



The Big Picture Worksheet

NAME

Top 3 challenges your visitors face: ?

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-
-

Top 3 personas: ?

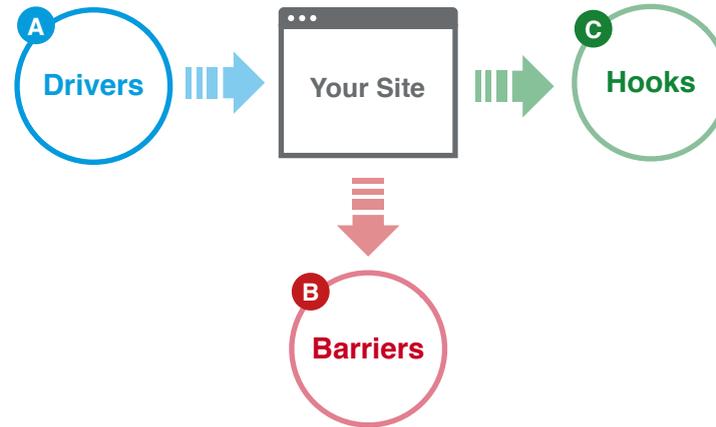
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Top 3 drop-off points: ?

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-
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Top reason why: ?

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Top 3 reasons that persuaded them to convert: ?

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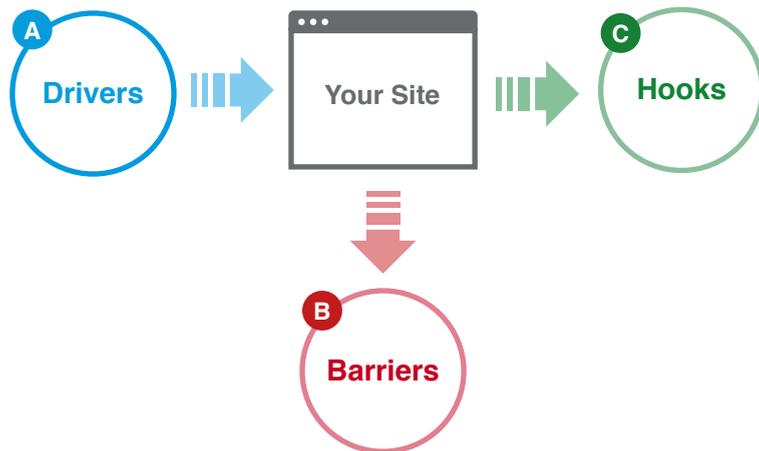
Top 3 fears or concerns: ?

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How to use this Worksheet

Getting the Big Picture:

Imagine you're playing a game of chess. You first need to evaluate the whole board before you can make your next move. The same goes for your site. You cannot change a page or launch a test unless you truly understand the 'Big Picture'. At Hotjar we've found there are 3 things you need to know in order to get a full overview: Drivers, Barriers, and Hooks.



A. Drivers: Discover you visitors' intent

Ask your Visitors to use their words to describe what they are looking for – and why they want it – and you will uncover powerful insights.

Step 1: Identify the top 3 challenges your visitors face

Tools: Polls, Surveys, in-person/phone interviews

Related Poll/Survey Question: "What are the main challenges you face on a daily basis?"

Analyze your responses and input the top 3 challenges in this section of the worksheet.

Step 2: Top 3 personas

Tools: Polls, Surveys, in-person/phone interviews

Related Poll/Survey Question: "In one sentence describe yourself e.g. I am a 36 year old male engineer, have 3 kids and a passion for hiking and the outdoors."

Analyze your responses and input them into this section of the worksheet.



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Barriers: Uncover high blockage steps

If you don't understand where and why your Visitors are leaving your site you cannot really improve your site's experience and bottom line. Always focus first on your biggest Barrier. Your hottest opportunity is always the step or page with the highest traffic and the biggest drop off – so start there.

Step 3: Top 3 drop-off points... and top reason 'Why'.

Tools: Funnels, Recordings, Polls, Surveys

Poll/Survey Question: "What's stopping you from using us today?"

Analyze your data and rank the top 3 barriers in order of hottest opportunity.

Hooks: Reveal the elements that are persuasive

Understanding what really persuaded your existing users / customers to act or convert is the fastest way to converting even more of your Visitors. It will also help you understand what will keep them coming back for more.

Step 4: What persuaded your visitors to convert?

Tools: Polls, Surveys, in-person/phone interviews

Poll/Survey Question: "What was the 1 main factor that persuaded you to choose us?"

Analyze your responses and input into this section of the worksheet.

Step 5: Top 3 fears or concerns

Tools: Polls, Surveys, in-person/phone interviews

Poll/Survey Question: "Please list your top 3 biggest fears or concerns that nearly stopped you from using us?"

Analyze your responses and input them into this section of the worksheet.



The Big Picture Worksheet

You're Done!

Once you've filled out the Big Picture Worksheet you will find that your action plan will bring itself to focus. Some areas may need more exploration, others will require immediate action. It helps to work through the Big Picture as a team so that everyone involved understands why and how your action plan will unfold.

Helpful Resources:

Ultimate Guide to Feedback Polls: <http://bit.ly/2bDz5tx>

The Questions We love to Ask our Users (And you should too): <http://bit.ly/2bDCAjy>

9 Step Hotjar Action Plan: <http://bit.ly/2bDASPO>

15 Minute Poll Kit: <http://bit.ly/2bDAHDr>

Poll and Survey Analysis Template: <http://bit.ly/2bDAujy>

Training: How to combine Feedback polls with Heatmaps to Uncover User Intent: <http://bit.ly/2bflW3F>

Training: Quickly Build and Analyze Polls, Connecting the Dots with Hotjar funnels: <http://bit.ly/2bDzOe9>