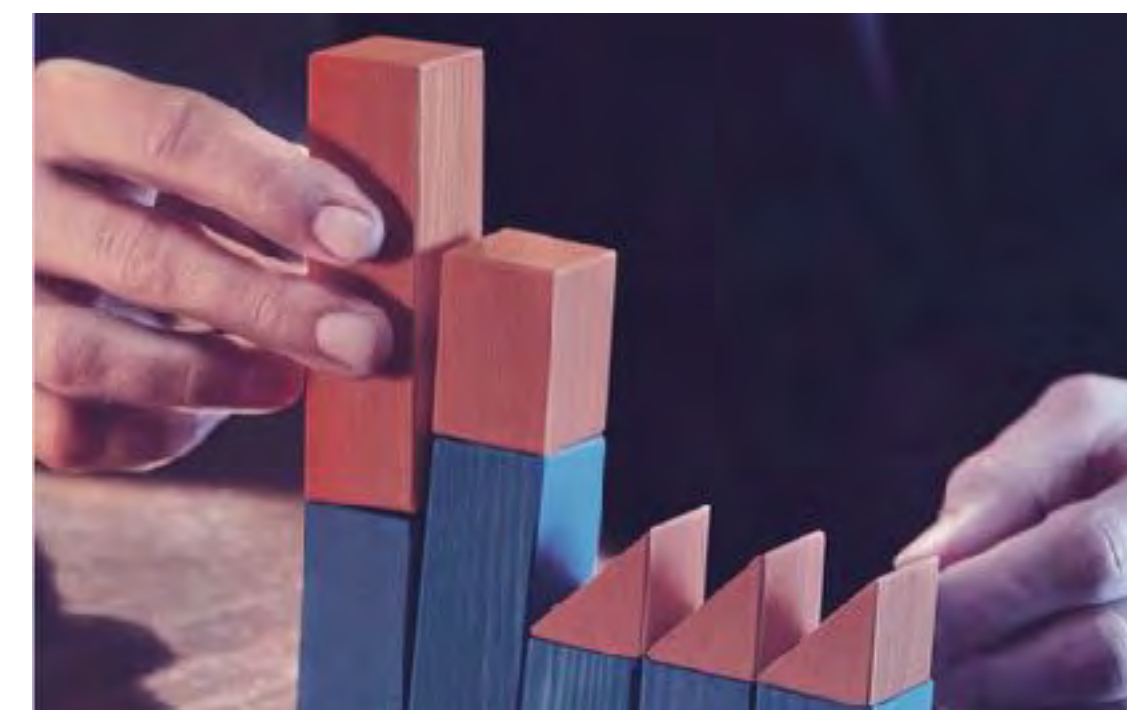
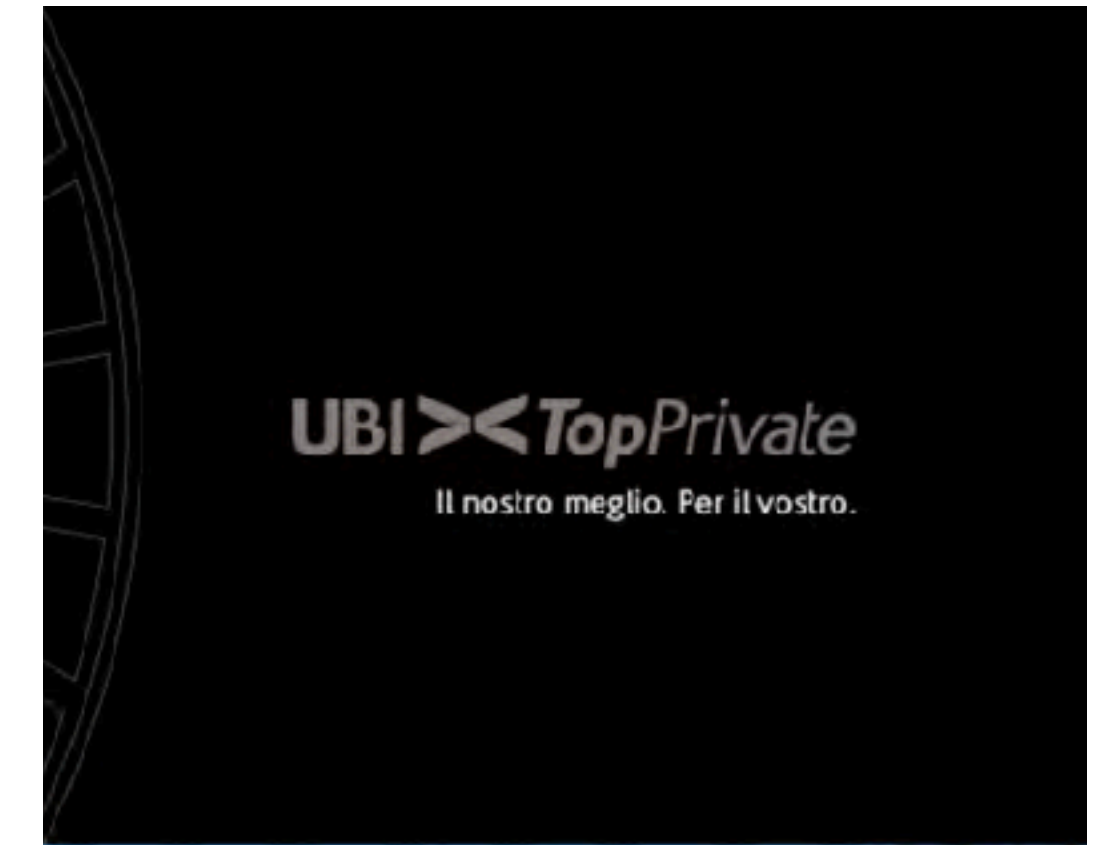
On the left the Desktop and Mobile Homepage of the public site ubibanca.com before redesign

CRITICAL ISSUES

PLURALITY OF STAKEHOLDERS

Since the beginning of the project two substantial criticalities have been identified linked to two very different areas. The first refers to the internal political context of the UBI Banca structure and especially of its online presence. In fact, the site has always been the only reference portal for all independent departments in the Retail and Non-Retail world. Inside it, commercial identities coexist with very different needs (eg. Private / Family and Corporate Investment & Banking) which often tend to overlap due to a complex hierarchical structure.

From top left: Privati 2018 advertising campaign, Top Private communication, Clb corporate images, UBI Community 2018 advertising campaign



CRITICAL ISSUES

VISUAL IDENTITY

The second major critical issue concerns the inconsistency of visual communication adopted by the UBI Banca brand across all branches, from the branches to the online showcase. The online identity, unlike the offline one, has been codified over the years by a captivating but difficult to maintain illustrated language. This illustrated communication also clashes today with the visual variety used by the brand for marketing campaigns and to explain the different Non Retail realities (eg Corporate Investment & Banking, Top Private ..).

From top left: retail advertising banner 2018, example of iconographic style used on the site, advertising banner for retail companies 2018





THE PROJECT IN NUMBERS

7
MONTHS

Duration of the project

50 PEOPLE INVOLVED
(between stakeholders and end users)

5 WORKSHOP

4 CO-DESIGN SESSIONS

4 USER TESTING SESSIONS

7 UI EVOLUTIONS



DESIGN THINKING

WORKSHOP



METHODOLOGY OF THE WORKSHOP

GENERAL ASSETS

The design process, according to a Design Thinking approach, requires moments of concrete confrontation with all project stakeholders, not only the possible users but also the people who are directly part of it, such as employees and representatives.

The workshops that were planned for this project had the objective of creating this moment of confrontation through various modes of interaction between the participants, individual and collective.

