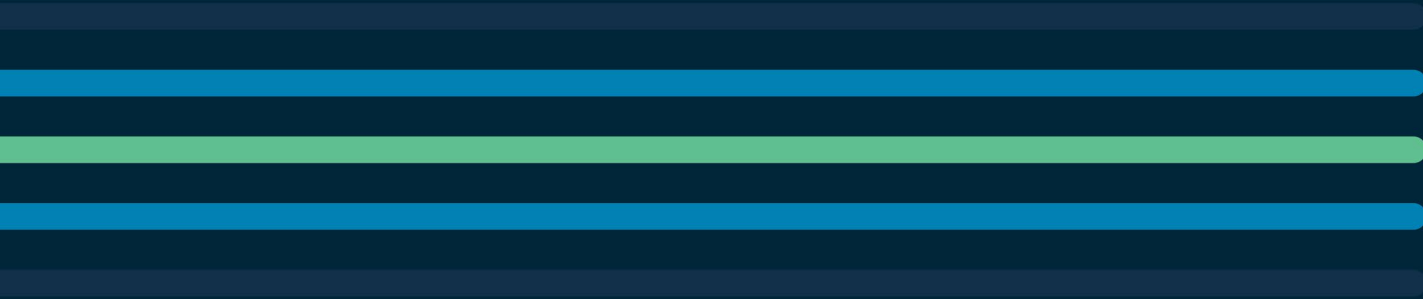


# New Information Architecture

An A/B analysis of two proposed designs



# Overview

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1. Goals
2. Research Approach
3. Executive Summary
4. Concepts 1 & 2
5. Descriptors/Nav Exercises
6. Participants
7. Findings
  - Individual
  - Comparative
8. Recommendations

# Our Goals



## Business Goals

1. Improve adoption and usage of the platform
  2. Identify best ways to modernize the product
  3. Increase satisfaction, NPS scores and references
- 

## Research Goals – Answer the Questions

Q: Which of the competing UI designs is preferred and why?

Q: How intuitive are the proposed primary navigations for key tasks?

Q: How would users describe each of the proposed designs?

# Research Approach

1



Exploration of 2 alternate models of revised information architectures

(Navigation Expansion vs Mega Menu)

2

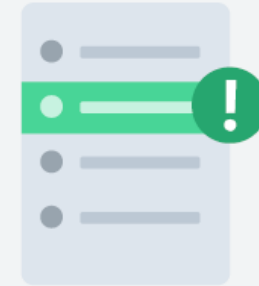


Selection of descriptors that reflect participants' impressions of each model

Descriptors mapped to our research objectives of determining product:

1. Clarity
2. Explorability
3. Desirability

3



Completion of task-based navigation exercise.

Users indicated where they would expect to find a function within each revised navigation hierarchy.



# Executive Summary

## Design Insights

### Design

Users were design-agnostic but hungry for simplification and streamlining of the high-use functionality.

### Icons

Placeholder icons need additional refinement.

## Big Wins

### Help

Dedicated, highly-visible help resources were unanimously praised.



Clients would love the ability to upload their own documentation/instructional videos. This function would be a game-changer for everyone.

### Settings

The settings icon was intuitive, and clients appreciated having a one-stop-shop to make changes.



Request to prioritize marketing and de-prioritize data management based on frequency of use.

## Cultural Insights

### Heavy Control

Admins are gatekeepers and wield all the control. Loan officers are infrequent and sporadic users which complicates their relationship to our software.

### Change-Averse Employees

Change is challenging for most employees. Users (beyond admins) are reluctant adopters who quickly grow weary of change and updates.

