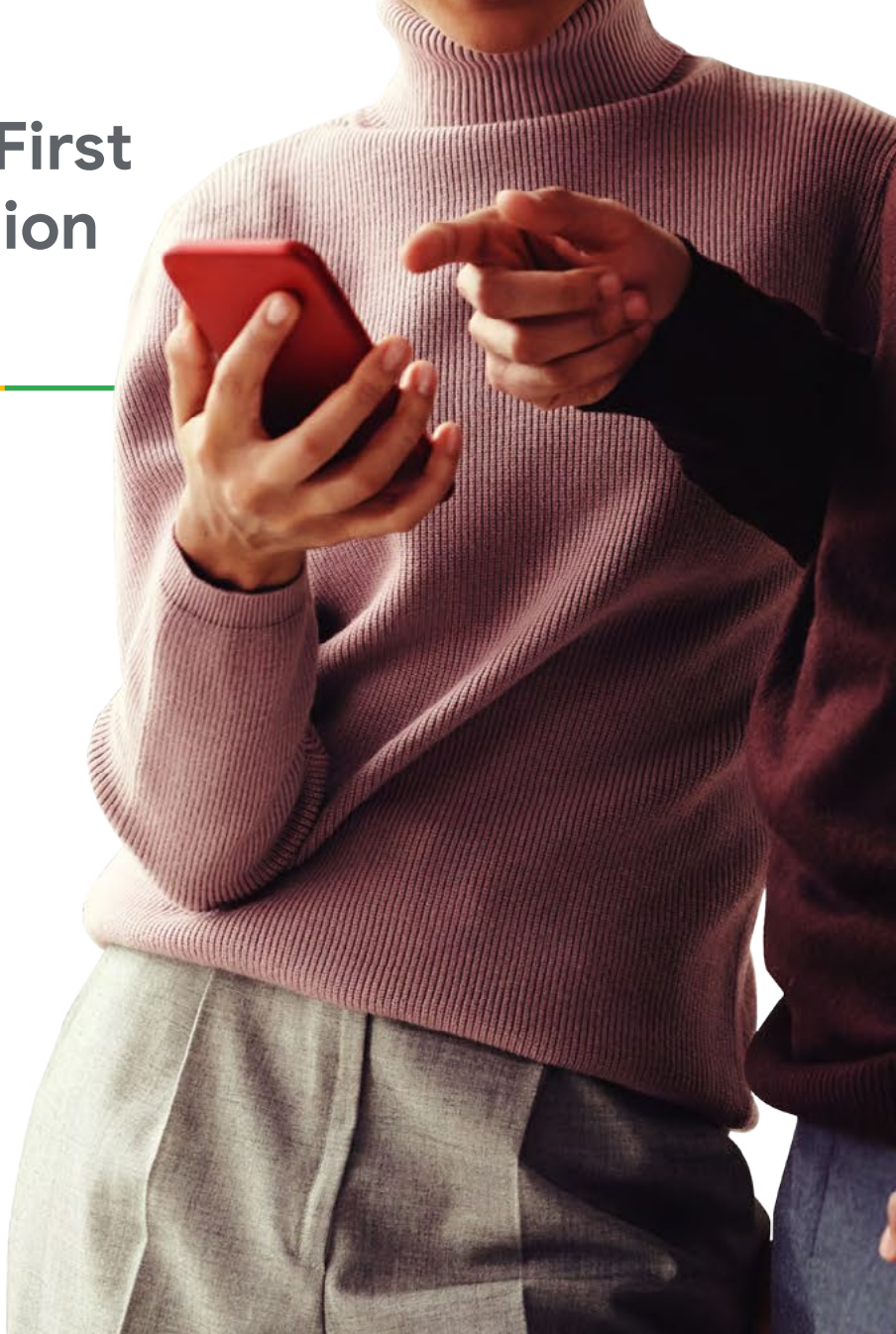
The Mobile-First Transformation Handbook

