



UX Research

Platform Redesign Project

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Summary

Discovery work done to date

In the last 30 days we've covered a lot of ground as we gathered information from various sources:

Event management industry research

- White papers
- Blogs
- Webinars

CMR systems familiarity

- Active sites
- Admin systems
- Project management

Internal interviews

- Reg Directors
- Coordinators
- Finance
- Development

Competitive analysis

- Reg site review
- Company websites
- Feature compare

Existing internal feedback

- Feature requests
- Logged stories

Summary (cont.)

Impressions on current platform

Attendee-facing site

- In terms of front-end features/functionality, our current Reg + Housing product seems to be working relatively well for clients and attendees. However, as indicated by numerous feature requests, there are many areas that could be working better such as the dashboard, session reg, guest reg, multi-reg, analytics, etc. We've captured all new feature requests and will prioritize these before design starts.
- As for the user interface, there doesn't seem to be any real complaints from a client/attendee perspective, but in researching competitor-hosted registration + housing websites we are a little behind. To be honest, most of the registration websites I reviewed aren't doing any better (in some cases much worse) than CMR, but this should be seen as an opportunity to wow clients.
- Colleagues have expressed interest in refreshing the look and feel of our product so we're keeping up with modern trends. I think this will be helpful in impressing current clients and gaining new ones.

Back-end admin systems

- I've met with Lee, Yohanna, and others and there is a consensus that the admin system needs to be connected, streamlined, and optimized so Reg Directors can build a site from start-to-finish without a developer.
- I've seen the current admin system, and although there are a lot of new tools that users seem to really like, everything does seem a bit disjointed. Functions in one system don't work the same in another system, and navigation is confusing.
- Most of the research we've done so far was attendee-facing site, so I'll need to dig deeper into the admin system before I design anything. I'll start by browsing the system on my own, then shadowing frequent users to see how they use the system, then once I have a bird's-eye view of how everything works together I'll start brainstorming how to connect it all.

Summary (cont.)

Direction for future projects:

UX update

Based on feedback we've received, we'll spend some time rethinking the general workflow and the use of specific components in order to achieve an intuitive experience.

New feature additions

There are many new features that have been requested by reg and housing directors that will be implemented during the redesign. I'll have to do some ongoing UX research for each of the new features to make sure we're designing them correctly.

Visual design update

The current visual design is a bit outdated and seems like features have been layered on top of one another over time. I'll be tackling a start-to-finish refresh of our Reg + Housing product.

Admin system update

A large portion of this redesign will be dedicated to connecting the admin systems and refreshing the admin UI to achieve an internal CMS that will put the control in the hands of reg and housing directors.

Research Methods

20

Industry White Papers Read

- Registration
- Housing
- Event tech (software)
- Social Media
- Future of events

6

Internal Interviews Conducted

- Joel Willmon
- Erin Moss
- Derrick Macaranas
- Yohanna Weller
- Pavel Quezada
- John Lee
- Sugar Salazar

30+

Competitor Sites Reviewed

- Competitor feature lists
- Active competitor-hosted conference websites

60+

Features Compiled for MVP

- Pulled feedback from:
 - Airtable lists
 - Registration request tracking sheet
 - Housing request tracking sheet
 - Interviews
- Synthesized in Miro

Research Methods (cont.)

Event Management Industry Research

General industry research to understand what is currently happening in the event space (white papers, blogs, etc.)

Competitive Analysis

Reviewed 22 competitor websites and 10 competitor-hosted registration websites to understand what other companies are doing and gain insight

Reg + Housing Product Familiarity

Tested a number of 'Active sites' listed in Airtable to experience a typical customer journey

Understanding the Current Vision

Reviewed latest wireframes from Pam to understand original vision

User interviews

Understanding key players to create an interview/support base. User interviews with Reg Directors, Coordinators, Finance, Support Center
Reviewed all sources of existing internal feedback to ensure we have a comprehensive list of feature requests, enhancements, and pain points:

- Requirements Airtable sheet
- User stories Airtable sheet
- Registration feature request Google Sheet
- Housing feature request Google Sheet

Collaborative Organization

- Scoured all "feature request" spreadsheets to capture features that reg and housing directors have submitted
- Card sorting with Pam to prioritize MVP feature list
- Generated a process map to see all possible screens and better understand all journey though points

