Mapping (and Building) the Ultimate User Experience

Presented by Bailey Ronnebaum

Forbinfi
A VGM COMPANY

About Me

- Expecting baby girl March 2024
- Dog & Cat Mom
- Business Development Manager
- Marketing for 9 years
- LinkedIn:

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What does forbinfi do?

- Website Development
- Digital Marketing
- Brand Development
- Print Marketing
- Training and Coaching
- Managed IT Services

1 Big Topic…
5 Parts

I will answer…

1. What is User Experience (UX)?
2. What does a UX Designer do?
3. Why is it important?
4. How to get started
5. Financial website trends

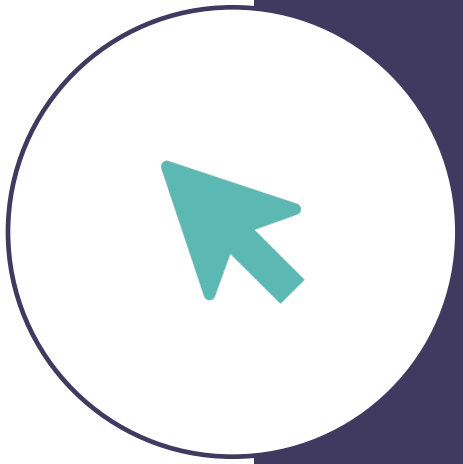
…plus takeaways in between!

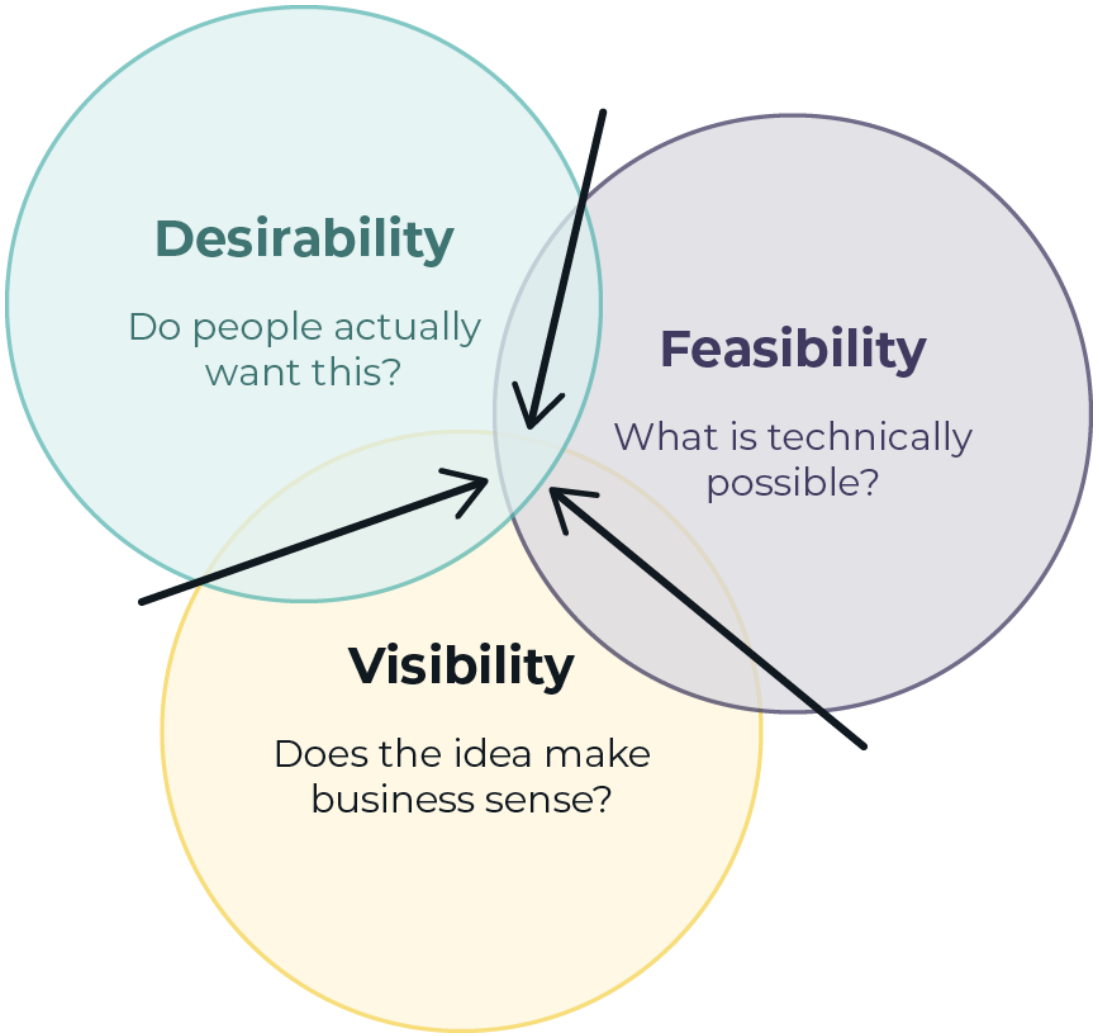
What is (UX) User Experience?

“We spend a lot of time designing the bridge, but not enough time thinking about the **people who are crossing it**.”

User Experience (UX)

- All aspects of someone's **interaction** with a company, its products, and services





UX manages the exchange of value between the user and the business.

Both sides need to be getting value or else things fail.

UX is intended to make sure that exchange happens efficiently.

What Does a (UX) Designer Do?

"UX Design is a commitment to building products with the end user in mind."

