Utility Company
Account Usability

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ELECTRONIC INK
26
CELEBRATING OUR TWENTY-SIXTH YEAR
1990-2016

September 13, 2016

Executive Summary

While the current utility company's My Account contains useful content, its current layout, labeling and site architecture make it difficult to find information and complete tasks.

Updating labels, removing duplicate links and reorganizing the information architecture of the site will better match users' expectations, and enhance their use of My Account.

Third-party sites disorient users and disrupt their experience. Embedding these tools directly into My Account would greatly improve user experience and help users complete tasks without having to call in.

Participants were interested in additional functionality and content from the site, especially more self-service features, such as submitting service requests online, and personalized advice on reducing gas usage.

Overview

1. Goals & Objectives
2. Method
3. Findings & Recommendations
4. Conclusion & Next Steps
5. Appendix

1

Goals & Objectives

Goals & Objectives

Understand ease-of-use of My Account pages

Collect users' impressions and perceptions of My Account pages

Identify customers' expectations for capabilities of their account

Review My Account from a best practices perspective to identify user experience challenges

2

Method

Usability Testing

Eight one-on-one sessions

Activities:

- *Explored My Account pages*
- *Completed card sort activity with existing account features*
- *Reviewed overall impressions of My Account*

Participants:

- *Utility company customers*
- *Utility company customers with an online account*
- *Included a mix of gender, age and income levels (see Appendix)*

3

Findings & Recommendations

Recommended Approaches

Simplify and refine My Account

Adjust labels and hierarchy on My Account homepage to improve customer experience right away

Combine My Account and companysite.com

Introduce more substantial changes to My Account by integrating it with the utility company site

Integrate third-party sites

Enhance customer experience in the long-term by influencing design on third-party sites

Simplify and refine My Account

Clarify what “customer choice” means

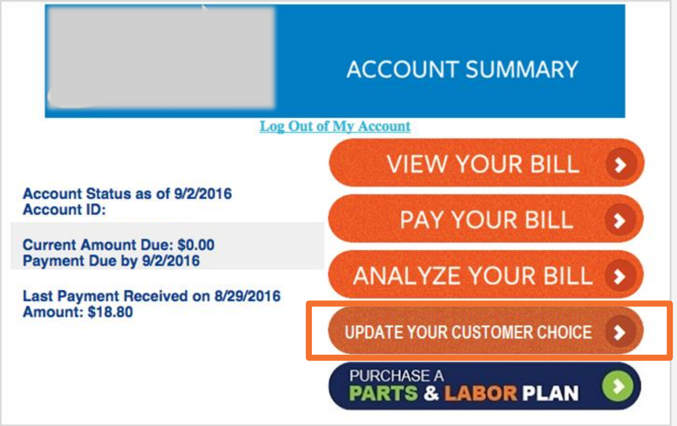
Adjust billing terminology

Remove duplicate links

Adjust visual hierarchy to match priorities

Highlight usage profile

Clarify what "customer choice" means



Most participants were not sure what "customer choice" referred to.

Some thought it had to do with how they pay or receive bills.

Participants suggested alternatives such as "update supplier choice," "opt out" or "update your gas provider."

Recommendation:

Change "Update Your Customer Choice" to "Choose Your Gas Supplier."

Adjust billing terminology

Some participants thought that “E-Billing” meant viewing a bill online, or referred to what online payment methods were available.

A few participants preferred the phrase “Understand My Bill” to “Analyze Your Bill.”

Many participants thought that “Billing and Payment Options” referred to ways that they could pay their bill online, or to managing their payment methods.