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Industry Research



Event Management Industry Research

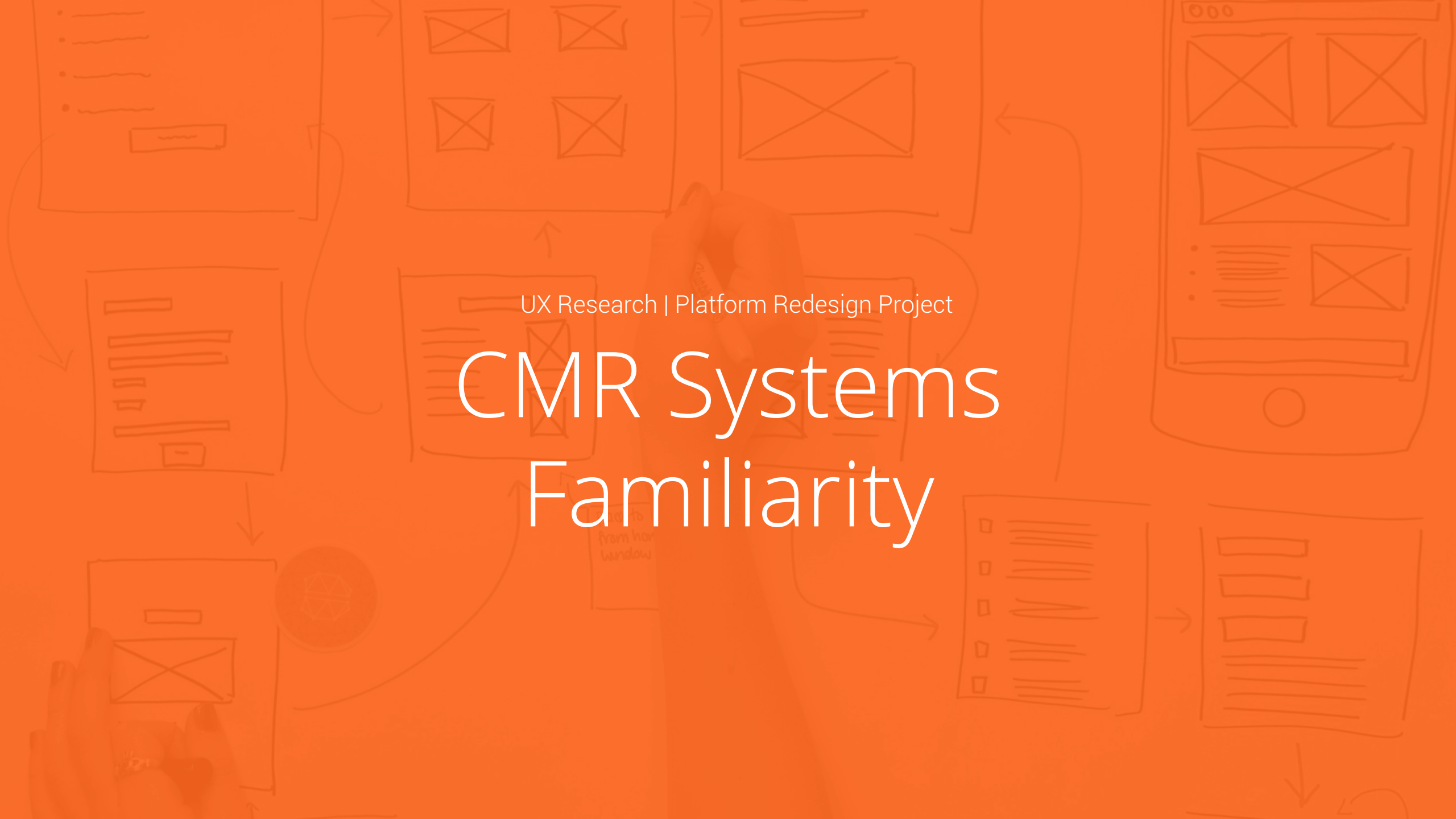
Sources (Articles, White Papers, etc.):

- ✓ Cvent: An Intuitive Tool for Event Management and Site Design [Review]
- ✓ Work-Life Balance for Event Planners
- ✓ The Event App Bible 2019
- ✓ The Good Event Management Software Guide 2019
- ✓ Engaging Events
- ✓ The Event Tech Bible 2018
- ✓ From Event Planner to Event Strategist
- ✓ Event Storytelling Playbook
- ✓ 10 Event Trends for 2019
- ✓ The Science of Event Experience Design
- ✓ The Year of Imagination: 15 Stories to Inspire Your Next Event
- ✓ The Power of Events: 29 Inspiring Examples To Increase the Impact of Your Events and Create a Long-lasting Legacy
- ✓ Room Block of the Future
- ✓ Social Media for Events
- ✓ The Future of Event Sponsorship: How Successful Events Win (and Keep) Sponsors
- ✓ The Rise of the Smart Venue
- ✓ The State of Event Sponsorship
- ✓ The Venue of the Future

Resources located in Box: <https://cmrus.box.com/s/1157nz7btneppdwnpcsllbzn5d6y230h>

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CMR Systems Familiarity



CMR Systems Familiarity



Active sites list

I spend some time reviewing our active sites list in order to obtain a better understanding of our Reg + Housing product.

Pam reconstructed a screen-by-screen workflow of the typical site so I could see the longest possible user experience. This ensures that I account for every possible scenario in the final design.



Teamwork PM

I've also become familiar with the process of building design documentation and communicating with team members through TWPM.



Airtable

Airtable has been a valuable tool for gathering required features, users stories, and researching competitor websites.



Reg Admin

During internal interviews, I was able to experience how Reg Directors, Coordinators, and other colleagues make registration changes on the back-end.



Housing Admin

During internal interviews, I was able to experience how Housing Directors, Coordinators, and other colleagues make housing changes on the back-end.

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Competitive Analysis



Competitive Analysis

Competitive analysis is an important step in the UX research process as it gives us a glimpse into the current state of the industry so we can compare our product(s) against those of our competitors. This step is critical for identifying gaps in our won products or services.

Competitor company websites

To make sure we captured all potential features, I went through 22 competitors websites listed in Airtable and tracked more than 300 features listed.

I grouped each feature into a category (Reporting/analytics, session registration, security, etc.), then ranked each category by how often a feature category was mentioned on a website so I could get a sense of how important or expected these features might be to our clients. (See the conclusions slides to see how each ranked).

How does this inform our design?

This information is useful to the design project because comparing our feature list to that of our competitors allows us to 1) determine if we are keeping up with what our clients and potential clients expect of an event management company, and 2) identify any gaps to address during design.

[See the Airtable competitor list](#)

[See list of features captured from competitor company websites](#)

Competitor-hosted conference registration websites

I reviewed 10 competitor-hosted registration websites and went through the whole process up until checkout. I captured screenshots to better understand registration workflow and visual design and made notes of interesting, terrible, or impressive elements of the experience.

Some of the websites (e.g. Eventbrite) we really impressive in terms of easy of use and visual design. Others were confusing, convoluted, or just plain didn't work.