UX Designer

What friends think I do

What my family thinks I do

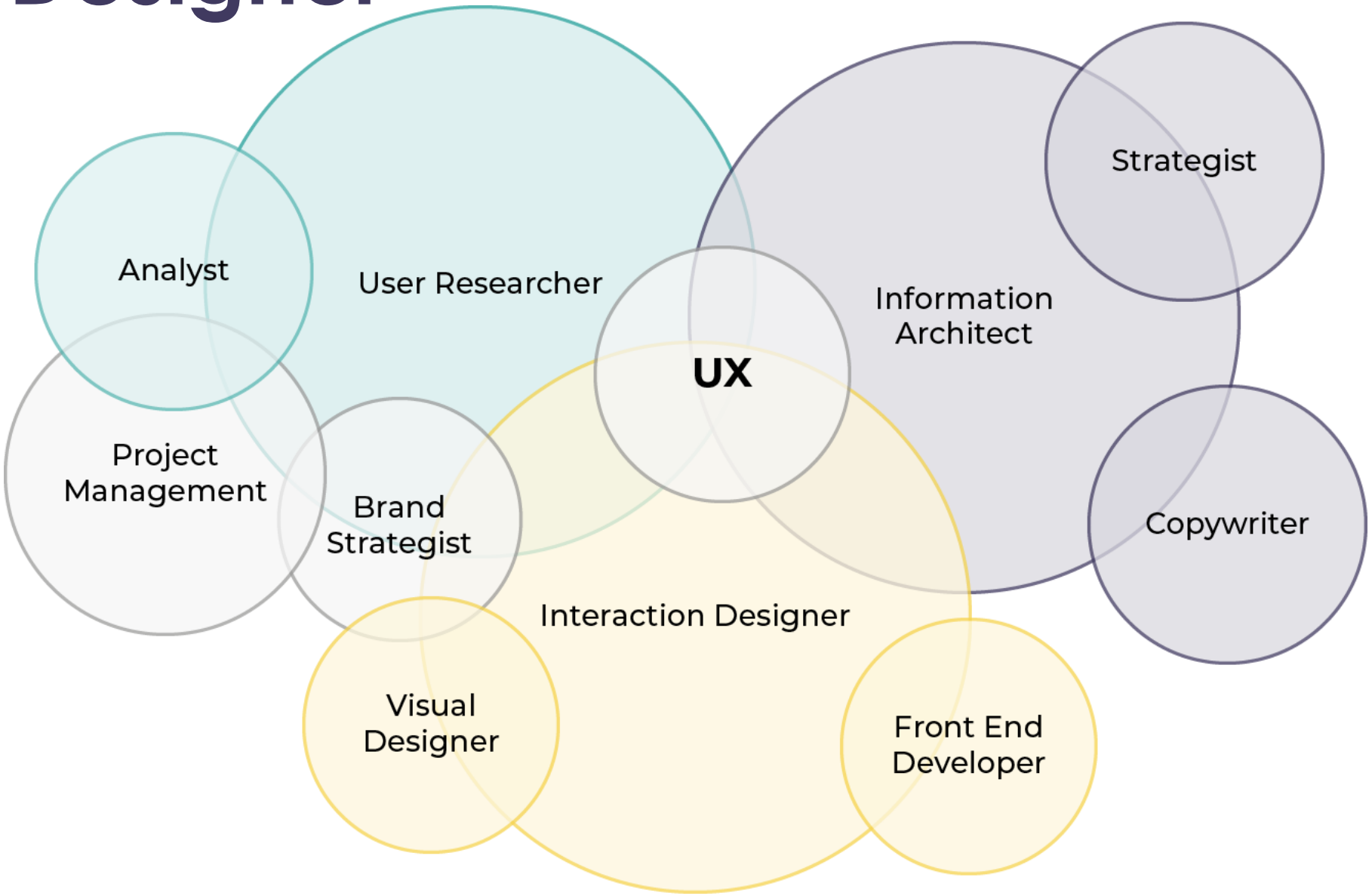
What clients think I do

What coworkers think I do

What I think I do

What I actually do

UX Designer


Analyst
User Researcher
Strategist
Information Architect
UX
Project Management
Brand Strategist
Copywriter
Interaction Designer
Visual Designer
Front End Developer

82% of UX professionals **collaborate** with other team members on the deliverables they produce.

- Nielsen Norman Group

"How UX Professionals Collaborate on Deliverables" (2016)

Why is UX Important?

“FIs that prioritize user experience are more likely to retain customers and attract new ones.”

