A UX Case Study

Purchase Experience
Mindbody

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ABOUT

Industry leader in the health and wellness tech space.

B2B

Providing SaaS products that empower and enable customers to run their businesses and provide wellness services to their consumers.

Who are our customers?

Owners
Receptionists
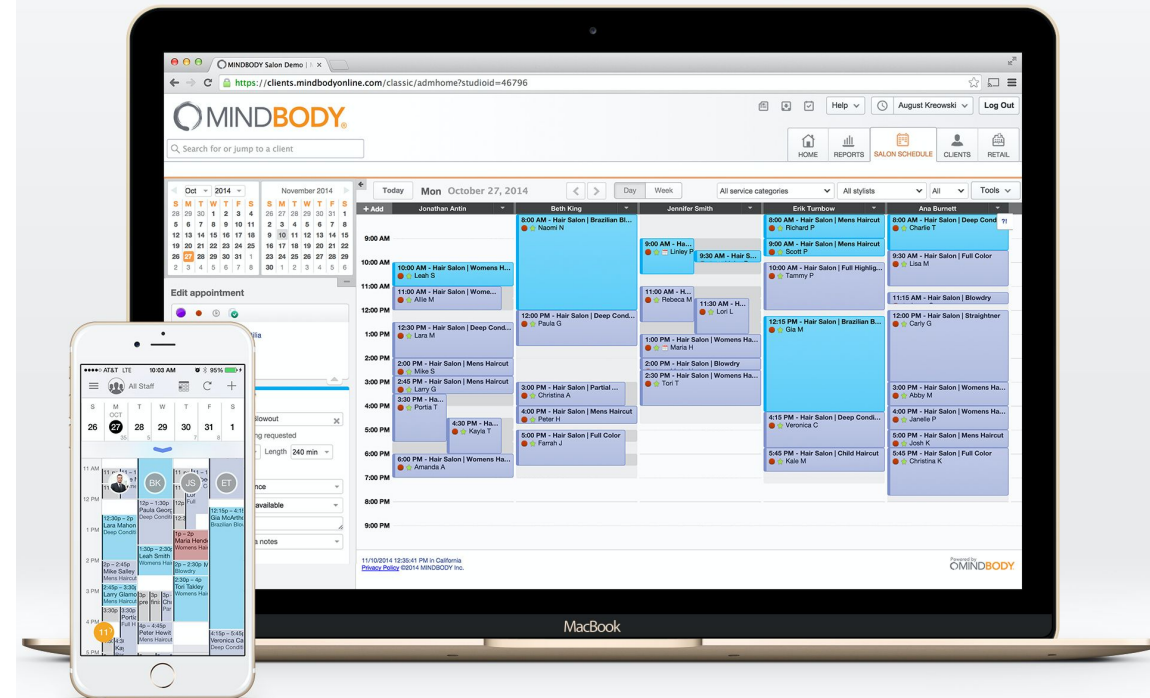Staff
Service Providers

B2C

Providing a consumer-facing app and web experiences for consumers to:

Discover new businesses
Book appointments and classes
Purchase products

Who are our consumers?