1_ONBOARDING

2_ICEBREAKING

3_ACTIVITIES



WORKSHOP GOALS

1_WS_PERSONAS

The first Workshop realized was fundamental for the creation of potential user profiles, better known as **Personas**.

3_WS_ARCHITECTURE

The third Workshop (together with the second) helped us to get all the elements necessary for defining the macro **Statements**.

5_WS_VISUAL CODING

The main purpose of this Workshop was to identify the visual language with the highest number of consents on which to base the project of new Visual Identity of the UBI Banca reality, online and offline.

2_WS_TAXONOMY

The second Workshop helped us to get all the necessary elements for defining the macro **Statements**.

4_WS_PERSONALIZATION

In this Workshop the objective was to identify the pain points and the opportunities of a hypothetical customer journey recreated with the participants.

WORKSHOP APPROACH

WITH PEOPLE

Not always having the possibility of being able to involve real customers, the Workshops were carried out with the involvement of UBI Banca colleagues from different sectors and departments. They were encouraged to put themselves in the shoes of the Personas traced in the first Workshop and through group work, collective discussions and punctual interventions proved to be strategic in the expression of effective and relevant points of view.

From the left we find: a moment of practical activity of the Personalization Workshop, a group activity of the Taxonomy Workshop and finally a click of the Question Time during the Visual Coding Workshop



WORKSHOP APPROACH

IN STUDIO

The second phase of each Workshop session saw the decoding in the studio of the results and the material produced and collected during the sessions. Each post-it, quotation and photographic memory of the session has been put into a system and re-elaborated so as to be able to provide a secure base with which to continue in the subsequent phases of design.



From the left we find: an image that narrates the reworking of the two Taxonomy and Architecture Workshops, an image that summarizes the decoding of the Personas Workshop results and finally a summary scheme emerged from the Customer Journey during the Personalization Workshop

WORKSHOP OUTPUT

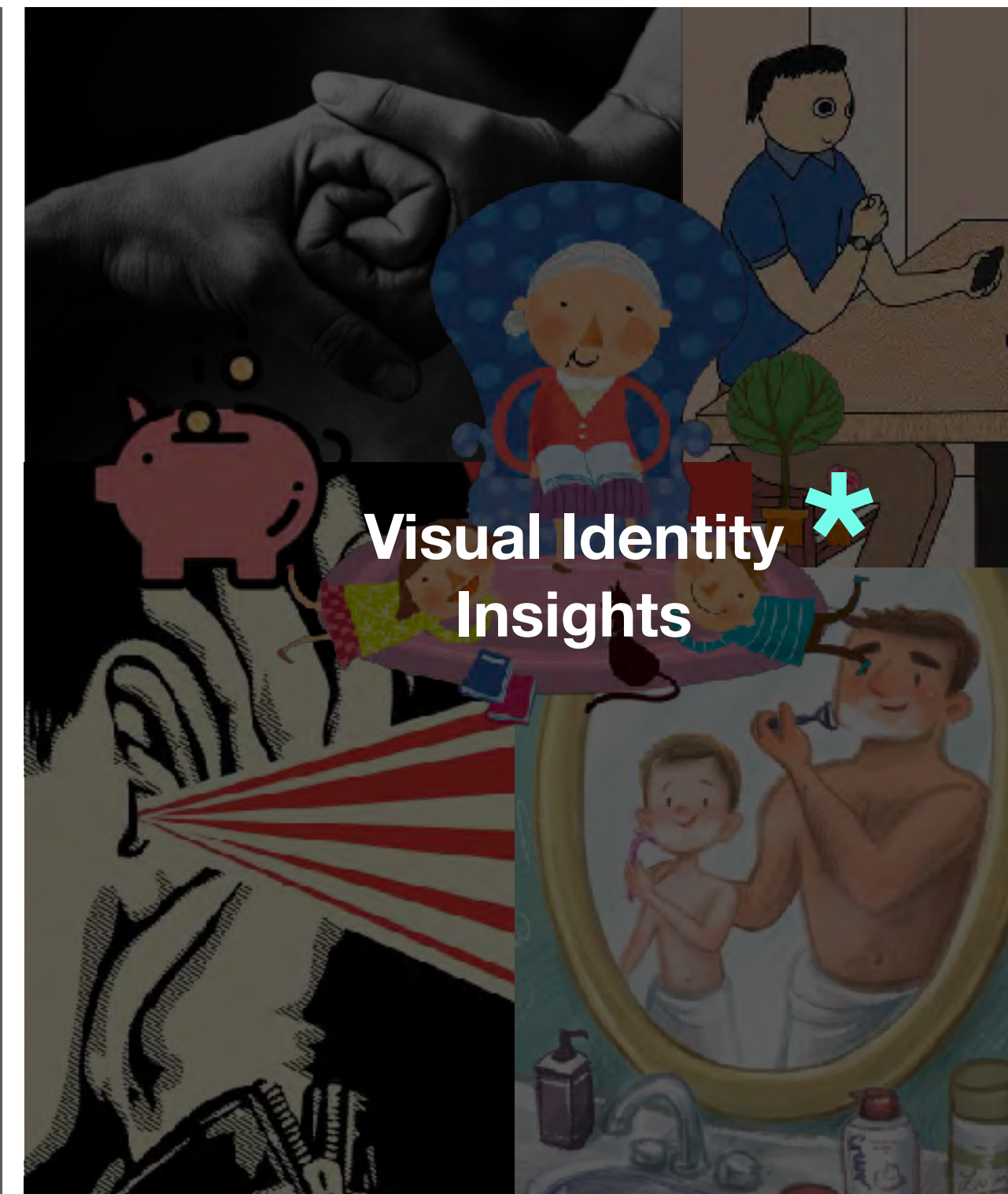
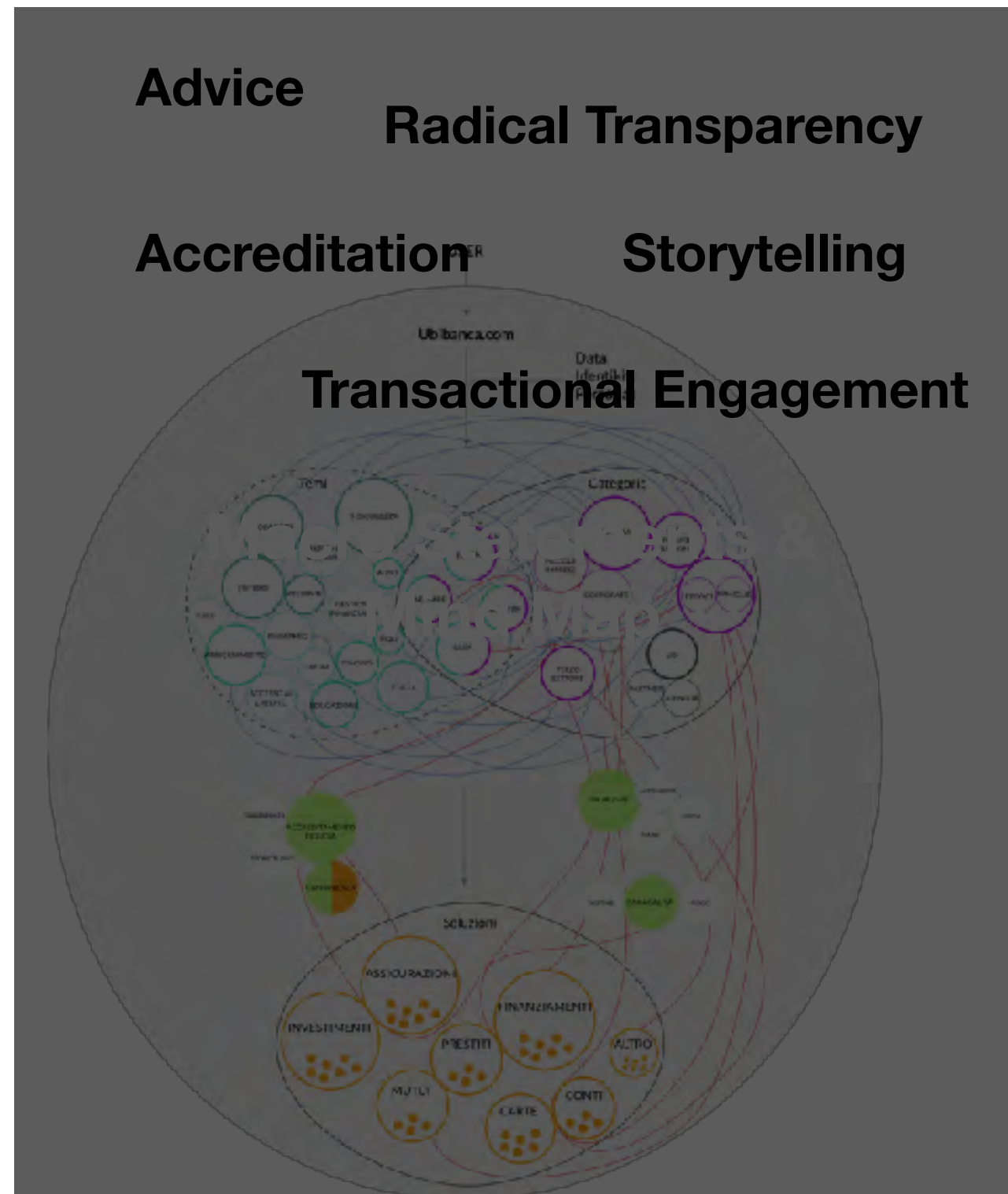
La Supermamma Single
Marta, 35 anni, single