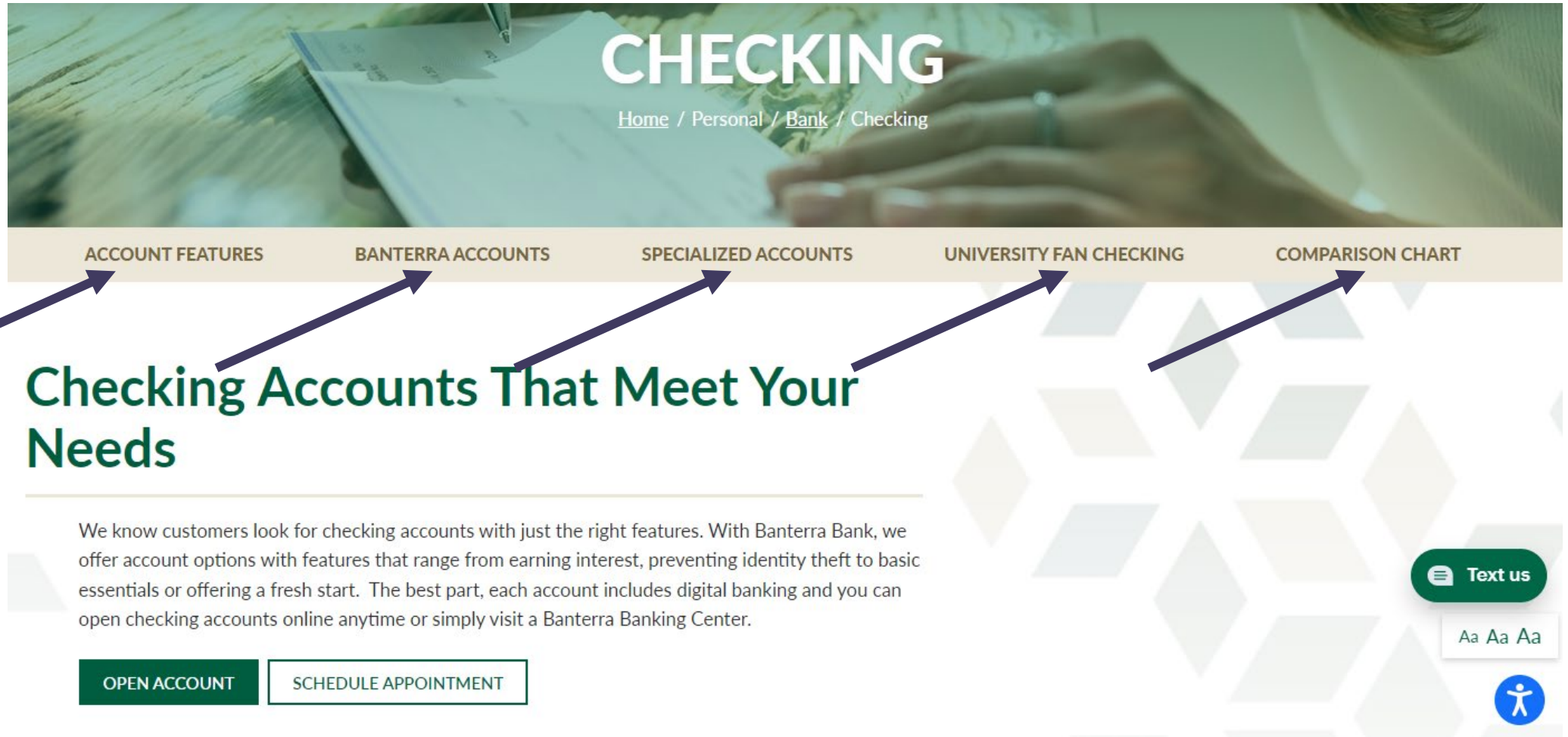
Key Components of UX:

1. Understanding User Needs & Preferences
2. Outlining Structure
3. Increasing Accessibility
4. Enhancing Efficiency
5. Evolving Security