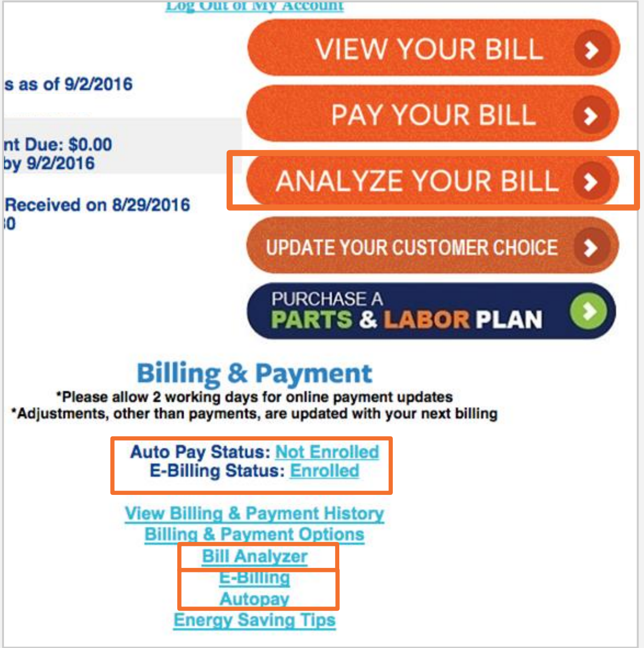
Recommendations:

Change “E-Billing” to “Paperless Statements.”

Change “Analyze Your Bill” to “Understand Your Usage.”

Remove the “Billing & Payment Options” link in My Account. Move this content to a section in the FAQ *OR* rename the link to “How Can I Pay My Bill?”

Remove duplicate links



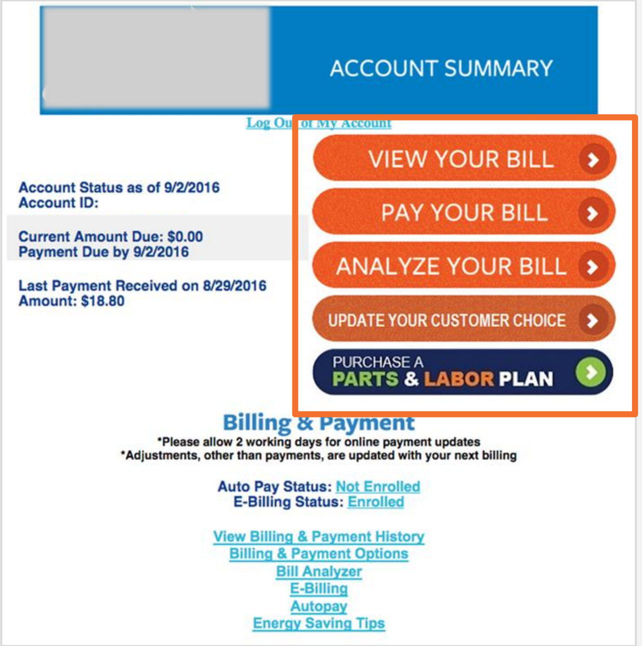
Having links in multiple places with slightly different names confused participants.

Duplicate links clutter the homepage and make the site seem more complicated than that it actually is.

Recommendation:

Remove duplicate links for bill analyzer, auto pay and e-billing.

Adjust visual hierarchy to match priorities



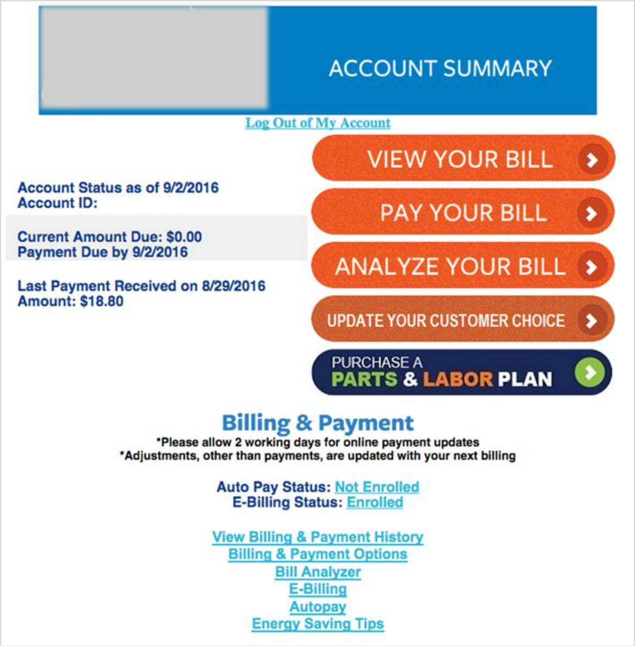
On their account homepage, participants wanted to see the following account summary and payment actions:

1. What was due and when
2. If they have an outstanding balance
3. Payment confirmation with date included
4. A link to pay their bill

Currently, account information is visually de-emphasized in favor of the large buttons on the right-hand side of the page. In addition, all the buttons look the same so there is no differentiation or hierarchy, making it more difficult to quickly pick out the pay link.