# Concept 1

## Navigation Expansion

- **Evolution, not Revolution**

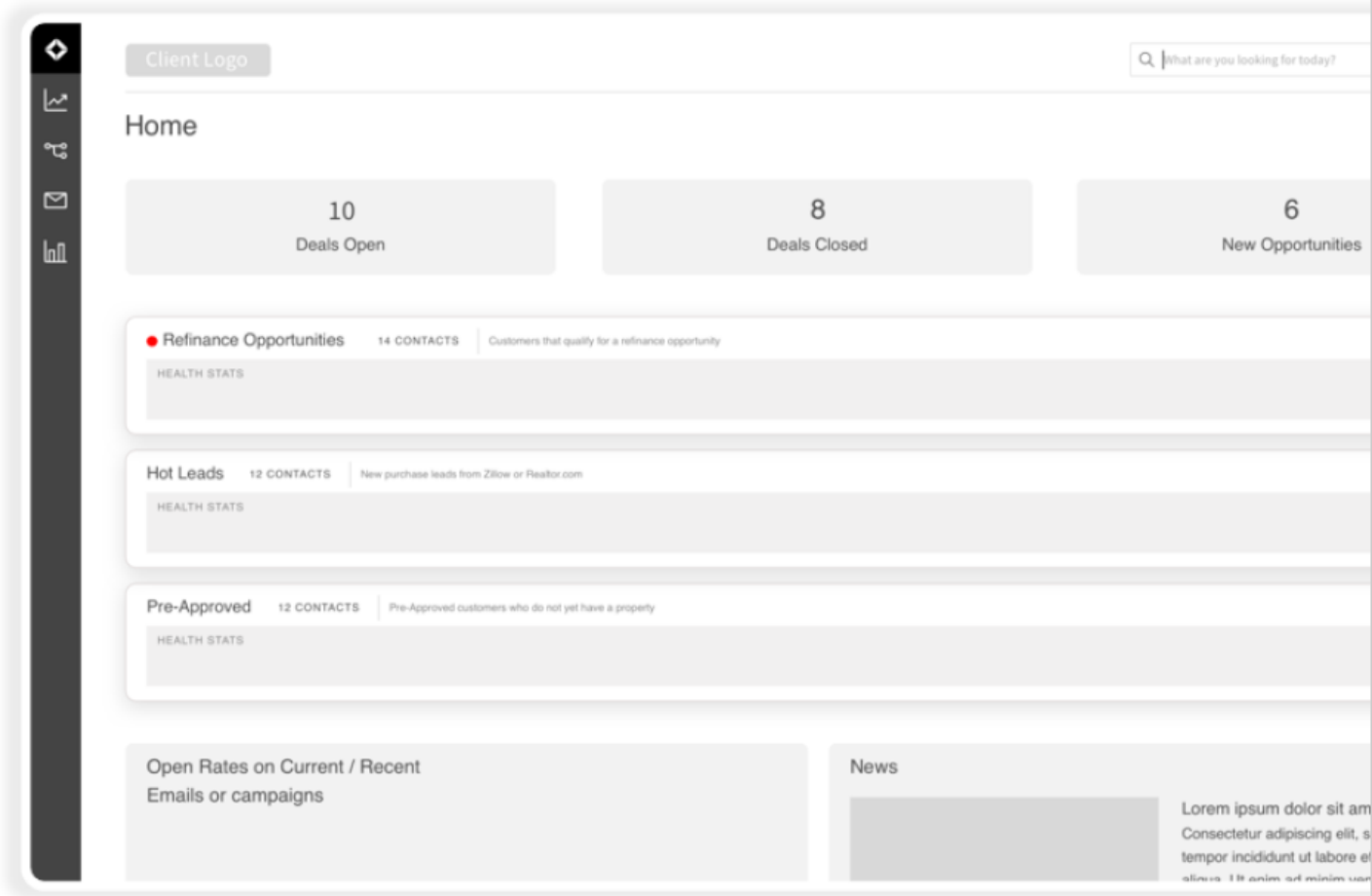
Uses similar, but improved version of existing model to limit learning curve.

- **Simplifies & Focuses**

Consolidates functionality into 4 specific sections

- **Separate & Distinct Administration**

Removes Admin functionality from main navigation and creates a separate space to manage the experience.



# Concept 2

## Mega Menu

- **Improved Discoverability**

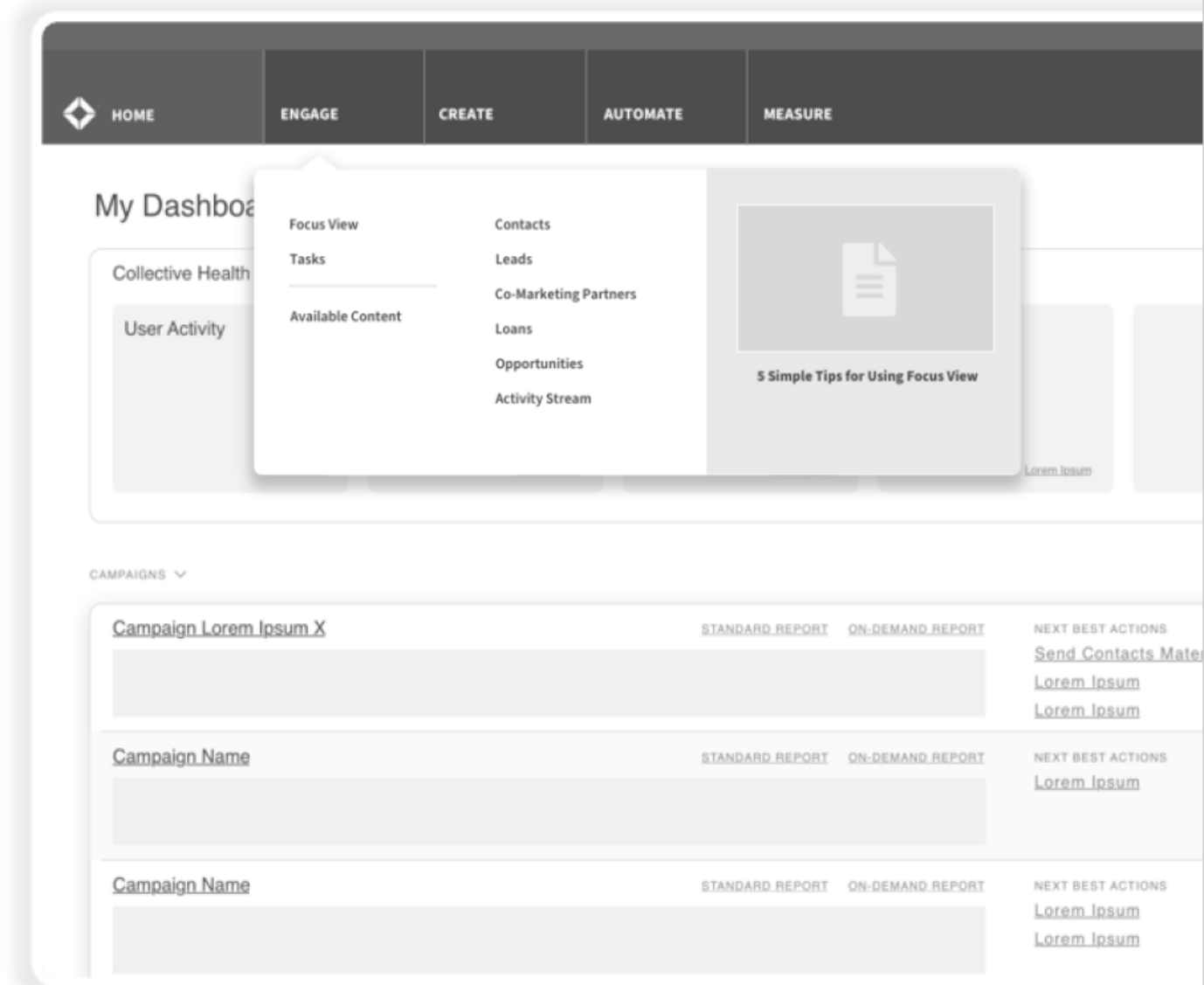
Makes it easy to browse and discover all the features we have to offer.