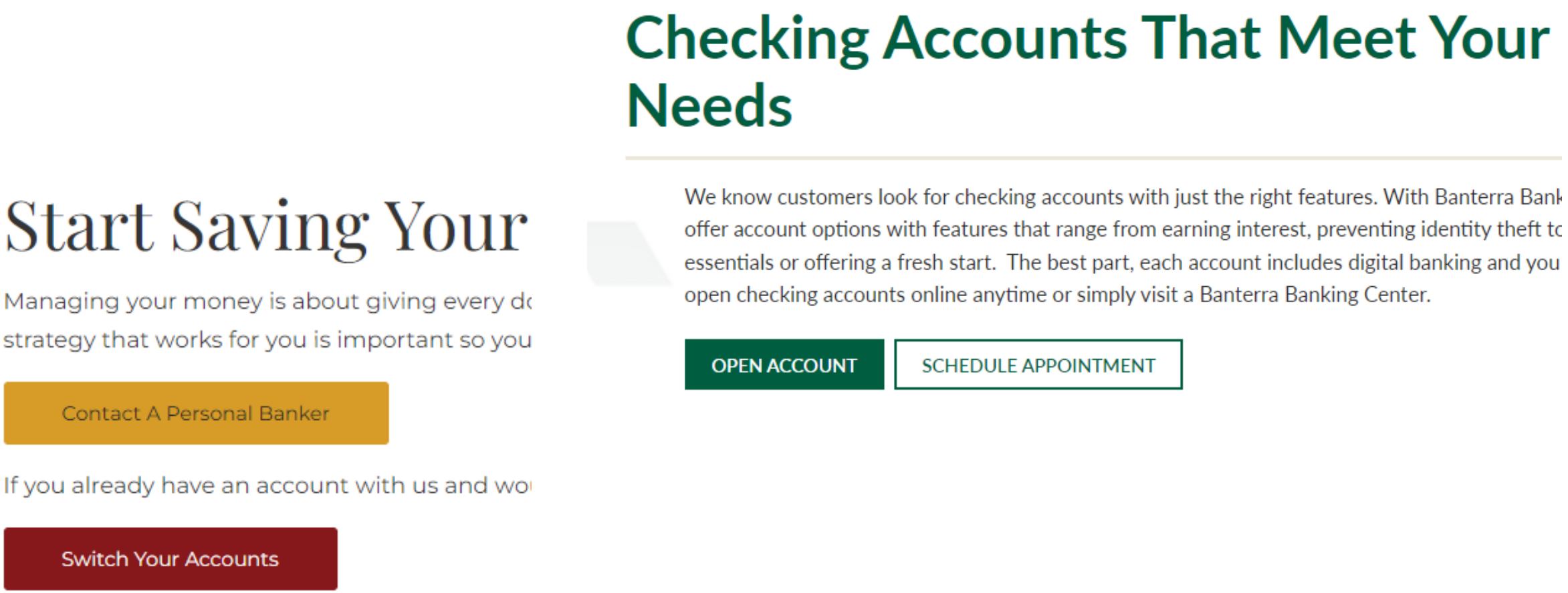
How to Get Started …

Web Updates for User Experience

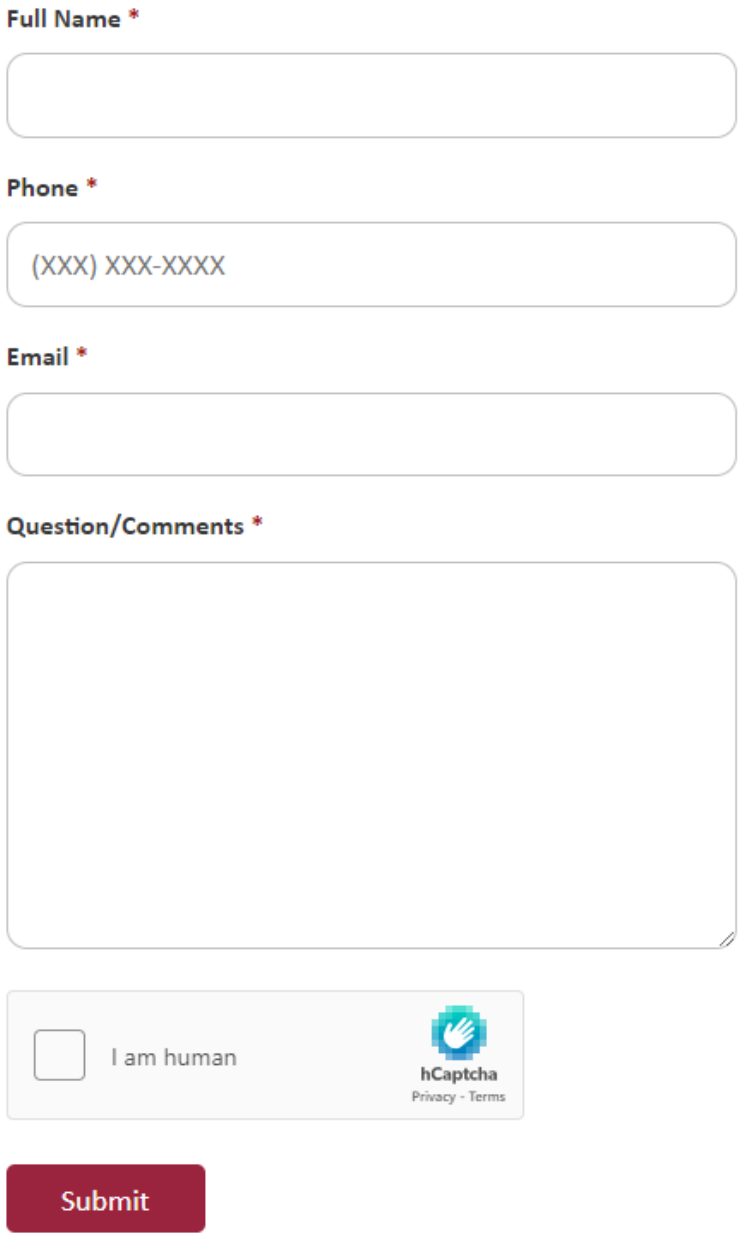
Add Text Anchors



Create CTA Buttons



