

# DESIGN RECOMMENDATIONS

Learn WordPress

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SEPTEMBER 2, 2021

## T A B L E O F C O N T E N T S

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### EXECUTIVE SUMMARY

High-level overview of the global themes and recommended design solutions for users of learn.wordpress.org.

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### PROJECT OVERVIEW

Summary of project goals and methods of data-gathering approved in the needs analysis plan.

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### KEY FINDINGS

The key themes from surveys and focus groups that drive the design recommendations.

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### HIGH-LEVEL SOLUTIONS

The core five-part solution that informs every piece of the users' experience and their learning experience.





# EXECUTIVE SUMMARY

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# THE WORDPRESS EXPERIENCE

Education for a wider WordPress world.

After gathering user insights throughout the data-gathering phase, we've analyzed the details of the users' current interactions with the learning platform and their needs for site enhancements to maintain the level of community of support to which they've become accustomed. These recommendations are driven by all user groups, but with most attention focused on the consumer intermediate grouping.

Based on the needs of all user groups we'd suggest to . . .

1

## MAKE IT MINIMAL AND MEANINGFUL

- Offer **assessments** to determine level of expertise and user group.
- Make the site easy to navigate with intuitive **searching** solutions with **auto complete options** for commonly searched terms.
- Include **filters** that can be easily accessed with meaningful content.
- Provide **quick access** to topics and solutions that apply to them. Because most use this for work obligations, they'll need quick solutions and quick access.

[See more details here](#)

2

## MAKE IT CONCISE AND CUSTOMIZED

- Provide a **revolving carousel** of new options for learning to ensure the new content gets cycled through and older content is flagged as possibly outdated.
- Facilitate easy, **simple options** for them to take ownership to **invest their own content** based on the needs of the community.
- Create **badging** or indicators that coincide with their level of expertise based on completion and contributions.

[See more details here](#)

3

## MAKE IT ITERATIVE

- Create **flexible, current opportunities** for the users to make the site their own based on their interests and level of expertise.
- Apply **dates to all materials** so learners can determine if the content is applicable to current versions of their current processes.
- Provide current, relevant **supplementary materials** for specific topics such as editors and plug-in functions. (PDF)

[See more details here](#)

4

## MAKE IT INTERACTIVE

- Include **training activities** that encourage the users to apply or think through the application of new processes or solutions.
- Don't test them on knowledge, but instead outline **various use cases** for the lessons and materials.
- Provide **pre-recorded sessions** and a way to ask questions of the presenter.

[See more details here](#)

5

## MAKE IT INTERPERSONAL

- Provide access to a collaboration of **real people** in real time so they can garner specific support when and where they need it.
- Continue to provide **instructional videos** of real people who may share some struggles they've also had and how they've solved it.
- Provide a **feedback loop** where they can offer suggestions and receive responses.

[See more details here](#)





# PROJECT OVERVIEW

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# THE CONTEXT AND DESIRED IMPACT

## CONTEXT

*This project presents an opportunity . . .*

### **To accommodate new conditions**

Due to changing conditions where traditional in-person learning forums and conferences weren't feasible, WordPress decided to create a learning platform that could increase the breadth of accessible information to the WordPress community.

### **For real impact**

While the site is effective in function, it lacks a well-crafted learner experience to provide the WordPress community the resources users need to be successful.

### **For necessary innovation**

In order to build a platform that works for all users, WordPress needed to uncover the needs of their opensource community to determine design solutions that will provide more learning methodology than plug-and-play videos with quizzes.

### **For modern scalability**

The information gleaned from the needs analysis will then fuel WordPress' ability to scale and enhance while not entirely replacing the current learn.wordpress.org program with workshops, courses, and quizzes. This modernized design approach bound in instructional strategies will prepare users for success when using WordPress for their personal or professional publishing goals.

## IMPACT

*This project provides . . .*

### **Support for the community**

Through an improved, interactive, modern learning platform WordPress will continue to build an educated, collaborative community.

WordPress will gauge the success of their site's enhancements based on a measurable:

- Increase of site visits
- Increase of completed courses and/or modules
- Increase of video views and accompanying activities
- Increase of materials added to the site by the contributor community.



# THE SOURCES OF DATA

1



What are the **needs and preferences**?

Objectives: Discover the current practices and needs of all three distinct user groups: consumers, contributors, and cohorts.



Consumers



Contributors



Cohorts

2



How do we meet the **levels** of needs?

Objectives: Examine the possible varying needs of consumers and contributors of varying proficiency levels.



Consumers



Contributors

## FURTHER RESEARCH RECOMMENDATIONS

Although the original plan included a third source of interview data with representatives of the three main learner groups, gathering volunteer representatives wasn't possible at this time.

However, throughout this report, we've included recommendations for the three groups based on extrapolated survey and focus group data. We will also offer suggestions for how WordPress might dive deeper into gathering the type of data which could lead to better understanding users' needs for future enhancements.

*The survey figures reflect the number of respondents at the conclusion of the allotted time frame for the survey. The additional entries beyond these figures followed similar trends, thus they did not statistically invalidate the data trends and contradict our overall sample assessment.*





# KEY FINDINGS

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## THE COLLECTIVE GROUP OF USERS

