D.R.E.A.M. Consultative selling model

Vanguard

Interest

Shopping

Buying

D **DO** **Product:** Do I need it? **Guidance:** Is there something I need to know?

R **REPEAT** **Product:** Should I buy it from you? **Guidance:** Should I trust you?

E **EVALUATE** **Product:** What are my options? **Guidance:** How can you help me?

A **ACCESS** **Product:** How do I do it? **Guidance:** How do I do it?

M **MONEY** **Product:** How much does it cost? **Guidance:** What are my next steps?

Shifting our focus to the big "Why"

To create the highest value, most "meaningful" user experience, Focus NOT on **what** you sell or **how** you sell it, but on **why** we sell it.

This also changes our working process to start with **content** (the story), then **design** (the delivery), then finally **architecture** (the context).

CURRENT CXG PROCESS

PUBLIC SITE RE-DESIGN PROCESS

HIGHER VALUE

Meaningful Reenforces who I am *(meaning)*

Status It makes me feel better about myself *(identity)*

Emotional It was really fun *(emotional)*

Functional It was really easy *(functional)*

Economic I got a great deal *(economic)*

LOWER VALUE

Persuasion, emotion and trust

Lots of persuasion methods = persuasion clutter

Experiments using more methods = less persuasion

Persuasion mastery requires a more focused and sophisticated approach

WATCH THE VIDEO

6 steps to make your site more persuasive

Conduct Gestalt interviewing methods to understand the users drives, blocks, beliefs and feelings.

Use Insights to discover the Big Issues: Things that usually matter

Example: Flu vaccination
Fear of getting sick and the fear of embarrassment & guilt of getting others sick

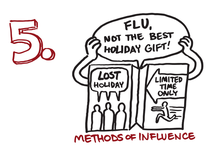
Pick the emotions things that are most likely to work

Our brains are wired for survival and passing on our DNA.

Focus on fear of being sick and getting your children sick, this driver & block becomes the theme.

Create a frame and a MEME that will support the theme. This will become the central point to the whole persuasion effort. It will become the central point (the why) to everything you do as a company.

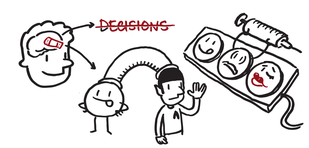
MEME (Cultural practice or idea) example for Flu vaccination



Take message, and select specific methods of influence that will support it. Testimonials (how I lost my holiday) or scarcity (the supply might run out).

Look at the flow of customers interactions through the entire digital experience. This can be visiting many sites, spanning multiple sessions over multiple days before they are ready to buy.

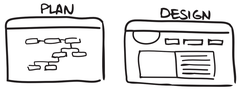
Need a strategy that pulls the user through this flow. Maybe using curiosity to get the user from the home page and draw them into the site. Engage them with fun interactions, exciting content (fear, food or sex) then getting them to the magic point of certainty (the sale).



This magic point of the sale is emotional. The brain frontal lobes control decisions and connects the emotional with the logical.

Use emotional triggers to close the sale that align the theme, frame and MEME.

Persuasion, emotion & trust in user experience design

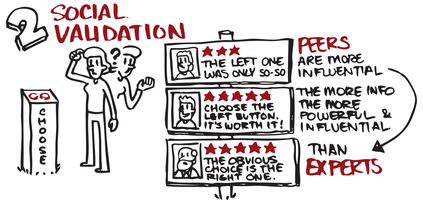


WATCH THE VIDEO

7 principles to make your site more engaging

1 IF PEOPLE HAVE TOO MANY CHOICES THEY WON'T CHOOSE AT ALL

2 SOCIAL VALIDATION



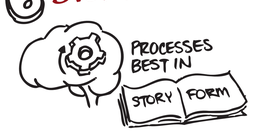
3 SCARCITY

LESS AVAILABLE ITEMS SEEM TO BE MORE VALUABLE

4 FOOD, SEX, OR DANGER

5 POWER OF FACES

6 STORY



7 COMMITMENT

Investors drivers, blocks, beliefs and feelings

Vanguard

DRIVERS

- Invest don't spend
- Responsibility (Do the right thing)
- Thinking for the future (Not living only for the now)
- Protection
- Hope
- Loss of opportunity / Loss of potential growth
- Pay if forward, be a steward and a provider
- Greed
- I want to win

BLOCKS

- I don't know what to do
- Too many choices
- Too many opinions
- Don't know where to start
- Multiple conflicting goals
- Lack of time
- Lack of interest
- Uncertainty about the markets
- Procrastinator
- Lack of urgency
- Lack of trust
- I don't have anyone to help me
- This is too complicated
- Existing provider relationship

BELIEFS

- Investing is risky
- I should invest
- You can't trust the financial industry — corruption
- It's smart to invest
- You have to be an expert
- I don't know enough to make a good decision
- It's complicated
- Ethics, cultural and morals to drive investment decisions
- Investing is "Vanguarding"
- Investing is speculating
- Money should be spread around
- The more you pay, the more you get
- I know how to invest
- I should invest a portion of all income
- Stick with the devil you know

FEELINGS

- Inadequacy
- Uncertainty
- Rewarding
- Anxiety
- Fear
- Pride
- Doubt
- Frustration
- Exciting
- Confusion
- Hopeful
- Confident
- Knowledgeable

BIOLOGICAL REACTIONS

- Are these people like me?
- Do they speak my language?
- Do they speak down to me?

Vanguard's brand personality traits

Vanguard®

BRAND PERSONALITY TRAITS *(broad list)*

- Accessible
- Accommodating
- Accurate
- Ambitious
- Approachable
- Calming
- Caring
- **Cautious**
- Competitive
- **Confident**
- Conscientious
- **Conservative (cautious)**
- Consistent
- Dependable
- **Disciplined**
- Empathetic
- **Empowering**
- Encouraging
- Enthusiastic
- **Ethical**
- Experienced
- **Fair** **We are not going to rip you off**
  Equal Playing Field
- Friendly
- Helpful
- Honest
- **Idealistic**
- Kind
- Knowledgeable
- **Leader**
- **Not-Impulsive**
- **Optimistic**
- **Passionate (Fiercely)**
- **Patient**
- Persistent
- Proud
- **Rebellious**
- Respectful
- Revolutionary
- Rigorous
- Serious
- Sincere
- Smart
- **Steady**
- Tactical
- Thorough
- Thoughtful
- **Thrifty**
- Trustworthy
- Warrior (Taking a stand for investors)

BRAND PERSONALITY TRAITS *(focused & differentiated)*

Cautious *but not* Close-minded

Confident *but not* Arrogant

Disciplined *but not* Inflexible

Empowering *but not* Abandoning

Optimistic *but not* Unrealistic

Passionate *but not* Obsessed

Patient *but not* Indecisive

Steady *but not* Stubborn

Straight forward *but not* Blunt

Thrifty *but not* Cheap