Sample Site Audit & Recommendations

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Overview

The following analysis and tactical recommendations are made to improve the usability of the Site application processes. However, a reevaluation of the larger process/customer experience should be completed to determine if the existing approach is best. More strategic recommendations will follow this first phase of site development and implementation. This will be done through the following tasks:

- our planned round of user testing (the purpose of a user test should be not only to justify current design and flow decisions, but also to elicit other suggestions which may be applicable to increase overall site usability and customer satisfaction)
- interviews with Company sales staff in order to gain a more comprehensive and holistic view of the effectiveness of the Company brokerage process
- continued strategic discussions with the Company development staff throughout this first phase

Summary of Findings

Because customers must input significant company and employee data before even seeing the companies and types of policies you sell, there isn't a great deal of confidence for your customer to get what they expect. Ultimately, there is too much unexpected work in order to compare plans.

Solutions:
1. Set Expectations by introducing your customers to the entire process through a 'you are here' element. This will be done through wireframe UI and development

2. Contextualize your help offerings, both in glossary and FAQs, but also through inline help in the application process. Provide support throughout the site in order to help customers move backwards and forwards while continually giving them appropriate information.

3. Offer customer needs first, then provide system needs later. Get users involved earlier to gain more buy-in – this will keep more customers on the site longer, instead of cutting them off due to the heavy up-front data input needs. (This is a larger, strategic issue which cannot be completely resolved within this first phase development.)

4. Compartmentalize and modularize the application process (beginnings of this are in your current demo). There are many pages presenting only an overview, which can be accomplished outside of the current, linear, flow. Integrate pages whenever appropriate to reduce page count.

Customer Survey

After more discussion with your Company, implement a customer feedback survey into your application process. This will allow for more feedback from your customers who might not otherwise provide any. We may want to place this in multiple points (and user test these) in order to gain feedback from customers leaving the site, say, after comparing products but not choosing to move forward with the application.

Contextualized, clearer help

Provide the user with help throughout their process – inform them why they are providing specific information at any point in time along with any educational information to create informed decision-making. *Clearer help copy throughout the application is a necessity.*

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Set Expectations for your customers

Your customers are required to provide much information before even seeing plans to compare—the very reason many customers come to your site. Again, inform users as to *why* they are providing particular information, and let them know when and what to expect throughout.

Inform your customers of what information is needed in order to complete the tasks on the site. Many customers may be bailing out when they are asked to input detailed questions about their business (and then about their employees) which may not be readily available to them (e.g. if they are researching from home, or if they are not privy to needed information due to their company structure). This is especially problematic given the lack of context/expectations mentioned above.

Let users know what the system is doing for them, e.g. "In order to figure out what kinds of plans you are eligible for, we have to ask you the following questions. Once we do this, we can help you get insurance that's right for your business," or "You may get better plan offerings by changing your start date by a month – some companies need more time … ."

Online Tour

Perhaps linked to the 'Advisor Tool' (under development by a 3rd party). To be discussed more thoroughly in the near future. A tour, showing users how easy it is to buy plans through your Company will set some broad expectations, before they move through the actual application process. It may also create demand, enthusiasm, trust, and incentive to complete the application process.

Incent users to input information

If possible, ask for detailed company and employee information *after* they have been able to view plan overviews and comparisons (with appropriate caveats that they may not be able to choose a specific plan once they have inputted other, required information). *Show customers valuable information that will continue to motivate data entry.*

There are enough caveats on the comparison page that it seems unnecessary for the customer to input so much information previous to comparing plans. This creates confusion, mistrust, and it also breaks the brand – a definite bail out moment for your customers. This is another reason to cut out as many required elements as possible before allowing the customer to compare. Is this copy legally binding in any way?

Error messaging

Consistency in error messaging is a must in order to accomplish a thorough and helpful brand to your customers. The display of these errors must also be consistent to allow customers to quickly identify and react.

Application error messages fall into three major areas: (1) required unformatted data that was not inputted; (2) formatted (date fields, mostly) data was not inputted correctly; (3) too many selections were made to compare. The recommendations given in some instances are good, but not layed out well. There is inconsistent referencing in some errors as to the "field name" which has an error. Where appropriate, remind the customer to correct the error(s) then click submit or continue again to move forward through the process.

Incidently, the error message on the browser incompatibility page is best – it apologizes for the *system* being wrong, not the customer.