- **Unobtrusive**

By occupying limited space on the interface, we can maximize the canvas the users have to work.

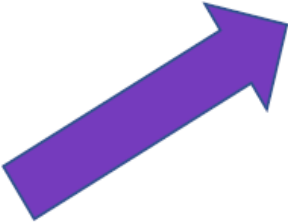
- **Separate & Distinct Administration**

Removes Admin functionality from main navigation and creates a separate space to manage the experience.



## Descriptor Exercise

Understandable	Describes what I just saw	Doesn't describe what I just saw	Words I'm choosing not to use
Confusing	Easy to use	Ordinary	
Accessible	Fresh	Frustrating	
Organized	Innovative		0 items
Intimidating	3 items	2 items	
Undesirable			
Motivating			
Empowering			
Overwhelming			
Intuitive			
Uncluttered			
Unapproachable			
Approachable			
Difficult			
Effortless			
Desirable			
Dull			
Complex			
Satisfying			
Hard to Use			



## Task-based Navigation Exercise

### Task 1 of 11

As a marketing admin, how would you update disclosure templates for marketing materials?

- Home
- Customer Engagement
- Journeys and Campaigns
- Content Creation
- Success Measurement
- Global Settings

### Task 1 of 11

As a marketing admin, how would you update disclosure templates for marketing materials?

- Home
- Global Settings
- Marketing Management
- Marketing Settings**
- ← 'I'd find it here





# Participants

## Customer Success

1. [Customer Success](#)
2. [Customer Success](#)
3. [Customer Success](#)

## Customers

1. [Customer Success - Customer Success](#)
2. [Customer Success - Customer Success](#)
3. [Customer Success - Customer Success](#)
4. [Customer Success - Customer Success](#)
5. [Customer Success - Customer Success](#)
6. [Customer Success - Customer Success](#)
7. [Customer Success - Customer Success](#)
8. [Customer Success - Customer Success](#)

# Design Findings



## Preferences

Q: Which design is preferred?  
Nav Expansion vs. Mega Menu



## Descriptors

Q: How do clients describe each design?



## Navigation

Q: How easily can clients find what they are looking for?



## Icons & Labels

Q: Are we using the right symbols and language?