Storia
Marta è una donna professionista, mamma-azienda, multitasking ed è una donna con molti impegni lavorativi con il ruolo genitoriale.

Emozioni
Marta è una donna spensierata ed organizzata, ha sviluppato questi tratti grazie alla necessità di poter contare solo su se stessa. A fine giornata però le piace rifugiarsi in un momento a termine molto sereno con le sue sole forze.

Scenario
Marta ha già svolto una ricerca ed è affondata su Ubibanca.com. Qui intende portare a termine il suo obiettivo nel minor tempo possibile ottimizzando al meglio lo strumento online evitando tutte le pratiche che le è possibile proprio tramite il portale.

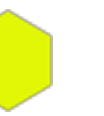
Retail and Non Retail Personas



* Reference to the chapter dedicated to Visual Identity



DATA DRIVEN APPROACH



DATA DRIVEN APPROACH



WHAT DO WE MEAN BY DATA DRIVEN APPROACH?

With a view to an approach aimed at customizing the contents, assuming a Null User case (a user of which there is no information), it becomes necessary to provide the user with elements to present themselves and identify themselves while browsing the site through the preparation of **Mindsets** in which we can recognize, specific **themes** and finally **products**, considered the real point of arrival of his online experience. We have summarized this approach in the Engagement Funnel.

The Data Driven approach applied in the project of the new public site ubibanca.com follows two logics:

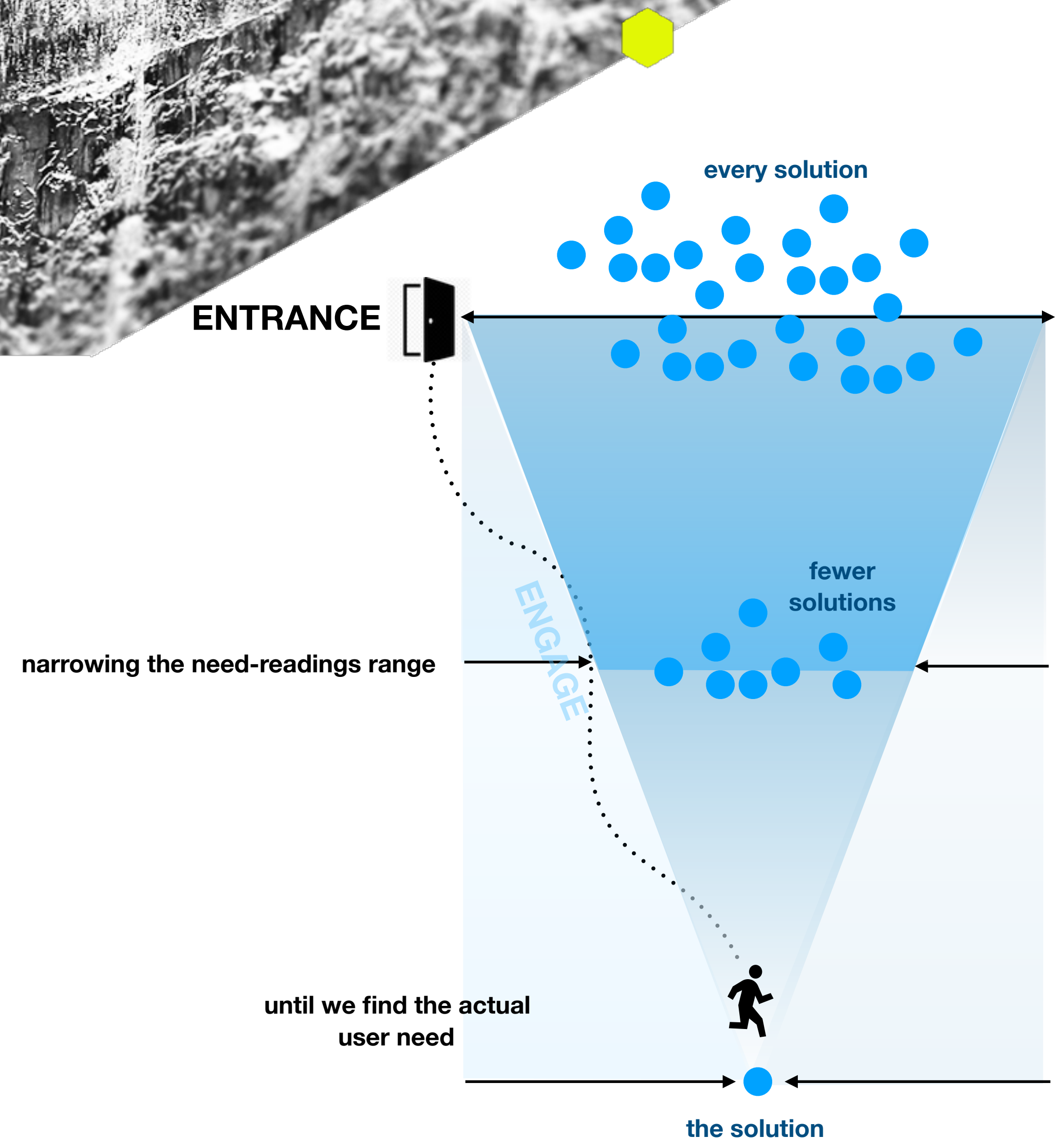
- **Customization logics:** it includes the proposition of personalized content based on the degree of user knowledge.
- **User-customer tracking:** provides for the recognition of customer users who navigate the site, in correspondence with access to the reserved area, by associating the user cookie with the customer's encrypted ndg.

DATA DRIVEN APPROACH

ENGAGEMENT FUNNEL

With a view to an approach aimed at personalizing the contents, assuming a Null User case (user of which no you have information), it becomes necessary to provide elements to the user to introduce themselves and identify themselves in during your navigation within the site through the predisposition of Mindsets in which one can recognize, Specific Themes and finally Products, considered the true point of arrival of his online experience. We have summarized this approach in the Engagement Funnel.