*The main users who will interact with the learning platform.*

### The Groups and Subgroups

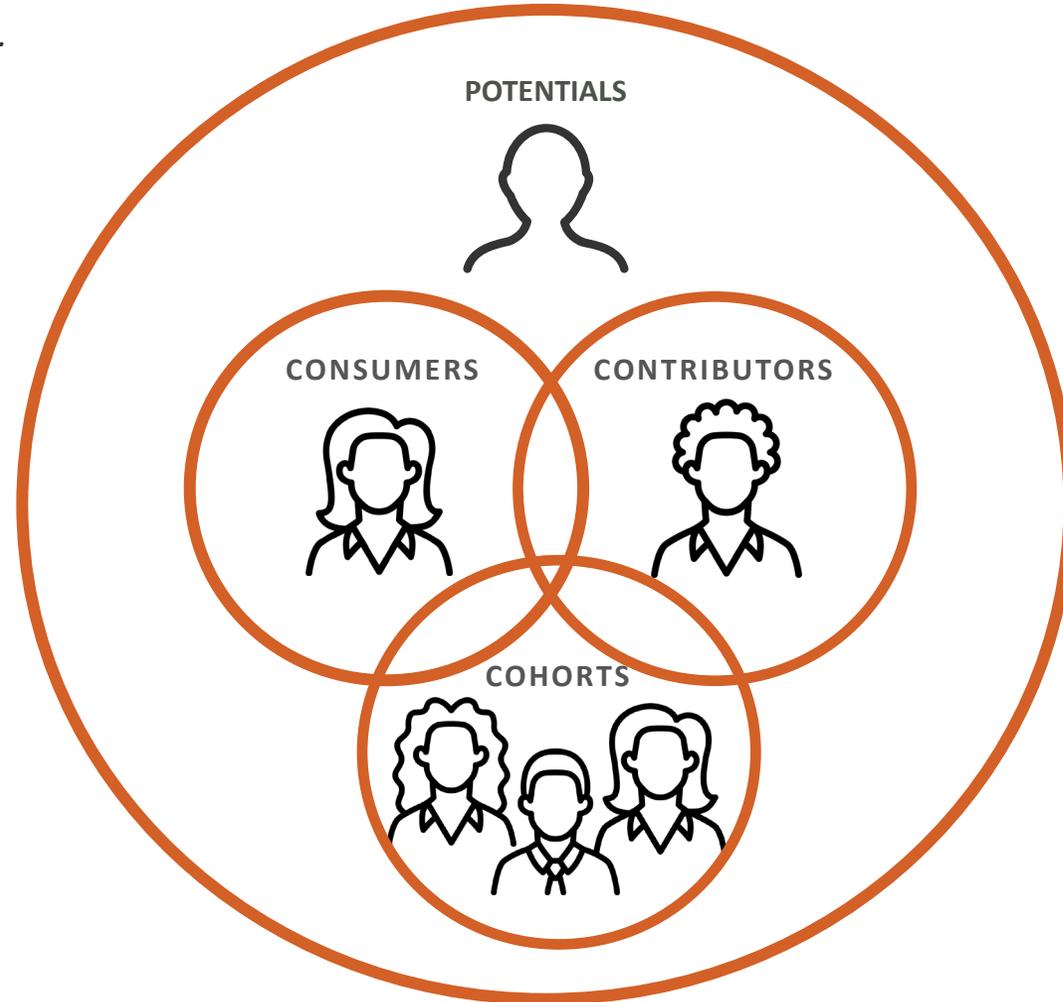
The users within these groups are distinct in their needs and struggles with the learning site. However, over time some users will identify across more than one group as they become more familiar with new content, and then apply the information they gain from the learning platform.

We believe it's safe to assume that eventually users could simultaneously identify with every role.

### The Proficiencies

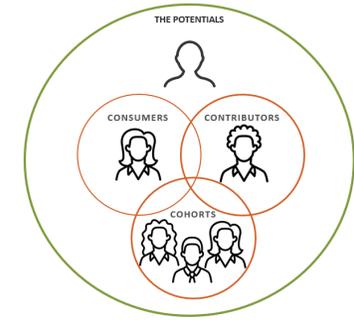
Each group and its subset of groups also has varying levels of proficiencies: Novice, Beginner, Intermediate, and Advanced.

According to our research, the largest representative sample of users is the **Consumer Intermediate** group.



# THE POTENTIALS

*Anyone who has the potential to use WordPress*



1

## Corporate

- May need to create a new site
- May need to create a blog that highlights specific aspects of their business

**Goals:** Learn how to create a site quickly with room to grow.

2

## Education

- May need to create cohorts for students
- May need to publish content for school

**Goals:** Access information that will demonstrate the functionality and usability of the product.

3

## Personal

- May want to publish information that is important to them
- Considering the idea of starting a website

**Goals:** Learn more about how WordPress might fit into their personal and professional aspirations.

### Connecting with Potentials.

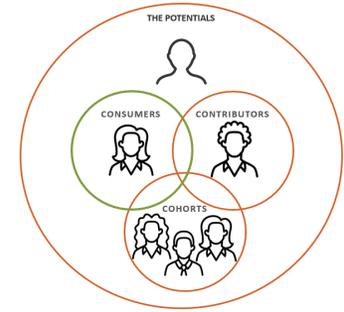
After they find or are directed to the learning site, Potentials will need additional incentives to both use WordPress and to continually visit this site for guidance instead of the myriad of other searchable, less reliable options.

We'd recommend simple things such as:

1. **Scripting to them specifically.** "New to WordPress? Let's walk you around. We'd recommend you start here." Then refer them to the modules that apply yet don't overwhelm."
2. **Pointing them to cohort and/or discussion group** immediately so they can start building a reliable, relatable community.

# THE CONSUMERS

Anyone who accesses the site to use WordPress



1

## Publishers

- Create or run a personal blog
- Create or run a company blog
- Create a new website for themselves (could be a small business)

