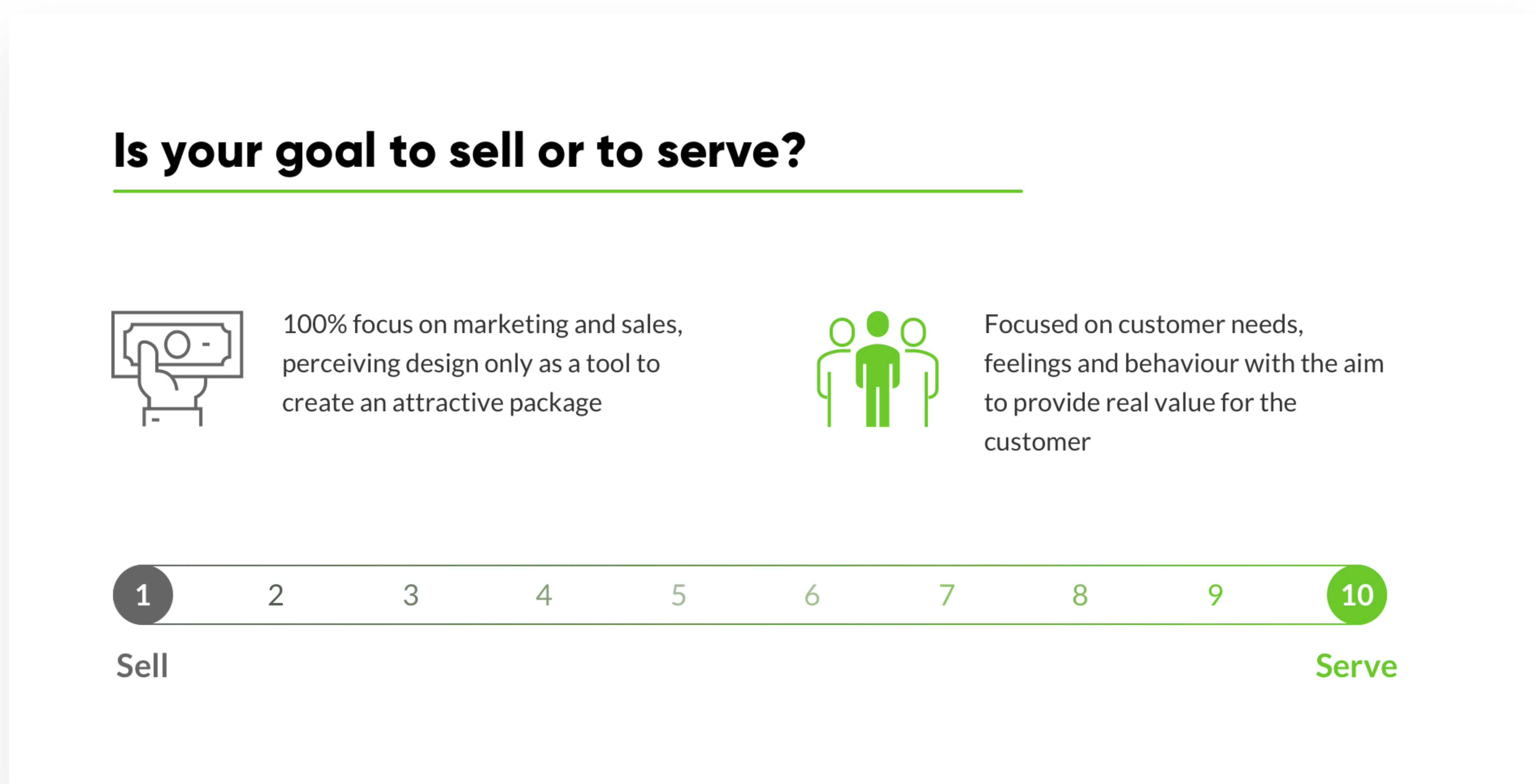


Does Your Mindset Fit the Digital Age and How to Improve It

Worksheet

1 Switch from sell to serve

Where would you place your business approach, culture and goals on this scale? What is the main driver of your activity - to “sell” or to “serve”?



“Sell” is about a focus on marketing, looking at people as numbers behind conversion. Design in this case is only about making the package attractive. And UX is a tool to manipulate user behaviour. “1” on the scale is about a selfish company that is driven only by profit and selling, perceiving customers as walking wallets. They absolutely don't care about their customers' feelings or product quality.

“Serve” is focused on customer needs, feelings and behaviour. Conversion is just a metric to evaluate product clarity. The main aim is to provide real value for the customer, to make some difference with the product and to generate an outstanding customer experience.