On the right: Engagement Funnel illustrating the user's journey through the platform, from the initial engagement to the point of arrival.



BEHAVIORAL MODEL

USER PROFILE

In order to build the predictive model of user behavior it is necessary to identify and. Cluster users according to clear and well-defined matrices.

PRINCIPLES OF DESIGN

Design principles are a tool to create a better user experience, they have helped us to guide decisions throughout the design phase. They are transversal to the type of marketing model to which they apply.

REAN MODEL

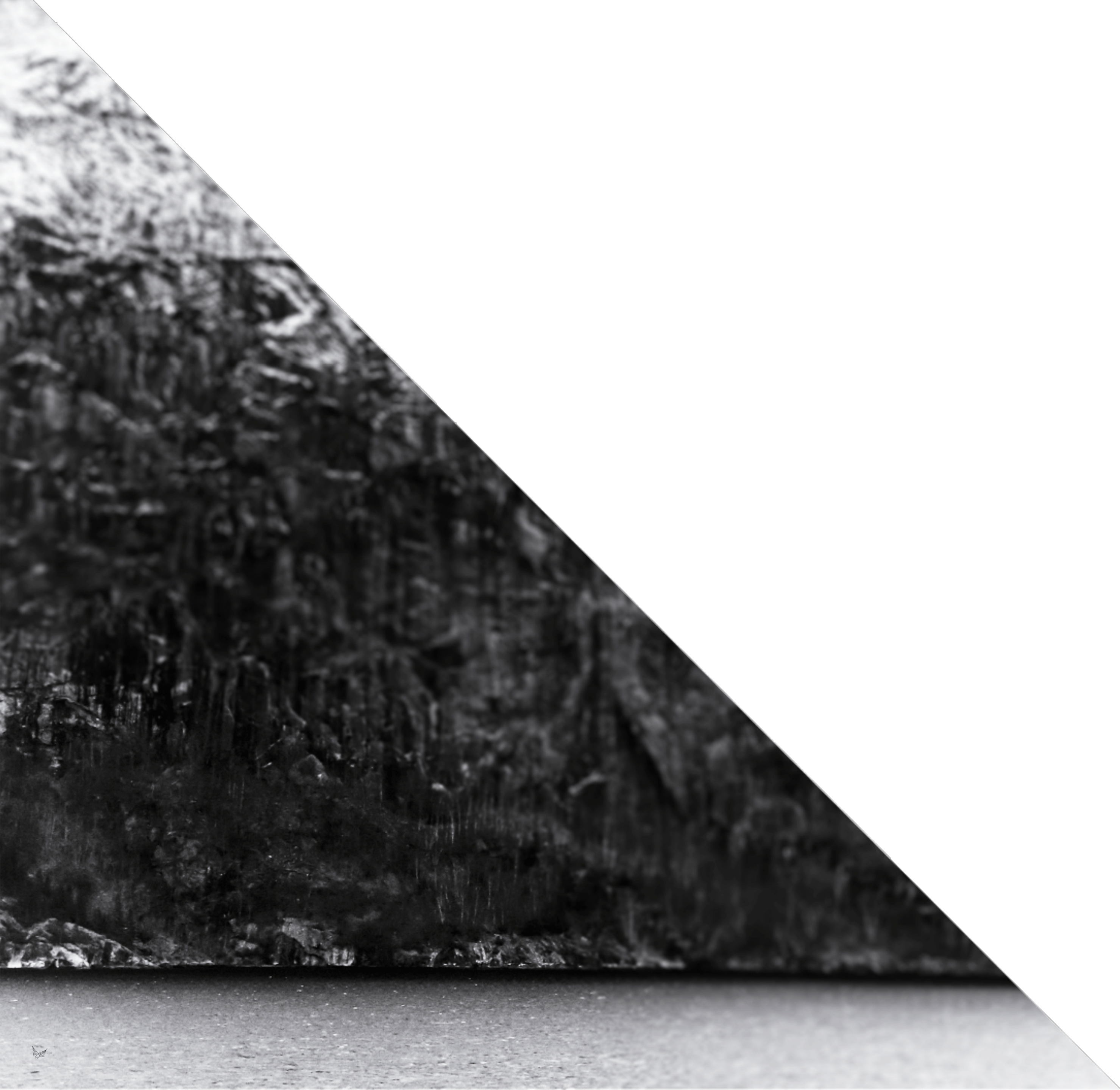
The proposed marketing model was REAN.

Reach - Methods to attract users to their offer. It also includes methods of raising public awareness of its offer

Engage - How people interact with their business. It is the first step compared to the action that helps the potential customer to make a decision.

Activate - Demonstration by the customer of interest towards one or more products

Nurture - Methods to re-engage the user who has already expressed an interest.



DESIGN PROCESS





DESIGN KEYPOINTS



Lean Usability Test

AS-IS insights



Google Analytics



Engagement Funnel

Data Driven Approach



Workshop Activities

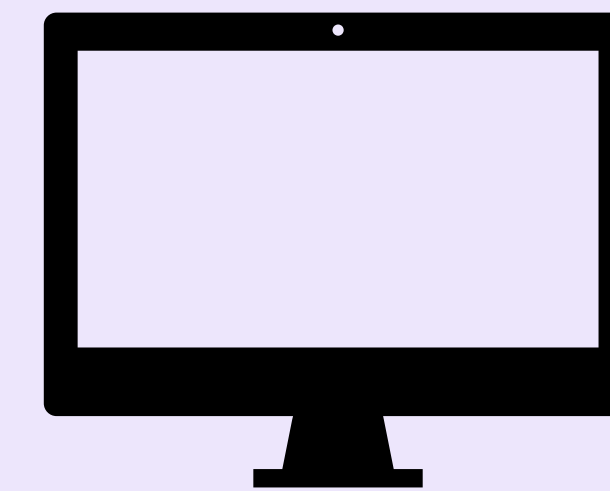
DTW

AS-IS INSIGHTS

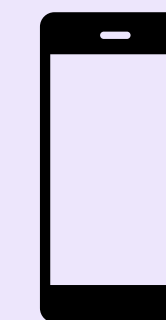
ARRIVAL CHANNELS

ANALYTICS

To support the activities with stakeholders it was necessary to make an As-Is analysis of the ubibanca.com website in order to identify the weaknesses most frequently encountered by real users. In this regard, we have analyzed the Analytics statistics from which the various information showed that: the use of the public site ubibanca.com takes place mostly through Desktop devices.