# Findings - Preferences



No Clear Winner - Design Agnostic

**3 votes** - Mega Menu

**2 votes** - Nav Expansion

**2 votes** - Neutral

**1 vote** - Hybrid

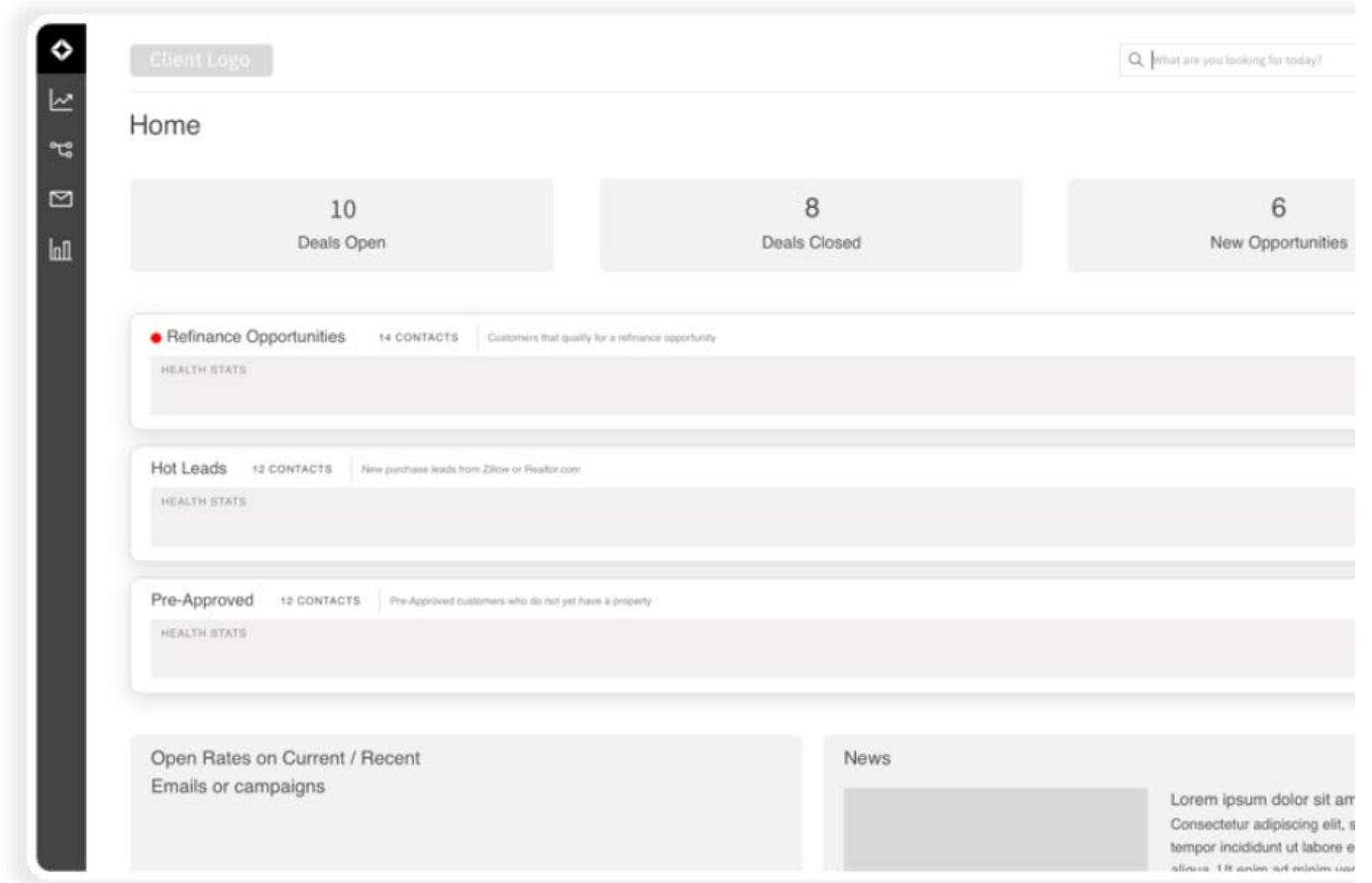
*(labels on nav expansion but layout of mega menu)*

“The LOs will not care either way as long as they can be trained on how to use it.

*John Doe— Finance of America*

# Concept 1

## Detailed Findings





## Nav Expansion Praise

*"I like how [there are] less options over on the left and it's categorized more than just having everything listed".*

Jane Doe – USA Mortgage

- Simplicity and consolidation of menu design
- Updated labels make sense
- Customer Engagement section – one stop shop for what loan officers need to be doing
- Term "Success Measurement" – sounds proactive and focuses attention on positivity



## Nav Expansion Concerns

*"Screen real estate is very valuable and, as you can see right now, it cuts off the dashboard. If I'm sitting on my laptop like most users will be, it takes up too much space".*

John Doe – Pacific Mortgage

- Consumes space that could otherwise be used for seeing the dashboard
- Icons are confusing – text is easier to process
- Labels are confusing
- Users can only view one secondary menu at a time. Misses seeing a "big-picture" view

# Findings - Descriptors

## Describes Navigation Expansion

Descriptor	% of Respondents	Dimension
Easy to use	88%	Clarity
Organized	88%	Clarity
Uncluttered	88%	Clarity
Understandable	88%	Clarity
Accessible	75%	Explorability
Straightforward	75%	Explorability
Approachable	63%	Explorability
Intuitive	50%	Clarity

## Does Not Describe Navigation Expansion

Descriptor	% of Respondents	Dimension
Intimidating	88%	Clarity
Overwhelming	88%	Clarity
Confusing	75%	Explorability
Difficult	75%	Clarity
Frustrating	75%	Explorability
Unapproachable	75%	Explorability
Undesirable	75%	Desirability
Complex	63%	Clarity
Hard to Use	63%	Explorability



