

SYDNEY YEAGER

User Experience Researcher

CONTENTS

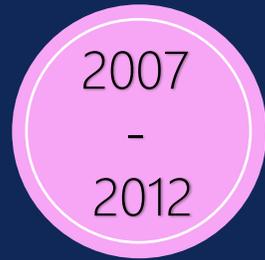
- About Me
- Case Studies
 - NPS: What's Behind the Numbers
 - Investing: a Disrupted Journey
 - Portfolio: Engaging Repeat Investors

ABOUT ME

- Digital anthropologist
- 15 years of ethnographic research experience
- Mixed methods UX researcher
- Human-centered Design & Systems thinking
- International Research: Ireland, Greece, Tanzania, and Baltic States
- Passionate about Diversity and Accessibility
- Ph.D. in Anthropology from SMU
- Native Arkansan



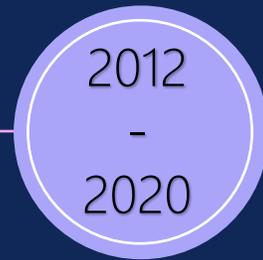
MY TIMELINE



Ethnographer

UCA & SMU

- US: Ozarks & Mid-South
- Tanzania
- Estonia, Latvia, Finland
- Ireland



Digital Anthropologist

SMU, UCA, & Rollins

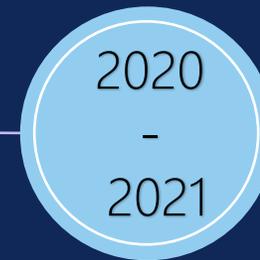
- Social Media & Mental Health
- Ethnographer of Facebook, Instagram, & Twitter



Digital Consultant

Yeager-Wright
Digital Marketing

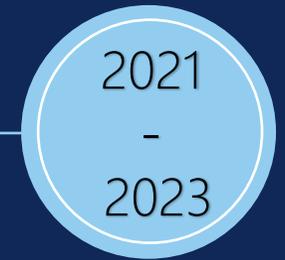
- Market Research
- UX Research
- Product Management



Product Researcher

Boston Scientific |
Preventice Solutions

- Product Management
- Product Research & Discovery



UX Researcher

AcreTrader

- UX Research
- Product Research

RESEARCH METHODS

Interviews

Surveys

Participant
Observation

Focus Group

Site
Analytics

Heat Maps

Competitor
Analysis

A/B Testing

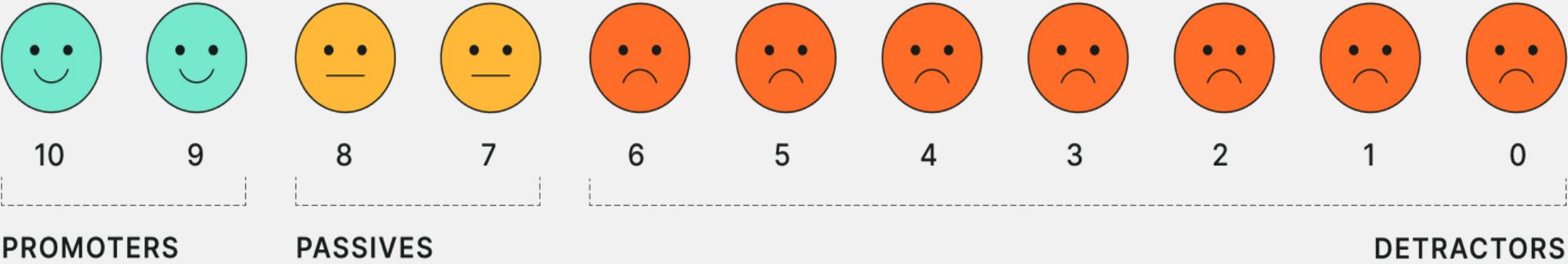
NPS: WHAT'S BEHIND THE NUMBER?