Your Journey to a Better Web



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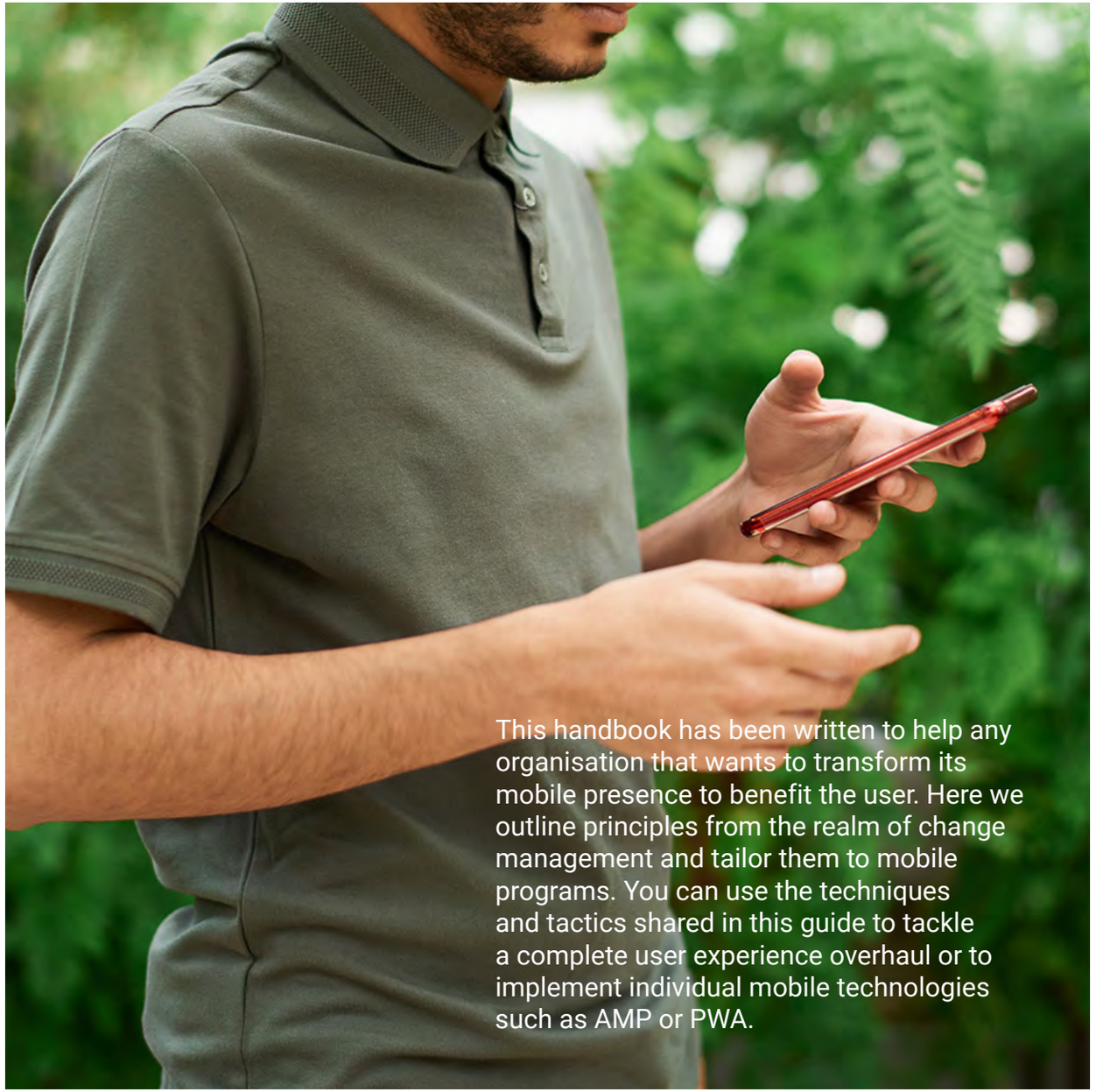
Recently I met with the UX team of a large UK retailer to review their website. I took them through a laundry list of recommendations for a more optimal customer experience including tests they could run - and was met with heads nodding in agreement. In the second part of the meeting though, we evaluated the difficulty in implementing the recommendations. The mood in the room dropped noticeably. For instance, fixing a button with a small bit of code was deemed "easy," but the political navigation to implement this was marked as "difficult."

In too many instances, corporate complexity gets in the way of a good customer experience. Designers and developers may have the best intentions, but often aren't empowered by leadership to do what's best for the user.

Brilliant customer experiences beg the question, "how did they do that?" Through deep partnerships with clients, we've helped transform businesses' customer experiences and drive commercial results. This guide is designed to help you navigate corporate complexities, provide tools to unlock resource, and walk you through the journey to a user-centric mobile experience.



This handbook has been written to help any organisation that wants to transform its mobile presence to benefit the user. Here we outline principles from the realm of change management and tailor them to mobile programs. You can use the techniques and tactics shared in this guide to tackle a complete user experience overhaul or to implement individual mobile technologies such as AMP or PWA.

Chapter One

Building the Business Case

In the majority of companies, the launch of any project requires a business case. This makes perfect sense and is sound logic. Our partners that have had the most success in achieving mobile experience transformation began by establishing committed executive sponsorship and a top-down approach.