Anyone interested in health and wellness

OVERVIEW: The New Mindbody Experience

A Reimagining of the Mindbody Software

- **Create** a central user experience across platforms
- **Update** clunky legacy code
- **Improve** customer and consumer-facing experiences
- **Innovate** ways for customers to quickly and efficiently manage their businesses
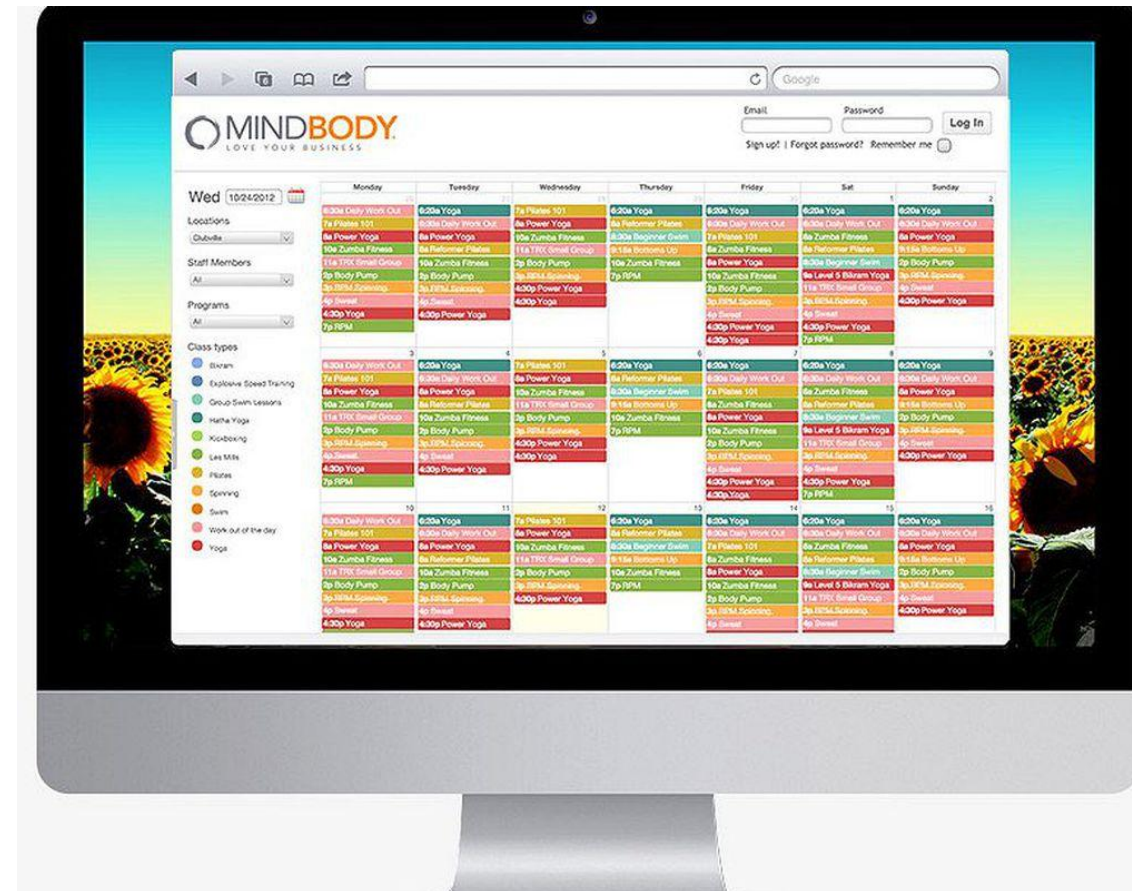
APPROACH

Role: Lead Researcher

Collaborators: UX, PM, Customer Support, Engineering

Responsibilities:

- Meet with stakeholders to gather questions and understand scope
- Create research plan, manage project timeline, and gather materials needed for sessions
- Collaborate with recruiter to connect with eligible customers and consumers
- Moderate and analyze research sessions
- Disseminate findings to stakeholders with actionable insights and recommendations

Discover (Oct – Nov '21)   *Explore (Nov - Dec '21)*   *Test (Jan '22 – Present)*

| Discovery Research | Empathy Workshop | Design Workshop* | Usability Testing |

APPROACH

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Discovery Research  →  Empathy Workshop  →  Design Workshop*  →  Usability Testing
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Stage 1 - Discovery Research

- Objectives
    - Understand top scenarios for customers
    - Understand customers' pain points and top tasks in the purchase experience
    - Observe length of time needed to complete tasks
    - Pinpoint areas of opportunity for innovation and improvements
- Method: 3 45-minute remote, ethnographic observation via Zoom
- Result:
    - Increased understanding of top areas of opportunity for innovating the purchase experience
    - Benchmark current user experience in purchase experience

POS – Observation Research

Research Overview:	

Research Methodology: Ethnographic observation	Sample size recommended:	Documentation: Screener Recruiting email/post Session recordings Session notes Transcripts

01: Research Objectives:

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02: Research Method:

- 45 minute remote, ethnographic observation via Zoom and a 15 minute follow up session

03: Research Participants:

- Mindbody customers that use either the antiquated POS system through the Retail tab or the Retail 2017 POS system through the Appointments tab