A few participants wanted to see their name and address on the homepage so they knew they were in the right account.

Adjust visual hierarchy to match priorities



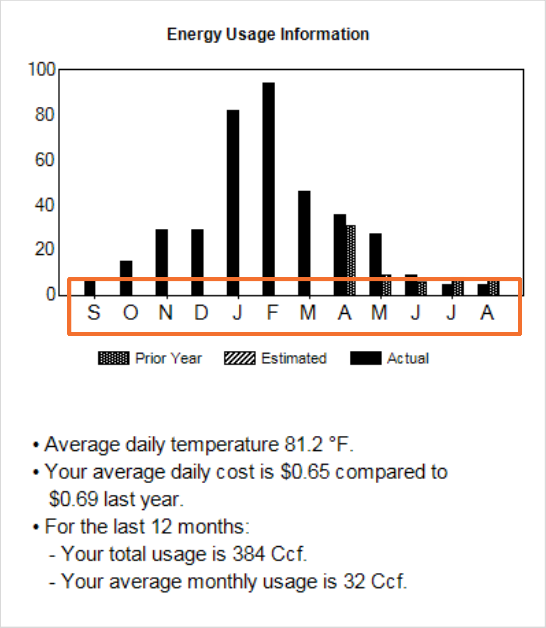
Recommendations:

Emphasize account summary information (amount due, scheduled payment and last payment received) and give participants a clear next step to pay their bill.

Nest infrequently-used links under secondary navigation.

Include the user’s name and address on the homepage, or use a profile avatar to clearly indicate that the user is looking at the correct account.

Highlight usage profile



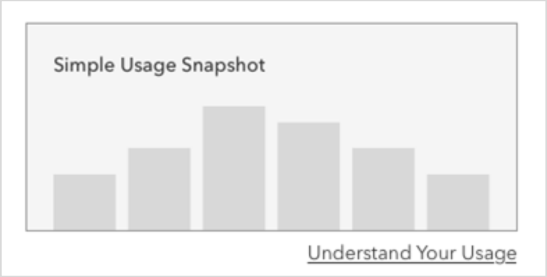
Participants liked seeing the graph displaying their gas usage and charges on their bill and said it was helpful.

However, the labels on the graph were not clear to all participants.

> For instance, P01 wasn't sure if the graph showed dollar amount or energy usage, and P03 had trouble reading the month axis.

A few participants said they wanted to see their usage graph on their account homepage.

Highlight usage profile



Revised usage graph concept.

Recommendations:

Put the gas usage graph on the homepage as a "usage snapshot."