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IE on Mac error messaging:

> "We apologize for any inconvenience – our system encountered an internal error. If you are using a Macintosh with Microsoft Internet Explorer to access this site, we suggest you use Netscape Communicator instead in order to avoid these errors. Click here to download Netscape Communicator."

When clicking a certain element on the Select and Compare page, the customer is given a very cryptic error stating "Your browser sent a message this server could not understand." This is far too impersonal and should be avoided at all costs. Eliminate the error, or at the very least change to more brand consistent, i.e customer-friendly, copy: "We're sorry, but a system error occurred".

Time-Out error. Can we help the user through this with helpful copy. What are are the implications of our customers having to log back in? More importantly, inform your customers that they will be timed out (glossary moment) after120 minutes of inactivity for their security.

Copy readability
Throughout the site, copy is too lengthy and not bulleted out enough for customers to read quickly and effectively. Please read attached "Writing for the Web" article by Jakob Nielsen for web-centric writing tips.

Quotes on the home page should be drawn out more – currently they are subjugated, lost with the lower navigation links. Rotate the quotes more frequently (without refresh, perhaps in gif animation). See healthaxis.com for examples of effective customer quotes. Draw the quotes out as well as visually link the copy to a "customer" photo, reinforcing the human, customer side of your business.

Don't underline HTML text for emphasis. This produces hyperlink confusion, and a customer might think it is a link, and not simply an emphasis. There might be legal implications here, which may override this suggestion.

"Save page" copy needs to be more complimentary. "Thank you for using our web site. The data you have entered will be saved in our secure database. You can complete your application …" The copy should also be more well layed out. This is another opportunity to build the privacy and security attributes of your brand.

System Status
Announce to the customer that they are moving into step 1 of *n* steps. Title steps appropriately to the information needed/presented. Provide a stepped process which is clear, and always viewable on each page of the application process. *Don't allow the customer to feel lost.*

The site will not let a customer save and return without inputting all required fields. A customer should be able to input a limited amount of information – even if there are other required fields – and save those changes to be able to return later. Currently, it appears that the changes are saved, but the system feedback to the customer implies that their changes will not be saved.

Some navigation options will take your customers beyond a certain step ("View Employee Premiums" takes you past the Comparison of multiple plans). Inform the customer of this action more clearly in

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the copy. Keep the customer informed of their place in the process as well as where they will go upon link selection, especially if it's outside the standard flow.

Glossary Terms & FAQ
Many glossary terms are not linked correctly and some are linked to a FAQ entry, not a definition. Link all terms to a glossary definition of that word or term. Also, reference any FAQs to this glossary term, below the definition. This may require a relational database in order to implement, but will be much more helpful than the inconsistent use of providing some glossary definitions at times, and some apparently related FAQs to a linked term. The copy in some definitions is confusing and should be rewritten (e.g. "Copayment: The amount you are required to pay for …" who does the "you" refer to?).

The on-going "Important Notices and Disclaimers" is annoying. Simply provide a hyperlink to this information after displaying it once.

A customer may want to print out pages for their records, or to show to a their manager for approval. Provide a print-friendly version of these pages or design the pages to be print friendly. Inform the customer of this feature.

Button confusion. The use of large buttons for varying actions is confusing, distracting the customer form the important information and comparisons they need to make. Redesign in order to contextualize more appropriately different actions.

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Heuristic Evaluation

A usability analysis of the Company site was conducted in order to assess current strengths and liabilities in usability. Key site assets - content (copy, images, messages), design (page layout), application flow, features/functionality, and navigation resources - were reviewed to understand their impact on the customer's ability to complete the site's tasks of comparing and purchasing health insurance.

The site was evaluated by information architects who judged the usability of the site with an industry standard list of usability heuristics (established principles and rules of thumb. This evaluation identifies specific usability problems and provides recommendations for correction to be considered for site enhancement. The analysis is built around your business goals and therefore the heuristic violations are rated in context to those goals, not the severity of the heuristic violation.

Rating & Organization

The following table contains the usability problems found with Company. It is organized by flow: first track live site, first track demo and second track live site as of 8/5/00. A severity is assigned to each problem, which is derived from a combination of three factors:

- The **frequency** with which the problem occurs: Is it common or rare?
- The **impact** of the problem if it occurs: Will it be easy or difficult for customers to overcome?
- The **persistence** of the problem: Is it a one-time problem that customers can overcome once they know about it or will they repeatedly be bothered by the problem?