Utilize Quick Forms



Lessen Clicks

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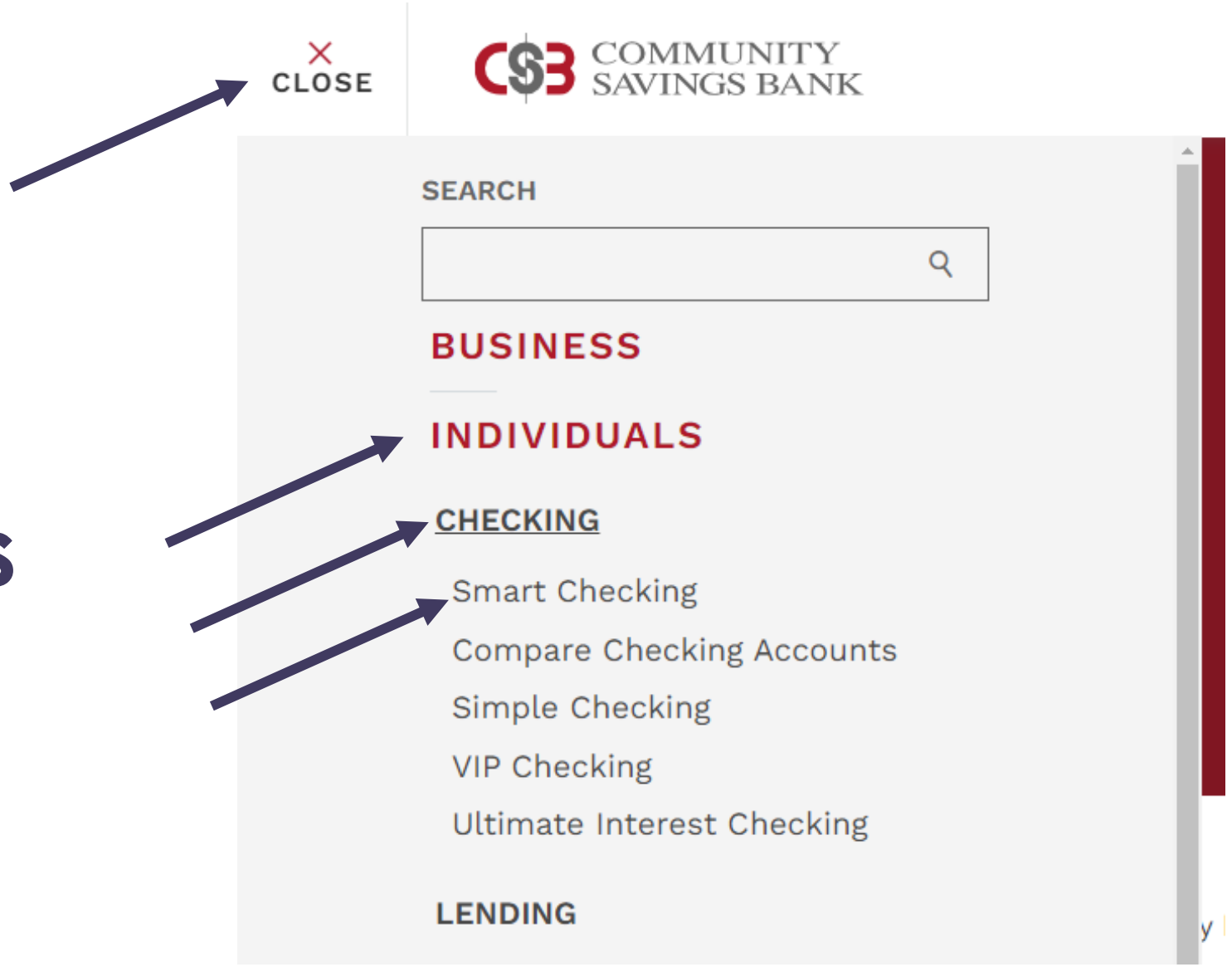
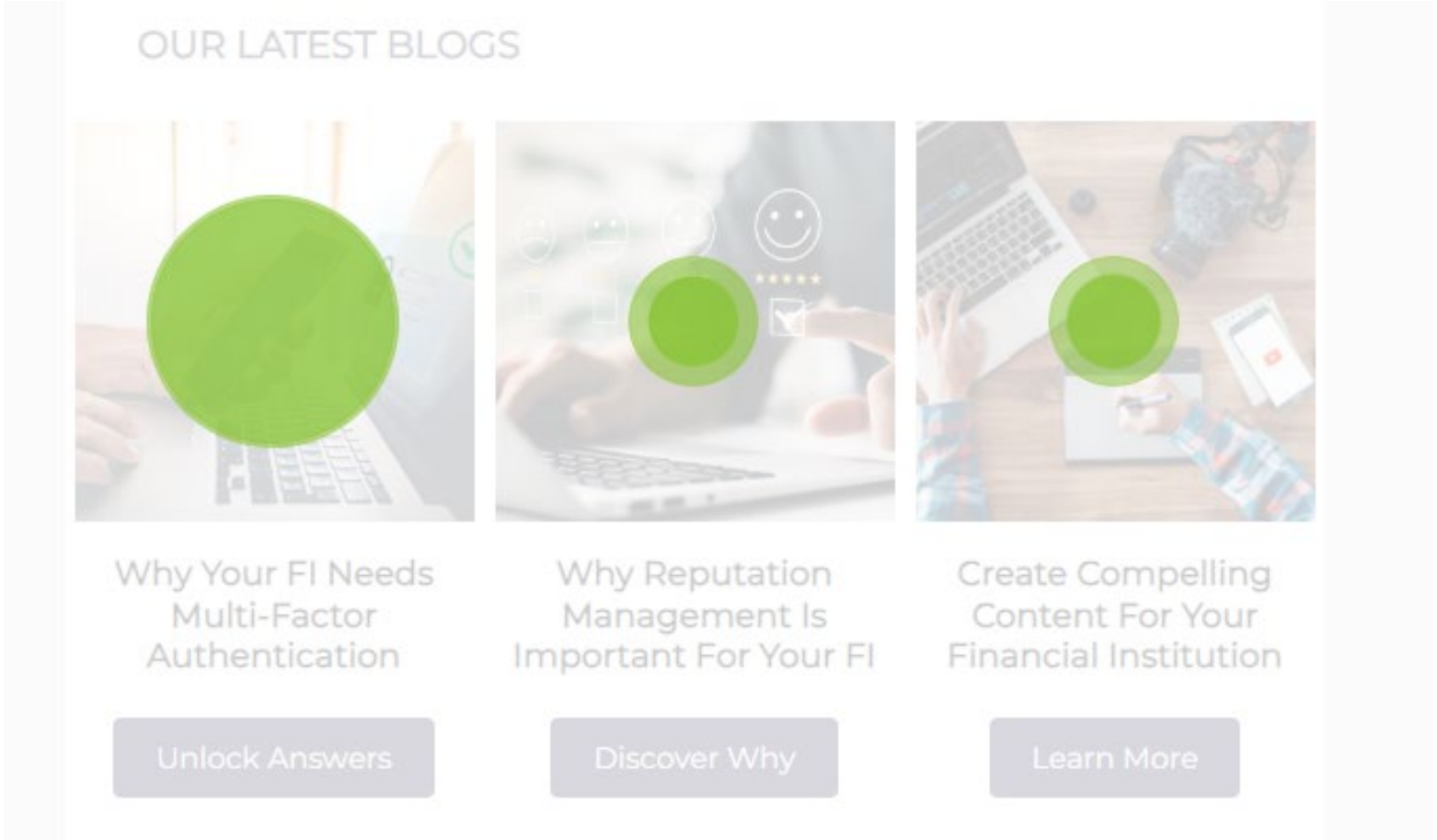


