



# **B2B Self Service “My Services” Landing Page Redesign**

*Project Sponsor*

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*December 2013*

## **Executive summary**

CUNA Mutual is a mutual insurance company that sells insurance and other financial products to businesses, credit unions, and their own members and customers worldwide. The My Services Landing page is a B2B secure web page that is primarily used by credit union employees to perform transactions such as filing claims, or to check various information such as webinar schedules or employee pension. The goals of this project were to provide recommendations to improve the user experience for CUNA Mutual's My Services Landing page.

Current state analysis was completed first by UW Students conducting this project. This involved gaining access to every function of the site and gaining a basic idea of how it works.

Then, using this information, the students worked with CUNA Mutual to conduct a usability survey that was completed by 161 of its users. The survey consisted of 27 questions that were aimed at gaining insight into the strengths and weaknesses of the My Services' page.

From the information gained from the survey data, 12 survey participants were interviewed (using a Web meeting format) to get a further understanding of opportunities to improve the user experience. These interviews involved 15-20 general questions about the participants' typical roles and usage of the My Services landing page, and their perceptions about the strengths and weaknesses of the webpage. We also conducted a usability test to see how the user actually interacted with the site.

Google analytics data on click streams from January of 2013 to August of 2013 was also analyzed and used to identify opportunities for improvements.

The key insights gained from the data and information we gathered and analyzed were that users relied heavily on the My Recent Activities feature, navigation through the website was not ideal, and that the web page had confusing wording on the many links it provided. The Google analytics data showed that about 80% of people clicked on the My Recent Activities feature when accessing the My Services web page, and data from the survey showed that only about 60% of people were satisfied with the My Recent Activities feature. These insights were the basis on the recommendations that were made.

The redesign changes that were recommended to the My Services landing pages were aimed clearly at addressing the pain points that users experienced while performing transactions on the My Services page, and also improving what users are already using the most, which is the My Recent Activities feature.