The following 1 to 3 scale is used to rate the severity of the problem:
- 1 = Minor usability problem; fixing this should be given low priority
- 2 = Major usability problem; important to fix, so should be given high priority
- 3 = Mandatory: essential to fix for product usability/business success

Also included are recommendations/notes on how to fix the problem. Since the site will be redesigned, these are general recommendations that will be used as guidelines to help design the new interface and flow for Company.

Ten Usability Heuristics[1]

The following set of heuristics developed Jakob Nielsen have been used to judge the usability of arthurandersen.com. Because these heuristics are used for both software and websites, web-specific comments are provided after each heuristic.

1. Visibility of system status - The system should always keep users informed about what is going on, through appropriate feedback within reasonable time.

Do users in the site know where they are and where they can go next? Does each page look like it belongs in the site? Is clear navigation provided to allow users to move up and down the hierarchy?

2. Match between system and the real world - The system should speak the users' language, with words, phrases and concepts familiar to the user, rather than system-oriented terms. Follow real-world conventions, making information appear in a natural and logical order.

Concise jargon-free nomenclature should be used.

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3. User control and freedom - Users often choose system functions by mistake and will need a clearly marked "emergency exit" to leave the unwanted state without having to go through an extended dialogue. Support undo and redo.

In general, avoid "trapping" users in a single path. Don't always rely on browser functionality to provide navigation. Consider having a homepage link and links to the main sections of the site always available.

4. Consistency and standards - Users should not have to wonder whether different words, situations, or actions mean the same thing. Follow platform conventions.

Does the site have a consistent, clearly recognizable look and feel? Is nomenclature, fonts, color schemes and GUI elements used consistently throughout the site? Make sure link names and page titles match as closely as possible.

5. Error prevention - Even better than good error messages is a careful design, which prevents a problem from occurring in the first place.

Does the interface prevent errors from occurring in the first place? Submission of data via forms should be checked by system for accuracy before being submitted.

6. Recognition rather than recall - Make objects, actions, and options visible. The user should not have to remember information from one part of the dialogue to another. Instructions for use of the system should be visible or easily retrievable whenever appropriate.

Are there visual clues that users can understand at a glance rather than having to read directions?

7. Flexibility and efficiency of use - Accelerators - unseen by the novice user - may often speed up the interaction for the expert user such that the system can cater to both inexperienced and experienced users. Allow users to tailor frequent actions.

Is it easy for users to bookmark pages of the website?

8. Aesthetic and minimalist design - Dialogues should not contain information, which is irrelevant or rarely needed. Every extra unit of information in a dialogue competes with the relevant units of information and diminishes their relative visibility.

Make sure content is written for the web and not just taken directly from a brochure.

9. Help users recognize, diagnose, and recover from errors - Error messages should be expressed in plain language (no codes), precisely indicate the problem, and constructively suggest a solution.

10. Help and documentation - Even though it is better if the system can be used without documentation, it may be necessary to provide help and documentation. Any such information should be easy to search, focused on the user's task, list concrete steps to be carried out, and not be too large. Is context-sensitive help provided?

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[1] J. Nielsen, "Heuristic Evaluation". In Jakob Nielsen and Robert L. Mack, editors, "Usability Inspection Methods". John Wiley and Sons, Inc. 1994.

Page Name	Heuristic	Rating	Recommendation/Notes
Throughout Site	System Status Visibility (1), Consistency & Standards (4)	3	Make a distinction between "Plans and Benefits" Inform user of steps, when to do what.
Throughout Site, esp. at intro pages [1]	System Status Visibility (1)	3	Set customer's expectations with appropriate intro text
Throughout Site	Documentation and Help (10)	2	Provide Glossary terms as individual terms, instead of lost within a larger list
FAQ pop-up	Documentation and Help (10)	2	the FAQ should be text searchable (not necessarily a search function, but simple browser-based text "Find"
Help	Documentation and Help (10)	2	Copy poorly layed out.
Login page		3	Login page takes too long to load.
Login page	Recognition, not Recall (6)	3	Send user to an overview page when returning, then allow them to move back into process where they left off.
Login page	Minimalist Design (8), Consistency & Standards (4)	2	Orange button for help should not draw attention from the GO button. Redesign.
Exit page	Documentation and Help (10)	2	Bold only most important information on this page. All being bold is too much.
First Track (Live Site)			
Create an account [2]	User Control & Freedom (3)	3	Why not allow a user to view plans without creating their own account? This is a bail out moment.
Save	System Status Visibility (1), Minimalist Design (8)	1	Page copy should be more prominent.
Company Information [3]	System Status Visibility (1)	3	Status should be shown as to where a customer is in process.
Company Information [3]	Error Prevention (5)	3	Users should not have to fill out all required fields before "Save and Return" Any minimal info should suffice to begin the process. Only errors should occur when a user supplies incorrect info (system can check this) or when Continuing.
Company Information [3]	Help with Error Messaging (9)	2	Error messaging is inconsistent; either errors are known by system or not, but should be consistent in their display.
Company Information [3]	Help with Error Messaging (9)	1	Red checks for missing or incorrect data alter the layout of the pages. Best if it doesn't.
Company Information [3]	Error Prevention (5)	1	Why can't a customer use their "Enter" key? Can this be controlled to not create errors?