04: Research Schedule:

Milestone	Date	Notes
Intake	October 15	
Research plan review	N/A	
Recruiting	October 19 - 25	

SAMPLE RESEARCH PLAN

APPROACH

Discovery Research → Empathy Workshop → Design Workshop* → Usability Testing

Stage 2 – Exploratory Research – Part A: Empathy Workshop

- Objectives
  - Establish empathy for users among internal employees by "stepping into the shoes" of the customer
  - Define top user personas
  - Identify problem areas for B2B and B2C users in the purchase experience

- Method: 2-hour remote, empathy workshop with internal employees

- Result:
  - Updated personas for the purchase experience across verticals
  - Increased understanding of the Mindbody software for internal employees
  - Plan of action for tackling problem areas in the user experience

SAMPLE PERSONAS

Consumer Claire

A customer or prospect of a business

What's my goal?

Owner Owen

SMB owner, franchise location owner, solo practitioner

What's my goal?

Service Provider Susan

Instructor, personal trainer, stylist, massage therapist, esthetician

What's my goal?

Front Desk Fiona

A front desk worker

What's my goal?

APPROACH

| Discovery Research | Empathy Workshop | Design Workshop* | Usability Testing |

Stage 2 – Exploratory Research – Part B: Design Workshop

- Objectives
  - Identify and categorize product features to include in the new experience
  - Classify and organize workflows based on usage via Pendo analytical data
  - Brainstorm workflows to meet the needs of customers in the purchase experience

- Method: 2-hour remote, design workshop with internal employees

- Result:
  - Product feature tree
  - Plan of action for a unified purchase experience across platforms
  - Low fidelity wireframes for top workflows across device platforms per persona

*Designer led workshop, supported as facilitator

APPROACH

| Discovery Research | Empathy Workshop | Design Workshop* | Usability Testing |

Stage 3 – Validation Research (Ongoing)

