

UX Configuration Guidelines

Overview

CaféWell Usability

What works? What doesn't? We have data. We have feedback. We have experience and expertise from working with our clients. And we have a seasoned UX product design team that has created this document to ensure our clients get the most out of their implementations so their populations are set up for success.



How to use this guide

Use this guide as a reference to build and implement best practice CaféWell client configurations

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Consumer Satisfaction Improvement Plan

Purpose

Why are we doing this? This is the beginning of conversations between client facing teams and the Product Experience team. In our collaborative efforts moving forward we will share knowledge impactful to consumer satisfaction, present the current consumer NPS state, give practical advice as we enter 2019 program designs and support our teams with information on best practices.

Agenda

In this document we used an IBM Case Study to present examples of opportunities to improve UX. You will see guidelines and examples of best practices and strategies to improve the consumer experience via configuration.

Goal

By taking action to improve configured consumer experiences we aim to:

- Improve CaféWell's Consumer NPS scores
- Reduce the variability across implementations
- Remove the burden of heavy configuration testing
- Provide guidance for consistent support responses based on configurations

NPS defined and recent scores

What is NPS?

NPS is a tool used to gauge the loyalty of our users towards the brand, product and experience. It helps us get an understanding about customer satisfaction, in addition to feedback through traditional research techniques. See scores here: usernps.cafewell.com

What is CaféWell's current NPS consumer score?

Scores as of July 31, 2018

Overall: 16

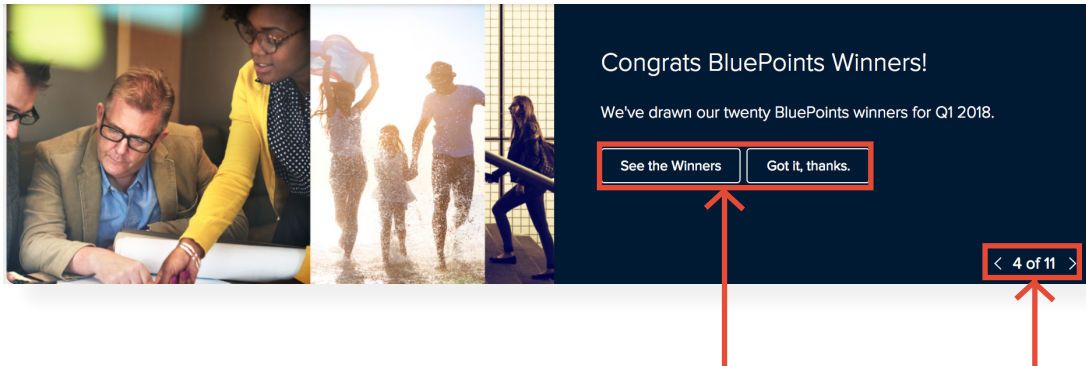
IBM: 11

Centura-employee: 21

Stanford: 26

Jumbotron Usability — Don'ts

How do our users interact with the jumbotron?



Whoa, so many promotions

Research studies and design best practices tell us that in most cases users do not click through more than three items on a moving carousel on home page.

What exactly should I click on?

Having more than one button/call to action on a promotional item confuses users. Use of language on the button “Got it, thanks” does not indicate its purpose or where it might lead a user.

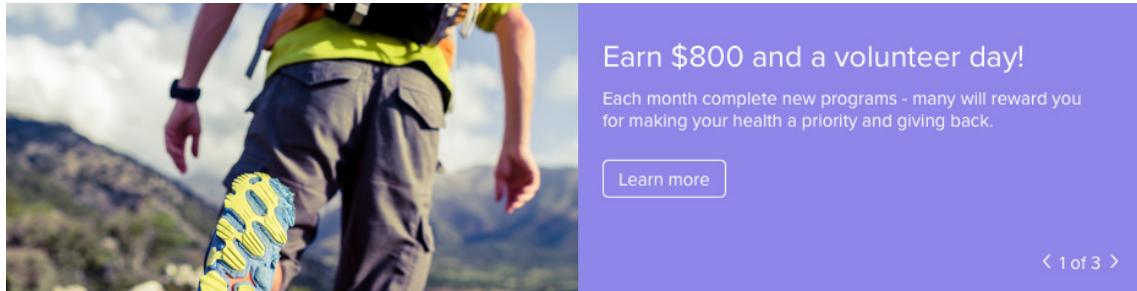
Why am I seeing this again?