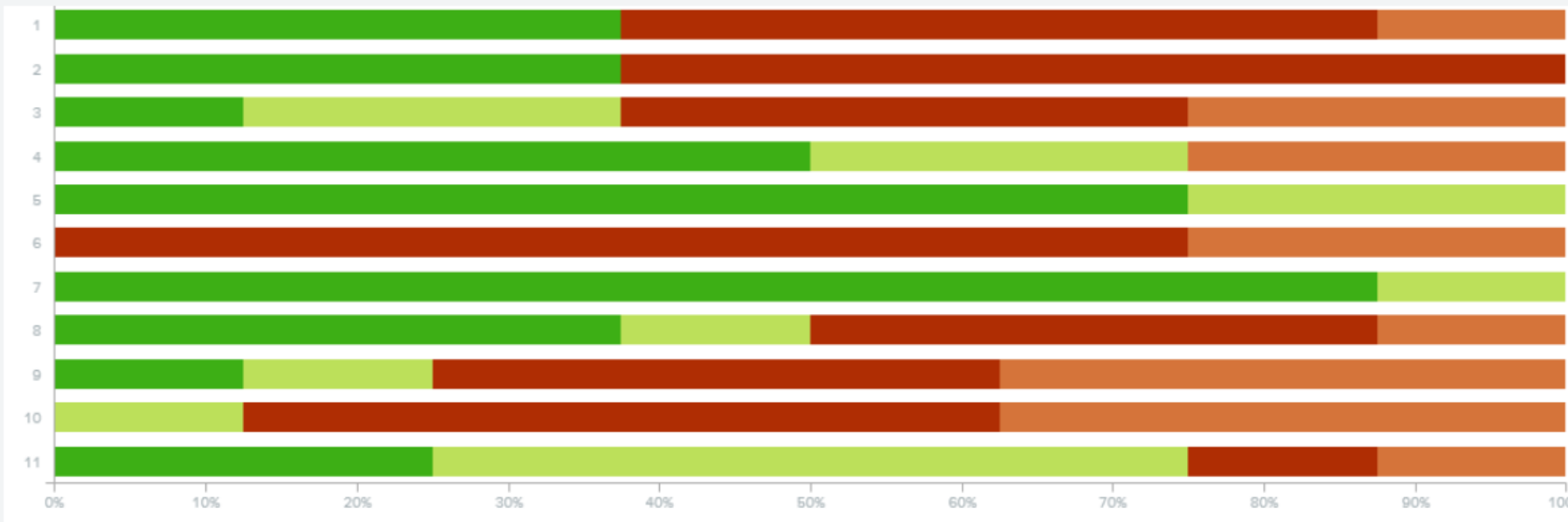
### Bottom Line

17 Descriptors Selected

53% - Clarity  
 41% - Explorability  
 6% - Desirability

# Findings – Task Evaluation

## Nav Expansion



- Direct Success
- Indirect Success
- Direct Failure
- Indirect Failure
- Direct Skip
- Indirect Skip

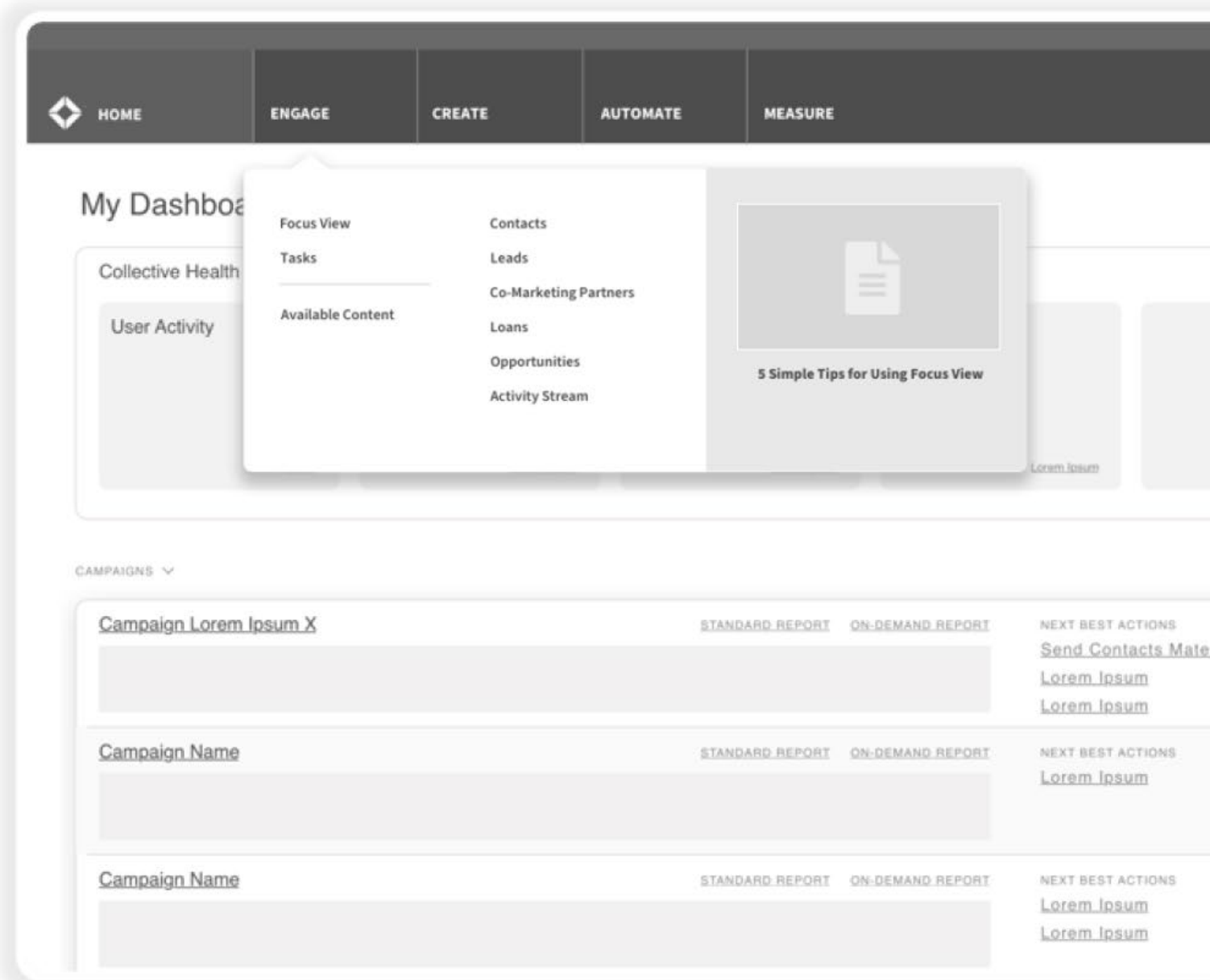


### Bottom Line

50% of users could find the correct answer across all tasks.

