

WELLTRACK

Participant Portal Planning



I. Purpose

What's the ideal result?

The new Participant Portal design should facilitate business needs by delivering intuitive, engaging, and beneficial experiences to users in a manner flattering to, and consistent with, the broader WellTrack brand.

Goals

Most development or UX projects begin with a desire to “make it better.” As an instigator, that works. Once work begins, though, **it is critical to understand the purpose, parameters, and desired outcomes** of the effort.

The Wellview mission is a compass. While every micro decision can’t always reflect this principle in a tangible way, **motivating concepts (project purpose, goals, and parameters) should always consider the mission a lodestone.**

NOTE:

*While not a specific “goal,” mobile design is a critical piece of all other goals. 58% of web traffic is mobile. Studies have also shown applications with lower mobile engagement typically experience this abnormal skew **due specifically to their lack of responsive design.***



WellTrack aims to inspire healthcare by empowering people and impacting lives.

Design, function, and other major decisions should be made in service of the WellTrack mission. Great design and functionality may impress, but genuine passion for the mission cultivates loyalty.

MISSION-DRIVEN GOALS

On-Trend Design

Just like a faded sign on the front of a business - out of date design communicates a lack of care and attention to detail. Conversely, modern and thoughtful design instills a sense of stability, and **trustworthiness necessary to inspire and impact users.**

Intuitive Interface

A beautiful design must empower users via clean, clear, available actions. Users don’t understand the purpose of a design typically see the associated negatively - often leading to and end in engagement.

Brand Accurate

Participant Portal is a key point of interaction for our clients; as such it is critical it accurately demonstrate WellTrack’s brand and identity as **aimed to inspire healthcare by empowering people and impacting thier lives.**

94%

of factors impacting a user’s first impression of a product are **design-related.**

<https://cxl.com/blog/first-impressions-matter-the-importance-of-great-visual-design/>

70%

of customers abandon purchases because of [poor] user experience.

<https://baymard.com/lists/cart-abandonment-rate>

67%

of users say a poor website experience negatively affects their opinion of the brand.