Currently, IBM jumbotron items are not updated for extended periods of times (several months), leading to content fatigue.

“I think I saw this two months ago and completed the survey. Shouldn't it be gone?”

“I find the scrolling big thing distracting, like an advertisement. Hopefully, its not too important because I tend to hide or scroll by such carousels or block it. Want to focus on the real stuff.”

Jumbotron – Dos



- Use 1-3 (max.) frames in the carousel
- Prioritize promotions sequence
- Refresh content as frequently as possible, every 1-2 weeks is ideal
- Present timely information and deadlines with new announcements and on-going campaigns
- Make links and buttons clear, large enough to click and include action verbs and such as “Get Started”, “Join Now”, “Find Out More”
- Ensure there are other ways, besides the jumbotron, users can access promoted CaféWell features and content

THE DATA

On average, the click-through rate on home page carousels is between .065% and 1%.

—*SearchEngineLand*

Banner blindness is a thing! And auto-rotation of too many items leads to accessibility barriers.

—*NNG*

Navigation - Don'ts

Does the navigation menu let users find their way?

Menu	Home	Ask Concierge	Rewards
IBM Wellbeing	IBM Health Care and Benefits	IBM Quick Links	Programs
Your 2018 Rewards	Aetna	Vitality	Create Your Own Program
How to Earn Rewards/Incentives	CVS/caremark	Employee Assistance (EAP)	
Our 5 Dimensions of Health	NetBenefits	Zipongo Nutrition	
Wellbeing Champion Network	Your Benefits Center	Optum Live and Work Well	
Benefits & Rewards FAQs	Telemedicine & Retail Clinics		
Popular Resources	Best Doctors		
Resources	IBM Connections		
Blogs	w3 Communities		
Health Resources	IBM Coaches		

Too many options to choose from

Past research studies and NPS comments demonstrate user frustration having to read through and decipher long lists of links and categories (see appendix)

Impact of phrasing

Users struggle to find what they are looking for as they expect to see descriptive phrases, improving confidence and intuitiveness in taking actions

Central Source

Using the site as a central repository loses focus of the program design

“This menu has too many layers, so much to read, hard to understand, not logical.”

“You have intentionally made it hard to navigate and find things.”

“Sometimes I don’t even understand the categories. Like, what are these quick links? What community? What benefits? Not clear.”

Navigation - Dos

IBM Wellbeing	IBM Benefits	IBM Quick Links	IBM Resources
My 2018 Rewards	My Benefits Center	Vitality	Create Your Own Program
Rewards FAQs	Aetna	Employee Assistance (EAP)	IBM Coaches
Our 5 Dimensions of Health	CVS/caremark	Zipongo Nutrition	w3 Communities
Wellbeing Champion Network	Net Benefits	Optum Live and Work Well	Blogs
	Telemedicine & Retail Clinics		Health Resources
	Best Doctors		

- Present 3-5 items/category to making it easier to read, grasp and remember
- Prioritize items that are most important to users – the most visited and actionable pages
- Use shorter phrases with appropriate words for category headers
- Eliminate using a category header for a single menu item
- Eliminate repetition

THE DATA

More than 47% of first-time visitors check out a company's product page before looking at any sections of the site,
—KoMarketing

Information architecture comes before site design and needs to be based on users' mental models.
—6 UX Laws
(see appendix)

Program Engagement - Don'ts

What is users' logging behavior?

Don't make me log every day

Users do not have time to log into the website every day, leading to lost chances of participation and earning rewards

Reminder Emails

Users don't tend to read beyond the subject line or part the email body text and therefore, miss out on important messages that might be at the bottom.

Calls to action in emails that aren't linked to the right pages on the website, further confuse users.

"Inability to complete logging on my own time. Cannot receive points without completing all logging tasks. This is a huge oversight."

"Email communication is not very frequent. With those that I receive, they take me to general pages on the website with no indication of what to do."