# Concept 2

Detailed Findings







## Mega Menu Praise

*"Its cleaner. You immediately know what it is [and] you don't need to guess about what these icons are. Just tell me what I need to know, instead of making me think about everything".*

John Doe – United Community Bank

- Supports loan officers who aren't in the platform as much as admins are
- Labels are intuitive and easy
- Frees up space on the left side of the screen
- Eliminates the need to interpret icons
- Instructional videos were intriguing. *"Videos require less concentration and focus which is what [loan officers] need"*
- Looks more modern – *"not like software designed in the year 2002"*



## Mega Menu Concerns

*"The home screen just looks busier to me. The dashboard is also making it look busy - dash + mega menus is a lot. There's no one central focus point".*

Jane Doe – USA Mortgage

- Significant concern on timing/behavior of roll over
- Menu is too tall – multiple requests to reduce its height
- Looks more like a retail website than like CRM software
- Concern that concepts are too broad. *"I just don't know that the end users going to understand them. When you're talking to a loan officer, you need to be talking at a second to third grade level".*

# Findings – Descriptors

Microsoft Sentiment Analysis Terms

## Describes Mega Menu

Descriptor	% of respondents	Dimension
Accessible	100%	Explorability
Organized	100%	Clarity
Intuitive	88%	Clarity
Uncluttered	88%	Clarity
Understandable	88%	Clarity
Approachable	75%	Explorability
Fresh	75%	Desirability
Innovative	75%	Desirability
Appealing	63%	Desirability
Easy to Use	63%	Clarity
Straightforward	63%	Explorability

## Does Not Describe Mega Menu

Descriptor	% of respondents	Dimension
Confusing	88%	Explorability
Frustrating	88%	Explorability
Dull	75%	Desirability
Hard to Use	75%	Explorability
Intimidating	75%	Clarity
Unapproachable	75%	Explorability
Undesirable	75%	Desirability
Complex	63%	Clarity
Difficult	63%	Clarity
Overwhelming	63%	Clarity



Bottom Line

21 Descriptors Selected

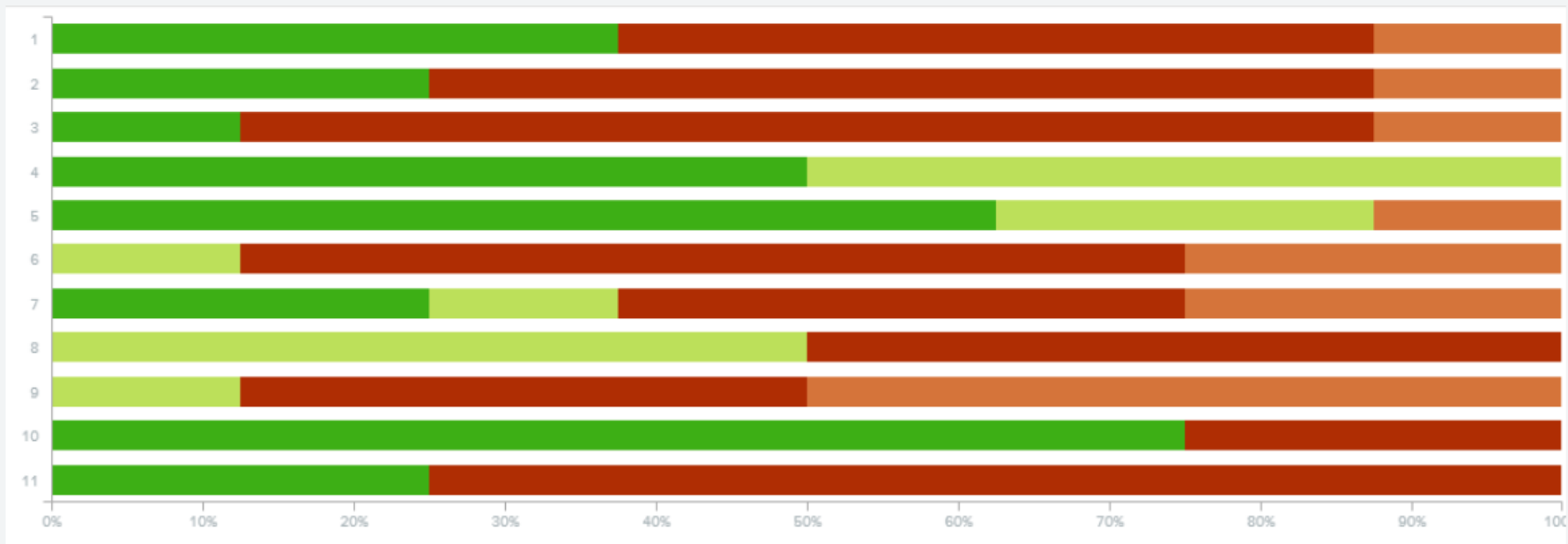
43 % - Clarity

33 % - Explorability

24 % - Desirable

# Findings – Task Evaluation

## Mega Menu



- Direct Success
- Indirect Success
- Direct Failure
- Indirect Failure
- Direct Skip
- Indirect Skip