Forrester.com

ii. Current Portal Audit

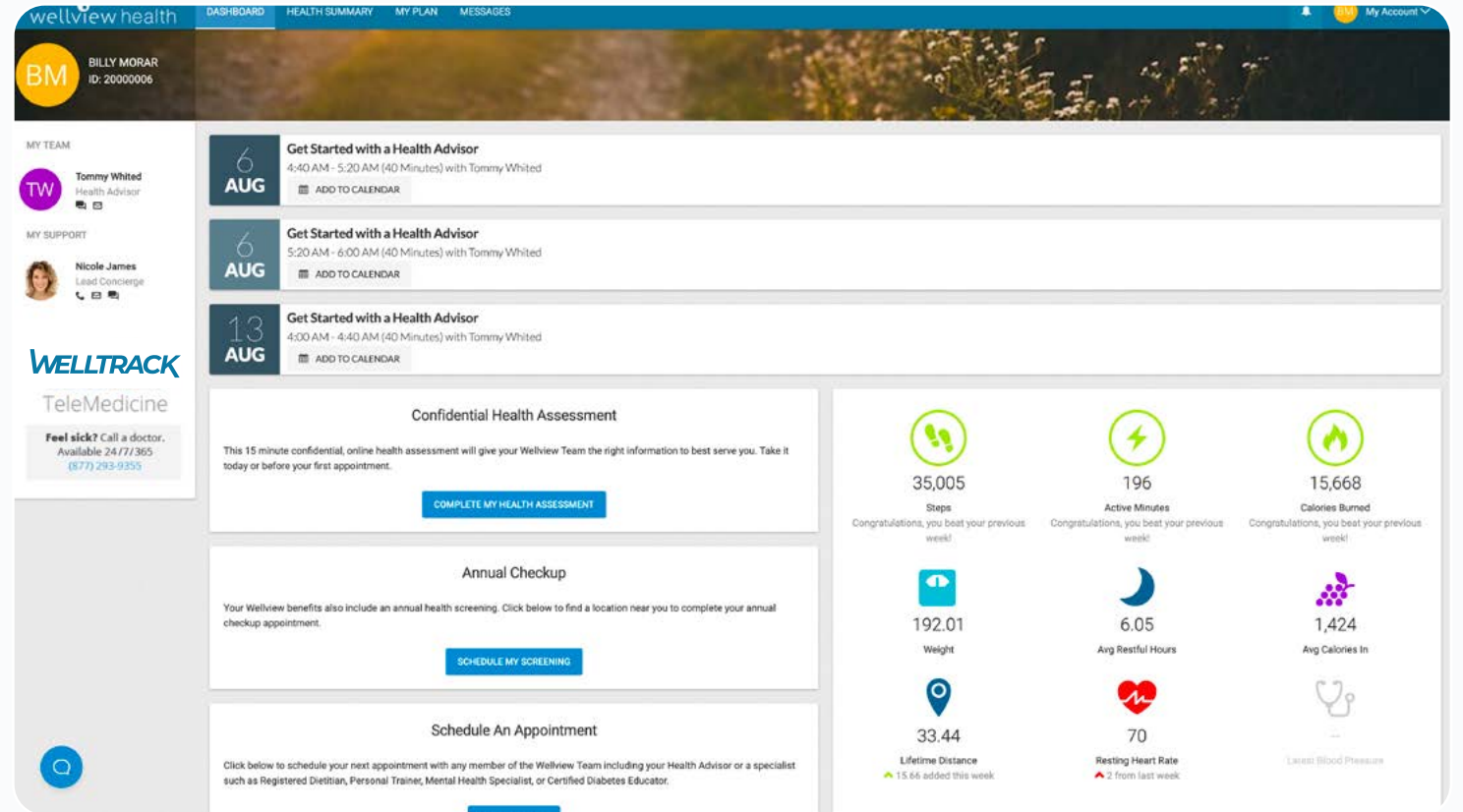
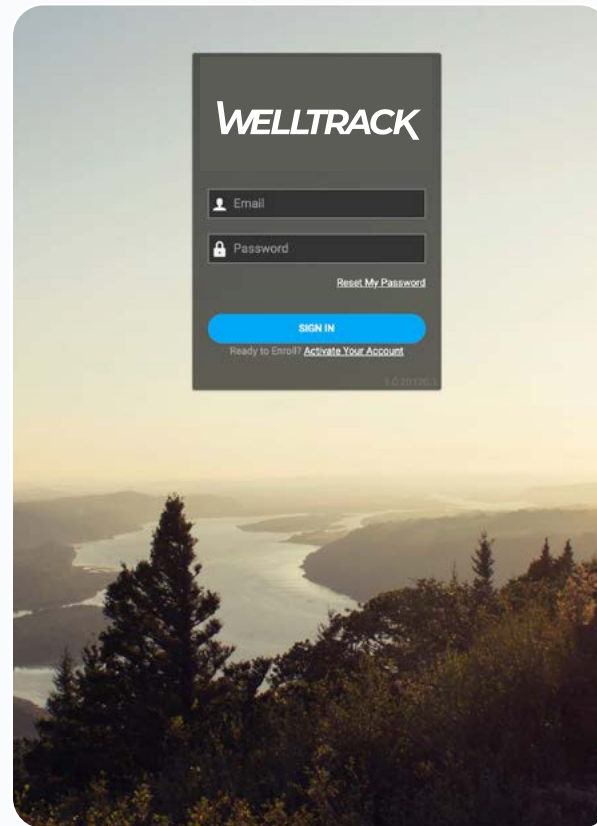
What can we learn?

The current Participant Portal was created to fill a functional need while still presenting a professional dashboard. To properly renovate this application, let's evaluate past successes and opportunities for improvement.

On-Trend Design

The current Participant Portal focuses on a standard “dashboard” approach designed to organize dozens of potential actions and data sets into a series of rectangles and icons.

