

# SLICE-B Experience Review: Assessment

## SUMMARY

Experiences are inherently personal. What works well for one customer or employee may not work well for another. So before you can create and deliver engaging experiences, you first need to consider the interaction from the point of view of the people you are designing for. One tool Experience Management (XM) professionals can use to evaluate experiences through the eyes of their target audience is called an “expert” or “experience” review. To conduct this type of review, XM professionals flow through a specific interaction from the perspective of a target user. XM Institute’s version of this review methodology is called “SLICE-B.” Use this assessment to execute a SLICE-B review on a specific experience. For additional guidance, review the supplementary material provided at the end of this tool and watch the accompanying training video.

## THE FOUR STEPS OF A SLICE-B EXPERIENCE REVIEW

SLICE-B is an expert review methodology where you systematically evaluate an interaction from the point of view of a well-defined target audience. Because SLICE-B breaks an experience down into its six component parts – *Start, Locate, Interact, Complete, End, and Brand Coherence* – it allows reviewers to quickly identify flaws and opportunities for improvement. You can use this methodology to assess existing experiences, improve design prototypes, embed experience requirements into your processes, compare against your competitors’ interactions, or learn from interactions in other industries. Here are the four steps for executing a SLICE-B evaluation:

- 1. Step 1. Define the experience, goal, and brand attributes.** First, select a discrete transaction or interaction to review. Define a clear goal that the user is trying to achieve and identify what criteria must be met for this experience to be considered a success. For example, you may wish to evaluate the experience of purchasing an electronic gift card from your site. Criteria for success might include things like the eGift Card is redeemable online, has a personalized message, comes with an email confirmation when it’s been used, and is worth exactly \$25. Then identify key brand attributes that may be relevant during this experience, such as logo, colors, organizational tone and personality, and brand promises you’re implicitly or explicitly making (e.g. “interactions will be easy and convenient”).
- 2. Step 2. Identify target persona.** Because experiences are inherently personal, before you can determine if an interaction is good or bad, you first need to know who the target audience is that you’re designing for. So before you begin a review, select a persona whose perspective you will adopt to evaluate the experience. A persona is a *vivid description of a prototypical person within a key segment* and includes a realistic description of their needs and requirements when interacting with your organization. For example, the target persona for buying a \$25 eGift card may be “Jane,” a middle-aged woman who is technologically savvy – though not a whiz – and has never bought anything from your company’s website before.
- 3. Step 3. Conduct a SLICE-B experience review.** Once you’ve determined the experience, goal, requirements, and persona, you are ready to conduct a SLICE-B review. This review should be done by people inside the organization using the assessment provided on page 3 to evaluate the chosen interaction across the six component parts. The point of this review is to find the flaws – to hunt for and uncover the points of friction that are going to get in the way of the chosen persona accomplishing the goal he or she has set out to achieve. Before filling out the assessment, go through the experience and write down ideas and observations during each stage using the worksheet on page 2. Then, use these notes, the guiding questions on pages 4 through 8, and your recall to fill out the assessment form.
- 4. Step 4. Prioritize areas of improvements.** Once you have used the assessment to rate the key elements of the experience and captured your observations and ideas, then use that information to prioritize which improvement opportunities you would like to address first based on criteria such as the potential impact of the improvement, the effort involved in implementing it, the capabilities of the organization to execute on it, and its financial ramifications.

## HOW TO USE

To complete a SLICE-B Experience Review to evaluate a specific interaction, you can use this tool for:

- + **Self-evaluation.** Watch the training video, then fill out this worksheet and assessment yourself by going through the experience, capturing your ideas and observations and then rating each element using the SLICE-B assessment form.
- + **Group discussion.** SLICE-B is particularly valuable as a group exercise. You can do the entire review as a group or have each person individually go through the experience and complete the worksheet on page 2 and then come together to fill out the assessment, discuss areas of agreement and disagreement, and determine which improvements to prioritize.
- + **Action planning.** Develop plans for improving key moments of the experience based on your observations and the assessment results. For more information on how to prioritize improvement areas, check out the SLICE-B training video.

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Prior to filling out the assessment on page 3, go through the entire journey first and take down your observations about what is going on during each part of the interaction. Once you've gone through the experience, use the notes you've collected here and your recall – as well as any screenshots, videos, or recordings – to complete the assessment form. This will help keep your rating consistent across all components. For guidance around what to look for during each stage, check out the supplementary information provided on pages 4 to 8.