Who:

The commercial and technical sides of the business must come together in this mission. A head of product needs to agree with the Head of marketing or ecommerce the value that can be gained in improving the digital experience. By joining forces to create a compelling pitch, executive and board level sponsorship can be gained.

What:

The business case needs to be strong enough to create a North Star when it comes to customer experience. With executive sponsorship, all parties within the organisation can align around this as a priority in decision making.

How:

The most compelling pitches include some or all of these components. Aim being to motivate the board level audience to compel them to approve the workstream and declare this a priority.

An illustration of the existing customer experiences

Organisations may become overly familiar with their own user journey and be blind to its flaws. Simulate an illustration of what the user is experiencing. Create a brief recording of a new user interacting with, interpreting, and attempting to transact with the site as a way of bringing the pain points and slow experience to life.

An illustration of best-in-class customer experiences

Organisations are constantly looking at their direct competitors as benchmarks, aiming only to be as good as, or better than, the competition. But users are actually spending their time on destinations like social media, messaging apps, and other rich experiences. Users expect the same high standard when they interact with any brand. Simulating an illustration of your experience compared to the best of the best will help set the bar where it belongs.

A demonstration of the commercial impact on the business

Websites can be thought of simply as cost centres for a business, but these days they are the very first touchpoint for your customers. Seemingly simple UX modifications or code fixes can have serious commercial impact. Gather the proof points and calculate the projected risk to the business if you don't make a change. For instance, we've worked with partners that have gathered examples such as:

- Speed to conversion rate to revenue
- UX testing to conversion rate to revenue
- Push notifications to conversion rate to revenue
- Percentage of traffic to mobile and desktop vs mobile conversion rate

An outline of desired and applicable uses cases

Begin considering your current experience, your aspiration and how you could possibly design for what you want to be. Review which systems and solutions will actually deliver value to the customer. Remember that the goal is optimising the existing experience, so don't be tempted to innovate for innovation's sake. There are hundreds of different types of optimisations to pursue, so drill down into what will be useful in your business, such as:

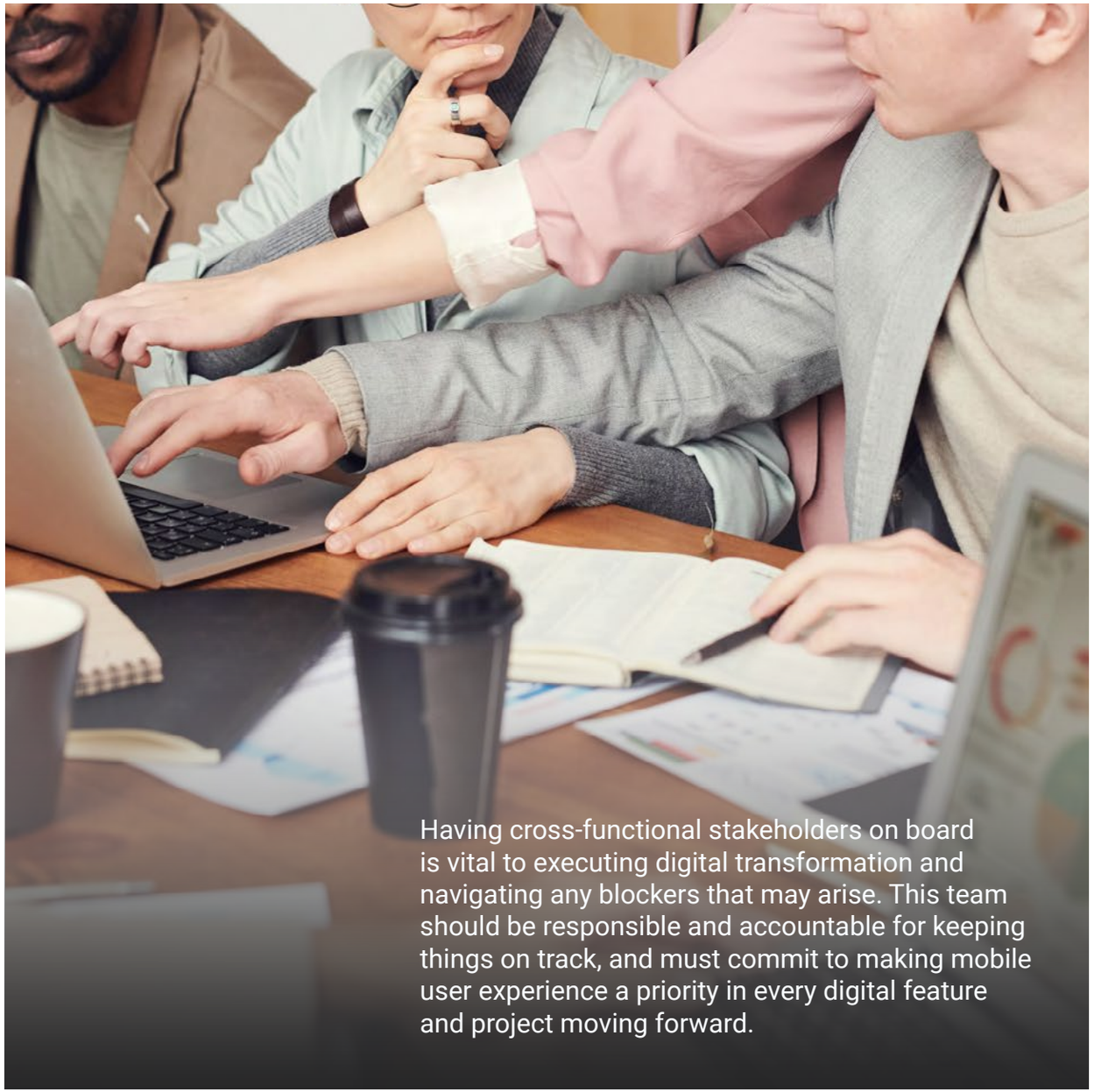
- User experience testing for checkout optimisation
- Accelerated Mobile Pages development to load pages instantly or generate ad revenue
- PWA caching for a fast experience
- PWA push notifications for re-engagement