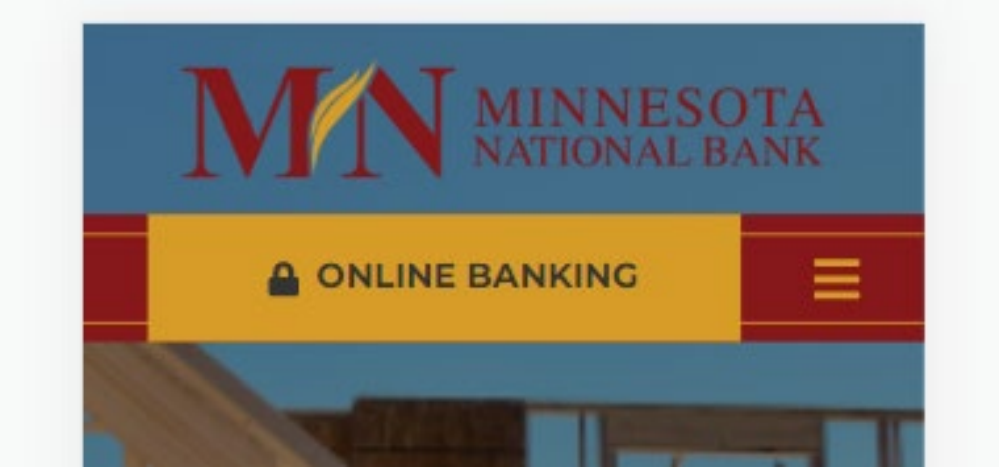
Utilize Comparison Charts

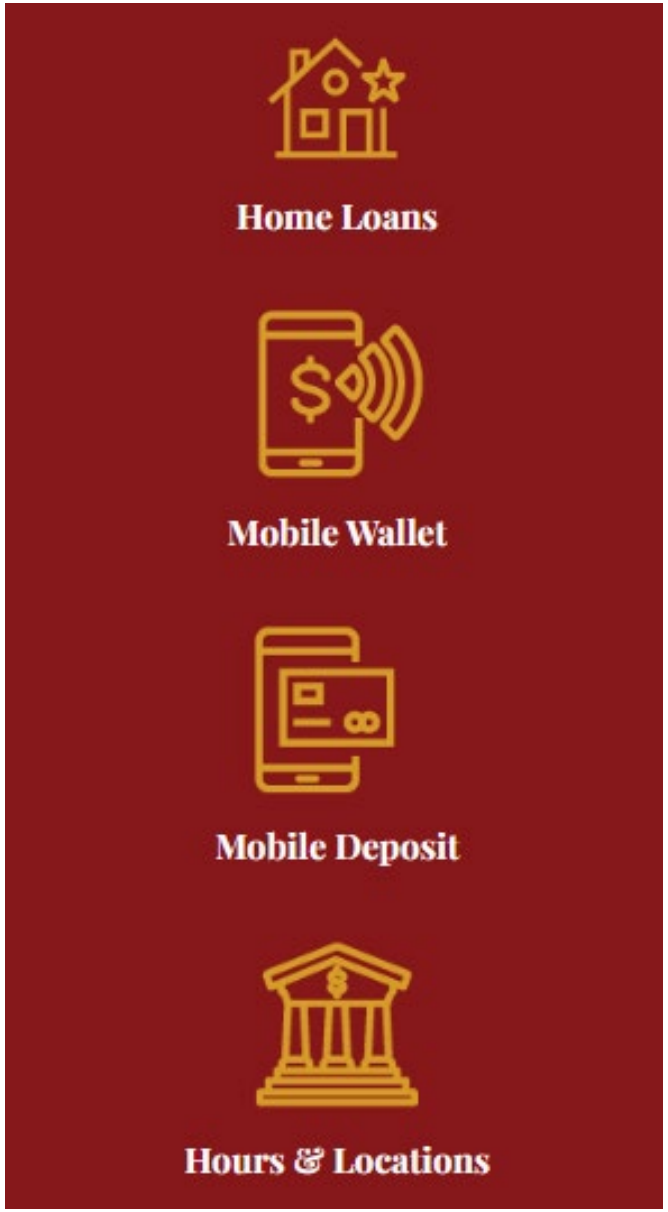
Account Name	Overview	Fee Details	Additional Details
Money Market Insured Savings	Minimum Deposit to Open - $0 Interest Bearing (Interest is earned on all balances at tiered rate)	$1 Service Fee if balance falls below $50 (Waived if under age 20)	N/A
Christmas Club	Minimum Deposit to Open - $0 Interest Bearing (Interest is earned on all balances at tiered rate)	Service Fee - $0	Maximum Balance of $5,000 Funds are not accessible until disbursement date Disbursement Date is around October 10 annually
Certificates of Deposit	Minimum Deposit to Open - $500 Interest Bearing (Interest is earned at tiered rate)	Service Fee - $0 Early Withdrawals subject to penalty	0.10% Rate bump if you have Premium Checking Terms range from 91 days to 60 months Funds can be withdrawn or reinvested at full maturity Laddering options available for more liquidity and higher return