SLICE-B COMPONENT	ISSUES AND OPPORTUNITIES
<p><b>START</b></p> <ul style="list-style-type: none"> <li>+ <b>Welcoming.</b> Is it immediately obvious that you will be able to accomplish the goal?</li> <li>+ <b>Beginning.</b> Is there a clear path(s) to begin the process?</li> </ul>	
<p><b>LOCATE</b></p> <ul style="list-style-type: none"> <li>+ <b>Findable.</b> Is it easy to find what you need?</li> <li>+ <b>Available.</b> Is all of the information available where and when you need it?</li> </ul>	
<p><b>INTERACT</b></p> <ul style="list-style-type: none"> <li>+ <b>Easy to use.</b> Is it easy to do what you want to do?</li> <li>+ <b>Understandable.</b> Is it easy to understand the information provided?</li> </ul>	
<p><b>COMPLETE</b></p> <ul style="list-style-type: none"> <li>+ <b>Success.</b> Can you accomplish what you wanted to do?</li> <li>+ <b>Feedback.</b> Did you get clear feedback that you've succeed?</li> </ul>	
<p><b>END</b></p> <ul style="list-style-type: none"> <li>+ <b>Next Steps.</b> Is it clear what to do next, even across channels?</li> <li>+ <b>Emotion.</b> Do you feel good about the interaction?</li> </ul>	
<p><b>BRAND COHERENCE</b></p> <ul style="list-style-type: none"> <li>+ <b>Brand Values.</b> Are the company's brand values reinforced throughout the experience.</li> <li>+ <b>Brand Consistency.</b> Are branding elements consistent throughout all experiences?</li> </ul>	

# SLICE-B Experience Review: Assessment

Description of target persona:	Goal(s) persona is trying to accomplish:	Key brand attributes:
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## RATE THE EXPERIENCE

**-3**  
**Definitely No**  
Obstacles may make goal unachievable

**-2**  
**Somewhat No**  
There are significant obstacles to completing goal

**-1**  
**Somewhat Yes**  
There are minor obstacles to completing goal

**+1**  
**Mostly Yes**  
There are negligible obstacles to completing goal

**+2**  
**Definitely Yes**  
There are no obstacles to completing goal

1. <b>Welcoming.</b> Is it immediately obvious that you will be able to accomplish the goal?	
2. <b>Beginning.</b> Is there a clear path(s) to begin the process?	
<b>START</b> subtotal	
3. <b>Findable.</b> Is it easy to find what you need?	
4. <b>Available.</b> Is all of the information available where and when you need it?	
<b>LOCATE</b> subtotal	
5. <b>Easy to use</b> Is it easy to do what you want to do?	
6. <b>Understandable.</b> Is it easy to understand the information provided?	
<b>INTERACT</b> subtotal	
7. <b>Success.</b> Can you accomplish what you wanted to do?	
8. <b>Feedback.</b> Did you get clear feedback that you've succeed?	
<b>COMPLETE</b> subtotal	
9. <b>Next Steps.</b> Is it clear what to do next, even across channels?	
10. <b>Emotion.</b> Do you feel good about the interaction?	
<b>END</b> subtotal	
11. <b>Brand Values.</b> Are the company's brand values reinforced throughout the experience?	
12. <b>Brand Consistency.</b> Are branding elements consistent throughout all experiences?	
<b>BRAND COHERENCE</b> subtotal	

**OVERALL** total

## EVALUATE THE RESULTS

### Subtotals:

<1: Poor  
1 or 2: Okay  
3 or 4: Good

### Overall Score:

<0: Very Poor Experience  
0 to 5: Poor Experience  
6 to 11: Mediocre Experience  
12 to 17: Good Experience  
18 to 24: Excellent Experience

# SLICE-B Experience Review: Assessment

The following five pages contain information to help you accurately complete the worksheet and assessment on pages 2 and 3. The exact criteria for each element will vary significantly depending on the target persona, the journey, and the channel, so these should be considered as guidelines to help you identify flaws and issues in the experience rather than hard-and-fast rules that must be followed.