Assessing & Recommending Alt Investments



Net Promoter Score[®]

$$= \begin{matrix} \text{😊} \\ \% \\ \text{PROMOTERS} \end{matrix} - \begin{matrix} \text{😞} \\ \% \\ \text{DETRACTORS} \end{matrix}$$



NPS & INVESTOR TRUST

- Q3 NPS
 - 90 days of NPS responses
- Score
 - NPS 61
 - Score above average for financial services industry
- Thematic and Sentiment Analysis of Comments
 - 19 of 86 comments were negative
 - 89% of negative comments mention trust and credibility issues

DISCOVERY RESEARCH

- NPS respondents who commented were interviewed (12 users)
 - Generative open-ended questions about investment experience
 - Investment Criteria
 - Modeled investment decisions
 - Captured Pain Points in the User Journey
- Goal: Understand Investor credibility and decision making



**REAL PEOPLE, REAL ASSETS,
& SAFER THAN MY MATTRESS
AT HOME.**



-Long-time Investor



**I SHIFTED MY RETIREMENT TO
FARMLAND INVESTMENTS, IF I
HADN'T, I WOULD'VE LOST
30% OF MY SAVINGS.**



-Long-time Investor



I HAVE FARM FEVER.



-New Investor

ACTION ITEMS

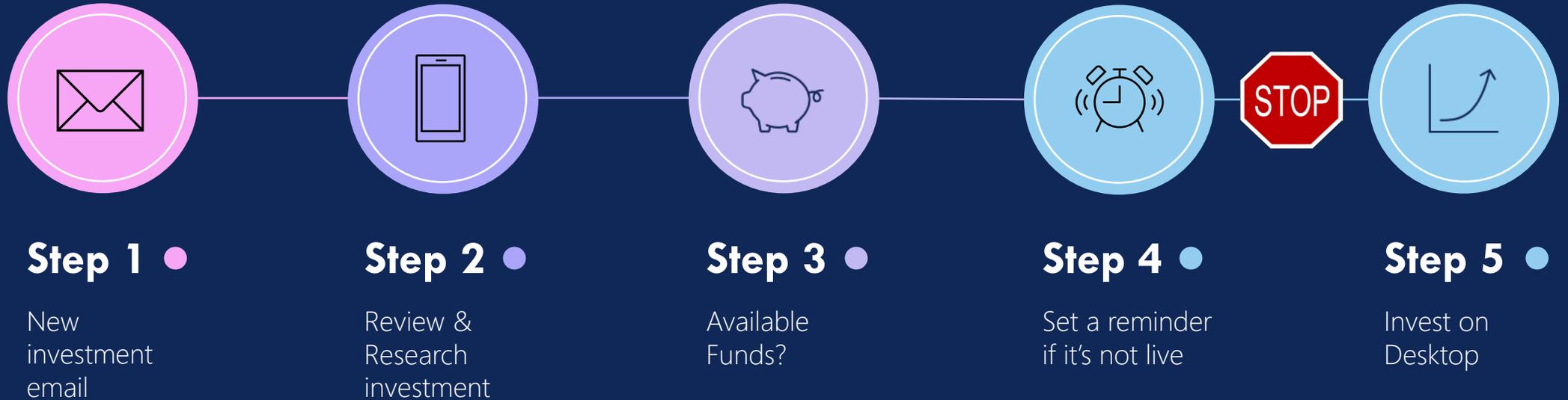
- Product Solutions
 - Prominently display Track Record on Homepage, For Farmers, and For Advisors pages
 - Prominently display Exited Investments and Actual Returns
- Business Strategy Applications
 - Marketing campaigns promote Track Record and Exited Investments