This approach is used frequently, even in 2020, but is typically indicative of an older system with a incrementally altered interface.



Corporate vs. Client

In the end, an application should guide **users** to:

- 1.) The most useful tools
- 2.) Top business initiatives.

The current layout is designed for **administrators**. Multiple paths to multiple functions with equal priority are designed for users who use a tool to manage users. For a user portal, CTAs should be simplified as much as possible, and priorities should be obvious and given room to breath.

White Space & Heirarchy

Currently, client-facing dashboards are rapidly being replaced with simpler pages with fewer “widgets” per view. The paring down is informed by proven user data captured to determine highest traffic functionality. Meanwhile, underutilized areas can be reshuffled into higher visibility sections.

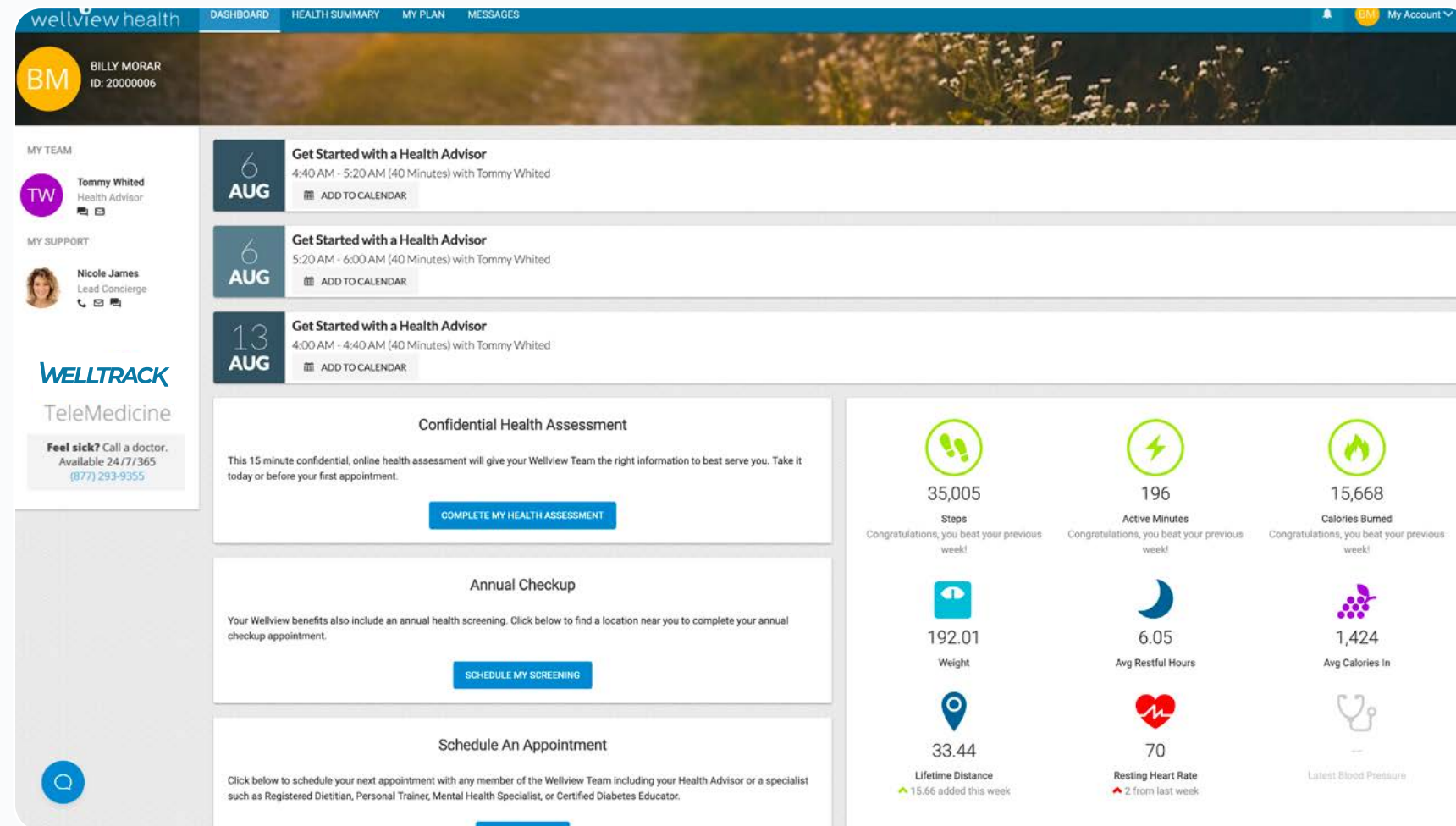
A Softer Touch

The obvious rows dark navigation are slightly outdated; newer systems rely more on less severe separations, fewer colors, and more subtle background textures.

Intuitive Interface

The logic behind the Participant Portal's current layout is rooted firmly in a corporate management tool. The top navbar effectively leads to key tools and areas of interaction.

The dashboard view offers a widget-based display and strives to present a tremendous amount of data to users upon entry.



Tough Decisions

The dashboard offers the most room for improvement in this portal. As the welcome page, it should be very direct in its purpose - displaying only the top 2 - 3 metrics, initiatives, or messages in the page body. There's simply too much information on the initial view of this page. While everything currently displayed offers value, user input should elegantly show and hide secondary and tertiary data to prevent the current crowded display.

Heirarchy and Priority

While the participant portal has a swiss-army knife style utility, steps to create clearer levels of visual importance should guide users to the areas they will find the most benefit from. In the long-term, this interface could rely on specific users' input to give their most frequently accessed features higher visibility.

Brand Accurate

WellTrack is headed in an exciting direction: offering Plan Sponsors, Participants, and Providers a new concept of wellness and health through an individual wellview.

This new approach requires a new focus on interacting with users in a personal, welcoming manner.

WellTrack has always endeavored to speak earnestly to its participants, but this new brand informs a new level optimistic and elegant interaction.



A Warm Welcome