**Goals:** Increase their online presence and publish necessary content for themselves or their respective businesses.

**Motivators:** Access to people who can help.

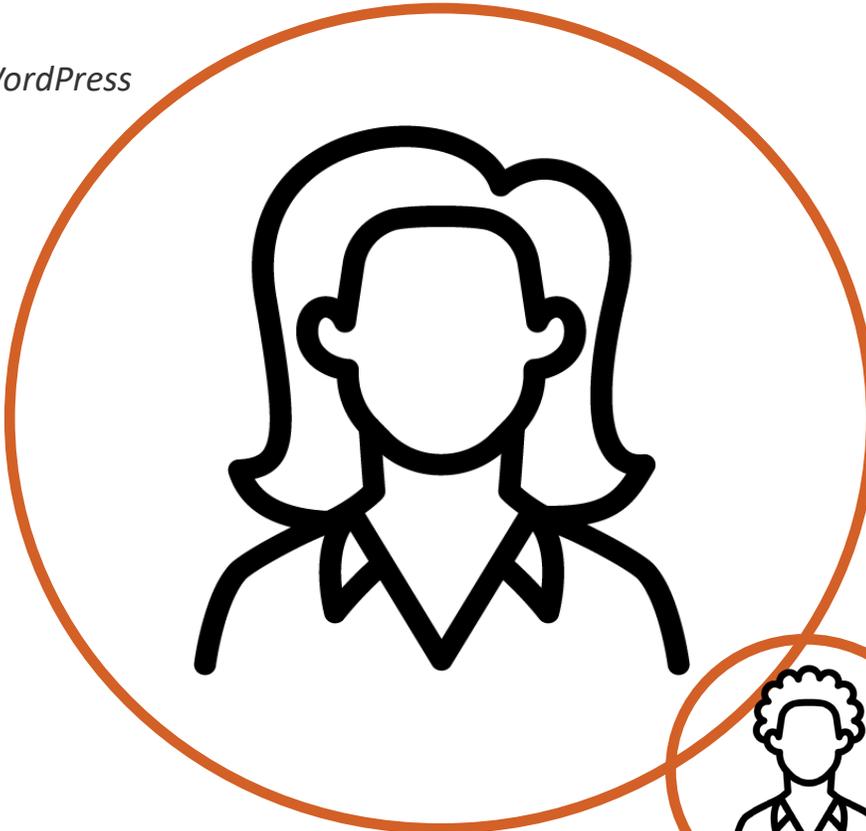
2

## Developers

- New to coding
- New developers
- Creating new features
- Creating elements of code
- Build websites as a coder using general dashboards

**Goals:** Learn how to write code.

**Motivators:** Learning platform with problem solving, quick answers.



3

## Builders

- Create websites that can be unique for their clients, but don't do any of the programming
- Find and use applicable themes for clients
- Know some CSS and can change the layouts
- Mostly mid-level experts
- May want to eventually move into a contributor role- could be persuaded to do more with WordPress

**Goals:** Use information to build solutions for their clients.

4

## Contributors

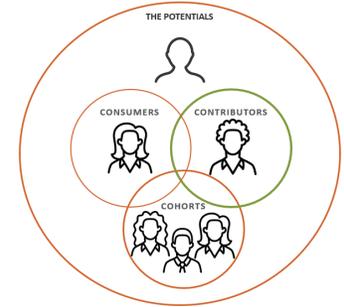
- Want to contribute content and/or ideas in general (18 teams)
- Would like to contribute outside the learning platform, somewhere within the WordPress project

**Goals:** Want to contribute posting, testing, and get involved beyond consumption.



# THE CONTRIBUTORS

Anyone who uses WordPress and contributes content or contributes to a community.



1

## Passive Members

- Consumers of content but may not want to get involved in contributing

**Goals:** May want to see what contributing would require and how they could start to contribute content.

2

## Active Members

- Want to get involved, but don't have a lot of time
- Collaborate with others
- Do what they can to contribute to the site
- Could be SMEs who develop or create content
- Could be more actively involved in cohorts

**Goals:** Look for ways to easily get involved.



*They contributed less than usual in 2020*

*They need the process of contributing content to be seamless.*

3

## Power Members

- Devote roughly eight hours each week.
- Create content
- Plan out courses
- Build courses
- Create the structure of a course
- Develop strategies or go into the design a bit deeper than the other contributors
- Could be a within a company that devotes time to these efforts
- Instructors (SMEs)- Interpret lesson plan and share the information

**Goals:** Explore how they may contribute to more communities and lead discussion groups.

### Deputies

- All over the world
- Volunteers

4

## Leaders

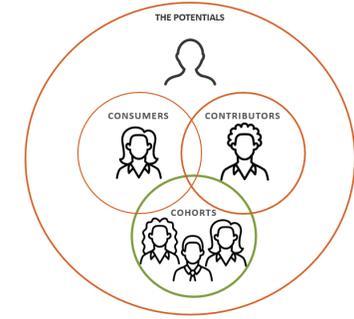
- Full time
- Team of leaders
- Can include deputies and super deputies
- A lot of institutional knowledge
- May be in their 40s or 50s

**Goals:** Gain methods of forwarding the WordPress vision and growing the community.



# THE COHORTS

*FUTURE: Anyone who participates in a group to learn, contribute, or build a community*



1

## Corporate

- Could work in the same industry
- Could work at the same company

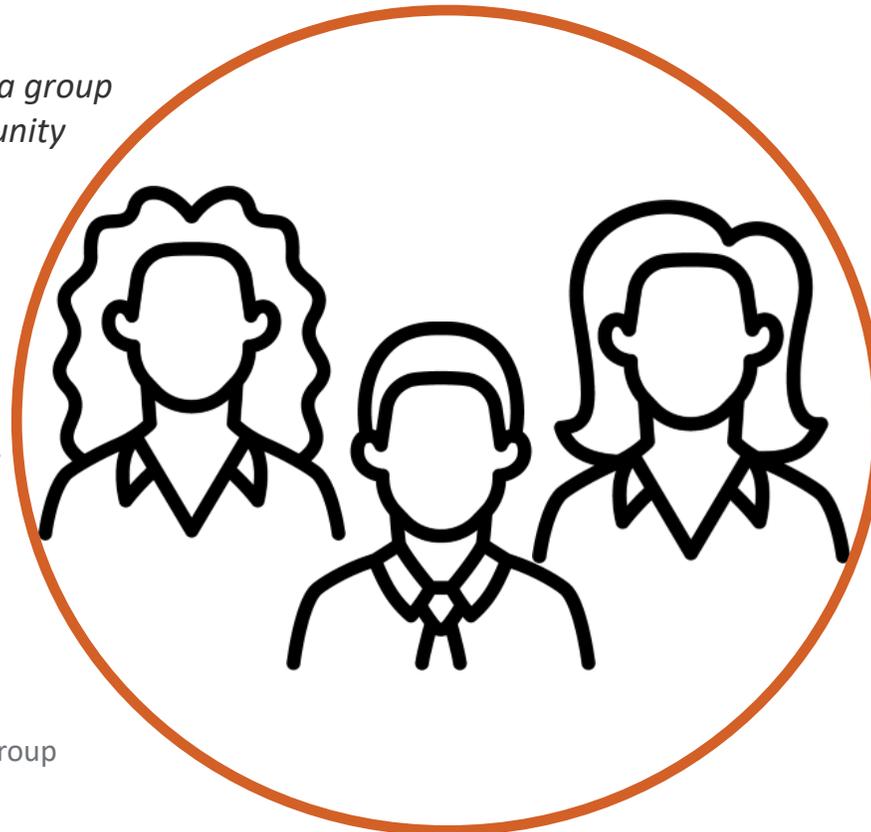
**Goals:** Maintain professional relevancy.