Page Name	Heuristic	Rating	Recommendation/Notes
Company Information [3]	System Status Visibility (1)	2	Show state of your application when logging back in.
Company Information [3]		1	Layout inconsistencies with drop-downs and fields in "Health Insurance Needs" section.
Company Information [3]	Minimalist Design (8)	2	Orange button, being so bright, is avoided by customer after too much exposure. Use less-bold colors & alternate placement, perhaps in top right bar area.
Second Track recommendation [3a]	System Status Visibility (1)	1	This page should provide user a title and more readable text informing the customer of their options.
Employee Information [4]	Match Real World (2)	1	"Census" form is an industry term, not one customers would identify. Replace.
Employee Information [4]	Minimalist Design (8)	1	Remove buttons are too overpowering. Replace with text-only or other minalist grpahic.
Employee Information [4]	Minimalist Design (8)	1	Visually contextualize "Add More Emps" actions. Move them away from the Save and Return & Continue buttons
Employee Information [4]	Help with Error Messaging (9)	3	Glossary links sometimes don't go to correctly anchored sections in a pop-up window.
Employee Information [4]	User Control & Freedom (3)	1	Show all employees on one page, if a limited number of employees is chosen. Why split up employees into 10 per page? If a customer only has 11, they will have to click through two pages.
Employee Information [4]	System Status Visibility (1)	1	Instructional copy must be consistent, with no "Quotes" around button names.
Employee Information [4]	User Control & Freedom (3)	1	How about a "remove all blank employees" to quicken process?
My Company Preferences [5]	Minimalist Design (8), Consistency & Standards (4)	2	Orange Update button is somewhat lost with Chat With Us button. Establish other, consistent button/action colors.
My Company Preferences [5]	System Status Visibility (1)	1	Pull out instruction to "change your start date". Also explain why in Help pop-up window or in text.
My Company Preferences [5]	Consistency & Standards (4), Error Prevention (5)	2	Preselect all companies so customer doesn't need to. Be consistent with other preselected options below on same page.
My Company Preferences [5]	Documentation and Help (10)	1	All potential glossary terms should be linkable.

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Page Name	Heuristic	Rating	Recommendation/Notes
My Company Preferences [5]	Match Real World (2)	1	Add $ to "Preferred Price" drop-down
My Company Preferences [5]	Consistency & Standards (4)	2	Compare Button instead of Continue. Either contextualize for page always, or consistent always.
My Company Preferences [5]	Error Prevention (5)	1	Code the Compare Plans button to not be clickable if no companies selected; or at least a pop-up error instead of a new page loading.
My Company Preferences [5]	Minimalist Design (8)	2	Redesign the action buttons at bottom of page - centered makes the page look unbalanced with all other table cell formatting.
My Company Preferences [5]/Error	System Status Visibility (1)	2	Contextualize title of the error page.
My Company Preferences [5]/Error	Documentation and Help (10)	3	Provide more helpful copy to the user. Do they need to change all those items to get results?
Select and Compare Plans [6]	Help with Error Messaging (9)	3	Clicking "Premier Value" Produced a browser error, "Your browser sent a message this server could not understand."
Select and Compare Plans [6]	Documentation and Help (10)	1	Underlined "$20 copay" is undelrined but not linkable to glossary term.
Select and Compare Plans [6]	Documentation and Help (10)	1	What does 'Rate not available" mean?
Select and Compare Plans [6]	Minimalist Design (8)	2	Oversized book icon is distracting.
Select and Compare Plans [6]	Minimalist Design (8)	2	"Physician Directory" should be linkable (along with icon, if we choose to keep it.
Select and Compare Plans [6]	Minimalist Design (8)	2	View Emp. Premiums buttons are distracting. Redesign.
Select and Compare Plans [6]		1	Premiums in button might be confusing term for some.
Select and Compare Plans [6]	Minimalist Design (8)	1	Place Compare button at top of page as well as bottom for ease of use.
Select and Compare Plans [6]	Consistency & Standards (4)	2	View Emp. Prices button takes user past compare page. Rename to 'Select this Plan" or other appropriate term to set expectations
Select and Compare Plans [6]	Minimalist Design (8), Documentation and Help (10)	2	"Important Notices and Disclaimers" if this is not needed on all pages, rely on link with information. Perhaps place on pages customers might print out. (demo site begins this.)
Benefit and Premium Comparison [7]	Minimalist Design (8)	2	Do not center-justify text in comparison table.
Benefit and Premium Comparison [7]	Minimalist Design (8)	1	Align to top, not center, the column of matrix titles.