A proposed execution plan including resource, stakeholders, milestones and blockers

Timelines and checkpoints are obvious essentials for reporting back on progress, but don't forget to outline requirements around stakeholders, staff, talent, and expected business impact.

Chapter Two

Assembling the Steering Group



Having cross-functional stakeholders on board is vital to executing digital transformation and navigating any blockers that may arise. This team should be responsible and accountable for keeping things on track, and must commit to making mobile user experience a priority in every digital feature and project moving forward.

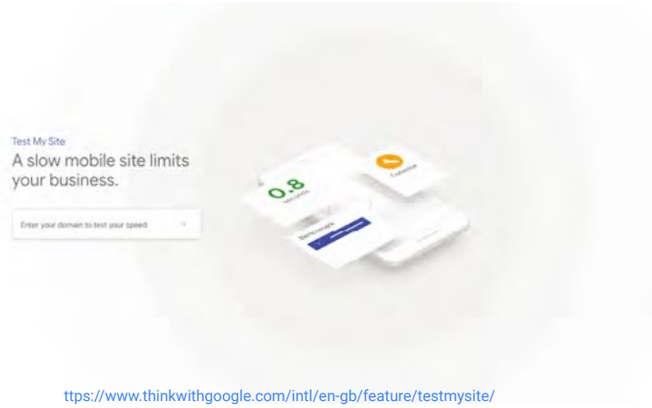
Who:

Expertise should be layered throughout all projects from the start.

Executive sponsorship: An assigned and committed leader to the program can be the difference between success and failure. Responsibility include helping reserve resources, selling to leadership for ongoing buy-in, removing systemic blockers and ideally reviewing progress once a month or every two months to guarantee momentum.

Marketing: Appoint a dedicated marketing stakeholder on the commercial side of the business. This should be someone who deeply understands and can represent digital interests, has influence, and most importantly - can translate the importance of the work-stream to others. If you have identified site speed as an issue, your SEO team may have flagged this already.

For a marketer friendly tool...



ttps://www.thinkwithgoogle.com/intl/en-gb/feature/testmysite/

Analytics: From the outset, the measurement and analytics team needs to be on board and fully sold on the importance of understanding the business results. They will know the back end of the business deeply and foresee any limitations in the plan. They will also be instrumental in helping you tie metrics together with business outcomes, for instance how page click-through rate translates to revenue.

Program or Product Manager: This person is solely responsible for moving projects within the workstream along. Managing projects should be their job description, not an extracurricular title. This individual could be hired specifically to look after driving performance or shipping specific new features.

UX Designer: Design teams and customer experience teams should be looped in as soon as possible since their contribution to the on-site experience is significant. What's more, any multivariate testing they perform on the site is likely to influence broader web performance.

Development: The developers and product owners are critical to execution, so they need to be brought into planning early. For instance, features and products might need to be built quickly prior to deployment, so don't leave development requests to the last minute.

What:

The key ingredients of a successful work-stream are structure and accountability. It's important to agree roles, responsibilities, and planned milestones up front. This framework will provide essential guidance and support as changes and problems arise.

How:

Identify short- and long-term plans, establish a timeline for checking in and reporting out, and create a red flag escalation process to tackle the imminent blockers.