2

## Education

- Could teach at the same school
- Could be part of a class or student group

**Goals:** Learn and contribute together.



*They will have a community mindset*

3

## Personal

- May want to find others with the same interests
- May want to find others with the same goals
- May want to contribute to a group to expand their personal offerings

**Goals:** Collaborate to continually grow.

4

## WordPress team (internal)

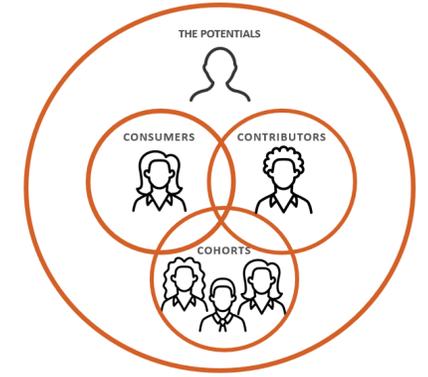
- Support others who will need help
- Support each other in initiatives

**Goals:** Maintain relevancy and contribute to the WordPress community.

# Collective Surveys

# THE HIGHLIGHTS

This data has informed our recommendations for course design and enhancements.



## USERS



Consumers

Contributors

Cohorts

Novice 1

0

1

Beginner 8

4

0

Intermediate 16

6

1

Expert 12

5

0



# CONSUMERS . CONTRIBUTORS . COHORTS

If we are to believe this survey represents the majority of characteristics and practices of WordPress users, we may be able to assume they . . .



## THE USERS

- (Q1) Are mostly **consumers**.
- (Q2) Operate at a self-proclaimed **intermediate level**.
- (Q3) Have used or contributed to WordPress for an average of **5-9 years**.
- (Q4) Have found the usefulness of WordPress mostly via **work obligations**.



## THE UX

- (Q5) Find the **search tool** to be mostly “**easy**” when navigating the site.
- (Q6) Mostly didn’t use the **filter feature**, but when they did, they still **needed further assistance**.
- (Q7 & Q8) Find the **navigation** to be moderately easy but **not entirely easy**, and when they noticed the site, its **simplicity** made it easy to find what they need.



## THE LX

- (Q9) Haven’t used **lesson plans**, but for those who have they want **more detailed information** when using lesson plans.
- (Q10) Find the **workshops** that exist now to be moderately helpful but need more **supplementary support** feeling comfortable applying the practices.
- (Q11) Would like improved **interactive activities**, **smaller** pieces of information, and **feedback** in the activities to assess their understanding.
- (Q12) Are somewhat engaged in the **video** but have **questions** throughout.
- (Q13) Believe the **amount of time** in the **workshops** was adequate to cover the content.
- (Q14) Believe the workshop **sessions** were **not challenging enough**, and the presentations need to be replaced with clearer versions.
- (Q15) Enjoys the **collaborative, flexible learning experience** that will keep them **up-to-date**.

# Focus Groups

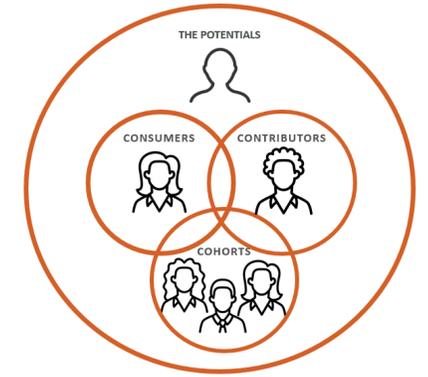
“I'm really impressed with the fact that you're taking the time to do such thorough research to build out the learning site. I think that's fantastic.”

“My big attraction to WordPress in the beginning was the community, and that continues to be the case and the resources they provide for everybody. Basically, I built a career without using much money because of the community.”

- Anonymised focus group participant

# PROFICIENCY LEVELS

This data has informed our recommendations for course design and enhancements.



## USERS



	Consumers	Contributors	Cohorts
Novice	0	0	0
Beginner	2	0	0
Intermediate	1	1	0
Expert	0	1	0

\* Has contributed content to other WordPress sites, not the learning site.

### FOR FUTURE CONTRIBUTOR RESEARCH

To further cater to the needs of this group, we'd recommend asking:

- What would make sharing information easier?
- What kind of information do you think the site is lacking that you could contribute?
- In what format would you be able to contribute content?
- What kind of identifiers would you like to be associated with your content so people can search for you?

### FOR FUTURE COHORT RESEARCH

To further cater to the needs of this group, we'd recommend asking:

- What is your ideal cohort set up? (Discussion groups, meetings, etc.)
- How often would you expect to interact with a cohort?
- What kind of personalization would be helpful when setting up a cohort?
- What would incentivize you to join a cohort?
- What kinds of lesson plans/modules/topics would be helpful to your prospective group?



# CONSUMERS . CONTRIBUTORS

If we are to believe this survey represents most characteristics and practices of the proficiencies of WordPress users, we may be able to assume . . .

## THE USERS

- Q1: While they all use it for **business purposes**, they use it in unique ways (site, their own WordPress business, eCommerce)
- Q2: A majority **uses WordPress every day**, thus mandating current content for their immediate questions and needs.

## THE LX

- Q3: In the beginning novice and beginners **lack the vocabulary** to search for what they need. As they become more familiar with the system as intermediate and advanced, they use the learning site to **enhance their designs** and are willing to take the time to learn what they need to know.
- Q4: Users across various proficiencies don't use the learning site to fix problems but will instead **go to other non-WordPress sites to troubleshoot**. Those other sites may not be reliable, accurate information, but they have access to immediate answers.
- Q5: Users use Google, Slack, WPNigeria (WP in their respective country), and virtual meetings for support. They appreciate information to be **tailored and timely**.
- Q6: At first the enormity of options for beginners on the site is **overwhelming**, later some intermediate users make their **designs too complicated** and end up needing to fix it. They also have problems with block **editors and plug-ins**.
- Q7: Beginners go to people when they experience difficulties, more experienced users go to Google search with the **appropriate key terms**.
- Q8 and Q9: Every user **immediately applies** what they practice. If they can't immediately apply it because they don't need it right then or something else takes priority, they want to **save it** to access later.
- Q10: Every user would like an **individualized experience** based on categories and recommendations tailored to their abilities and interests.
- Q11: For immediate support, a majority of users want an **accessible FAQs** and **live chats**, regardless of their level of expertise.