- Objectives
    - Validate usability of future designs with customers
    - Understand customers' perception of terminology in the POS
    - Gauge importance of feature components in the purchase experience
- Method: 6-8 45-minute remote usability sessions with customers (each round)
- Result:
    - Updated iterations of designs
    - Additional features for increased value prop for customer
    - Increased understanding of user needs in the purchase experience
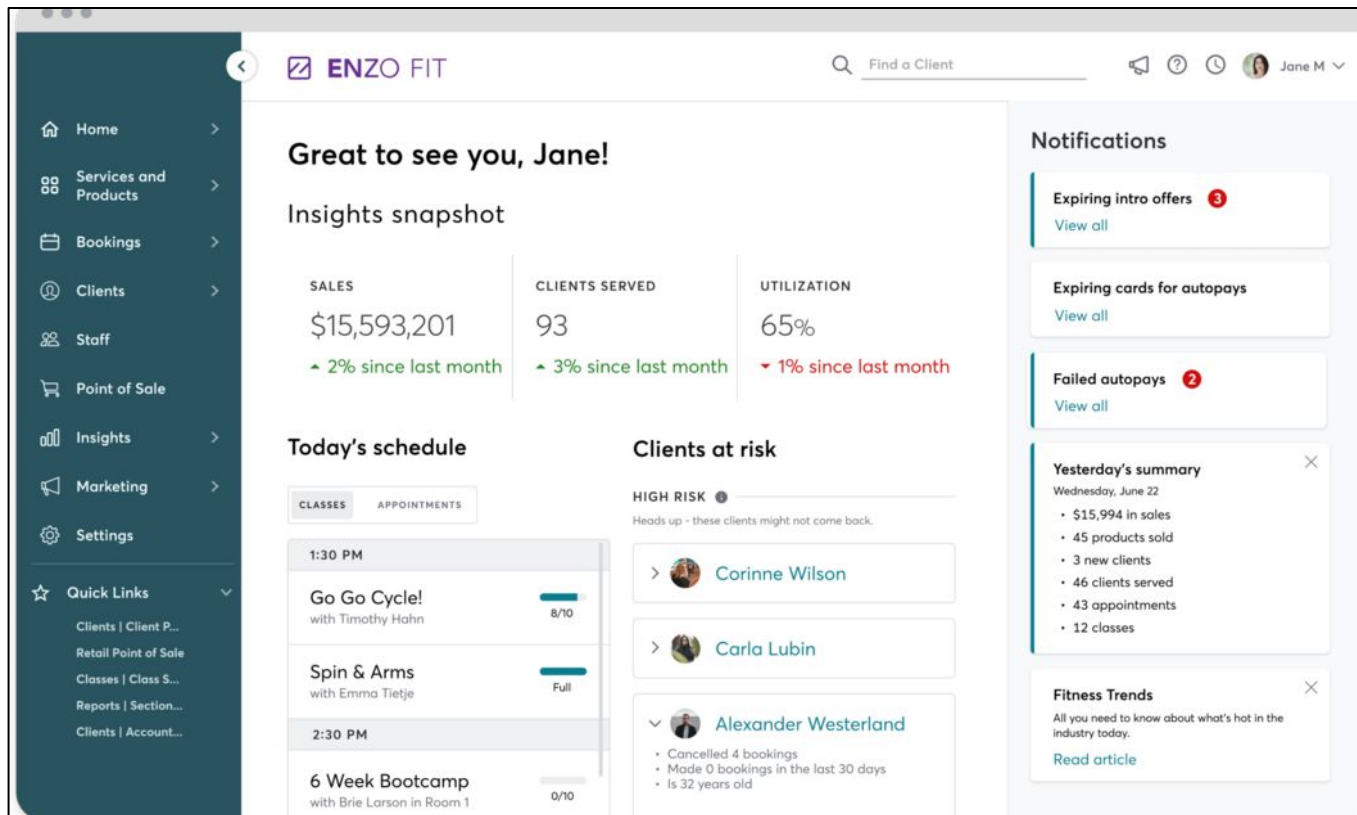
NEW EXPERIENCE
Updated backend legacy code
Modern UX/UI
Reimagined navigation & tools
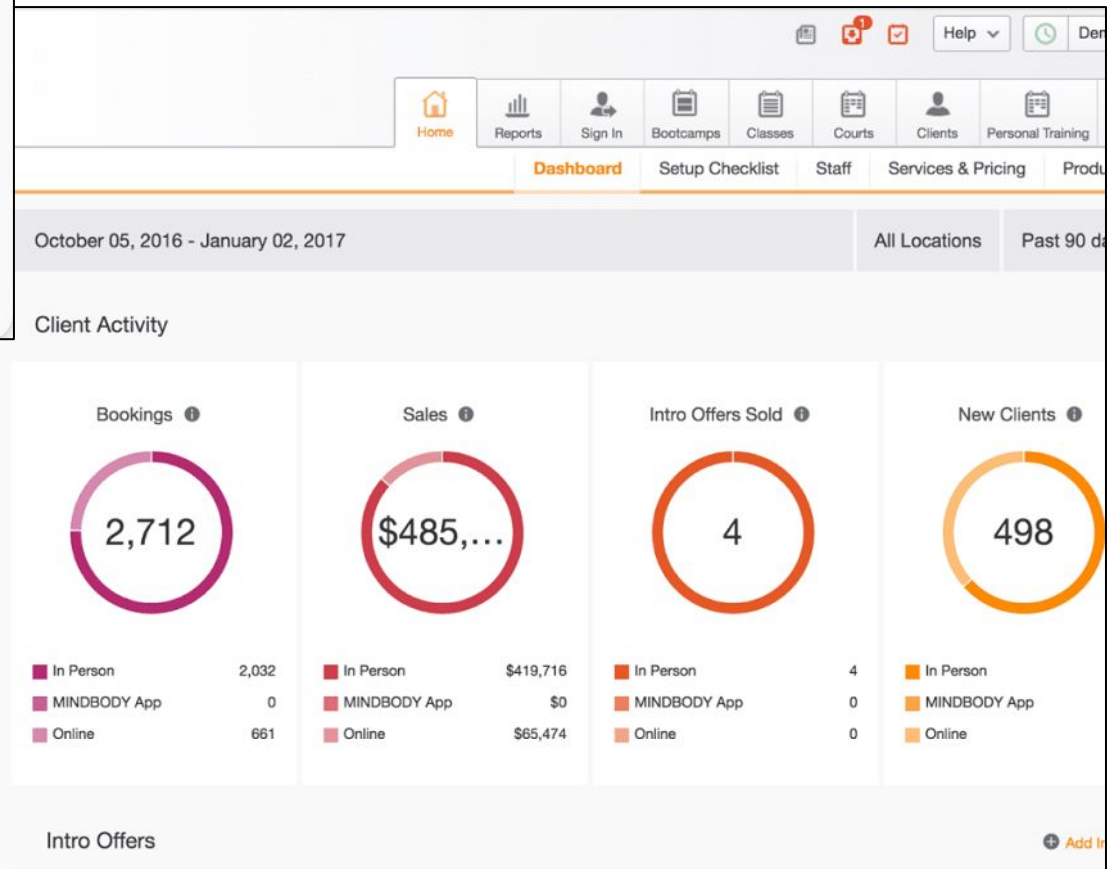
OLDER EXPERIENCE
Antiquated backend legacy code
Clunky, unfriendly UI
Difficult to navigate