Program Engagement - Dos

Log-in Frequency

Avoid mandatory daily logging/tracking when designing ActionCards and the overall program

Reminder Emails

- Ensure links and buttons in emails are directly linked to expected pages
- Determine when to send reminder emails based on user's last login (e.g. after 5 days of inactivity)
- Give users a fair chance to complete programs by sending realistic and timely email reminders about program deadlines
- Test, test, test all calls to action

THE DATA

74% of marketers say targeted personalization increases customer engagement
—eConsultancy

About 53% of emails are opened on mobile devices
—Campaign Monitor

Content Presentation

Does quality, organization and amount of content impact design?

1. Volume of Text
2. Rewards Communications
3. Flows, Links and Labels

Content Presentation – Don'ts (1 of 3)

VOLUME OF TEXT

Readability and Impact on Learnability

Currently, users find it difficult to efficiently read and absorb the information

“This is a ridiculous amount of steps and programs to read through.”

Hierarchy

Lack of content hierarchy makes it difficult for users to read and grasp information

“Need time and patience to understand this”

Use of Language

Use of ambiguous and internally-used phrases become additional obstacles. For example: well-being champion, net benefits

The screenshot shows the 'Live Well, Live Better' website interface. At the top, there's a navigation bar with 'Menu', 'Home', 'Ask Concierge', and 'Rewards'. Below this is a hero image with a family. The main content area is titled 'How to Earn 2018 Rewards' and includes a 'Jump to Section:' list with links like 'Rewards Program Structure', 'How are rewardable programs personalized in my recommendations?', 'Explore Program Options in IBM's 5 Dimensions of Health', 'How do I get credit for my programs?', 'How do I check the status of my Rewards?', and 'Earning is easy and opportunities exist all year long'. A large table titled 'Rewards Program Structure:' follows, with columns for 'Opportunities to Earn', 'HSA Member (Employee and covered spouse/domestic partner)', and 'Non-HSA Member or Opt-out (Employees)'. The table is divided into 'Individual coverage' and 'Family coverage' sub-columns. Below the table, there are sections for 'Health Devices' and 'BluePoints'. A 'Next Steps' section provides instructions on how to earn rewards. A 'How are rewardable programs personalized in my recommendations?' section explains that recommendations are based on the user's Wellness Checkpoint. A 'Explore Program Options in IBM's 5 Dimensions of Health:' section features a table with columns for '5 Dimensions of Health', 'Program Options', 'Rewards Criteria', and 'Details'. This table lists programs like 'Physical Activity Tracking', 'Zibongo', 'Due Date Plus by WSPower', 'Sitting Mind', 'Employee Assistance (EAP)', 'MoneySmart Financial Coaching', 'Financial Engines', 'Financial Wellness Assessment', and 'Volunteering'. At the bottom, there are sections for 'How do I get credit for my programs?', 'How do I check the status of my Rewards?', and 'Earning is easy and opportunities exist all year long:'. The footer includes 'About Wellness', 'Help', 'Contact Us', 'Terms of Use', 'Privacy Policy', 'Accessibility', and 'Live Vision Theme'.

Content Presentation – Don'ts (2 of 3)

REWARDS COMMUNICATION

Impact on Rewards

Users are confused about the rewards system and its requisites without clear instructions on earning rewards (when, where, how, what)

Progress

Users find it difficult to understand their progress and earnings when they are not communicated about their status

Credibility and Desirability

Users lose confidence in CaféWell and the rewards system when they are not communicated about their completion and don't receive payment

"I could never get through your maze of screens and claim my \$150 although I met the requirements."

"It is sometimes difficult to see the points I've earned."

"Rewards program is a fraud"

Content Presentation — Don'ts (3 of 3)

ACTION VS DESIRED OUTCOME

While traversing through heavy text, users fail to go down the desired funnel due to endless loops and redundant links.

Similar links that are differently labeled, appear on multiple pages leading to false expectations and confusion among users.

In several instances, users recall landing on pages accidentally without knowing why or how they got there.

“Links just take you through loops and you eventually just wind up back at the beginning.”

“When I came to the How to Earn page, it said use these links to go to rewards. On another page I saw a different link taking me to the same page. Or I didn't know the difference? This is an example of how difficult the navigation is.”

Content Presentation – Dos

Test the configuration as a user would!