This new dashboard will greet users by name, and present datapoints as valuable pieces of knowledge informing the participants next step along their journey to a balanced and fruitful WellTrack.

Message notifications and other personalized content will have higher visibility, and be displayed in a way that demonstrates **this portal exists for the specific user.**

Let's Talk

WellTrack's conversational approach to health and wellness will be central in the way participants interact with their portal, and by extension, their wellview.

This portal is an opportunity to present WellTrack's personality while embodying a professional and intentional strategic tool.



iii. User Personas

Understanding Participants

Current and aspirational WellTrack. Participants cover a large gamut of lifestyles, backgrounds, work cultures, and world views. The common aspect is a need to understand wellness, and to create a manageable and effective WellTrack.

Second Career

Kevin

Spouse

54 (Generation X*), Married
Client Services

Kevin's career provided him a comfortable retirement. Not that his children are grown, he's settled into a lower stress, lower-paying position until he's ready to stop working.

Perspective on Technology

In his previous vocation, Kevin used Office and other productivity applications. Socially, though, Kevin never ventured too far beyond Facebook. He prefers a simple approach to solving problems, and that doesn't always mean an app.

<https://www.emerald.com/insight/content/doi/10.1108/K-09-2019-0598/full/html>

<https://www.theladders.com/career-advice/these-are-generation-x-characteristics-in-the-office-and-their-new-label>



- **Highly Introverted**
- **Studious**
- **Cautious**

Psychographic Segment: Direction Taker

Core Desire: Guidance and Direction

Behaviors: Wants direction, Needs help following plan, Must fit in patient's plan

Mindset: "My doctor knows best and is the authority", "Tell me what to do next"

Descriptors: Defers to physicians, Needs direction, Likes routine, Utilizes health care

KEYS TO ENGAGEMENT

Multiple Asks

Prove Benefits (Testimonials)

Simple Integration into Existing Routine

Opportunities to Engage

Chris is most likely to engage when:

- It is demonstrably simple
- Prompted via email vs. text or notification
- The effort to begin is very low

Barriers to Adoption

- Kevin is resistant to big changes to his routine
- Kevin sees doctors on a regular basis, and feels that is enough
- Kevin will only adopt new technology if he sees it as both beneficial and painless

Loyal Taskmaster

Candice

Participant

59 (Baby Boomer), Married
Bank Teller

Candice has been a part of the workforce for 40 years and enjoys the customer service and precision of her job. She strives to do her job well, and is very content in her role as a teller.