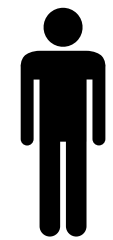
80%



15%

Data extracted in the period from 08/2017 to 08/2018

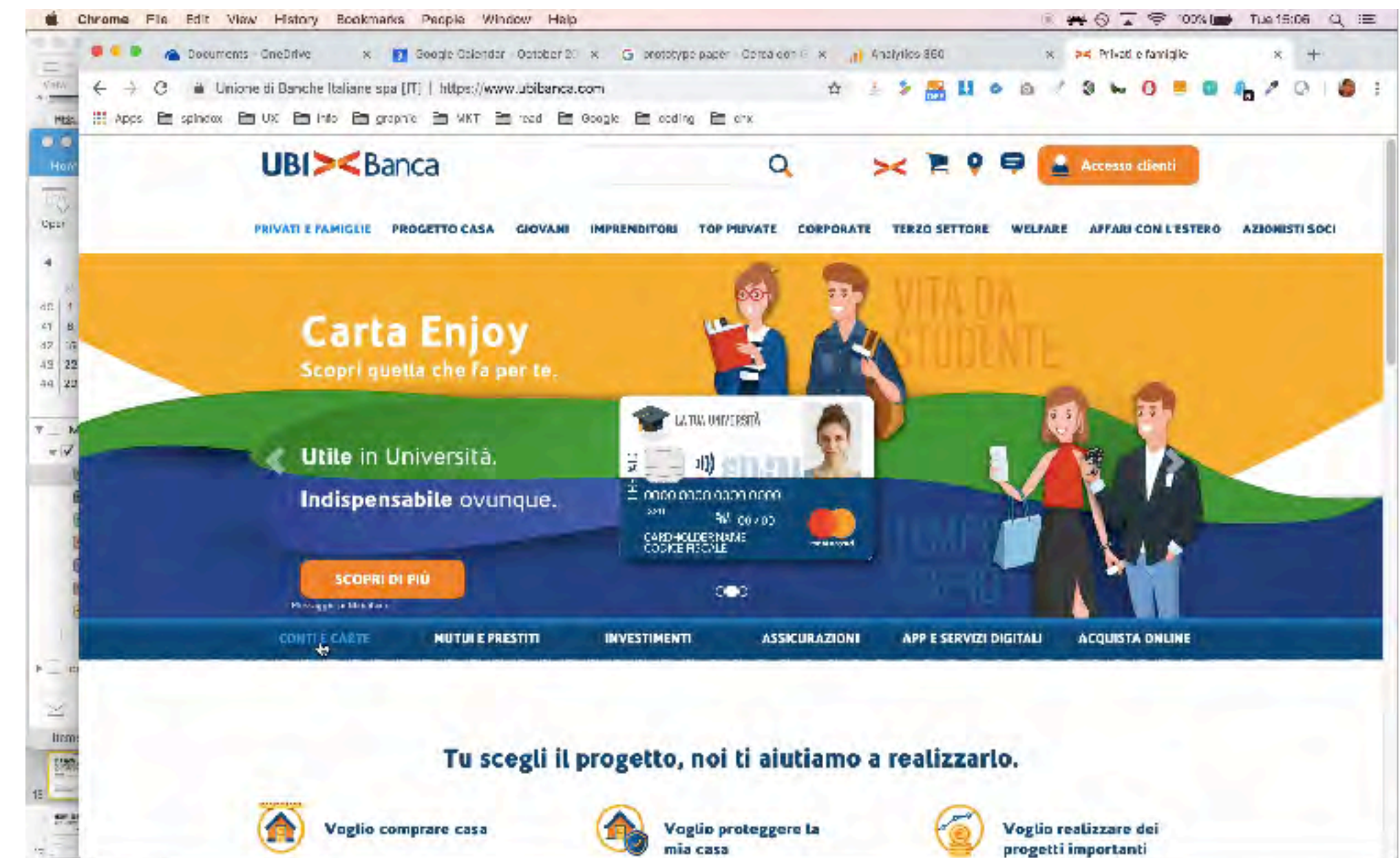
AS-IS INSIGHTS



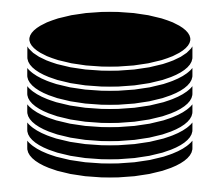
LEAN USABILITY TEST

In support of stakeholder activities, Lean User Tests were conducted with 5 prospect customer participants that reflected the target users of interest (men and women between 20 and 60, single, in pairs or with families). Participants were asked both to perform simple tasks (eg try to contact the information center) and to comment on what was viewed and tested. The most critical issues emerged in relation to the Buy Online section, which is a source of frustration and confusion for all respondents.

Resuming a participant's screen during the completion of a task



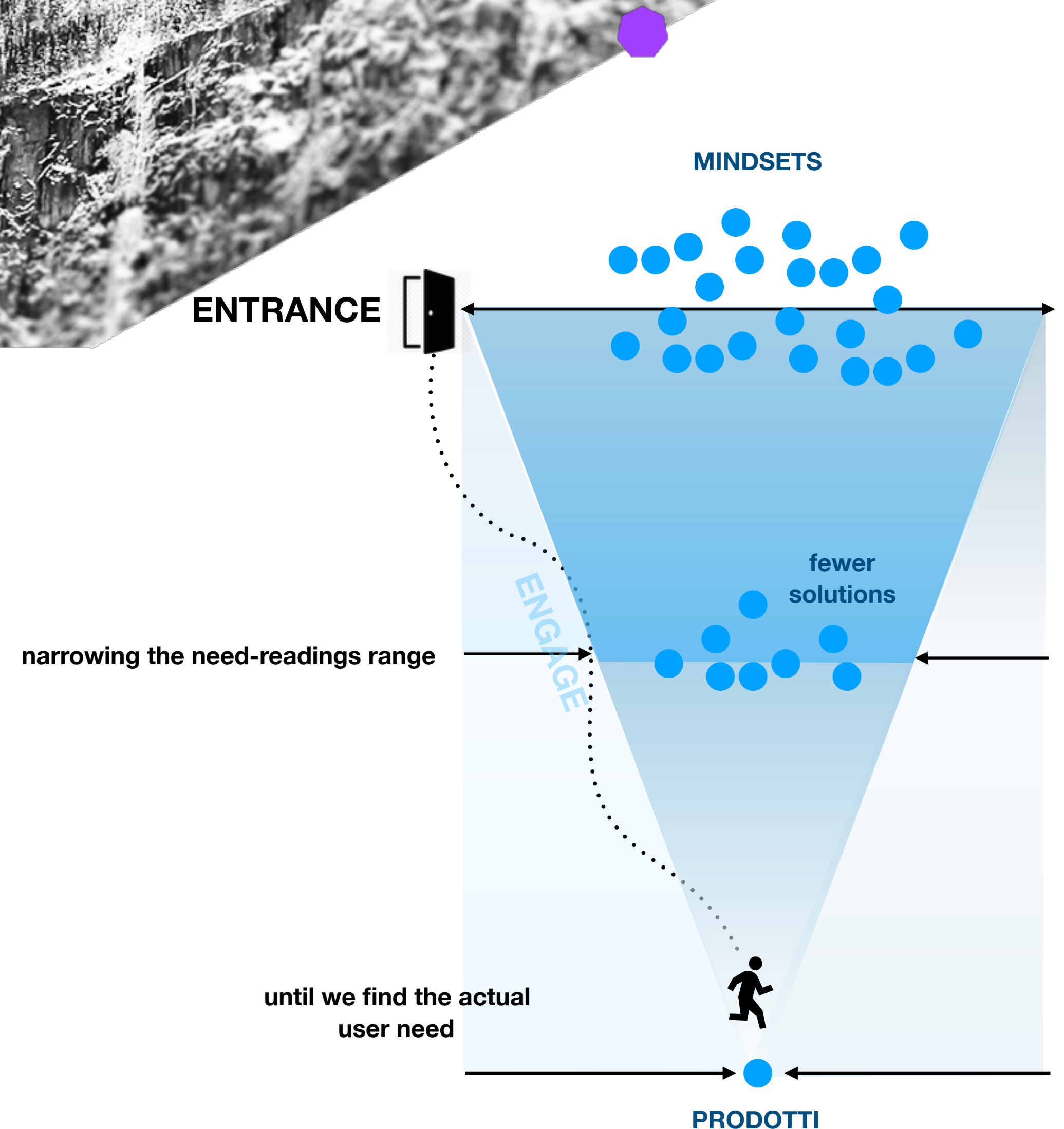
DATA DRIVEN APPROACH



ENGAGEMENT FUNNEL

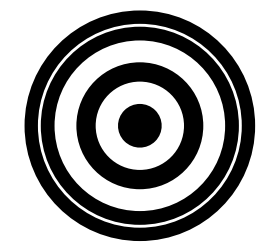
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Right: Engagement Funnel model illustrating the user's journey through the platform, from the initial engagement to the point of arrival.