Clients who Accelerate Hire for Accountability

Client Side Executice Sponsor	Dedicated Client Side mWeb Program Manager	Resource, Measurement & Accountability
Key Profile Can seriously influence tech roadmap	**Key Profile** Authority (via sponsor) to move projects with tech teams	**Reserve the Resource** In time, Headcounts, money to allow for implementation
Roles & Responsibilities **Set** mWeb as a priority internally **Assign/hire** mWeb Program Manager **Carve out resources** (time, people, money) in dev, UX & design teams e.g. CMO, Chief Product Officer, Board	**Roles & Responsibilities** **Lead** cross functional efforts across UX & web dev **Measure & Report** progress to Sponsor **Partner with Google** for best practices e.g. Head of Product, Head of Digital, Senior Digital Product Mgr	**Measure Impact** Quickly to prove program value

Chapter Three

Establishing the Strategy & Milestones

Commit to the projects that make the most sense from the point of view of user experience, and prioritise initiatives that provide maximum benefit to the user - and therefore the business.

Who:

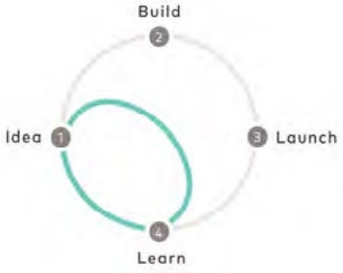
Senior leadership on both the commercial and technical sides should agree on the customer journey and touchpoints to focus on. By evaluating the consumer journey alongside business objectives, it should become clear where your teams need to invest their time and your money.

What:

Evaluate the greatest opportunity for your intended customer base and identify the weakest parts within the user journey. Consider conducting a condensed, one-day Design Sprint so that cross-functional stakeholders can participate in the process and help identify priority projects.

- Analyse where the bulk of the site or app's business is taking place and flag the drop-off points.
- Map out the main customer profiles, journeys, and value of each of these.
- Be harsh. If there are redundant or ineffective experiences, design better ones.
- Declare your ambition for where you want to go and what you can deliver.
- Create a grid of all technical steps required for execution (and potential blockers), then immediately relay this among stakeholders to discover whether you've missed any contingencies.

A Design Sprint is a five-day process for answering critical business questions through design, prototyping, and testing ideas. It gives teams a shortcut to learning without building and launching. https://www.gv.com/sprint/



How:

Workstream leaders and major stakeholders should agree on the following up front:

Measurement: Measure for commercial impact, and don't begin projects until metrics have been established and the analytics team has agreed on a methodology. For example, connection or abnormal data isolation may be required to monitor how certain product launches or optimisations impact user behaviour on the site and revenue. Ensure that sponsorship from the marketing or commercial side is fully committed.

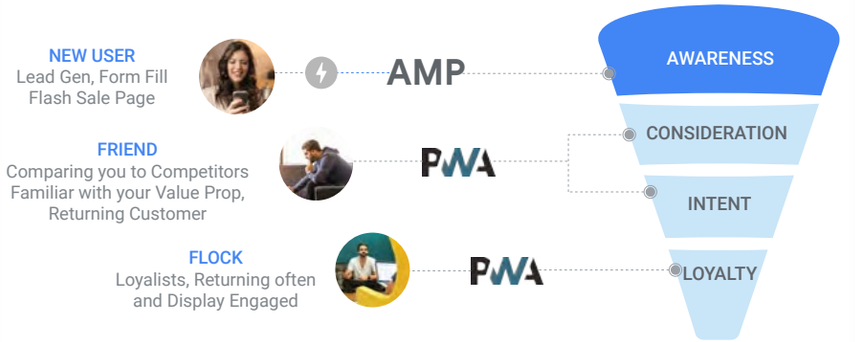
Challenge your team on any current analytics and tracking issues that necessitate the build of a separate dashboard. Bear in mind that some project completions and releases that are important on the tech side may not be fully understood or appreciated on the business side. Develop communications to fill this gap. For instance, compressing images by 50% does mean they're smaller but it's not immediately obvious how this contributes to business outcomes. Expand on the results by explaining how using smaller image files has directly reduced your page load times and increased conversion rates.

Strategic Tech Application: Among the many digital touchpoints where your customers interact with your business, some have greater impact than others, some may require more maintenance, and some may have more perceived importance within the business.

Here's an example. Legacy technologies often remain in place that provide no benefit to the user experience. A company might maintain multiple apps across different parts of the business. These may be expensive to maintain and could actually confuse the user. A strategy to align all apps into one could save considerable money and resources for the company down the road, while preventing frustration for the consumer.

Milestones: Once you have decided what technology to use and have mapped the implementation, agree the critical milestones and share these among all parties in the workstream.

