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Case study

Online Services

Profile & Preferences redesign

Problem statement

The existing Profile and Preferences didn't align with updated branding and tone of voice. Unclear labels and poorly designed information architecture was a source of frustration for clients, while a long vertical orientation didn't support a mobile-first approach.

Where we started

Objectives & goals

- Refresh the design using the newly launched content design system to reflect updated branding
- Improve page navigation, moving toward a mobile-first approach
- Help the user understand capabilities through improved labelling and content hierarchy
- Detect potential calls to advisors and licensed insurance representatives

Our process

Discover & research

Define & strategize

Ideate & prototype

Build & deploy

Scope & constraints

- Complete design and content refresh, including new information architecture
- API and back-end constraints limited the adding or removing of existing fields
- Technical debt related to updating legacy codes reduced developer bandwidth
- Some fields locked (not editable) due to business rules
- Existing navigation not within scope

Product users

Our users are home and/or auto insurance customers **between the ages of 30 to 65**

Quantitative research

Survey-based unmoderated sessions were synthesized in combination with individual/group differences.

Observations

95%
of users **want to see settings** that can't be changed

84%
found it **easy or very easy to find** their account settings in the new design

75%
expect fields that can't be changed to **look different** from those that can be

60%
want **more control** over their subscriptions and the methods of receiving them

73%
of users felt splitting Profile from Preferences would be **the same or better**

User needs

- Clearly labelled settings for sections including Contact, Consent and Subscription, Do Paperless, eAlerts and eReminders, and Close account
- Certainty about the purpose and meaning of presented fields
- Easier overall navigation and findability

Features & functionalities

to solve for user needs

Improved labels and descriptions

New tabbed navigation

Predictably grouped info

Competitor analysis

TD MyInsurance

A single My Profile page provides limited info but improved functionality

Features :

- Allows for editing of address through the division between policy and mailing addresses
- More functionality is security settings and document preferences

TD Insurance

canada life

My Canada Life

A Real Profile landing page displays cards for personal info, communication settings and security preferences

Features :

- Maximized subscription customization
- Minimal functionality, but editable fields are clearly marked

Priorities

	Urgent	Not urgent
Important	• Re-skin UI with new branding and components • Reorganize and re-label fields and replace tooltips • Improve overall accessibility • Replace side anchors	• Re-label second level navigation • Add functionality and customization • Allow for onscreen editability and one-to-one edit buttons • Add communication preferences
Not important	• Update Angular.JS code • Remove redundant fields	• Redesign transactional email templates

Screens

Account settings

Contact details

Personal information

Edit sign in email

Confirm email modal

Edit password

Edit security answer

Edit contact details

Edit preferred name

Communication settings

Paperless delivery

Cancel paperless modal

Subscriptions

Privacy

Questions?

Email stephanie.zolis@gmail.com