POTENTIAL IMPACT

Increased customer and consumer satisfaction
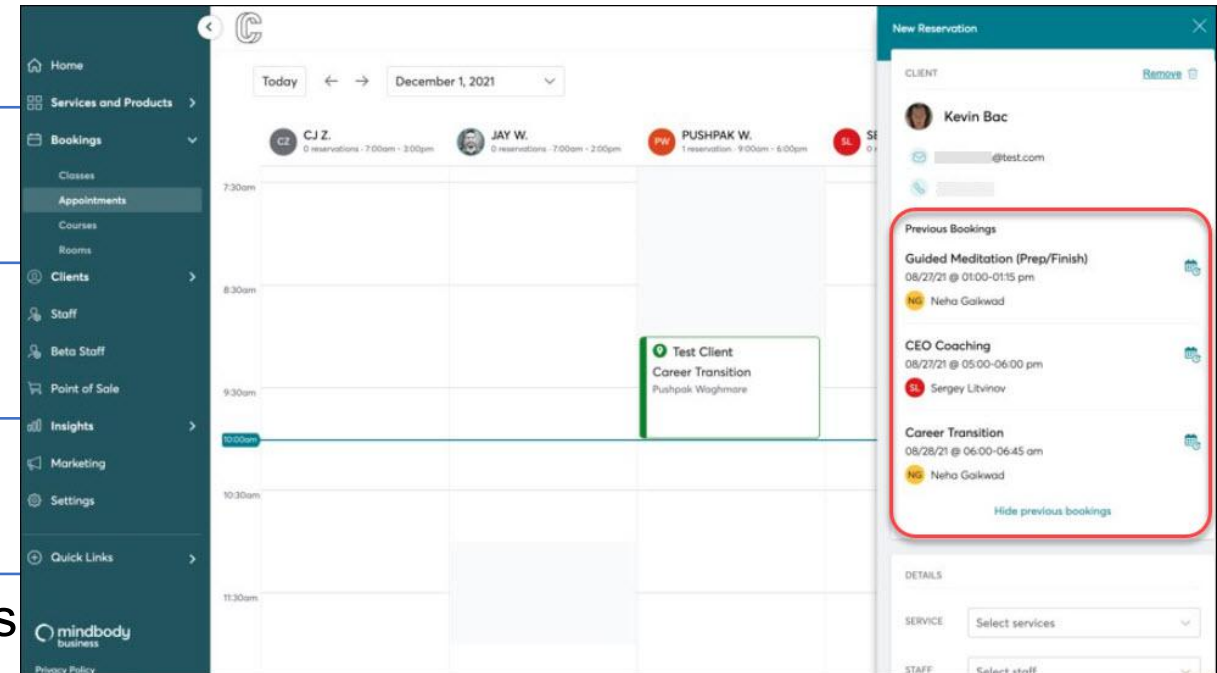
Increased product functionality

Increased value prop to customers/consumers

Decreased task time

Decreased number of clicks to complete a task

Improve customer and consumer-facing experiences

Innovate ways for customers to quickly and efficiently manage their businesses

Thank You!

Questions?