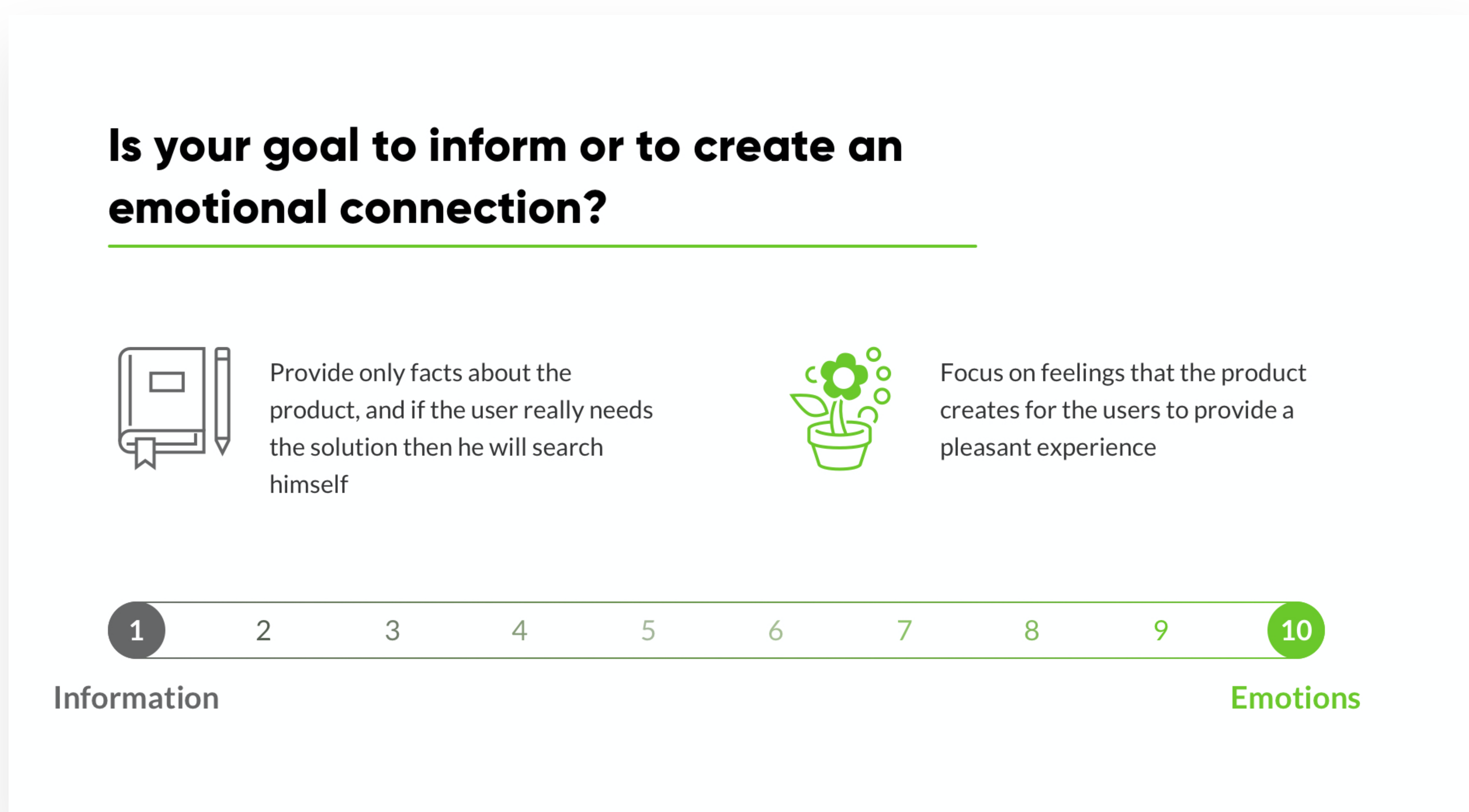
Selling and money comes as a result of such activity. A “10” rated company is one that provides ultimate value to its customers by changing their life and world for the better. You might think about Google here.

How could you move closer to a 10? What are the key actions that can take you closer to “serve” principle? For example, you can share some inspiring insights with clients instead of pushing products to them.

If you really want to make a significant change, I would suggest writing down the ideas that come into your mind while doing these exercises.

2 Emotions instead of information

Where would you place your business approach, culture and goals on this scale? What is the main drive of your activity - to inform or to create an emotional connection?



“Information” is about providing some facts about your product or service, like the do-it-yourself approach. If a user really needs our solution, then they will search for it as long as it's needed by carefully reading all the information on our website. “1” on the scale is about a company that absolutely has no idea how the user feels and does not let them get too close.

“Emotions” means to focus on the feeling that our product or service creates. Such a company is interested in understanding its users well, their thoughts, emotions and behaviours. Why do they need our product, how will they use it and how can we better help them? What could be a pleasant experience in our case? “10” on a scale could be given to a company that tries to perceive the world through its customer eyes and creates a close connection through its service. Apple is a good example of such approach.

If you wish to improve your result and get closer to a “10”, you could simplify your website by reducing some content, making the design more emotional or establishing a closer connection by asking your customers for feedback.

Maybe you already have other great ideas of adding emotions to your financial product? Write them down!

3 Provide a solution instead of features

How would you rate your product - a feature or solution provider? What is more important - to create new advantages or to maximally fit your solution to customers' needs?

Is your product/service a feature or solution provider?