Make Graphics Clickable



Make Site Mobile-Friendly





Web Updates for SEO

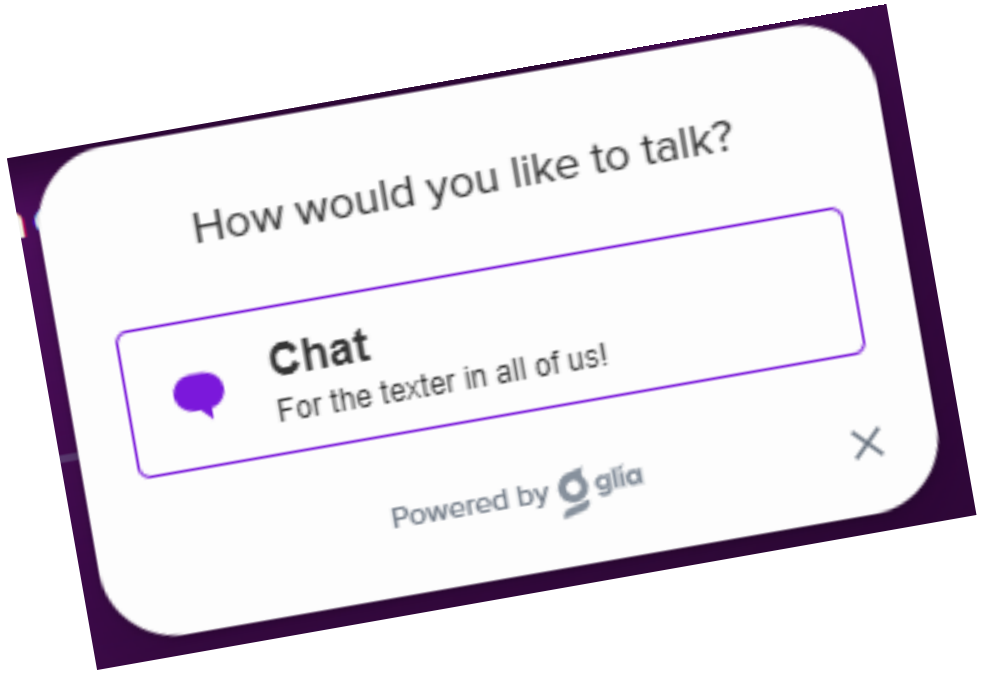
- Optimize metadata
- Avoid text on graphics
- Add internal links
- Add keywords to headings
- Create new pages of content
- Eliminate duplicate content
- Update content over time
- Claim social media & directory listings

