Project Report

Advisor Workspace Responsive Design

Project Sponsor

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Executive Summary

CUNA Mutual Group provides a variety of product solutions to meet the unique needs of credit unions and their members. Financial advisors and coordinators are two of the positions at the credit unions CUNA Mutual supports. Advisors are financial service agents that work within a credit union and provide management and support to credit union members regarding various financial products. Coordinators support the advisors and help them manage their clients. Advisors and coordinators use a central hub, called Advisor Workspace, which helps them run their business and maintain client accounts.

There has been a noticeable increase in the amount of advisors accessing Advisor Workspace from mobile devices (tablets and smartphones) over the past year. There is a clear trend of increasing traffic that creates a need for a mobile device friendly site. Although users are able to access the website on these devices, the content is not optimized for mobile screen sizes. The main focus of the Advisor Workspace Responsive Design project was to assist CUNA Mutual develop mobile prototype mockups and provide recommendations to improve the current desktop version.

These goals were accomplished by collecting analytic, user interview, and poll data in combination with outside responsive design research to form mockups of what the current website should incorporate as well as future state mobile designs. The analytic data was Google Analytic and CrazyEgg data that was provided by CUNA Mutual and helped identify the user personas and common functions that users clicked. A total of 5 user interviews were conducted to gather data from both advisors and coordinators about what features they use and what they would like to see in a mobile version. Finally, poll data that was collected on Advisor Workspace was used to identify the most commonly used features among a large sample size. The data was analyzed and key insights to how users use the current website and what CUNA Mutual should incorporate on mobile versions came out of it.

The key findings from the data collected were that users need mobile access, user role is critical to website usage, the current layout is mismatched with user needs, search is necessary but unusable, and the navigation menu needs improvement. The increasing use of mobile technology is enabling advisors to work remotely and a mobile version of Advisor

Workspace should accommodate this need. Next, the user's role is critical to how he or she uses the site. Advisors and coordinators use the website differently. Advisors typically use the website to develop, maintain, and research their client base whereas coordinators use planning and form related features. Also, it was uncovered that the website layout is not well aligned with how advisors and coordinators use the website. We also confirmed that search functionality was important for users, but not satisfactorily supported by the current search capabilities of the website. Finally, found that the navigation and use of dropdown menus needs to be revamped.

  Based on these key findings and outside research of best practices, a mockup was developed for what responsive design of the current state should incorporate. In addition, three future state designs were created to show possibilities that could be accomplished in the long term. These future state designs are largely mobile app-based and use common mobile practices to create a unique and effective user-experience.

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