Believe that customers measure the value of the product by how many features it has



Prioritize features based on their value for a solution that the user is seeking



What can be done to immediately start improving your business right after reading this article? You could begin with the evaluation of your service features from a solution perspective or maybe even reduce the complexity of the existing product design.

4 Focus on disruption instead of protection

Where would you place your modus operandi? Are you still trying to save your business from dangerous trends and aggressive competitors? Or, are you like pioneers who open new paths and challenge things around you?

Is your business focused on disruption or protection?



Fighting to save your business from dangerous trends and aggressive competitors



Pioneers that open new paths and take on challenges to inspire improvement

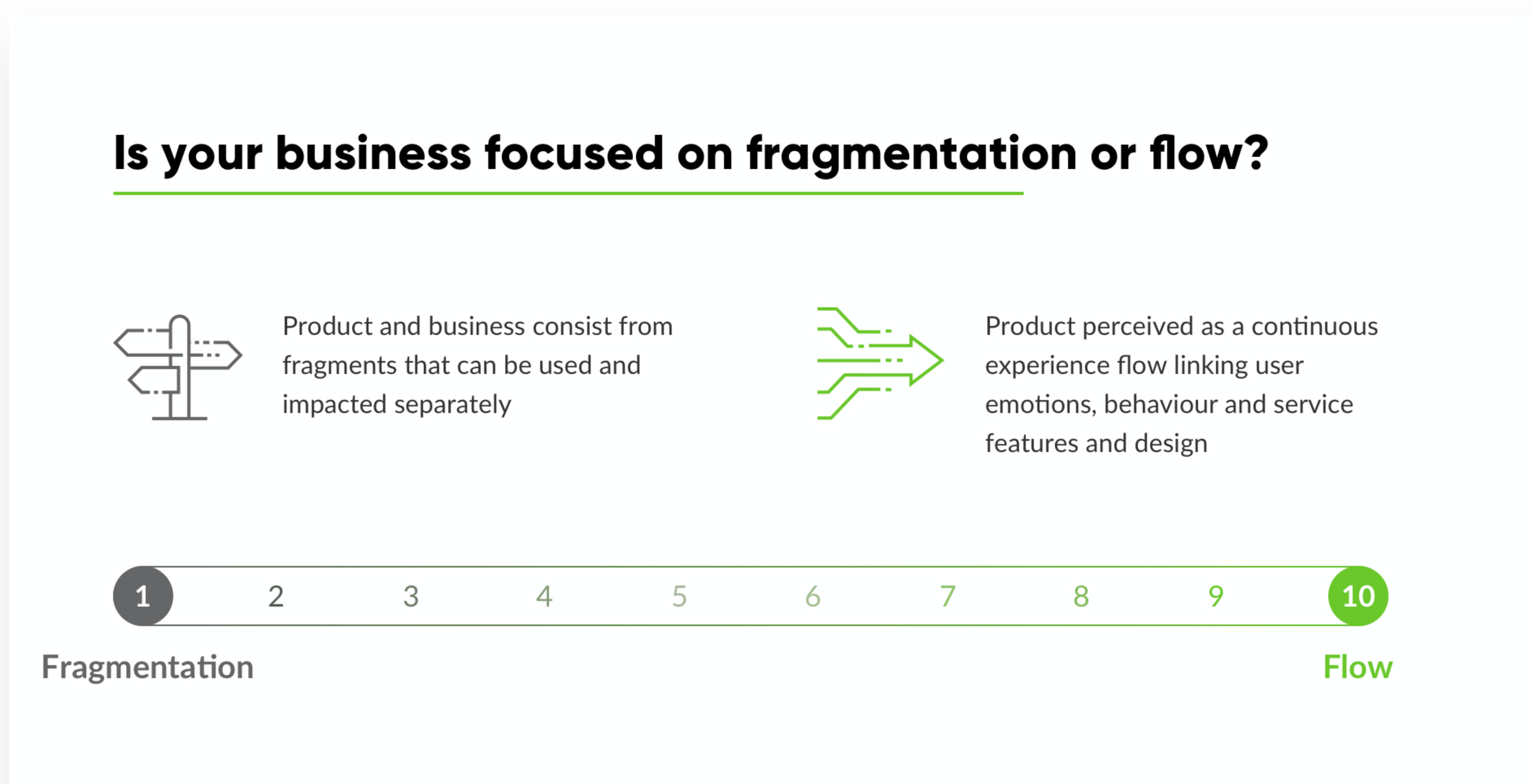


Evaluate your strategy, values, employees and products and mark your position at the scale.

Let's think about some key actions that can get you closer to a “10.” You can start by rearranging your targets or maybe try out disruptive technology or cooperate with some startup.

5 Create flow and avoid fragmentation

Where are you on this scale? Does your company generate fragmented solutions in the majority of situations and perceive product as unconnected parts? Or, maybe you have already created a holistic journey for your product from a customer perspective?



Try to find at least one solution that can take you closer to the “flow” mindset. Maybe you can reduce friction in your onboarding process, make customers engaged with a fully digital experience or create a user journey map. Find the first step and write it down.

**If you are willing to take the mindset change to the next level,
contact UXDA - we will help you:**

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