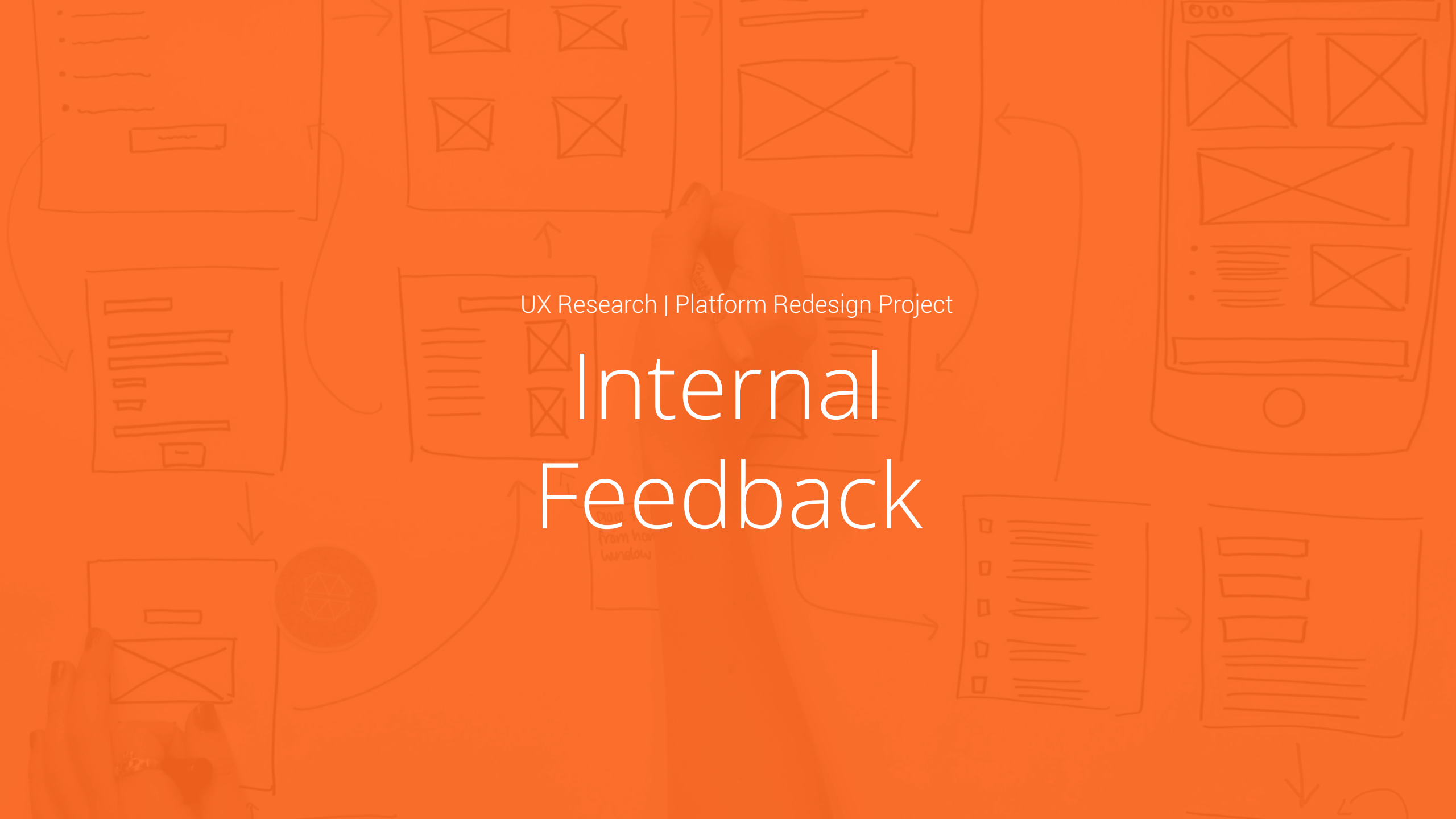
How does this inform our design?

Reviewing our competitor's registration websites is in an important step in the UX research process as it gives us a glimpse into the current state of the industry so we can compare our product(s) against those of our competitors. Understanding how a competitor's website appears and functions will help us identify gaps in our own product and perhaps find ways to make ours superior.

[See screenshots of 3rd-party conference websites](#)

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Internal Feedback



Internal Interviews and Recorded Feature Lists

Internal interviews

To better understand the roles/responsibilities of colleagues and how they interact with the current Reg + Housing product, I conducted a series of video interviews. In each interview I asked a series of questions designed to elicit honest feedback about our current product, both from the colleague's, client's, and attendee's perspectives.

Conducting direct, personal interviews with those responsible for the website content allows me to tease out the major pain points that users experience every day. This feedback will be invaluable as we prioritize features in the product redesign.

[See a sample list of interview questions](#)

Recorded feature lists and open requests

We also gathered various lists of recorded project features/requirements and open feature requests submitted by the reg and housing teams. We then organized each feature into 'MVP' and 'Post-MVP' boards and subsequently grouped them into smaller categories.

This allows us to keep an eye on all potential features which reduces the risk of losing them during design, and gives us a high-level view of what should be included in the final design.

Sources

- Internal interviews:
 - Joel Willmon, Sr. Reg Director
 - Erin Moss, Sr. Reg Director
 - Derrick Macaranas, Sr. Reg Director
 - Yohanna Weller, Client Program Director
 - Pavel Quezada, Customer Contact Center Director
 - John Lee, Executive Finance Director
 - Sugar Salazar, Finance Manager
- Contact Center feedback provided by CSAs
- Airtable [Requirements](#)
- Airtable [Reg + Housing Stories](#)
- Grouped and prioritized all internal feedback in [Miro](#)

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Conclusions & Next Steps

Conclusions

Features & functionality

Capturing platform requirements & feature requests

CMR has done a really good job capturing platform requirements and tracking feature requests. Pam and I have gathered feedback from a number of sources and feel we have a complete list. I've also captured feedback from internal interviews and will add any new feature requests to the Miro board. However, I still need to group the gathered features and distill them into scenarios to ensure I'm designing the product correctly.

Are we delivering on client expectations?

After conducting industry research, internal user interviews, competitive analysis, and gathering all sources of internal feedback, I think we were doing really well at providing our clients what they expect in registration software. I didn't come across any feedback that suggested that CMR is failing to deliver on client needs. From what I've learned about how our development team functions, CMR does a great job accommodating client requests.

Room for improvement

CMR offers most software features that our competitors offer, with the exception of a few novel features such as badge-preview, real-time session conflict alerts, and session filtering. Additionally, according to internal interviews, there is room for improvement in areas such as guest reg, multi-reg, and promo/invitation codes. We'll need to map out these areas to create a exceptional experience.