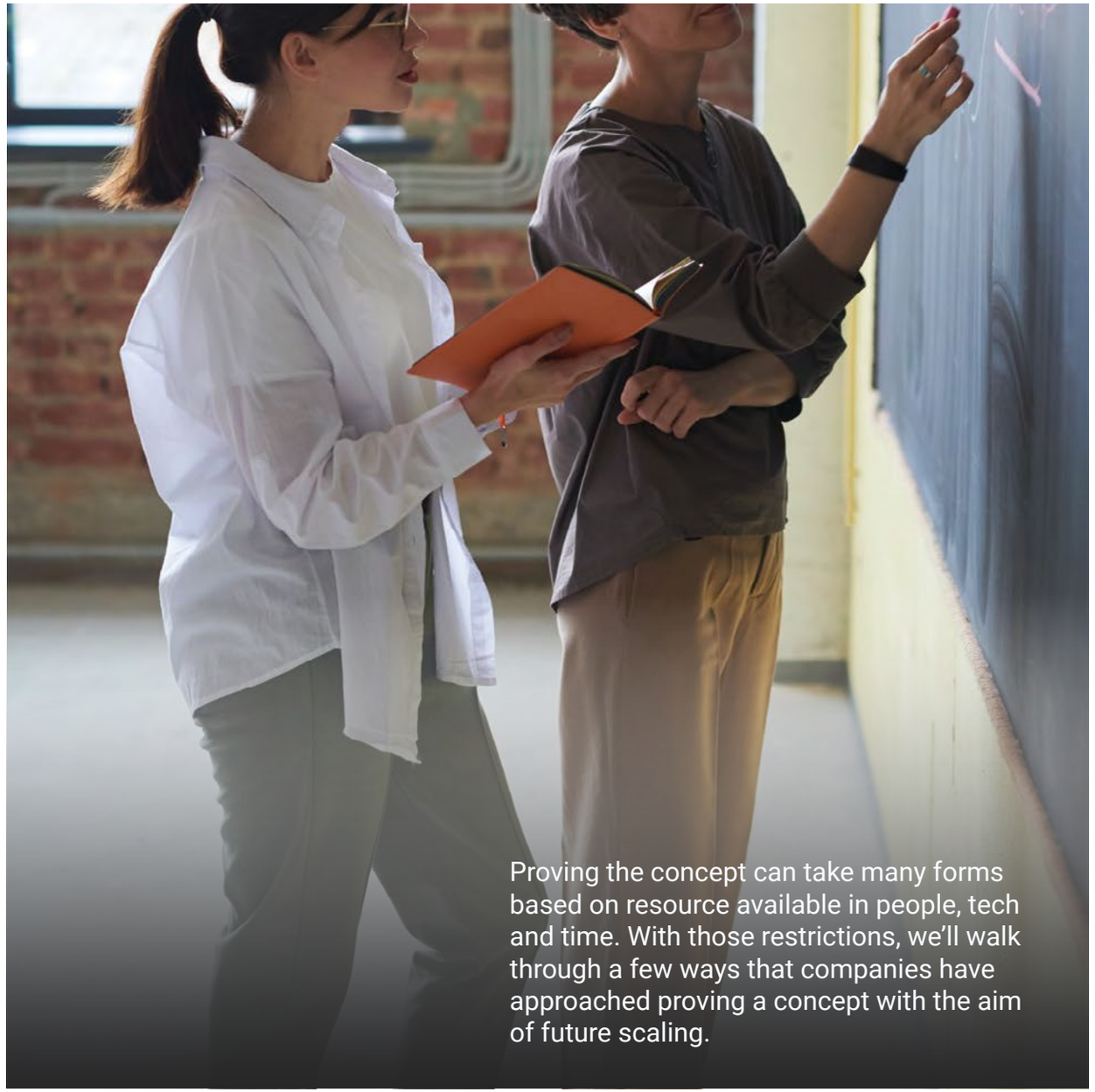
Where to use AMP vs. PWA?



Consider the importance of user experience at different touchpoints. Here's an example showing how speed-related technologies can create value for users throughout the purchase funnel.

Chapter Four

Proving the Concept, Execution & Scaling



Proving the concept can take many forms based on resource available in people, tech and time. With those restrictions, we'll walk through a few ways that companies have approached proving a concept with the aim of future scaling.

Who:

This is when the practitioners responsible for managing and moving the project forward start. Carving out and protecting the resource of time and effort is important for the proof of concept. Leadership in the workstream should be very precious over the practitioners' focus on the proof of concept and ensure they other projects or player are not distracting from the build.

What:

Projects typically need a starting proof of concept before a new technology or optimisation can be executed and scaled.