INVESTING: A DISRUPTED JOURNEY

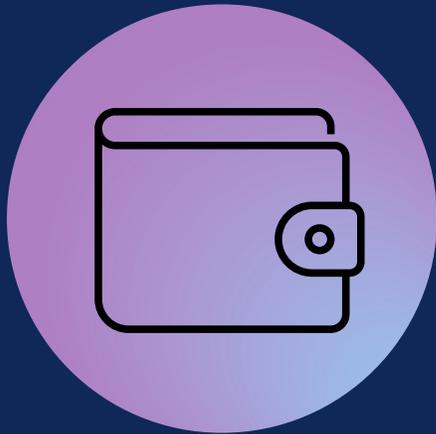
Optimizing the Investment Process



INVESTMENT JOURNEY



PAIN POINTS



Wallet Feature

High User Error



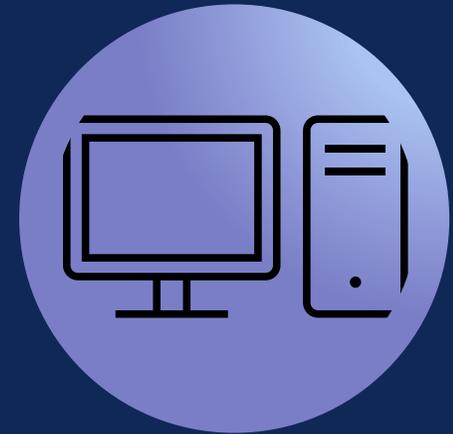
Re-accreditation

Time Consuming
Delays Investment



Investment FOMO

Strong fear of missing out
due to history of fast
subscribing investments



Device Switching

93% of Investors stopped
mid-investment to switch
to their Computer

PRODUCT SOLUTIONS

- Guided onboarding
- Re-design Wallet Feature and Location on Account Page
- Automate Re-accreditation
 - Expiration notifications
 - Automate balance check
- Waitlist Feature
- Enhanced mobile experience

PORTFOLIO: ENGAGING REPEAT INVESTORS

Enhancing Portfolio Building



EVALUATING PORTFOLIO OVERVIEW

- New Portfolio Overview
 - Investor-centric Design
 - Designed to visualize portfolio diversification
 - Designed to promote repeat investment
- Evaluative Research
 - Feature engagement with investors (15 investors)
 - Design Mockups
 - Live Product Walkthroughs
 - Feedback
 - Caught bugs
 - Design recommendations to meet investors expectations & needs
 - Discovery of new features and enhancements

PORTFOLIO BUILDING



Step 1 ●

First Investment



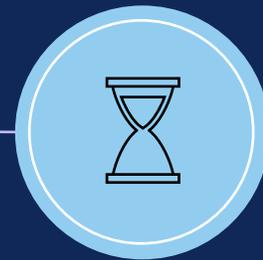
Step 2 ●

Confident of
Credibility



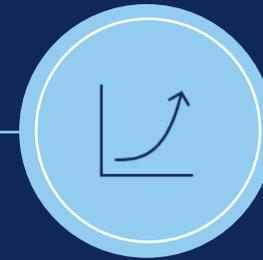
Step 3 ●

Financial Planning



Step 4 ●

Farm Picking



Step 5 ●

Build a Diverse
Portfolio

REPEAT INVESTOR PAIN POINTS

Decision Making	Research	FOMO	Subscription Bar	Taxes
<p>Design directly impacts which data points investors think are the most important</p>	<p>It requires a lot of time to research every farm</p>	<p>Investors fear they'll miss investing if it goes to fast</p>	<p>The percentage subscribed is an emotional trigger</p>	<p>Too many individual K1s Filing in multiple states</p>

SUMMARY



UX RESEARCH: AREAS OF FOCUS

Engagement: Repeat Investors

- Satisfaction with first investment
- Desire to invest in multiple farms
- Interest in diversification
- Understands asset class
- Promotes investment platform

Conversion: First Time Investors

- Diversify your portfolio through investing in farmland
- Cautious of scams
- Research the investment & company
- Develop a plan with clear goals

HOW TO GET THERE

Assessing

- Track Record
- Exited Investments with Actual Returns
- Education & Research Resources

Make it Easy

- Easy Onboarding
- Transparent Investment Offering pages
- Easy First-time Investment process

Portfolio Building

- Visualizing portfolio diversification
- Education & Research Tools
- Performance & Financial Planning tools

THANK YOU

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