Perspective on Technology

Candice loves to learn, and is tenacious. When presented something new, she patiently reads available documentation and methodically works to make the most of what is offered.

Candice's eye for detail makes her a natural editor and always ensures details are in place.

<https://www.forbes.com/sites/forbescommunicationscouncil/2019/08/16/what-to-consider-when-creating-marketing-to-target-digital-boomers/#84f0e5a2b1c8>



- **Extrovert > Introvert**
- **Patient**
- **Meticulous**

Psychographic Segment: Self Achiever

Core Desire: Expertise and Action

Behaviors: Takes ownership of health, Ready to fight for health

Mindset: "I am determined to beat this", "By taking necessary steps, I will overcome my health issue"

Descriptors: Proactive, Health Conscious, Doctor is Expert, Enjoys Change, Measures Progress and Achievement, Task Oriented

KEYS TO ENGAGEMENT

Clearly State Next Steps and Overall Process

Excellent Execution

Opportunities to Engage

Candice is most likely to engage when:

- She feels a process is properly "buttoned up"
- She is initially offered access
- It is suggested by a friend or colleague

Barriers to Adoption

- Candice doesn't respect incomplete or subpar execution
- Candice can be very particular about the details
- Candice can sometimes have difficulty adopting if she doesn't understand the underlying details

Goal-Based Extrovert

Chris

Participant

39 (Millennial), Single
Vice President, Operations

Chris has worked hard his whole life, and pays attention to details. He and his wife plan trips and life-choices well in advance. While Chris has hobbies, his work is his passion. Chris is confident, detailed, cares about aesthetics, and is happiest when he sees a well-charted course ahead of him.

Perspective on Technology

Chris regularly uses technology to track workouts, schedule meetings, outline strategies, and order food. He isn't resistant to using technology for entertainment, but in his life, applications and devices are tools.

<https://assets.pewresearch.org/wp-content/uploads/sites/3/2010/10/millennials-confident-connected-open-to-change.pdf>



- **Highly Extroverted**
- **Planner**
- **Decisive**

Psychographic Segment: Balance Seeker

Core Desire: Knowledge and Growth

Behaviors: Asks a lot of questions, Craves information on treatment and options

Mindset: "I know my body best.", "Explain options and reason for care plan."

Descriptors: Proactive, Eats Healthy, Monitors Health, Seeks Information, Independent, Needs Context

KEYS TO ENGAGEMENT

Clean Design

Obvious Benefits

Convey Commitment to Continued Excellence

Opportunities to Engage

Chris is most likely to engage when:

- He sees care in a product, interaction, or individual
- A key exclusive benefit is available
- He sees a path toward excellence
- His participation encourages others

Barriers to Adoption

- Chris expects technology to be clean and modern, and will judge a cluttered interface as antiquated
- Any app in Chris's day must be the best solution for the problem it addresses
- Chris likely already has a wellness plan in place
- Chris is prone to stop activities if he doesn't immediately understand their benefit.

Young Family Focused

Samantha

Spouse

26 years old, Married
Homemaker

Samantha is happy, but frequently feels stretched thin. She sets ambitious goals, and juggles a variety of tasks at any given time. Samantha has a small business she runs out of her home, and will likely work full time once she and her partner's children are in school.

Perspective on Technology

Samantha grew up with technology, and is on her phone, tablet, or laptop throughout the day - sending pictures, catching up on news, sending correspondence, shopping for necessities, teaching her children, and planning. She is tech savvy, and is quick to praise technology that "just works."