How:

Proof of Concept as a Product: How to Scale without Hired Headcount

One company we worked with produced a proof of concept demonstrating the effect of speed-related wins on business results. Since there was no dedicated headcount for this initiative, the organisation needed a way to incentivise people to adopt speed requirements.

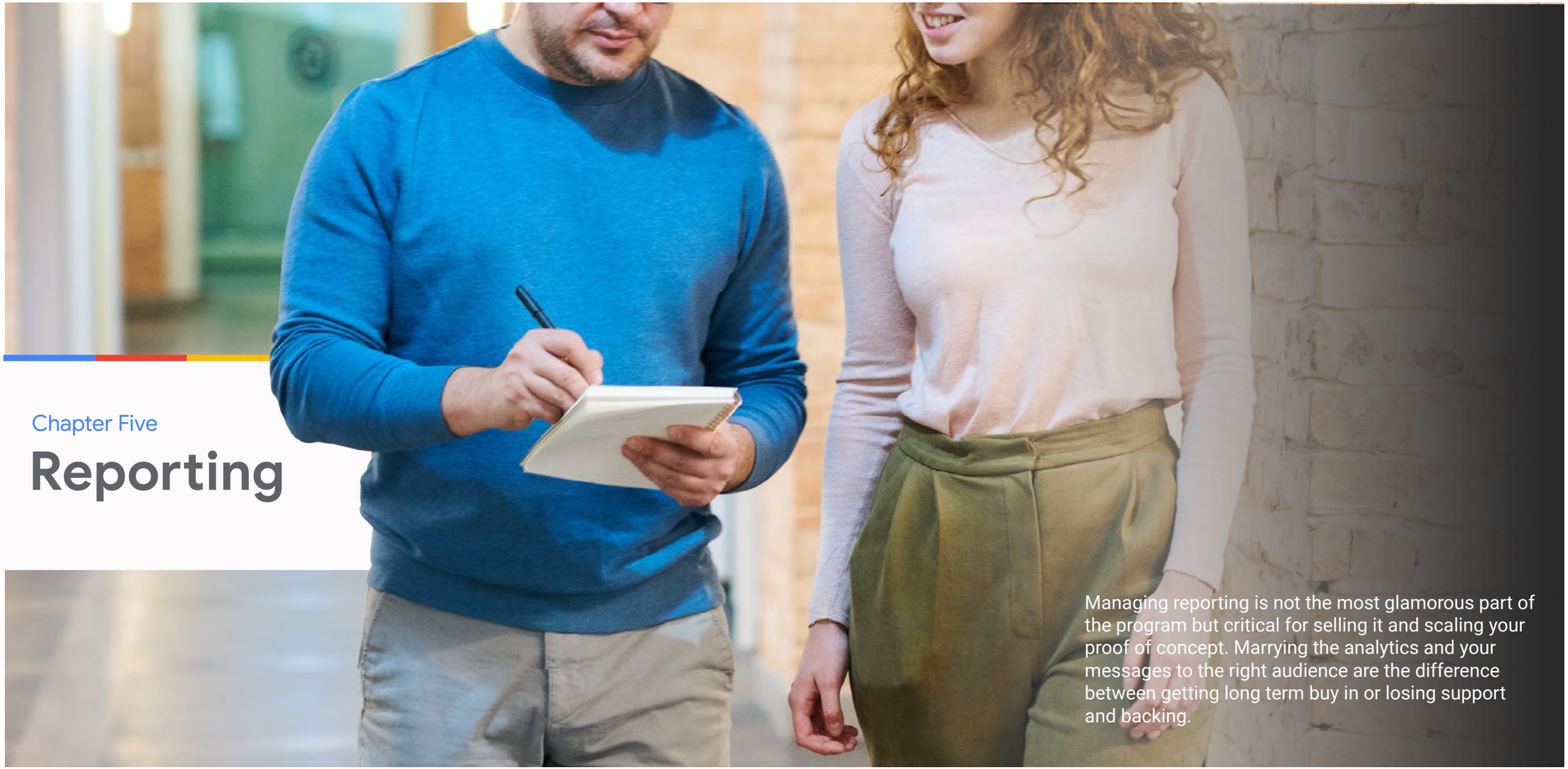
A senior engineer was able to get speed built into their product excellence framework and into the dashboards used across the engineering team. In this way, they gamified the metric. The team could compare their speed to competitors and to fellow product teams, which kept people motivated.

Proof of Concept as a Specialised Team: How to Scale Using Hired Headcount

One company we worked with committed a proof of concept team to hit the ground running. They pitched to the board and received headcount for a team to specialise in making the most of the current platform and launching AMP pages for entry points. One year later, this team is rolling out their mobile expertise and learnings horizontally across all products. In this way, proven standards and best practices are being woven into each part of the customer journey.