DESIGN THINKING

Workshop



MACRO STATEMENTS

The activities carried out during the Workshops have revealed different points of attention which are the basis of our planning:

- The increasingly strong incompatibility of the Retail and Non-Retail worlds that has resulted in a necessary detachment also in the platform
- The need to give form and substance to recurrent concepts that have therefore become the basis of our design

Accreditamento

Radical Transparency

Advice

Storytelling

Ubiquity

Transactional Engagement



MACRO STATEMENTS

ACCREDITAMENTO

Becoming known as a bank identity but also as a partner, as a bridge of relationships in other contexts. Speak the "same language" as the user

ADVICE

Giving more space to the support, entering the perspective of transversal support at every stage of the customer experience, both online and offline

UBIQUITY

Building a consistent experience (eg shared design system with all touchpoints)

RADICAL TRANSPARENCY

Inform and fill users' knowledge gaps on products, services but also on the institution itself.

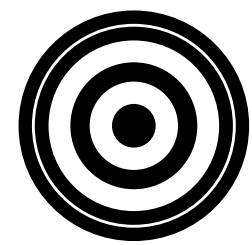
STORYTELLING

Strengthening the editorial power in the story of projects, giving more space to its contents.

TRANSACTIONAL ENGAGEMENT

Tactical engagement as the direct request to the customer of the preferred engagement tool

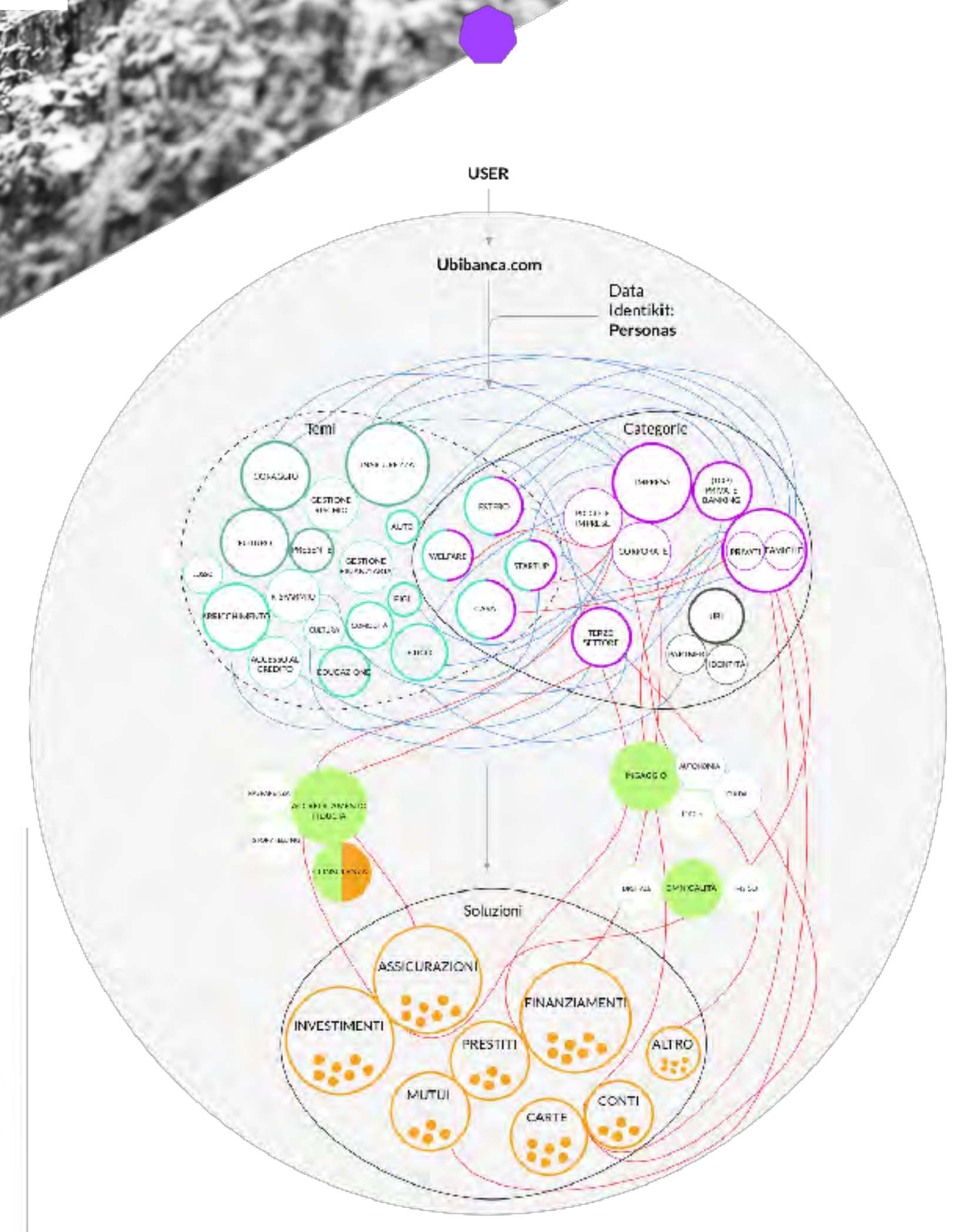
DESIGN THINKING WORKSHOP



MIND MAP

By integrating the Engagement Funnel model (see slide 30) with what emerged during the activities of the various Workshops and as revised in the study it was possible to build a first conceptual summary map of the structure that the new platform would have had. The map served as a basis for defining the architecture of the new public site. The final architecture has been the subject of constant SEO friendly implementations throughout the design process.

Right: Mind Map based on the Engagement Funnel model



CO-DESIGN SESSIONS



WHY DO CO-DESIGN

Having reached the moment to give shape to what we have researched and analyzed, we decided to approach it with the same approach of direct comparison of previous Workshops. The Co-Design sessions not only led to a substantial reduction in the times of sharing and approval of the outputs, having been processed directly together, but also a greater ease in identifying possible solutions, given by the fact of having available stakeholders who could answer questions or resolve doubts immediately after the session.