## THE UX

- Q12: Every level of user is willing to take modules of any length but are **looking for specific details**. If they can isolate these searches to their specific details, they'd like that. If they can learn a subject in **10-15 minutes**, they'd be happy. A majority is also open to **supplementary materials**.
- Q13 and 14: Regardless of level, a majority of consumers don't see the value of having a badging system, but if they're searching for experts with some credentials, **badging would be helpful** to identify those **experts**.
- Q15: For those that are familiar with the learning site, they thought the **simplistic design** was helpful.
- Q16: Some beginners want the videos to be curated where the ineffective ones with poor visual quality and sound, **should be redone**. All levels of proficiency would like more personalized interaction with the content and feedback.
- Q17: Some users suggested **games, recorded webinars** with links to the presenter for **further conversation**, and up-to-date **rotating content** on the landing page regardless of level of expertise.
- Q18: Users would like to see this **site promoted** more so other users are aware of it and so they can widely share it, one user would like a **feedback loop** for the site's designer where they can offer feedback on the experience.



# HIGH-LEVEL SOLUTIONS

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# THE RECOMMENDATIONS

The WordPress Experience: Education for a wider WordPress world.

1

MAKE IT MINIMAL AND MEANINGFUL

2

MAKE IT CONCISE AND CUSTOMIZED

3

MAKE IT ITERATIVE

4

MAKE IT INTERACTIVE

5

MAKE IT INTERPERSONAL

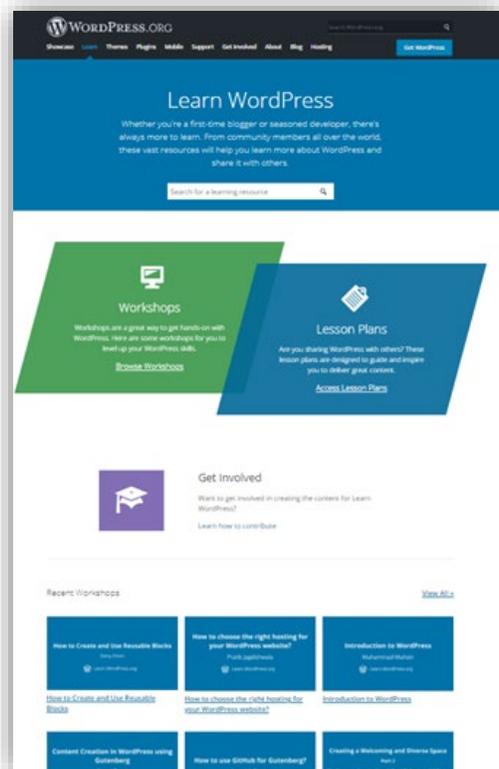


# MAKE IT MINIMAL AND MEANINGFUL

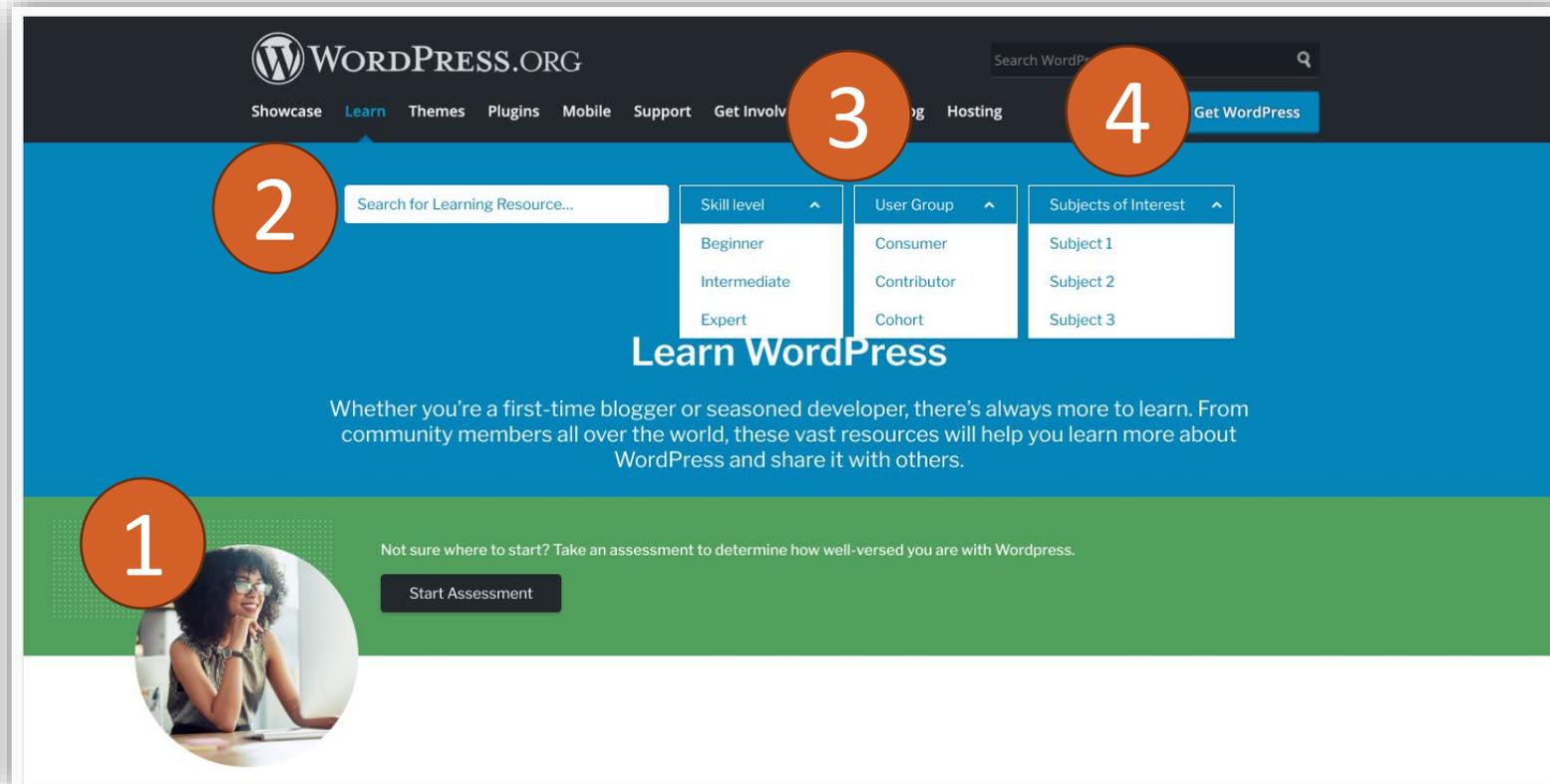
1. Offer **assessments** to determine level of expertise and user group.
2. Make the site easy to navigate with intuitive **searching** solutions with **auto complete options** for commonly searched terms.
3. Include **filters** that can be easily accessed with meaningful content
4. Provide **quick access** to topics and solutions that apply to them. Because most use this for work obligations, they'll need quick solutions and quick access.