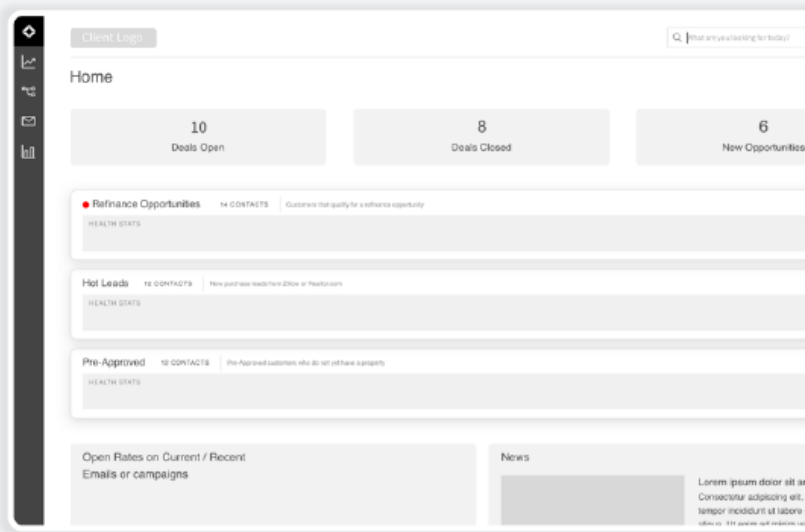


### Bottom Line

43% of users could find the correct answer across all tasks.

# Findings – Descriptor Comparison

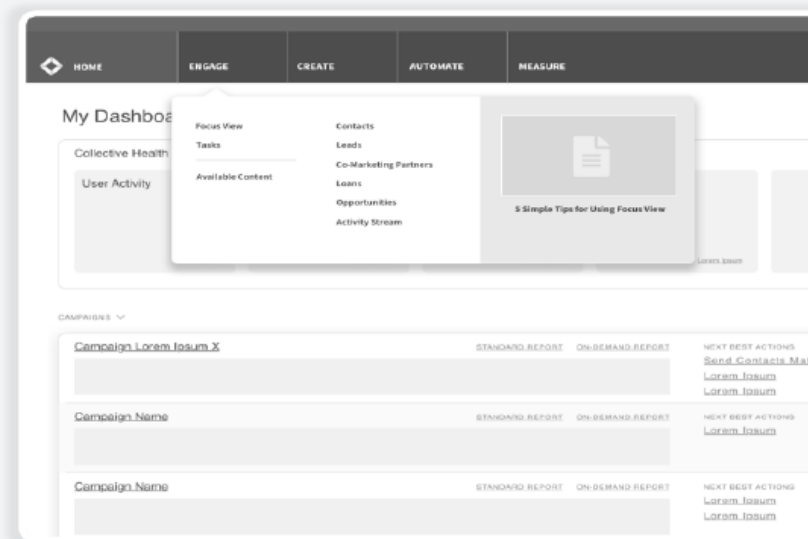
## Nav Expansion



**17 descriptors selected**

- ★ 53% - Clarity (+10%)
- ★ 41% - Explorability (+8%)
- 6% - Desirability

## Mega Menu



**21 descriptors selected**

- 43% - Clarity
- 33% - Explorability
- ★ 24% - Desirability (+18%)



**Bottom Line**  
A battle of 18%

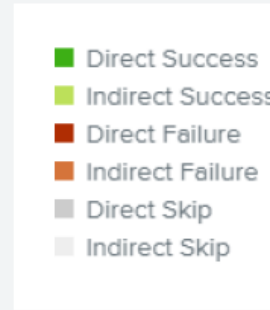
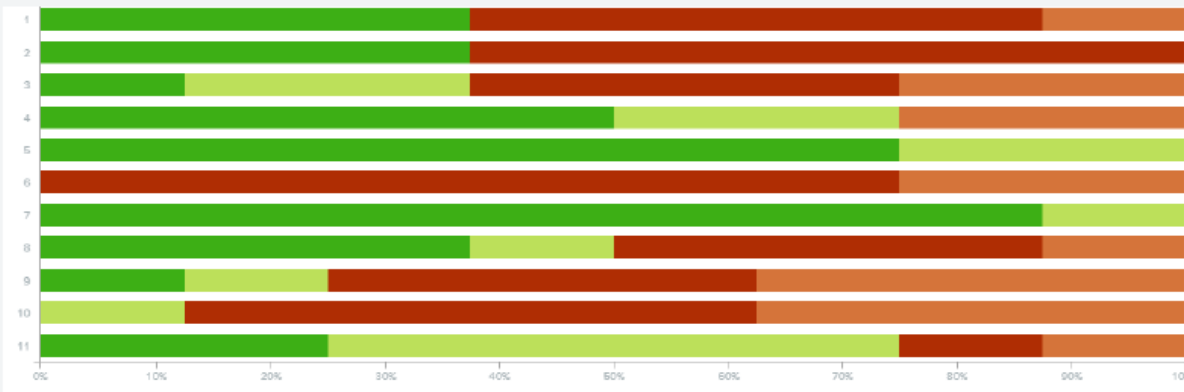
Nav Expansion outperformed Mega Menu on 2 of the 3 dimensions.  
→ 18% higher ratings


Mega Menu outperformed Nav Expansion on the desirability dimension  
→ 18% higher rating

Both designs had an 18% difference in their evaluations.