1_SPEED

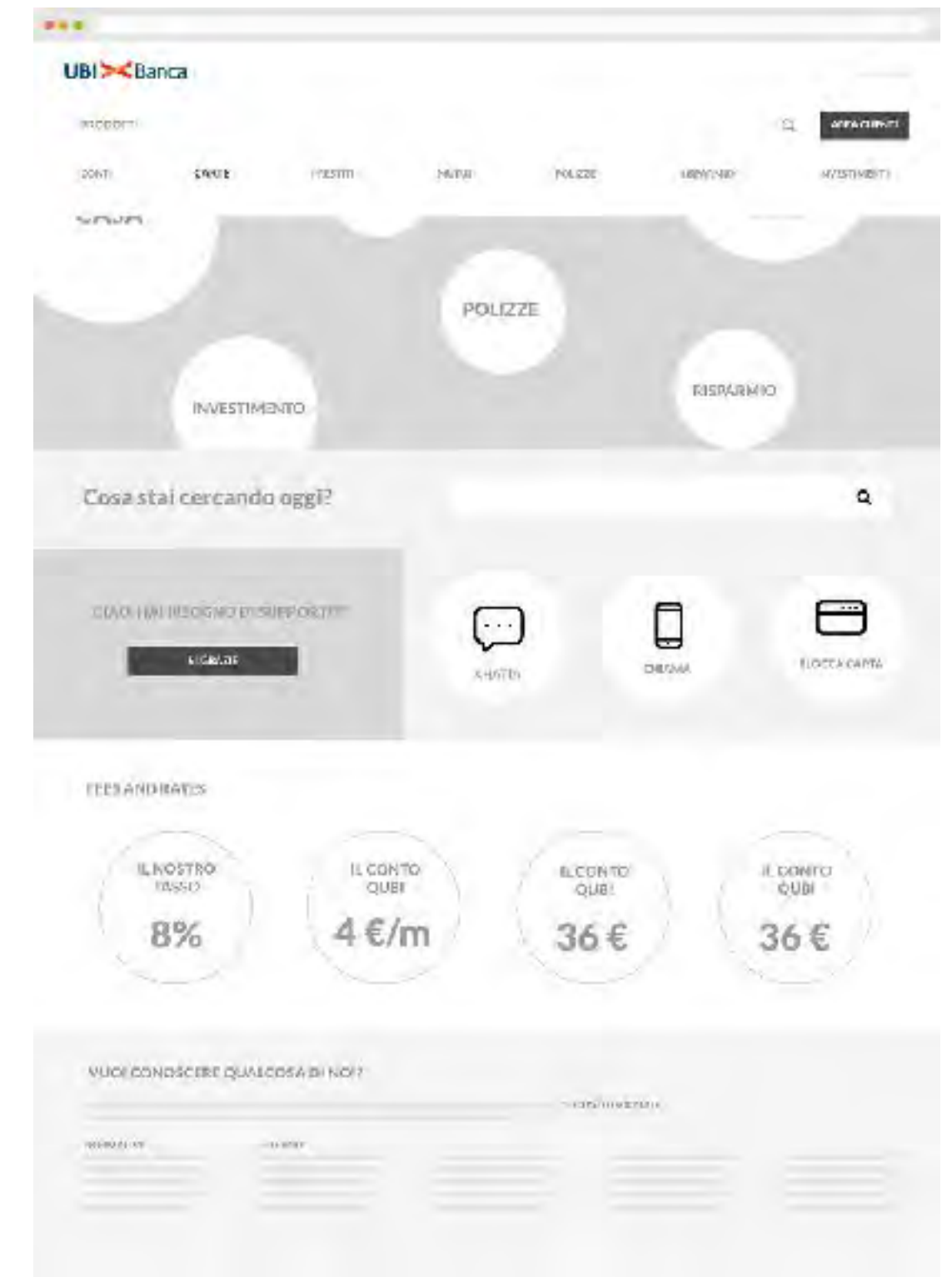
2_EASE

CO-DESIGN SESSIONS

FROM SCRATCH

During each session a theme was addressed (eg Retail-Private world) which was explored from different points of view up to the creation of real Paper Wireframes. The artifacts devised by the community in the studio were later reworked by our team, which completed their effectiveness from a functional and visual point of view, making them real interfaces.

From the left we find: the representation the first draft of Homepage of the Private world born in the studio with the project stakeholders, while next to its functional re-elaboration realized in a second moment by our team.

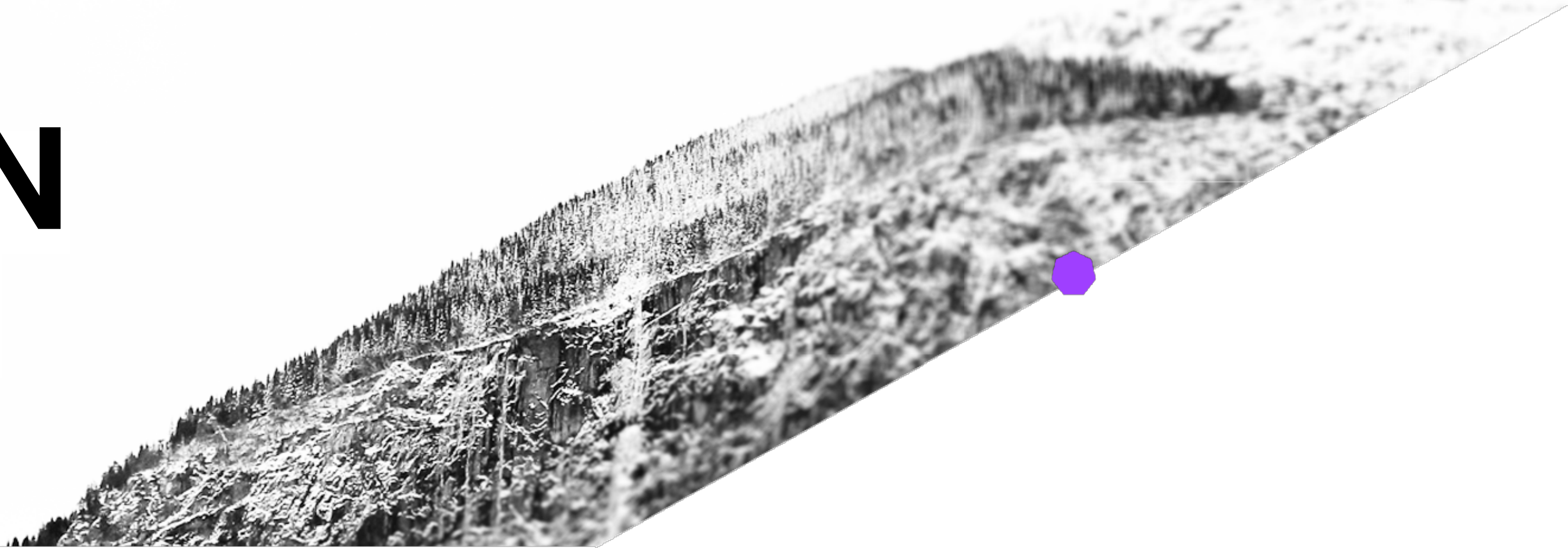




USER TEST



KEEP ON TESTING



LEAN VS TRADITIONAL SESSIONS

During the interface design phases, we discussed a number of user prototypes based on the first low-fidelity wireframes up to the most recent UI. We held several sessions following a lean and agile mode, others, when possible, following a more traditional and rigorous method. Despite the different method of execution, the approach was the same:

- Selection of a panel of hypothetical users, similar to the reference target of the end user
- Identification of main tasks to be performed by users
- Recording and analysis of the results emerged during the session



LEAN USER TEST

WHO

5 people each representing a segment of the overall target audience

WHEN

Lean sessions were performed several times: both at the beginning of the design phase on the As-Is portal and during the evolution of the first wireframe of the new interface.

WHY

Since these are the first phases of planning, this approach has been fundamental to identify, both As-Is and non, the macro criticalities that a restricted panel can statistically identify.

HOW

Both for the As-Is and for the low-fidelity prototype, short individual sessions (about 10/15 minutes each) were performed in which the participants answered questions, browsed the platforms making observations aloud and performed small tasks at the moderator's request. For a more accurate analysis of the results we used both audio and video recordings of the session.



TRADITIONAL USER TEST

WHO

10 real UBI Banca customers, each representing a segment of the overall target audience

WHEN

This session was conducted about halfway through the User Interface design phase of the new site.