<https://www.forbes.com/sites/paycom/2017/03/08/the-millennial-expectation-of-technology-in-the-workplace/#5b078f624a50>



- **Extrovert > Introvert**
- **Thoughtful**
- **Productive**

Psychographic Segment: Priority Juggler

Core Desire: Efficiency and Duties

Behaviors: Does not take time to invest in their own health

Mindset: "It's not about me.", "I worry about my family, job, and others.", "I am always on the go."

Descriptors: Busy lifestyle, Family/work priority, many responsibilities, strong peer influence, group learning

Opportunities to Engage

Samantha is most likely to engage when:

- She feels an aspect of her life will become simpler
- She has seen how participation improved others' lives
- Her family will benefit
- A tool offers simple reminders or integrates well into her other tools

Barriers to Adoption

- Samantha must trust a provider of a service before participating
- Samantha is resistant to anything adding redundancy to her day
- Samantha must be able to access her apps on whatever device she has convenient
- Using an app must be simpler than making a phone call

KEYS TO ENGAGEMENT

Clear Family Benefit

Simple Interface

Establish Credibility

Industrious Introvert

Rod

Participant

26 years old, Married
Restaurant Manager

Rod works 50–60 hours weekly to make sure his store operates correctly; he tends to worry things may go wrong without him there. He’s been married for several years, and is proud of his job, but struggles to balance his life in a healthy way.

Perspective on Technology

Rod primarily uses technology for entertainment. He plays video games and streams movies frequently. While Rod isn’t opposed to using apps for work, he just hasn’t found time to strategize the best way to do that.



- **Introvert**
- **Hard-working**
- **Great Imagination**

Opportunities to Engage

Rod is most likely to engage when:

- He feels genuinely seen and heard
- Progress is displayed graphically
- There is a gamified element
- Reminded

Barriers to Adoption

- Rod manages things mentally; he can frequently forget
- Rod is resistant to “add things to his plate”
- Rod keeps his work and home life separate; if he doesn’t feel something is personally gratifying, he’s less likely to do it on his own time

Psychographic Segment: Willful Endurer

Core Desire: Support and Trust

Behaviors: Typically Only Visits Doctor When Symptoms are Bad, Hesitant to Stick With a Plan

Mindset: “I’m living for today.”, “On my own terms.”, “I can handle anything life throws at me.”

Descriptors: Reactive, Lives in the Now, Least Engaged in Health, Hardest to Reach, Independent, Self-Sufficient

KEYS TO ENGAGEMENT

Clear Family Benefit

Simple Interface

Establish Credibility

Young Life-Builder

Sarah

Dependent
19 years old, Single
Student

Sarah is completely engaged in the college experience. She has an active school and social schedule, but keeps up with both well.

Perspective on Technology

Sarah uses technology in every part of her life. She searches using Google 10 - 12 times daily, checks social media every 35 minutes, listens to music while studying, and collects useful life-tips from multiple sites. Sarah uses multiple devices at once, and is intuitively aware of the quality of an application simply by using it.

<https://www.pewsocialtrends.org/essay/on-the-cusp-of-adulthood-and-facing-an-uncertain-future-what-we-know-about-gen-z-so-far/>



- **Extrovert**
- **Adaptable**
- **Technology Evangelist**

KEYS TO ENGAGEMENT

Clean Design

Obvious Benefits

Convey Commitment to Continued Excellence

Opportunities to Engage

Sarah is most likely to engage when:

- An application offers something new
- The interface is responsive and well-designed
- An unmet need is addressed with new technology

Barriers to Adoption

- Candice interacts with the fastest, most stable, and most popular websites online routinely; this can cause any slowness or old-fashioned design to seem irrelevant to her
- Candice's life is so busy, she may not have dealt with weight management, heart disease, or other chronic conditions frequently motivating a more health-conscious life
- If Candice has begun a health-maintenance routine, she will be resistant to alter it without a clear benefit