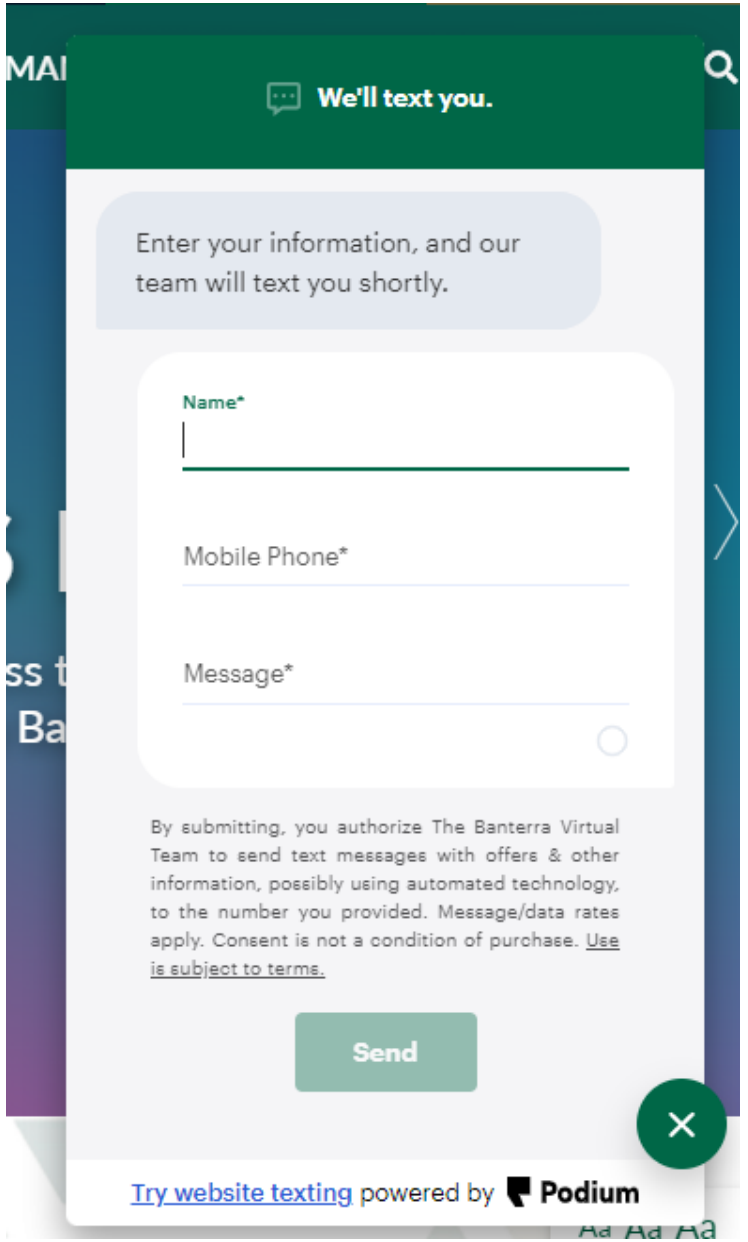
Financial Website Trends

Latest & Upcoming Trends

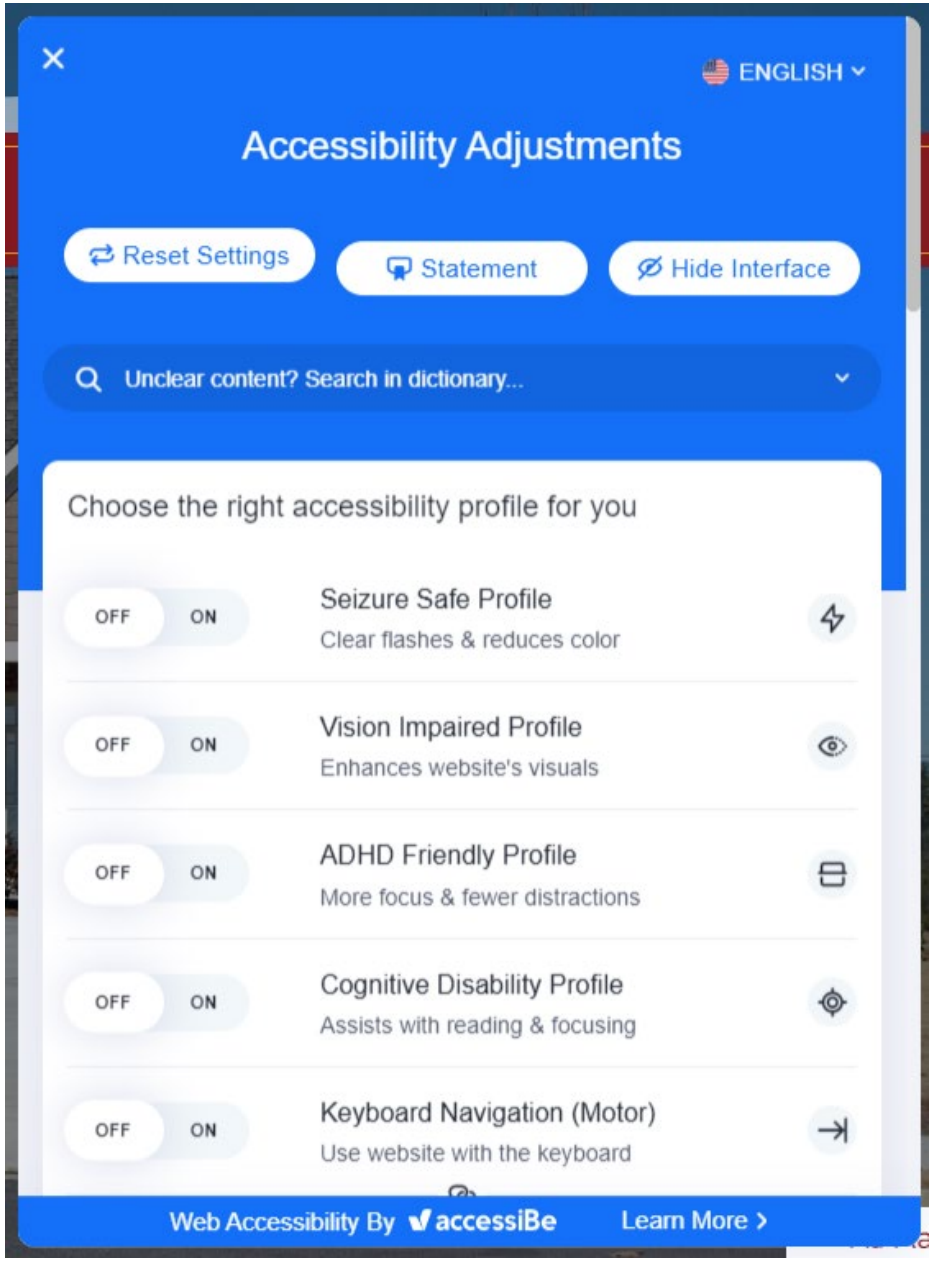
Chat Integrations

- Podium
- Glia
- POPi/o



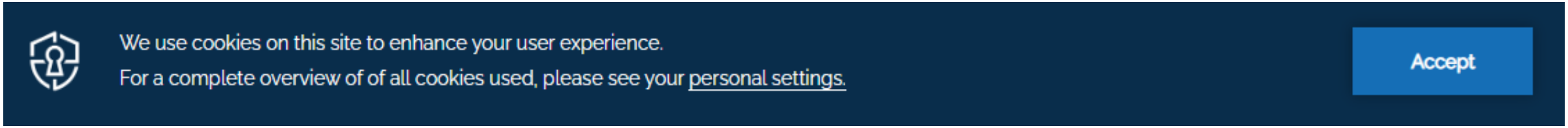


WCAG
(ADA Accessibility)



Data Privacy

- Comparable to GDPR(General Data Protection Regulation)
- Varies by state
- Cookie consent banner
- Consent logs for advertising & data collection cookies
- Self-service cookie consent opt-out



Multi Factor Authentication

Step 1.

Install a verification app on your phone

You'll need to use a verification app such as Google Authenticator, Authy, or Duo.

Step 2.

Scan this QR code with your verification app

Once your app reads the QR code, you'll get a 6-digit code.

Manual Setup

Step 3.

Enter the 6-digit code here

Enter the code from the app below. Once connected, we'll remember your phone so you can use it each time you log in.

6-digit code

######

Connect Phone

Summary

1. Remember what the “U” stands for…. (hint: it’s not YOU!)
2. Your user’s experience is a differentiator (good or bad)
3. UX design isn’t a one-person job/one-size-fits all
4. The UX must evolve as your information, competition, products and users evolve

Questions?

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- Digital Marketing
- Brand Development
- Print Marketing

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