# Findings – Task Evaluation Comparison

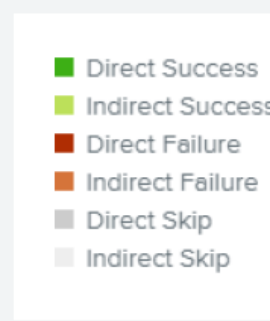
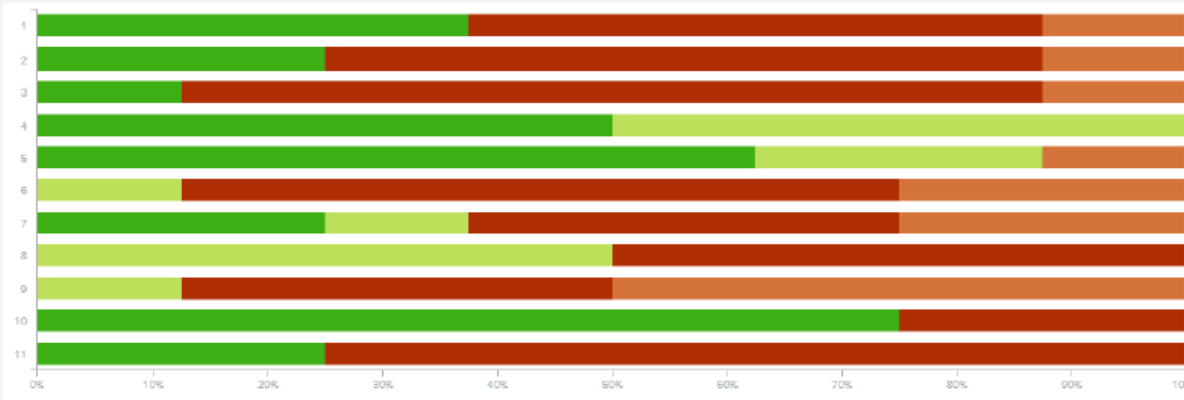
## Nav Expansion – 50% Success








 **Bottom Line**

Nav Expansion outperformed Mega Menu by 7%

## Mega Menu – 43% Success



# Findings – Icon Clarity

	Customer Engagement	<ul style="list-style-type: none"><li>• <i>"Customer engagement icon looks like a revenue graph - up and to the right"</i></li><li>• <i>"We try to see customers as people, clients as people and not as revenue sources". This icon "does not fly with that very well"</i></li></ul>
	Journeys and Campaigns	Thinks journeys icon look like a football play
	Content Creation	<ul style="list-style-type: none"><li>• Doesn't like the email envelope icon because it feels like just email - wants a megaphone</li><li>• Since only their admins create content, the name "Content Creation" is tricky for their end users. Prefer it just say "Content" or "Marketing Content".</li></ul>
	Success Measurement	<ul style="list-style-type: none"><li>• Likes the label, Success Measurement. <i>"I think it has a positive connotation like we're measuring the success. It also makes me immediately understand what I am going to see"</i>.</li><li>• <i>"This looks like some sort of a chart or graph me or maybe it's downtown Chicago - I don't know"?</i></li></ul>
	Settings/Manage	People unanimously understood the settings/manage icon

# Findings – Label Clarity

## Content (Nav Expansion)

Multiple users were confused about the content labels in the Nav Expansion model. Mockups display content in 2 places:

1. Customer Engagement > Marketing > Content and Templates
2. Content Creation > Content

Users were expecting all content and templates to live under  
Content Creation > Content

---

One user noted, that only admins create content at her company, so Content Creation is confusing for her users. (Consistent with other organizations)



*I'd rather have it say, "Content" or "Marketing Content".*

## Create (Mega Menu)

Several items that are automated on the Create header felt like they belonged under the Automate header.

1. Campaigns
2. External drip campaigns
3. Auto campaigns
4. Drip campaigns



*"Automating is like, how are you going to deploy something so that's why I think that campaigns, external drip campaigns, auto campaigns and drip campaigns would move over to the [automate] category"*

# Recommendations

---

1. Streamline and simplify as planned. Either design concept will be a welcome improvement.
2. Revisit iconography and labeling.
3. Review navigation tasks that scored poorly.
4. Revise designs and re-test in subsequent rounds of user research.
5. Explore the feasibility of allowing users to upload their own help documentation/videos.

These resources would augment TE documentation.

Customers unanimously loved this idea and described it as a game-changing, differentiator.



The image features a dark blue background. In the top right corner, there is a decorative graphic consisting of several parallel, curved lines that form a partial square shape, transitioning in color from dark blue to light blue and then to a pale green. At the bottom of the image, there are five horizontal lines of varying colors: dark blue, light blue, pale green, light blue, and dark blue.

Questions?