Readable = Discoverable = Logical

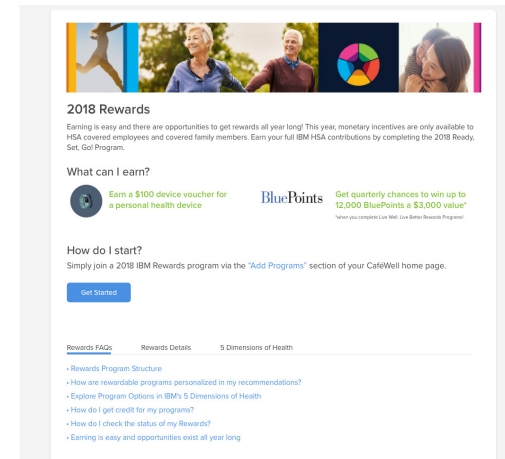
- Switch from paragraphs to 3-5 bullet points
- Paragraphs no longer than 3 lines
- Avoid sectioned areas of text on corners of the screen to improve information hierarchy

Prioritize

- Key instructions, rules and calls to action should appear above the screen fold
- Use consistent, precise and distinct language for unique links across the website

Use of links

- Open in the same window if they link to other HTML pages
- Open in a new window/tab if they link to an external website or non-web documents (example: PDF, surveys etc.)



THE DATA

On the average web page, users typically have time to read about 20% of the words during an average visit
—NNG

38% of people will stop engaging with a website if the content/layout is unattractive
—Adobe

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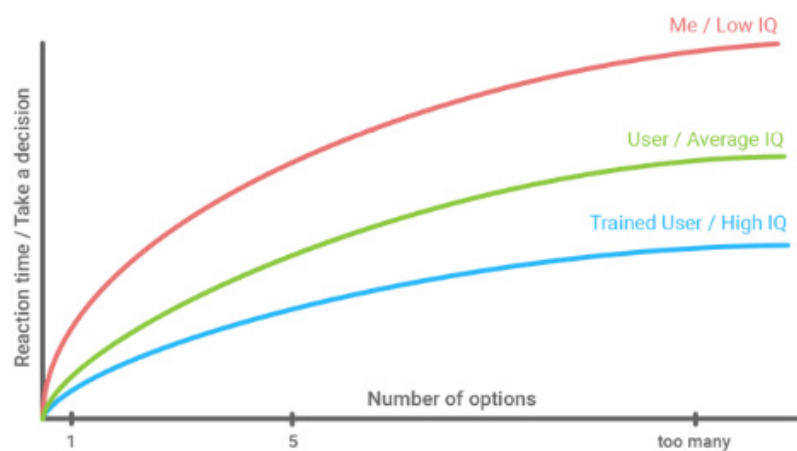
Appendix — 6 UX Laws

Jumbotron

1. Hick's/ Hick-Hyman Law

“The time it takes to make a decision increases as the number of options increases”

—William Edmund Hick and Ray Hyman



- The number of page views can also be indicator for how effectively you've used Hick's Law. If the navigation is too complex, the number of page views is likely to be lower than if it was simple.
- Focus on optimizing the design to provide the user with the right amount of options to keep the engagement.

Appendix — 6 UX Laws

Navigation and Content Presentation

2. Miller's Law

“The average person can only keep 7 (plus or minus 2) items in their working memory.”

Having more than 7 elements generates confusion and loss of focus of the user, who is no longer able to remember where was the option that he now is looking for. Chunking is an effective method of presenting groups of content in a manageable way. Organize content in groups of 5-9 items at a time.

Navigation

3. Serial Position Effect

“Users have a propensity to best remember the first and last items in a series.”

- Presenting long lists of information places significant strain on limited attentional resources and restricted memory systems, especially short-term memory, where only three or four items or chunks of information can be maintained at one time.
- Our ability to recall previously presented items is also severely impacted by events between initial processing and later recall.
- Reduce the amount of information user needs to recall from previous step, in order to complete current and next steps.

Appendix — 6 UX Laws

Navigation and Program Engagement

4. Zeigarnik Effect

“People remember uncompleted or interrupted tasks better than completed tasks.”

Content Presentation

5. Fitt's Law

“The time required to rapidly move to a target area is a function of the distance to the target and the size of the target.”

- The closer and bigger something is to you, the easier & faster it is for you to touch it
- This is mostly applicable in mobile design (proximity to buttons, large vs small target areas to tap on)

6. Von Restorff Effect/Isolation Effect

“The Von Restorff effect, also known as The Isolation Effect, is when multiple similar objects are present, the one that differs from the rest is most likely to be remembered.”