Conclusions

User interface

Our UI compared to competitors

As I reviewed the list of active program websites I found myself unimpressed with the visual design. Basic visual design rules like padding, alignment, and white space seemed to be ignored, which makes for a confusing and untrustworthy experience. However, as I reviewed competitor-hosted registration websites I found the same thing. With the notable exception of EventBrite (which caters to much smaller programs), it seems in the space of event management clear visual design isn't a priority.

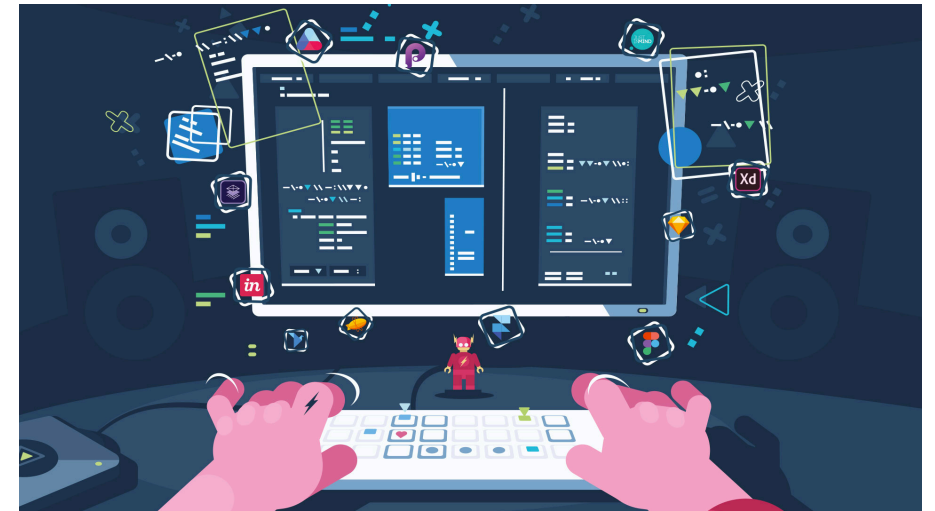
Clients seem unconcerned about the UI

In all my internal interviews I asked the question "Overall, how satisfied are clients with the website design?" The response I received from all directors was "no". This was surprising to me as I assumed the visual design of the program websites would be of the utmost importance to clients. Of course, I'm a visual designer, so I was happy that my own bias was proven wrong. According to the interviews, clients are much more concerned about function. They need to know that an attendee, chapter executive, and exhibitors can register without any obstacles.

Now, this doesn't mean that visual design should be ignored, but rather that there are no major issues with the interface. This is a really good thing, so I'll take this feedback and keep it in mind as I get started on design.

Mobile UI

However, it has been expressed that mobile versions of attendee websites often look different than mockups. We will focus some attention on ensuring the mobile experience is optimized.



Conclusions

Admin systems

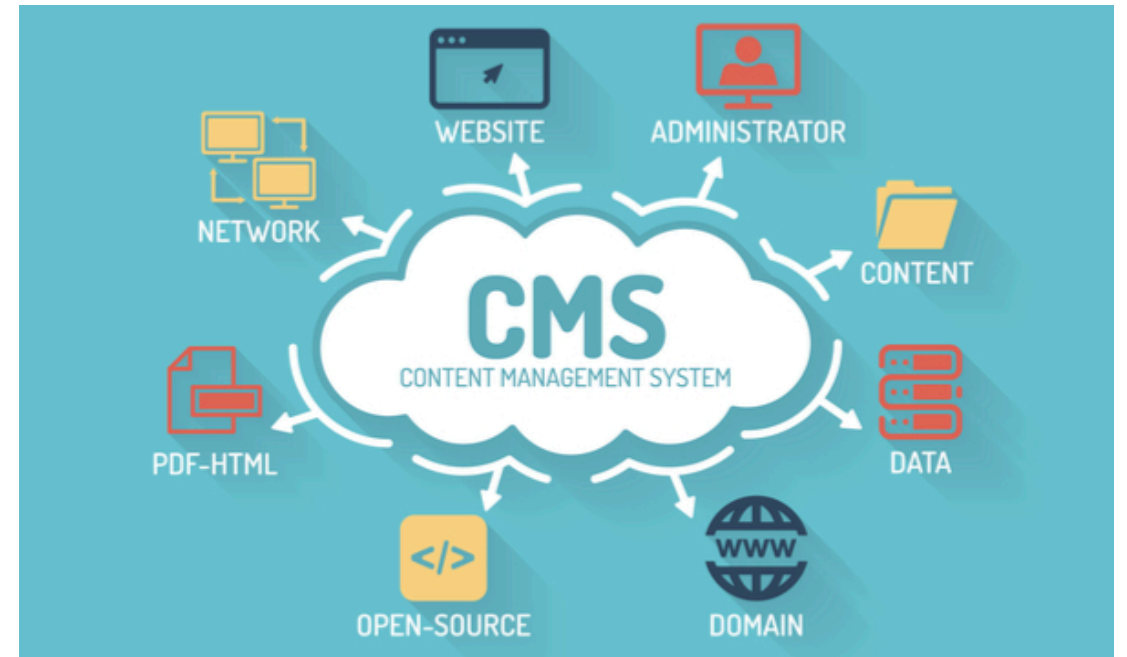
A consistent source of frustration

During my internal interviews with reg directors and coordinators, a common refrain was that admin systems were frustrating to use. Although they appreciate the new tools that have been released, colleagues continually have to wait for small changes to be implemented, tested, and released – something that can take days. The reg directors and coordinators are hoping the platform redesign will allow them to build entire site, start-to-finish, with minimal help from a developers.

Building a consolidated and streamlined admin system

A large part of the project will be consolidating the many and disparate admin systems and streamlining the website configuration workflow. However, before we can start designing, I'll need to become familiar with how the admin systems are currently used. Next steps will be as follows:

- Take inventory of all systems
- Gain access to all systems
- Shadow current admin users understand exactly how each admin system is used



Conclusions

Competitive analysis

Client expectations

- Competitive analysis shows that CMR's platform includes most functionality that users expect in the field (either currently, or once new features are added). We're really good about accommodating special requests as well.
- The good thing is that we're executing on nearly all categories. This is great news because it tells us we're keeping up, if not exceeding client expectations.