Page Name	Heuristic	Rating	Recommendation/Notes
Benefit and Premium Comparison [7]	Minimalist Design (8)	1	Place Plan titles at bottom of matrix as well, for readability.
Benefit and Premium Comparison [7]	Documentation and Help (10)	2	Glossary links are not anchored correctly. Draw out specific terms (with FAQ refs as well) to identify them specifically, not in a long, confusing list.
Benefit and Premium Comparison [7]	Consistency & Standards (4)	1	"(Standard Rate)" is not consistently inputted into DB/consistently displayed on page.
Benefit and Premium Comparison [7]	System Status Visibility (1)	1	Is the top copy legal in any way? Subtitle may need to be changed
Benefit and Premium Comparison [7]		1	Don't say "click here for ..." shorten instructional copy.
Your Group Health Quote [8]	Documentation and Help (10)	2	Instructional copy too wordy.
Your Group Health Quote [8]	Minimalist Design (8), Consistency & Standards (4)	*	I like how the content layout is different than pages which are not overview pages. Keep this consistent throughout.
Select Benefits [9]	System Status Visibility (1), User Control & Freedom (3)	3	Clearly state that users will, after choosing plan, select additional benefits in instructions, not just in previous page's copy.
Select Benefits [9]	Documentation and Help (10)	2	Provide help copy/glossary for "Group Term Life and AD&D"
Select Benefits [9]	Consistency & Standards (4)	1	Return to Compare Plans should be Return to Benefits or similar.
Select Benefits [9]	Documentation and Help (10)	2	"Benefit Explanation" help link is not accurate.
Select Benefits/ Error [9b]	Help with Error Messaging (9)	1	Make "Benefit Details are not avail." error message friendlier.
Select Benefits [9]	Help with Error Messaging (9), Consistency & Standards (4)	2	Inconsistent Error messaging.
Summary Information [10]	Help with Error Messaging (9)	2	(Again) FAQ for RAF should be built into distinct pop-up; It should also be contextualized to inform customer of what the 3 RAFs are.
Summary Information [10]	System Status Visibility (1)	2	Inform the customer as to why they would click Contact Me or Request Application?
Thank You [11]	Consistency & Standards (4)	2	Needs header: "Thank You!" They have accomplished something and should be supported, not dropped off on a boring page.
Thank You [11a]		3	Wasn't able to download a real application to fill out.

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Page Name	Heuristic	Rating	Recommendation/Notes
Thank You [11a]		2	Show options more boldly in copy. Break up copy.
Small Business (SBG proposed site)			
Company Information [3]	Consistency & Standards (4), Minimalist Design (8),	2	Layout of questions are sometimes left-right, sometimes top-down. Consistency needed Redesign.
Company Information [3]		1	"tax forms filed" asks to indicate "all applicable" with radio button, only one option can be chosen.
Company Information Error pages [3abcde]	Consistency & Standards (4)	3	Copy should be more instructional. Redesign layout as well.
Create or Update Employer Prefs [4]		1	Title of this page should be contextual - if a customer is coming to the page for the first time, say "Create" if coming back, say "Update".
Create or Update Employer Prefs [4]	Documentation and Help (10)	1	"Census" is a confusing term.
Create or Update Employer Prefs [4]	Documentation and Help (10)	*	Why can't we use the "Enter" key?
My Company Preferences [5]	Documentation and Help (10)	2	Inform users why changing their start date will provide more options. Don't show this notice if not applicable.
Employee Information [6]		*	Like the loss of Remove and More Employees buttons.
Compare Plans [7]		*	Like the sortability. May need definitions of terms they can sort by.
Compare Plans [7]	Efficiency of use (7)	1	Put 'Back to Top' link throughout page.
Benefit and Premium Comparison [8]	Minimalist Design (8)	2	(Again) left-justified copy instead of center-justified.
Benefit and Premium Comparison [8]		*	Like the link for Important Notices, unclutters the page.
Your Selected Medical Plan [9]		1	More exciting copy please!
Select and Compare Add'l Benefits [10]	Documentation and Help (10), Minimalist Design (8)	2	Are the Important Notices etc. needed at the bottom of this page. Analyze the absolute needs per page. Limit if at all possible.
Additional Benefits Comparison [11a]	Minimalist Design (8)	1	PacifiCare copy is too markety - brand/wrap copy so customers know it is outside of Company control.
Your Selected Group Benefits [13]		2	Printable version of this page.
Your Selected Group Benefits [13]	Consistency & Standards (4)	2	Action links (Save and Return, Contact Me) are not prominent.