Other LX suggestions:

- Some **inclusive and directive messages** in the scripting welcomes the learners and offer reasons for them to personalize their experience.
- The assessments and search functions give them autonomy to guide their own experience. The results page of the assessment should offer suggestions for what they should **do with the results** from the assessments including connecting modules or sharing with their professional network.



CURRENT STATE



POSSIBLE FUTURE STATE

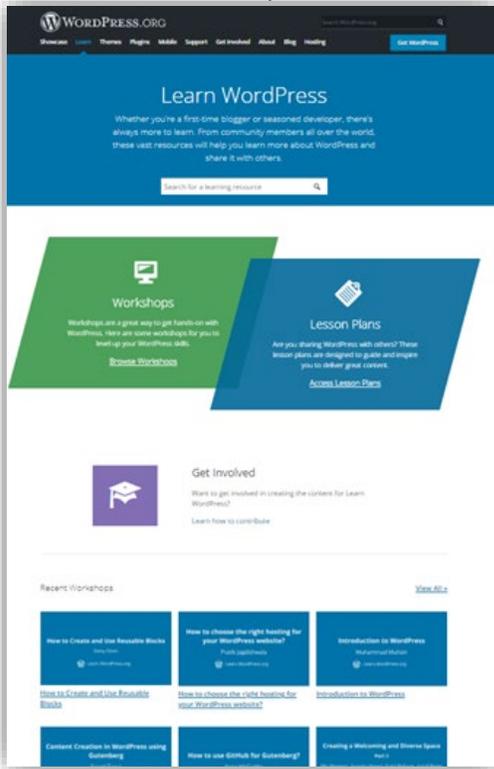


# MAKE IT CONCISE AND CUSTOMIZED

1. Provide a **revolving carousel** of new options for learning to ensure the new content gets cycled through and older content is flagged as possibly outdated..
2. Facilitate easy, **simple options** for them to take ownership to **invest their own content** based on the needs of the community.
3. Create **badging** or indicators that coincide with their level of expertise based on completion and contributions.

Other LX suggestions:

- If **badging** with various proficiency levels becomes part of the experience, consider when the learner **could level up**. Is that something they earn? Is it something they declare or share?



1

## What's Trending

[See All Courses →](#)

**Intermediate**

**Reusable Blocks**  
 Ted Yoshida · Intermediate Contributor  
 Excepteur sint occaecat cupidatat

SHARE 1h 7m July 2021

**Expert**

**Choose The Right Host**  
 Amanda Sok · Intermediate Contributor  
 Excepteur sint occaecat cupidatat

SHARE 16m August 2021

**Beginner**

**Introduction to Wordpress**  
 Amy Jones · Intermediate Contributor  
 Excepteur sint occaecat cupidatat

SHARE 25m Updated May 2021

3

**Workshops**

Workshops are a great way to get hands-on with WordPress. Here are some workshops for you to level up your WordPress skills.

**Lesson Plans**

Are you sharing WordPress with others? These lesson plans are designed to guide and inspire you to deliver great content.

2

**Get Involved**

Want to get involved in creating the content for Learn WordPress?

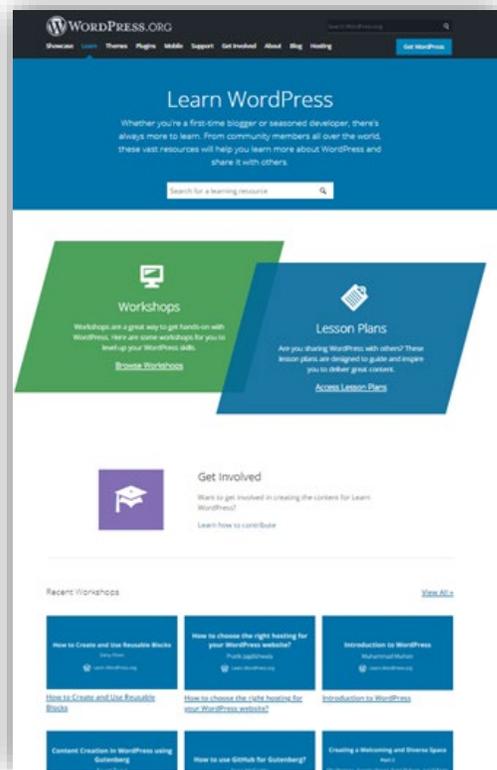


# MAKE IT ITERATIVE

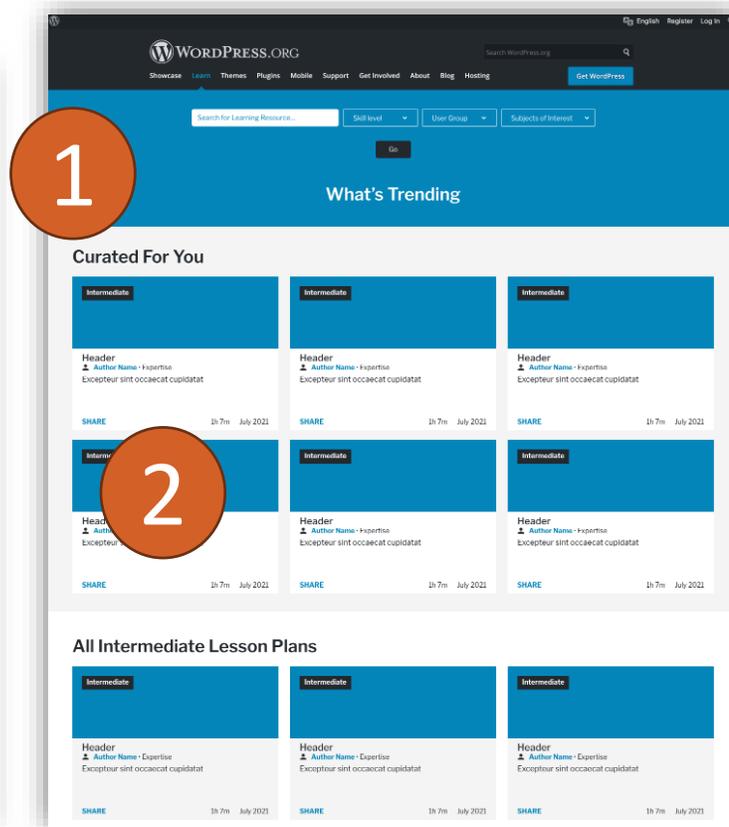
1. Create **flexible, current opportunities** for the users to make the site their own based on their interests and level of expertise.
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Other LX suggestions:

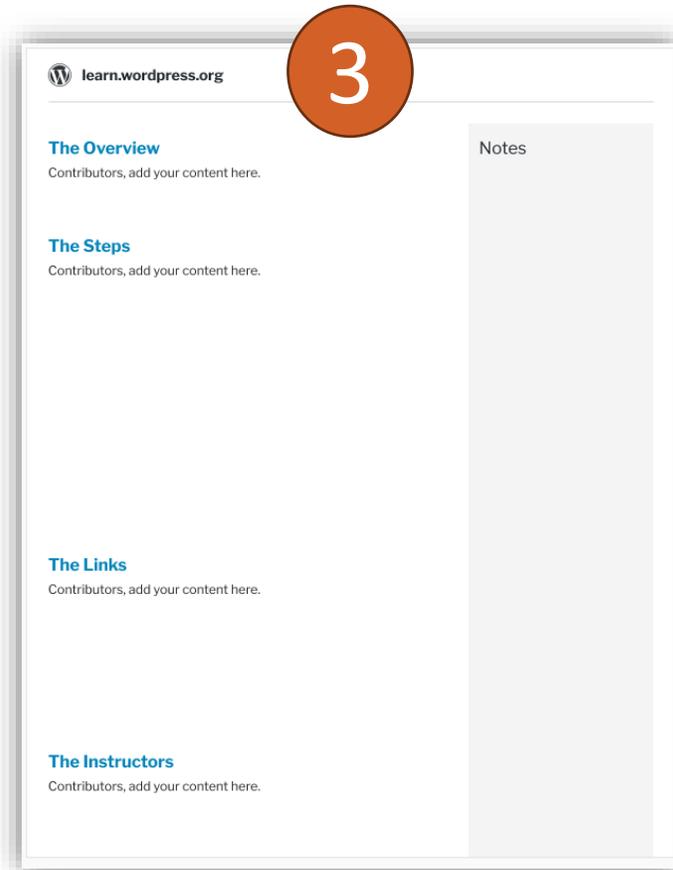
- Although the contributors will be responsible for adding the content into the supplementary materials, ensure your **scripting includes examples** of what they might list in each respective section.



CURRENT STATE



POSSIBLE FUTURE STATE



# MAKE IT INTERACTIVE- THE MODULES

1. Include **training activities** that encourage the users to apply or think through the application of new processes or solutions
2. Don't test them on knowledge, but instead outline **various use cases** for the lessons and materials.
3. Provide **pre-recorded sessions** and a way to ask questions of the presenter.

1

## The Learning Strategy.

Create a variety of **multiple-choice questions**. Here are some suggestions for question strategies:

### Predictive Analysis

By asking the learner to guess what they think could happen when making a decision, they begin to see the value in pausing to consider how one small action could impact their design and/or outcome. Example: When interacting with x, y, and z, what would happen if you choose . . . “

### Memorable Sequencing

Because they will be applying these practices outside of this site, users will need to recall the sequence of steps to execute the new action. If they guess, or predict the next step in the process, and they get feedback on their correct or incorrect answer, it will make that sequence easier to recall when applying it. Example: “What would the next logical step in this process be?”

### Preventing Setbacks

Inevitably, the learner will make some mistakes when applying the new action. However, when learning and identifying the common missteps of others, they'll understand where they could go wrong when faced with a similar situation. Example: “When using reusable blocks, what do you think is the most common misstep?”

ALLEN COMM



**How to Create and Reuse Blocks**

This brief workshop shows reusable blocks as they exist in WordPress 5.7

1. Learning Chapters	14 min
2. Reusable blocks	2 min
3. Save a block, group of blocks as a reusable block	1.5 min
4. Manage existing reusable blocks	2 min
5. Use reusable blocks list view	2.5 min
6. Convert a reusable block	3 min
7. Learn how to insert reusable block	3 min

**Suggested Modules**

- How to choose the right hosting for your WordPress site - Pratik Jagdishwala
- Introduction to Wordpress - Muhammad Muhsin - Beginner Contributor
- Content Creation in WordPress using Gutenberg - Sayed Taqui - Expert Contributor

3

**How to Create and Use Reusable Blocks**

Reusable blocks are a powerful way to manage frequently used content on your WordPress site from the block editor. In this workshop learn to create and insert blocks into your content that can be edited from a central location allowing changes to be made across the site, anywhere the reusable block has been placed. This workshop shows reusable block features as they exist in WordPress 5.7.

**Learning outcomes**

1. Learn what a reusable block is and how they are useful
2. Learn how to save a block or group of blocks as a reusable block.
3. Learn how to manage existing reusable blocks from the block editor.
4. Learn how to access and use the reusable block list view.
5. Learn how to convert a reusable block back to regular blocks in the block editor.
6. Learn how to insert an existing reusable block into block editor content