Features

- Compared to competitors, we offer features such as multi-step registration, progress bar (breadcrumbs), GDPR compliance, and sponsored content that some others don't. However, there are some features competitors are using such as profile management, session filtering, and real-time session conflict indication from which we can take inspiration. We've got the universal profile set for MVP, and we're incorporating some new session functionality, so I think we're headed in the right direction.
- Our feature list meets or exceeds what I've experienced on other websites, with the notable exception of session management. A couple of the websites did a great job of organizing sessions in an easily-digestible manner, even offering filtering solutions for complicated session lists. Also, some did an excellent job of making sure conflicting sessions couldn't be selected. We should use these to inform our design.

Top 10 mentioned competitor features

According to the features pulled from 22 company websites, the top 10 features mentioned are as follows:

1. Reports / Analytics
2. Page / Form builder
3. On-site Services
4. Admin / Database
5. API Integration
6. Marketing / Emails
7. Mobile-friendly / Responsive
8. Help & Support
9. Conditional logic
10. Pricing / Payments

Conclusions

Competitive analysis (cont.)

Visual design

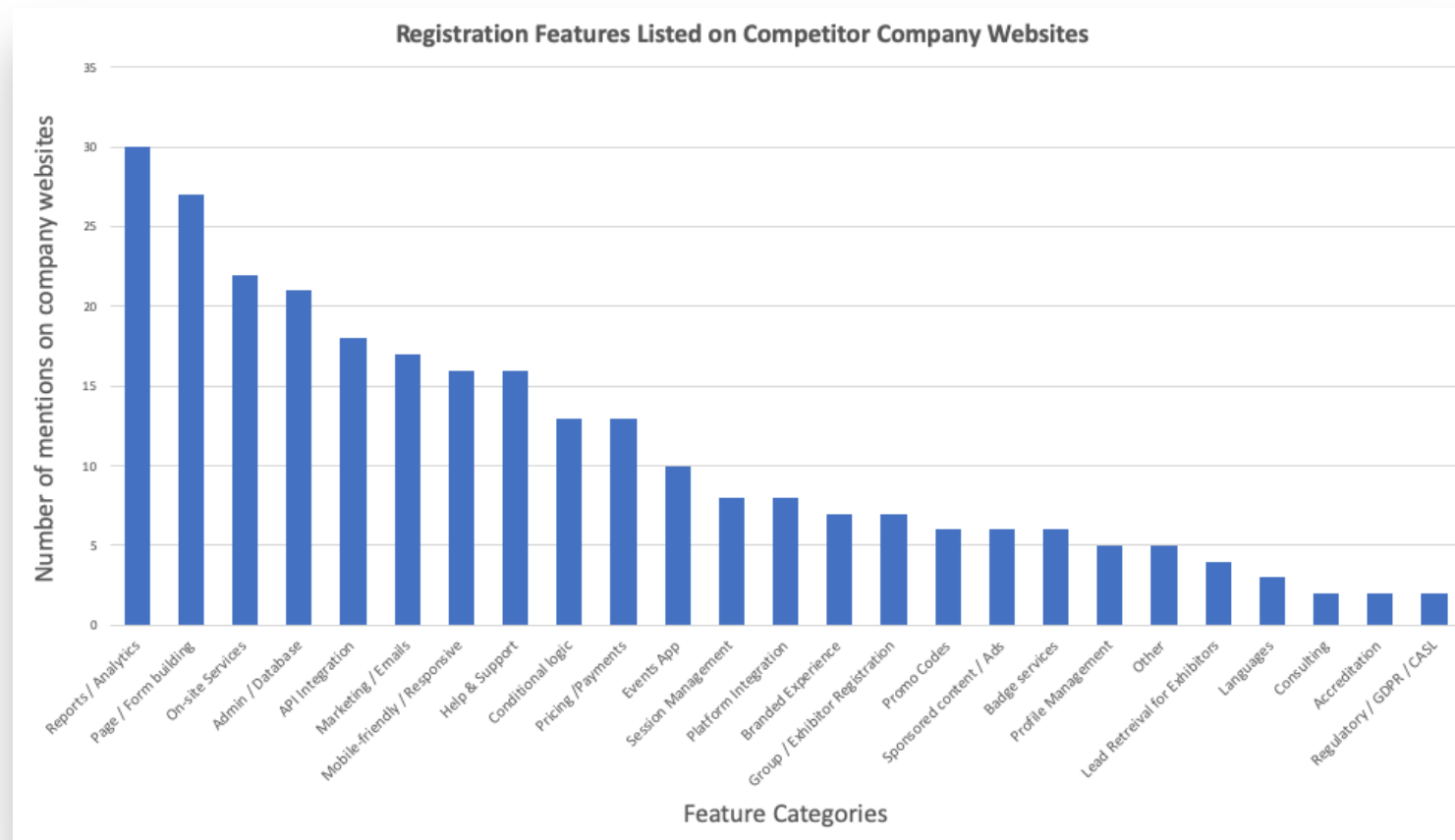
- After reviewing a few 3rd-party registration websites, it is clear that we are a little behind in terms of modern UI trends.
- This isn't necessarily bad, especially when all of the registration websites I visited look terrible, with the notable exception of Eventbrite. However, our clients are not comparing our sites to competitors, they're comparing our site to any other well-designed site they frequently use.
- We will be addressing this by refreshing the entire UI for MVP for a cleaner look. My goal is not to copy any specific competitor, but to draw on the experience as a starting point.

Using research to inform design

- At a glance, the screenshots collected during the registration process will show us areas where we can improve our product for our clients.
- For example, ePly's HCD Expo website shows us how session organization and conflict management should function. We will look to examples like these to inform the product redesign.
- Areas of improvement include areas such as guest reg, multi-reg, and promo/invitation codes. We'll need to map out these areas to create a exceptional experience.

Conclusions

Competitive analysis (cont.)