## BEFORE BEGINNING

Answer these three questions before conducting the SLICE-B Experience Review

### Box: Description of Target Persona

*Who is having this experience and how much do they know about the journey?*

Here are some questions to ask when you are in this step:

- + How familiar would this person be with this channel?
- + How well does this person know our organization?
- + How familiar would this person be with this type of process or interaction?
- + Is this a common activity or infrequent event?
- + What is this person's attitude towards the company based on previous interactions or surveys?
- + For an employee: characteristics may include tenure, region, job title, demographic information
- + For a customer: characteristics may include products owned, lifetime value, lifecycle information, loyalty status, region, demographic information

*\*\*NOTE: If your organization has design personas, we recommend using them here*

### Box: Goal(s) Persona is Trying to Accomplish

*What specifically is the target persona trying to achieve?*

Here are some questions to help you identify goals:

- + What is a common goal this persona type sets out to achieve?
- + Which interaction or touchpoint are we hearing – especially from this persona – is broken?
- + Where are there problems or opportunities we would like to dig into?
- + Is there a new or updated interaction that we would like to ensure is working effectively?
- + Where is there a step on our journey map that we would like to dive into more deeply?
- + Does this interaction have a clear beginning and end and occur in a relatively compressed period of time? (answer must be yes)

### Box: Key Brand Attributes

*What branding elements would the target persona expect to experience during this interaction?*

Here are some questions to ask when you are in this step:

- + How do we want the target persona to feel during this experience?
- + What brand promises have we made that are relevant to this interaction?
- + What expectations would the target persona be coming into the experience with?
- + What is our corporate culture like?
- + What marketing messages (internal or external) would they have been exposed to?

# SLICE-B Experience Review: Assessment

## RATING SCALE

Understand the scoring system before conducting a SLICE-B Assessment

<p><b>-3</b> <b>Definitely No</b></p>	<p>Obstacles may make the goal unachievable. Here are some criteria for this rating:</p> <ul style="list-style-type: none"> <li>+ Cannot accomplish this part of the experience</li> <li>+ What you're looking for is not available</li> <li>+ What you're looking for is impossible to find</li> <li>+ Your expectations and mental models are consistently violated</li> <li>+ This part of the experience creates severe negative emotions</li> </ul>
<p><b>-2</b> <b>Somewhat No</b></p>	<p>There are significant obstacles to completing the goal. Here are some criteria for this rating:</p> <ul style="list-style-type: none"> <li>+ Very difficult to accomplish this part of the experience</li> <li>+ What you're looking for is very difficult to find</li> <li>+ Your expectations and mental models are violated in key places</li> <li>+ This part of the experience creates negative emotions</li> </ul>
<p><b>-1</b> <b>Somewhat Yes</b></p>	<p>There are minor obstacles to completing the goal. Here are some criteria for this rating:</p> <ul style="list-style-type: none"> <li>+ Slightly difficult to accomplish this part of the experience</li> <li>+ What you're looking for takes longer than expected to find</li> <li>+ This part of the experience doesn't quite live up to expectations</li> <li>+ This part of the experience creates neutral emotions</li> </ul>
<p><b>+1</b> <b>Mostly Yes</b></p>	<p>There are negligible obstacles to completing the goal. Here are some criteria for this rating:</p> <ul style="list-style-type: none"> <li>+ Easy to accomplish this part of the experience</li> <li>+ Mostly everything is exactly where you expect it, when you expect it, in the format you expect it to be in</li> <li>+ This part of the experience meets expectations</li> <li>+ This part of the experience creates positive emotions</li> </ul>
<p><b>+2</b> <b>Definitely Yes</b></p>	<p>There are no obstacles to completing goal. Here are some criteria for this rating:</p> <ul style="list-style-type: none"> <li>+ Easier than expected accomplish this part of the experience</li> <li>+ Everything without exception is exactly where you expect it, when you expect it, in the format you expect it to be in</li> <li>+ This part of the experience exceeds expectations</li> <li>+ This part of the experience creates significantly positive emotions</li> </ul>

# SLICE-B Experience Review: Assessment

## START

The extent to which a person is drawn into the experience

### Welcoming

*Is it immediately obvious that you will be able to accomplish your goal?*

Here are some questions to ask when you are in this step:

- + Do you know where to begin?
- + Are you confident it is at least possible to achieve your goal?
- + Is the space crowded or overwhelming?
- + Are the products or layout in the format you expected?
- + Is there an obvious place to go for help?
- + For phone interactions, does it seem like you will be able to reach the correct person or department?