WHY

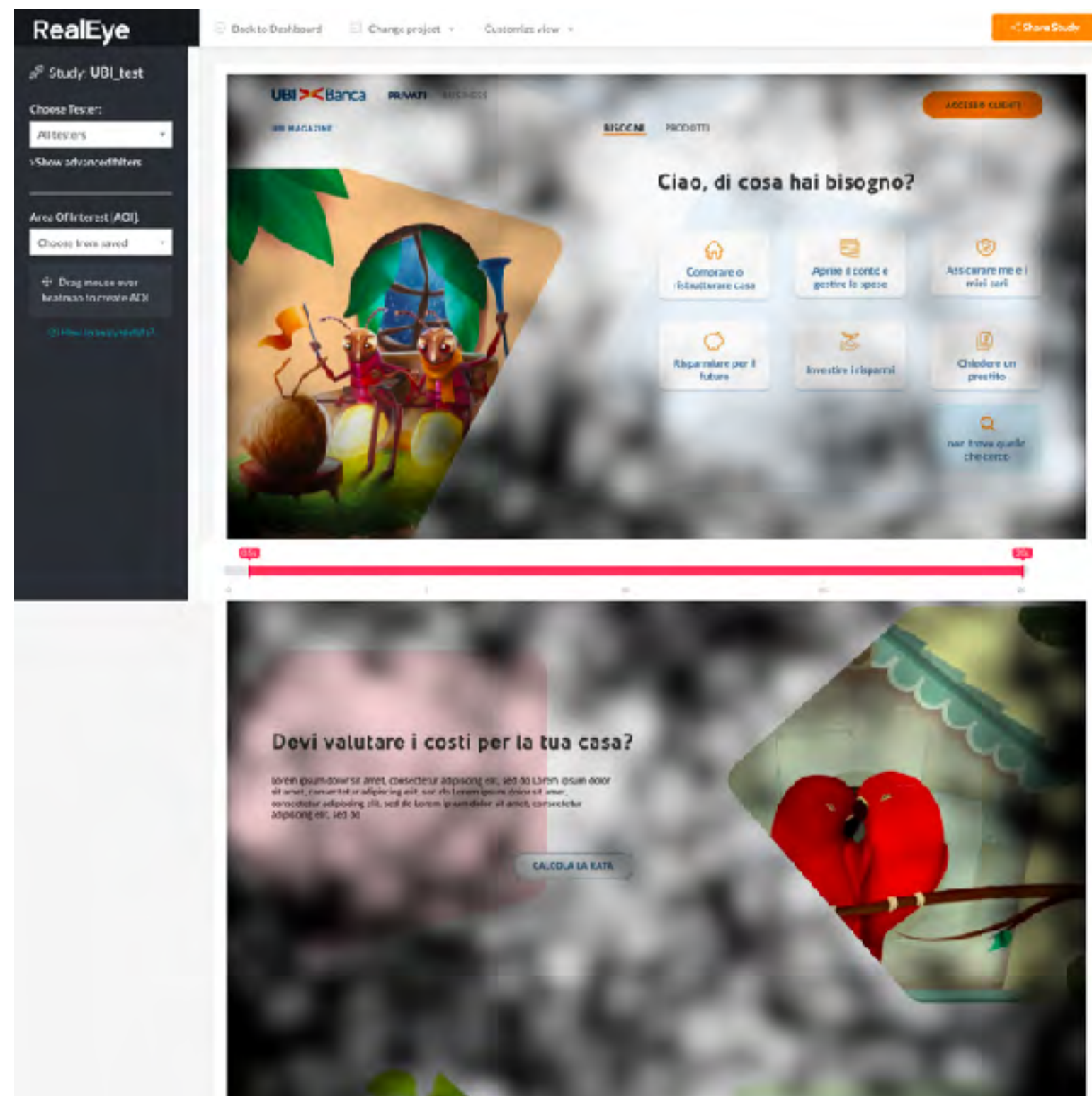
Once the main critical points that emerged during the first tests focused more on the structural and functional components were solved, we had the need to know the users' feedback also regarding the visual one.

On this occasion we were able to gather more specific and punctual feedback thanks to the variety of invited participants.

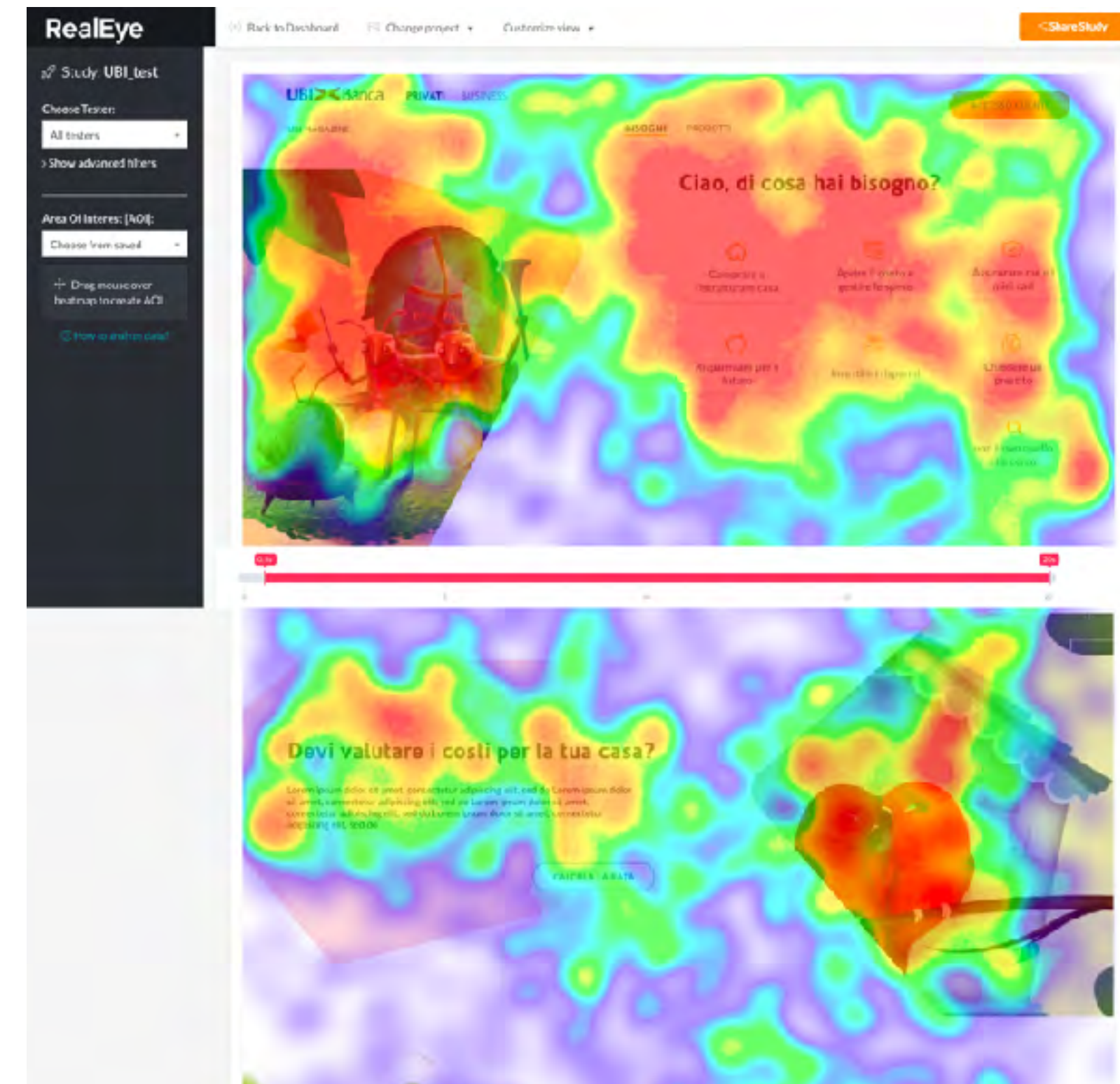
HOW

Also in this session we have reserved individual sessions a little longer (about 30 minutes each) in which once again the participants answered questions, browsed the platforms making remarks aloud and performed small tasks at the request of the moderator. On this occasion we supported the interview with specific Eye tracking and Hit Mapping tools.

TRADITIONAL USER TEST



Screenshot Eye Tracking tool di un partecipante



Screenshot Hit mapping tool di un partecipante



THANK YOU