Competitor feature analysis

- This chart shows 300+ features distilled into categories and ranked in order of the number of times each feature was mentioned on a competitor's website.
- There are a few ways to interpret this data, but I think we can use it to determine
 1. Which features our clients expect CMR to offer
 2. Which features are most commonly offered, and
 3. Which features are most important to our clients

Source: Multiple competitor company websites. Pulled features manually and organized by feature category.

Conclusions / Competitive Analysis

Big Data Ignite 2019

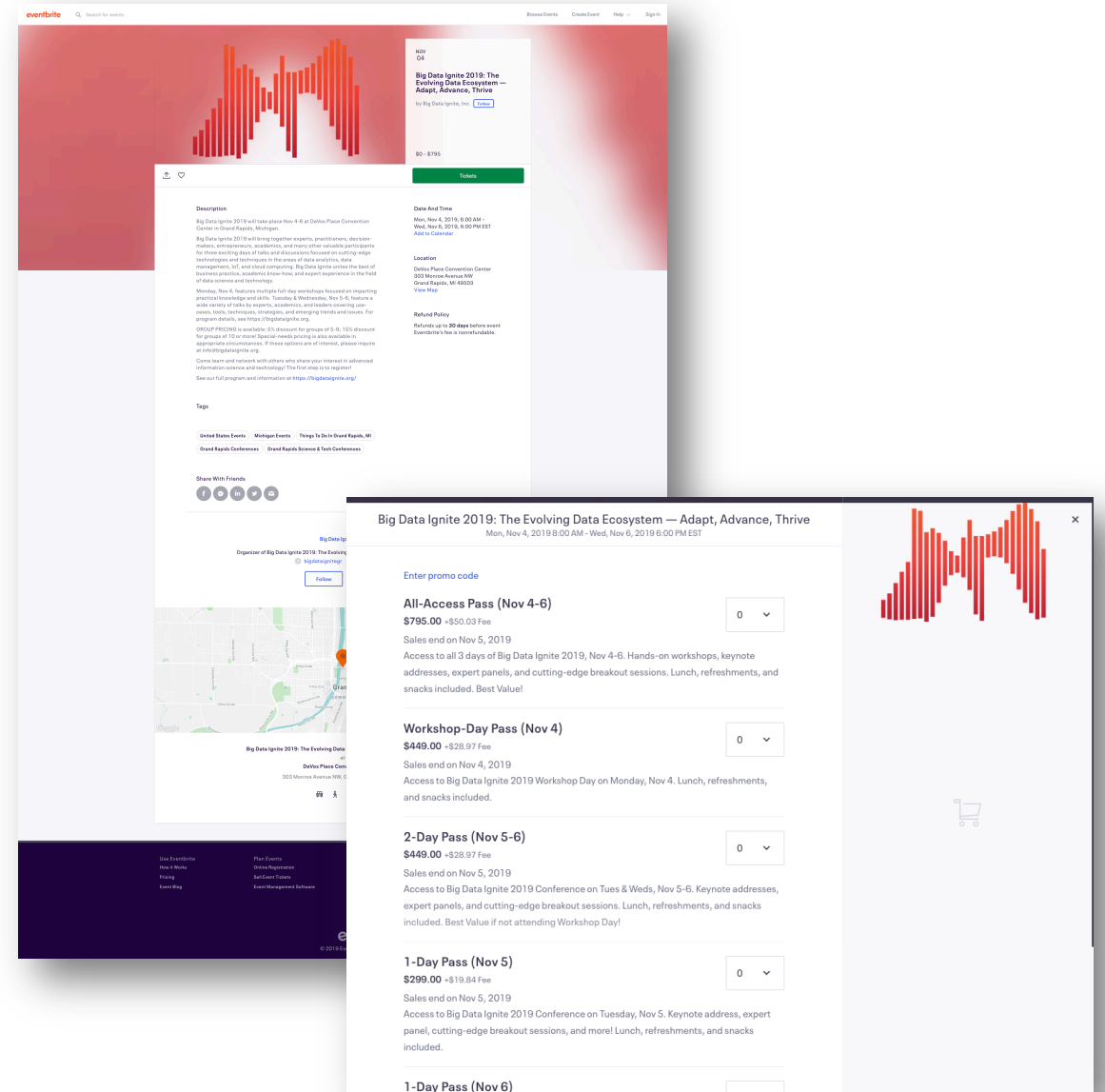
Registration host: Eventbrite

Observations:

- UI is very clean and simple (best I've seen)
- All passes and sessions exist on one page using show/hide function to display text
- Profile information is captured at checkout

Take-aways:

- We should be aiming for a layout this clean
- We can save ourselves visual clutter by displaying conference pass and session details with show/hide
- Is there any way we can postpone asking for profile information until checkout?



Conclusions / Competitive Analysis

CES 2020

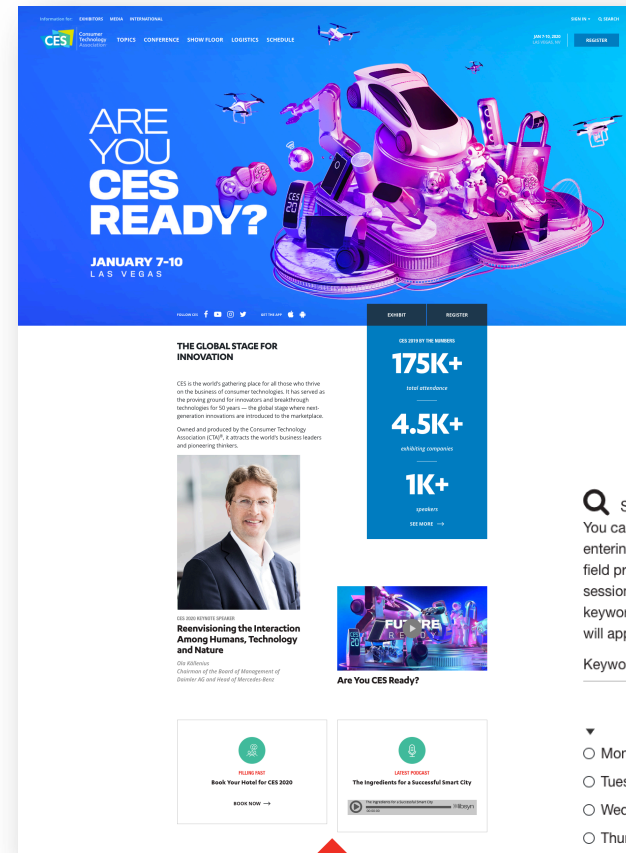
Registration host: CompuSystems

Observations:

- CES is a huge conference so the registration process is long
- Registration features a Badge Preview
- Sessions can be filtered on day, time, and venue

Take-aways:

- Even though this is a great example of a fully-loaded conference, this site could use a lot of work to make the experience better. There is just so much information required up front and the conference/session/add-on system is convoluted.
- Badge preview is a fun feature. This is not on our list for MVP, but we could use this as a reference if we'd like to add this feature in the future.
- The conference passes and sessions are a bit confusing, but since there are so many of them the filtering function is really useful. If session filtering is a feature we'd like to add in the future we can use this as a reference.



Q Search
You can search for sessions by entering your keyword(s) in the field provided. All tracks or sessions that contain your keyword in the title or description will appear in blue.

Keyword Search

- Date**
- Monday, January 6
 - Tuesday, January 7
 - Wednesday, January 8
 - Thursday, January 9
 - Friday, January 10
- Time**
- 7:00 AM 12:00 PM 5:00 PM
- Venue**
- ARIA
 - Las Vegas Convention Center
 - Venetian
 - Venetian/Sands & Las Vegas Convention Center
 - Westgate

	Title
<input type="checkbox"/>	INCLUDED Digital Money
<input type="checkbox"/>	BUY Disruptive Innovations in Health Care
<input type="checkbox"/>	INCLUDED Drone Operations and Innovation
<input type="checkbox"/>	INCLUDED Enterprise Solutions
<input type="checkbox"/>	ADD Entertainment Summit
<input type="checkbox"/>	ADD Gaming and Esports
<input type="checkbox"/>	INCLUDED HighTech Retailing
<input type="checkbox"/>	INCLUDED Home Entertainment
<input type="checkbox"/>	ADD Innovation For All
<input type="checkbox"/>	ADD Innovation Policy
<input type="checkbox"/>	INCLUDED IoT Business Logic
<input type="checkbox"/>	ADD Kids@Play/Family Tech Summit
<input type="checkbox"/>	ADD Marketing Reinvented
<input type="checkbox"/>	BUY Privacy and Security
<input type="checkbox"/>	ADD Re-Imagining Resilience

Conclusions / Competitive Analysis

Design Thinkers 2019

Registration host: ePly

Observations:

- Entire registration is one page
- Passes/sessions do not contain descriptions, but have an obvious link to details (which links out to the main site)

Take-aways:

- In theory, I like the idea of a one-page registration but this is such a good example of why it doesn't work for a standard conference. With all the profile info, the passes for members and non-members, add-ons, guest reg, and checkout this is just too much to display on a single page.
- The one thing this site does well is link out to pass/session details where available. We can use this to inform our design.

RGD
Design Thinkers Toronto 2019
October 24 & 25, 2019
@ Meridian Hall (formerly Sony)

Contact Information

*First Name
*Last Name
*Position
*Company/School
*Address
*City
*Province/State
*Country
*Postal/Zip Code
*Phone Number
*Email
Social Media Handle 1
Social Media Handle 2
Did someone refer you to register?
* I wish to receive Design Thinkers updates via email Yes No
* I agree to having my information provided to selected sponsors Yes No
Please be advised that photographs and video are taken at Design Thinkers for use on RGD web, print and social communications channels. We may also share them with media and/or partner organizations. By attending this and any RGD event, you consent to being photographed and/or filmed, and to your image or likeness being used at RGD's discretion.
Special Requirements (i.e. dietary, mobility, etc.)
How did you hear about Design Thinkers?
 RGD Newsletter/Website
 Twitter
 Facebook
 Instagram
 LinkedIn
 Instructor/Colleague
 Digital Advertising
 Printed Advertising
Other

Conference Registration - Thursday, October 24 & Friday, October 25

Please Select Your Registration Type:
RGD Members
Want to find out more about Membership and receive a reduced rate? [Join today.](#)
 Registered Member: \$99 (incl. RGD, 4 Day, \$350 Value) \$79 (incl. 28% tax)

Conclusions / Competitive Analysis

HCD Expo 2019

Registration host: Experient

Observations:

- Sessions separated by days in tabs
- Countdown timer for rate changes
- On-page feedback

Take-aways:

- For multi-day conferences, having the sessions separated by tabs ensures users aren't overwhelmed by options. I like this setup and will explore this setup.
- The countdown timer for rate changes is something we should think about adding. This gives users a incentive to complete registration soon. This could also be used as a "reserve your seat" countdown.
- The "Was this page easy to use?" feedback bar is another feature that I'd like to implement, but perhaps in a more generalized "Feedback?" ribbon somewhere on the page. This gives users a direct line to tell us when they're experiencing issues.

The screenshot shows a registration page for HCD Expo 2019. At the top, there are tabs for days: Sat Nov 02, Sun Nov 03, Mon Nov 04, and Tue Nov 05. The main content is organized by date and time slots for Saturday, November 2, 2019. A prominent overlay in the top right corner is a countdown timer that reads "5 : 6 : 33 : 47" in days, hours, minutes, and seconds, with the text "Register today! Regular rates ends" above it. Below the timer, the page lists several sessions with "Add" buttons, session titles, and prices. A feedback bar at the bottom asks "Was this page easy to use?" with "YES" and "NO" buttons.