### Beginning

*Is there a clear path(s) to begin the process?*

Here are some questions to ask when you are in this step:

- + Are there clear sign posts pointing you in the right direction?
- + Are products clearly categorized?
- + Do you ever question whether you are on the right path?
- + Does the path fit the mental model you expect from similar interactions?
- + Is there an way to quickly search for what you're looking for (e.g. search bar, directory)?

## LOCATE

The ease with which a person can find what they need

### Findable

*Is it easy to find what you need?*

Here are some questions to ask when you are in this step:

- + Do you encounter any obstacles?
- + Do you encounter any ambiguities?
- + Is the process convoluted or streamlined?
- + Is it easy to differentiate between products/services?
- + Do you ever need to backtrack?

### Available

*Is the information available where and when you need it?*

Here are some questions to ask when you are in this step:

- + Do you ever need to deviate from your path to find information?
- + Do products/services have readily available descriptions?
- + Are there directions for how to use a product/service?
- + Do you know what to expect next?
- + Is it easy to reach help (e.g. customer service, help desk, in-store employees, managers) at every stage of the interaction?

# SLICE-B Experience Review: Assessment

## INTERACT

The ease with which a person can understand and control their experience

### Easy to Use

*Is easy to do what you want to do?*

Here are some questions to ask when you are in this step:

- + Do you experience any logistical difficulties?
- + Is it easy to make decisions?
- + Is the experience intuitive?
- + Does everything work the way it should (e.g. drop-down menu, self-checkout, virtual assistant, IVR system)?
- + Does the company remember your information from previous interactions?

### Understandable

*Is it easy to understand the information provided?*

Here are some questions to ask when you are in this step:

- + Is everything explained in a straightforward, concise manner?
- + Does the information include jargon or acronyms that a layperson would not understand?
- + Are you ever confused about what you are purchasing or experiencing?
- + Does the order of operations make sense?
- + Are the people available to help (e.g. in-store employees, agents, help desk, IT support) easy to understand?

## COMPLETE

The confidence a person has that his or her goal has been accomplished

### Success

*Can you accomplish what you wanted to do?*

Here are some questions to ask when you are in this step:

- + Did you accomplish every aspect of what you set out to do?

### Feedback

*Did you receive clear feedback that you have succeeded?*

Here are some questions to ask when you are in this step:

- + Did you receive an accurate receipt or email confirmation?
- + Are you unambiguously sure you completed your goal?
- + Is there a way to review your order information and status?

# SLICE-B Experience Review: Assessment

## END

The transition into the future state of the relationship

### Next Steps

*Is it clear what to do next, even across channels?*

Here are some questions to ask when you are in this step:

- + Is the path to your next goal obvious?
- + Are there clear directions for how to return an item, dispute a claim, resolve an issue, provide feedback, etc.?
- + Is there a clear place to go for help if you have problems with your order or using the product?
- + Is there a way to set up an account to ensure faster future interactions and begin personalizing your experiences with the organization?

### Emotion

*Do you feel good about the interaction?*

Here are some questions to ask when you are in this step:

- + Did you feel an emotional connection to the organization?
- + Did the experience engage your senses (did it look aesthetically pleasing, sound good, smell delicious, etc.)?
- + Did the organization elicit positive feelings (e.g. delight, confidence, surprise, enchantment, relaxation, reassurance, amusement)?
- + Did the organization make you feel like part of a broader community?
- + Did the organization effectively communicate that its values align with your own?

## BRAND COHERENCE

The reinforcement of an organization's brand

### Brand Values

*Are the organization's brand values reinforced throughout the experience?*

Here are some questions to ask when you are in this step:

- + Does the experience live up to the organization's mission statement? Vision statement? Brand promises? Culture?
- + Is the experience specifically designed for the organization's target customer, employee, partner, etc. segment?

### Brand Consistency

*Are branding elements consistent throughout all experiences?*

Here are some questions to ask when you are in this step:

- + Are the brand colors consistent? Is the font? Logo? Tone of text? Mascot? Store/webpage layout?
- + Are branding elements present even on receipts and emails?
- + If you interacted with a person as part of this experience, did you embody the brand's personality?