Page Name	Heuristic	Rating	Recommendation/Notes
Thank You [14]	Consistency & Standards (4)	2	Action links (Save and Return, Contact Me) are not prominent.
(Begin Employer App) [15]	Efficiency of use (7)	2	Give this page a title, inform the user in fewer words what this page is doing for them.
Employer Application [16, 17]	Consistency & Standards (4), Efficiency of use (7)	2	Consolidate these pages, along with [15], so there are fewer clicks and the content flows more logically.
Employer Application [17]		1	Missing content under "5. Health Plan Info" - how much information will be here?
Individual & Familiess (IFP)			
Who We Are [1]	System Status Visibility (1)	3	Inform the customer of what they will need to complete this process, and when they'll need it.
Who We Are [1]	System Status Visibility (1), Consistency & Standards (4)	3	Consistency between the "1,2 3" steps and the accurate flow and process a customer can expect.
Who We Are [1]	Documentation and Help (10)	2	Draw out the FAQ, Glossary, Things to Consider sections.
Step 1 [2]	Consistency & Standards (4)	1	No quotes around the CONTINUE button - and keep it consistent throughout.
Step 1 [2]	Error Prevention (5)	1	YYYY date field produces many errors - both due to field size, and the need to input four characters. Can the system resolve this instead?
Step 1 [2]	Help with Error Messaging (9)	2	Error messaging is not consistent with terms used in the form field.
Glossary pop-up [2a]	Documentation and Help (10)	1	How about help/ recommendations on how to figure out your maximun co-pay?
Step 2 [3]	Consistency & Standards (4)	2	Consistent instructional copy - both tone and button referencing (no quotes, again)
Step 2 [3]	User Control & Freedom (3)	1	Make plan comparison sortable by important criteria.
Step 2 [3]	User Control & Freedom (3)	1	Allow customers to view other important information - Max Copy instead of Est. monthly premium for example.
Provider Finder [3a]	Consistency & Standards (4), Minimalist Design (8)	1	Brand this page as much as possible with Company design
Provider Finder [3a]		1	Code for window is incorrect.
Plan Benefit Summary & Comparison [4]	Consistency & Standards (4), Minimalist Design (8)	2	Left-justify the text for comparison - much easier to read.