View	Sat Nov 02	Sun Nov 03	Mon Nov 04	Tue Nov 05
SATURDAY, NOVEMBER 2, 2019 8:00 AM - 12:30 PM				
	W02 - Is Functional Programming a Thing of the Past, Or the Only Reason to Design for the Future?			
SATURDAY, NOVEMBER 2, 2019 8:00 AM - 3:00 PM				
You filled this time slot with: W02 - Is Functional Programming a Thing of the Past, O...				
Add	W01 - Coaching Workshop: Practical Application of Evidence-based Design, hosted by The Center for Health Design		\$395.00	
SATURDAY, NOVEMBER 2, 2019 9:00 AM - 11:00 AM				
You filled this time slot with: W02 - Is Functional Programming a Thing of the Past, O...				
Add	PCD-DD01 - Design Collaboration: Transforming the Patient Experience (A Clinic Design Charrette)		\$50.00	
SATURDAY, NOVEMBER 2, 2019 9:00 AM - 12:00 PM				
You filled this time slot with: W02 - Is Functional Programming a Thing of the Past, O...				
Add	A04 - AIA-AAH Student Design Charrette - Mid-Term Review		\$0.00	
Add	W03 - The Code Interpretation Clinic		\$109.00	

Was this page easy to use?

Conclusions / Competitive Analysis

Novel Registration Feature Comparison

This is a list of interesting features included on these competitor registration websites. The list is by no mean exhaustive, but gives us a quick look at features we may want to include in our platform.

	CMR	Eventbrite	Experient (HCD Expo)	Compu Systems (CES)	Convention Data Services (AARC)
Progress bar	✓	✗	✗	✓	✓
GDPR compliance	✓	✓	✗	✓	✗
Sponsored content (ads)	✓	✗	✗	✗	✗
Guest registration	✓	✓	✓	✗	✗
Promo codes	✓	✓	✓	✓	✗
Reg, Booking, Checkout status bar	✓	✗	✗	✗	✗
Real-time session conflict indicator	✗	✗	✓	✗	✗
On-page feedback collection	✗	✗	✓	✗	✗
Conference pass comparison table	✗	✗	✗	✗	✓
Profile management	✗	✓	✓	✓	✓
Session filtering	✗	✗	✓	✓	✗
Session search	✗	✗	✓	✓	✗
Badge preview	✗	✗	✗	✓	✗

What do we get from this feature list?

This list allows us to see what our competitors are offering their clients and compare that to what CMR offers.

How does it inform design?

- At a glance, this comparison paired with the screenshots collected during the registration process will show us areas where we can improve our product for our clients.
- For example, we can see that compared to CMR, Experient and CompuSystems are both winning in terms of session filtering and search. (Of course, these features would typically be used for more complicated programs with lots of sessions, but using this table we can see our gaps.)
- This gives us a better idea of what features might need to be included in the product redesign.

Conclusions

Moving forward

Registration

Moving forward, we'll consider all conclusions synthesized from research and incorporate them into the final design. It is important that the redesign be based on the data collected during research so we can deliver a final product that meets (and hopefully exceeds) both client and user expectations.

Next steps for registration include:

- Building personas based on research
- Building wireframes and low-fidelity prototypes for testing
- Building high-fidelity prototypes for testing
- Handing final designs to development team

Housing

This research has been focused on the registration portion of the product, but I'll dedicate research time to housing later in the project. Just like registration, I'll take a look at the current state of the housing industry, conduct user interviews, research competitors, and get familiar with our current product.

Admin systems

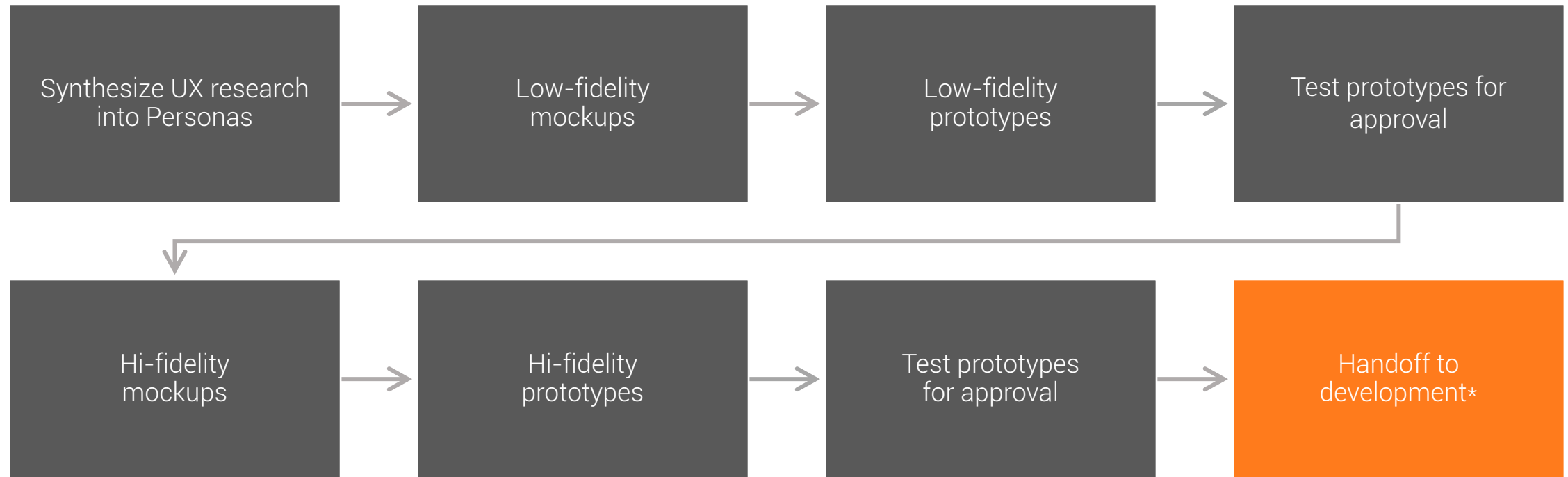
I need to dedicate some time to researching the admin system before making any decisions on design. Next steps include

- Taking inventory of all admin systems
- Gain access to admin systems
- Shadow current admin users to understand exactly how each admin system is used
- Synthesize findings and use them to inform final design

Reporting dashboard

Another part of the platform redesign is creating a new reporting dashboard for clients. I'll need to spend some time getting familiar with what we currently use, then going through the standard UX research process to gather data to inform the final design. I'll work with Pam and likely the reg directors to determine goals and objectives for this portion of the project.

Next steps



**In order to design and develop simultaneously, we will break the project into related groups and roll out this process as each group of designs is ready.*