Proof of Concept as a Horizontal Team: How to Scale across Vertical Product Teams

Another example was authoritative organisation that formed an expert team focused on evangelising, educating and ramping up product teams for user centric wins. The horizontal team established goals and standards for design and site speed then began to slowly roll out these "rules" and expectations to the product teams for accountability.



Chapter Five

Reporting

Managing reporting is not the most glamorous part of the program but critical for selling it and scaling your proof of concept. Marrying the analytics and your messages to the right audience are the difference between getting long term buy in or losing support and backing.

Who:

Senior stakeholders and all practitioners should be responsible for reporting back results.

What:

Think of the entire spectrum of reporting. This encompasses the very technical (where value is tied to digital performance), the very commercial (where value is tied to revenue), and general understanding for all of your stakeholders.

How:

Product Facing: Build in operational rigour with frequent and regular Sprints to deliver new features or optimisations. Be specific in establishing what to measure and how the numbers correlate with your goals and desired outcomes. For example, if you release X on product pages you expect the pages to load Y seconds faster with an anticipated commercial impact of £Z. One successful company we worked with ran Sprints every two weeks.

Commercial Facing: Given that the tech and product side can seem like a black box to the business side of an organisation, it's critical to carefully translate the work that is being done in commercial terms. Reporting out latest results to the commercial side every four to eight weeks can be effective. These reports should include concise information on projects completed, what new features have been launched, and the resulting contribution to revenue, SEO, traffic, lighthouse metrics and most importantly, revenue. Technical detail in these reports should be kept to a minimum.

Technical and business stakeholders should partner closely to ensure that reports are translating results effectively and are providing the right level of detail to the audience. One successful company we worked with hired an agency to help them create internal branding around their workstream and solicit direct customer quotes to validate proposed projects. The product lead also did some boots-on-the-ground socialising with the marketing team to ensure the messages were on point before releasing the report.

Board Level Facing: When presenting to top stakeholders, focus on the big ticket items. For example "We launched 1 million AMP pages impacting Y% of traffic and gaining 50% conversion rate uplift" or "We launched Z feature." This is also the time to call out any blockers you came up against, such as technical debt or headcount issues, which made it difficult to deliver on the initial proposal.

Mock Up of Speed Dashboard

Landing Page	Page Weight	Time To Interactive (TTI)	First Meaningful Paint (FMP)	Lighthouse Score	Revenue

Lighthouse Metric:
Lighthouse is an open-source, automated tool for improving the quality of web pages. You can run it against any web page, both public and requiring authentication. Lighthouse has audits for performance, accessibility, progressive web apps, and more.

https://developers.google.com/web/tools/lighthouse

Don't forget internal PR and comms! Consider using internal marketing and newsletters to maintain the workstream's presence, focus, and authority. Send out updates, get on the agenda of all-hands meetings, and stimulate frequent interaction with extended stakeholders such as local marketing managers.

Chapter Six

Sustainability & Iteration

Of those businesses that make substantial changes for customer experience, 40% regress within six months. Acknowledge the workstream exists to create an institutional change; it's not just a plaster where the business invests in tech for a year and then moves on.

Who:

All workstream parties need to work with the mindset that user-first digital initiatives will continue into the future. The original project shouldn't be pitched as finite, but rather as a continuous workstream for the ongoing betterment of the customer experience. Within this sustained approach, the plan may need adjustment over time due to changes such as a new technology stack or the company's reorganisation.

What:

Promise an iterative session for mid-implementation or at the end of the first year in order to evaluate new KPIs, projects, and needs for scaling. Most companies we've worked with have not built sustainability into the initial pitch and find themselves doing so retrospectively or in round two of their digital transformation process.

How:

Systems: Building checks and balances can ensure customer centricity and a good user experience in all things moving forward.

- Design Standards: A centralised hub for design standards can ensure branding consistency and prevent work being rejected upon review, which takes time and costs money.
- Analytics Standards: A centralised hub and routing system for third-party tags is very useful. Create a workflow that marketers and others must adhere to whenever new tags are launched.
- Web Speed Standards: Set parameters and systems to prevent regression and future bloating. For instance, performance budgets, before projects can be deployed, pages must meet a certain sizing, time to interactive (TTI,) or speed index. Ensure monitoring, enforcement throughout the development pipeline. https://web.dev/performance-budgets-101/

Celebration, Reward & Incentives: Celebrate improvements and reward people and teams for activating and embracing user-centric strategies. Gamification, contests, and prizes can help maintain momentum and support. If possible, a company-wide objective can keep user centric initiatives as the North Star for any feature or product.

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