Page Name	Heuristic	Rating	Recommendation/Notes
Plan Benefit Summary & Comparison [4]	Documentation and Help (10), Error Prevention (5)	1	"Exclusions & Limitations" are not available for some plans - this limits the customers ability to compare. Can this be resolved?
Choose Optional Coverages [5]	Help with Error Messaging (9)	2	Inconsistent error message layout.
Fill out Your App Online [6]	Documentation and Help (10)	2	Rewrite, layout copy with appropriate info bolded or brought up.
Fill out Your App Online [6]		1	Marketing question (How did you her about us?) is inappropriate here. Perhaps another space for these, and more, questions?
Returned user [6a]	Efficiency of use (7)	3	Provide ability to move customer right back to the last page they were working on.
Returned user [6a]	Error Prevention (5)	2	Bold out the notice that the customer cannot make any changes to their already submitted application.
Info Req'd for Blue Cross "Page 1" [7]	Documentation and Help (10)	1	Italicized text is hard to read. Bold it if necessary, but don't italicize.
Info Req'd for Blue Cross "Page 1" [7]	Efficiency of use (7), Recognition, not Recall (6)	1	Fields where there will potentially be a lot of info to be filled in ("please explain") should be larger for customers to review their data input.
Info Req'd for Blue Cross "Page 1" [7]	Recognition, not Recall (6)	2	Reference to "Section 3" doesn't match the system flow. Either note this or build the application into a wrapper which will help users through the BC application.
FamilyElect info [7a]	Consistency & Standards (4)	1	Build off-site information into Company wrapper, for brand consistency & identifying to the user when they are seeing information *not* on your site.
Provider Finder [8aa]	Consistency & Standards (4)	1	Again, build off-site info into a Company branded wrapper, if possible.
Info Req'd for Blue Cross "Page 3" [8]	Minimalist Design (8)	2	Layout of options is inconsistent and hard to read.
Info Req'd for Blue Cross "Page 3" [9]	User Control & Freedom (3), Recognition, not Recall (6)	3	This page is referenced back from step 13; no anchoring is done to help customer understand why they are here/what to do. Inform the customer with contextual help of what they did to get here/what to do next.
Info Req'd for Blue Cross "Page 5" [11]	Documentation and Help (10)	2	Part of the "screen is left blank" … good to see the note, but the language is

Page Name	Heuristic	Rating	Recommendation/Notes
			confusing.
Info Req'd for Blue Cross "Page 6" [12]	Consistency & Standards (4)	2	Error messaging is not consistent with terms used in the form field.
Info Req'd for Blue Cross "Page 6" [12]	Minimalist Design (8)	1	Error checkmarks - big red ones - effect the layout of the page - refine design so it does not.
Info Req'd for Blue Cross "Page 7" [13]	Recognition, not Recall (6)	3	This page is referenced back from step 13; no anchoring is done to help customer understand why they are here/what to do. Inform the customer with contextual help what they did to get here/what to do next
No Name Page [14]	Minimalist Design (8), Documentation and Help (10)	1	Orange button is lost next to the Online Chat button. Action Change Benefit Seleection is confusing. Redesign.
No Name Page [14]	Minimalist Design (8)	2	Layout of overview info is confusing. Important information is lost without clearer layout.
You're almost done [15]	Documentation and Help (10)	2	Copy is badly written, informing user of second options in first option copy. Bold out important first sentence.
You're almost done [15]	Documentation and Help (10)	1	Don't underline non-linkable copy.
You're almost done [15]		3	System error? Could not successfully download and view the PDF application.
Thank you [16]	Documentation and Help (10)	2	Copy & layout
Thank you [16a]	Documentation and Help (10)	2	Copy & layout

Some Notes on Content and Copy

The two articles below provide an overview of the strategies and importance of web-centric content and copy writing and their impact on usability and user success factors. Both articles are authored by Jakob Neilson, arguably the most prominent, referenced, and consulted web usability engineer today.

From Jakob Nielsen's Alertbox, www.useit.com, May 14, 2000:

Eyetracking Study of Web Readers

In May 2000, the Poynter Institute released an eyetracking study of how people read news on the Web, mainly focusing on newspaper sites. Their results confirm the findings from my previous studies in 1994 and 1997 of how users read on the Web.

Web content is intellectually bankrupt and almost never designed to comply with the way users behave online. Almost all websites contain content that would have worked just as well in print. Even online-only webzines are filled with linear articles with traditional blocks-of-text layouts. No hyperlinks, no scannability.

Main Findings

Text Attracts Attention Before Graphics

It was almost twice as common for users to fixate on the text as on the images upon their initial visit to a page. In general, users were first drawn to headlines, article summaries, and captions. They often did not look at the images at all until the second or third visit to a page.

Keep Headlines Simple and Direct

Confirming our findings from 1997, the users in the current study also preferred straightforward headlines to funny or cute ones. A new finding was that users often praised the Web headlines for being better than the headlines in print newspapers. It seems that several of the news sites have taken the earlier findings to heart and have started rewriting their headlines for online.

Shallow Reading Combined With Selected Depth

It was more than three times as common for users to limit their reading to a brief as opposed to reading a full article. Even when reading a "full" article, users only read about 75% of the text.

In other words, the most common behavior is to hunt for information and be ruthless in ignoring details. But once the prey has been caught, users will sometimes dive in more deeply. Thus, Web content needs to support both aspects of information access: foraging and consumption. Text needs to be scannable, but it also needs to provide the answers users seek.