**Comprehension questions**

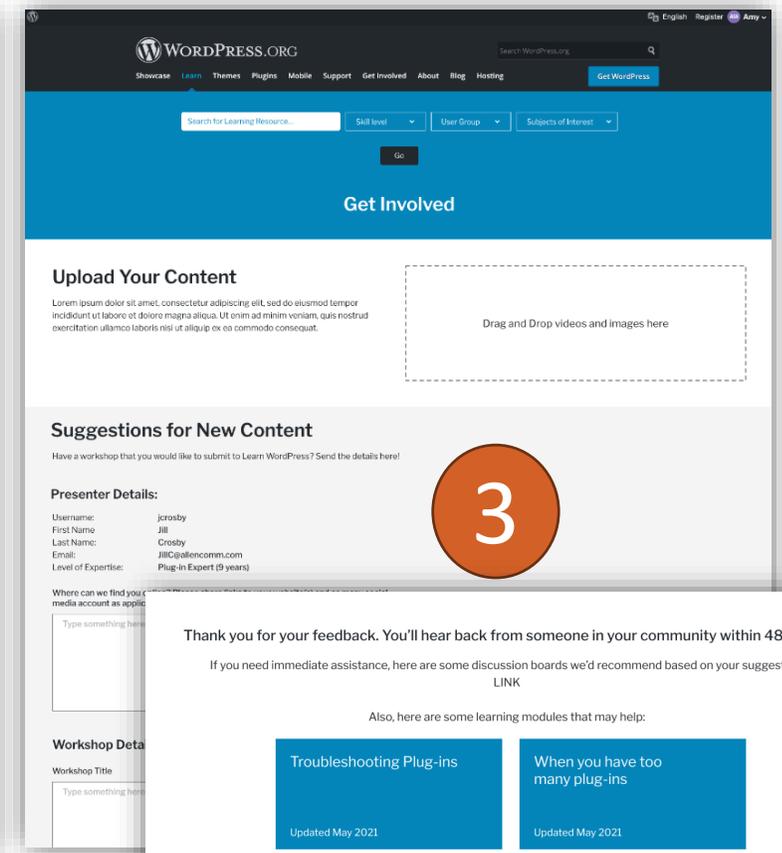
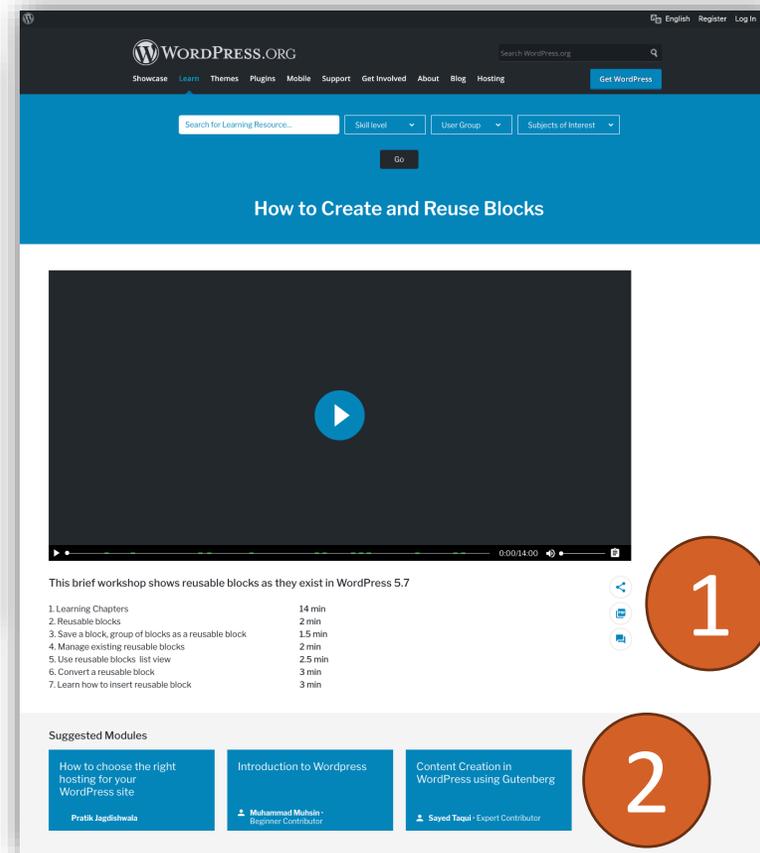
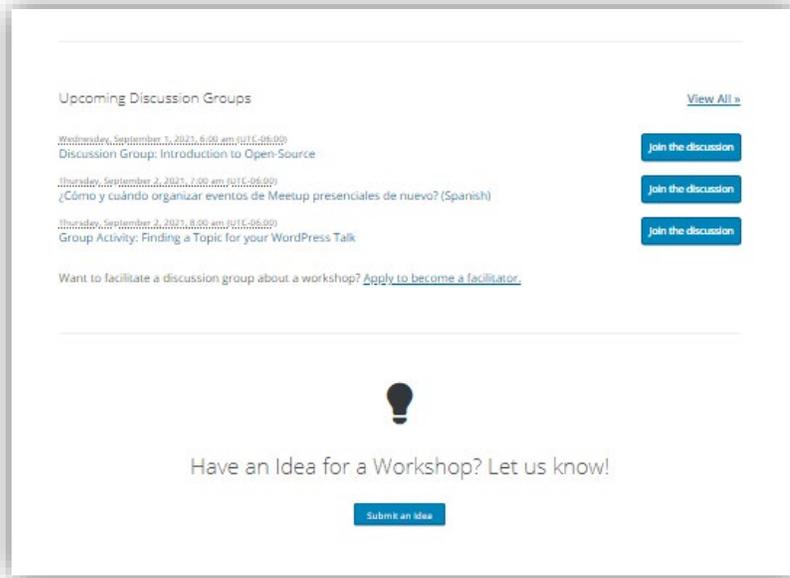
- How does a reusable block differ from a group of blocks?
- After adding a reusable block to your content, can it be changed back to a regular block?
- Can a reusable block be created without any coding knowledge?
- How can you include multiple blocks in a reusable block?

# MAKE IT INTERPERSONAL

1. Provide access to a collaboration of **real people** in real time so they can garner specific support when and where they need it.
2. Continue to provide **instructional videos** of real people who may share some struggles they've also had and how they've solved it.
3. Provide a **feedback loop** where they can offer suggestions and receive responses

Other LX suggestions:

- The **scripting of the feedback loop** messaging should be conversational and appreciative of their efforts to contribute.
- When **scripting for the activities**, introductory text, or any lead-in messaging, the tone should reflect the users- passionate, appreciative, yet casual.



# THE WISH LIST

Some additional features users mentioned in the focus group.

- A consistently updated list of the day's most viewed courses.
- The user's WordPress account linked to track their progress within videos and the modules with which they've interacted.
- Advertisements: The learning site specifically should immediately populate in search inquiries about WordPress.