Interlaced Browsing

Users in the Poynter study frequently alternated between multiple sites:

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They would read something in one window then switch to another window and visit another site and then return to the first window and read some more on the first site; possibly to turn to the second window again later in the session

I observed this behavior as early as 1994: users would interlace browsing sessions in several windows. Doing so is particularly easy on big monitors that show several full-page windows simultaneously, but can also be done on small screens. The Windows task bar facilitates session interlaced browsing as long as users stay below eight sessions or so.

I admit that I was surprised when we started seeing interlaced browsing in 1994. Previous studies had not identified this behavior, so I originally expected people to browse a specific site and stay with its navigation features until they decided that they were done with it. In retrospect it is clear why interlacing was not seen in the old days: we were simply not studying sufficiently rich hyperspaces.

The lesson for site designers is that users are not focused on any single site. There is not even such a thing as "a visit" to a site: even while the user is "visiting" your site, he or she is also checking out the competition. Truly, the Web as a whole forms the user experience.

Site design must accommodate people who leave and return frequently:

1. help users reorient themselves

2. plain and simple headlines immediately tell users what each page is about simple page titles that start with a salient keyword help users pick out pages from the minimized tiles in the Windows task bar do not assume users can remember their entire browsing session:

3. provide breadcrumbs and other location tools

4. do not change the standard link colors - doing so makes it harder to recognize what pages the user has already seen

5. use standard terminology to minimize the need for users to switch context and remember what you call things

Trust is less of an issue for newspapers which usually have high integrity. Other sites need to fight for credibility and must reduce marketese, slogans, and other elements that generate distrust.

Users are likely to spend much less time on other sites. Ten minutes would be a long visit to most sites.

Users will read fewer words on other sites than they do on newspaper sites. Editorial integrity and journalistic objectivity makes people more willing to read a larger percentage of the material. The task of reading news implies a willingness to process more words more than the average Web task which is directed at finding specific information and solutions.

The new eyetracking study is mostly applicable to all types of websites.
Most of the Poynter findings confirm earlier findings from studies of many
other types of sites, so they relate to basic characteristics of reading on
the Web and are not limited to newspapers.

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Adding one more study to the list of evidence for different reading behavior will hopefully convince more Internet executives of *the need write differently for the Web* and hire specialized Web editors who understand online content.

Jakob Nielsen's Alertbox for October 1, 1997:

How Users Read on the Web

They don't.

People rarely read Web pages word by word; instead, they scan the page, picking out individual words and sentences. In a recent study John Morkes and I found that 79 percent of our test users always scanned any new page they came across; only 16 percent read word-by-word.

As a result, Web pages have to employ scannable text, using

- highlighted keywords (hypertext links serve as one form of highlighting; typeface variations and color are others)

- meaningful sub-headings (not "clever" ones)

- bulleted lists

- one idea per paragraph (users will skip over any additional ideas if they are not caught by the first few words in the paragraph)

- the inverted pyramid style, starting with the conclusion.

- half the word count (or less) than conventional writing

We found that credibility is important for Web users, since it is unclear who is bCompanynd information on the Web and whether a page can be trusted.

Credibility can be increased by high-quality graphics, good writing, and use of outbound hypertext links. Links to other sites show that the authors have done their homework and are not afraid to let readers visit other sites.

Users detested "marketese"; the promotional writing style with boastful subjective claims ("hottest ever") that currently is prevalent on the Web. Web users are busy: they want to get the straight facts. Also, credibility suffers when users clearly see that the site exaggerates.

Measuring the Effect of Improved Web Writing

To measure the effect of some of the content guidelines we had identified, we developed five different versions of the same website (same basic information; different wording; same site navigation). We then had users perform the same tasks with the different sites. Measured usability was dramatically

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higher for the concise version (58% better) and for the scannable version (47% better). And when we combined three ideas for improved writing style into a single site, the result was truly stellar: 124% better usability.

It was somewhat surprising to us that usability was improved by a good deal in the objective language version (27% better). We had expected that users would like this version better than the promotional site (as indeed they did), but we thought that the performance metrics would have been the same for both kinds of language. As it turned out, our four performance measures (time, errors, memory, and site structure) were also better for the objective version than for the promotional version. Our conjecture to explain this finding is that promotional language imposes a cognitive burden on users who have to spend resources on filtering out the hyperbole to get at the facts. When people read a paragraph that starts "Nebraska is filled with internationally recognized attractions," their first reaction is no, it's not, and this thought slows them down and distracts them from using the site.

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