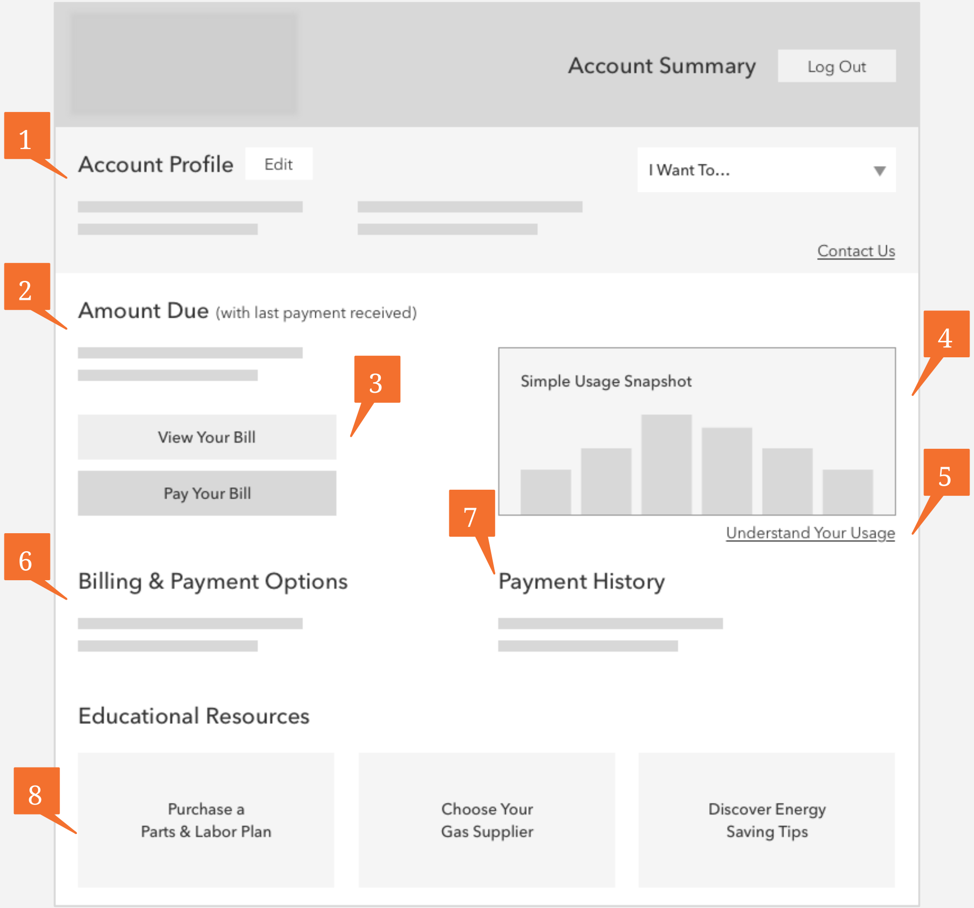
Add labels to the graph axes so users can easily read the graph and see trends in their gas usage. Use three-letter abbreviations for months.

Give users another data source on the graph as a point of reference so they understand their gas usage (e.g., "Compared to your neighbor" or "Compared to a home of a similar size.")

Use color to distinguish elements in the legend and graph.

Simplified and refined My Account

1. *Profile information*
2. *Amount due*
3. *Payment next steps*
4. *Usage graph*
5. *Link to bill analyzer*
6. *Payment options (paperless, autopay)*
7. *Payment history*
8. *Educational links*



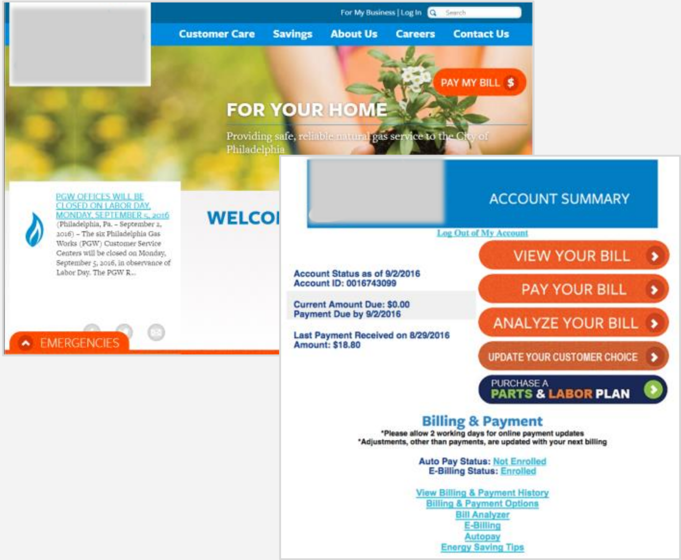
Combine My Account and companysite.com

Visually connect My Account to existing utility company framework

Make My Account responsive

Restructure information architecture

Visually connect My Account to existing utility company framework



Participants were concerned that My Account looked different from the main utility company's site and third-party sites, and sometimes wondered if they were still on the utility company site.

Participants said My Account was out-of-date, and doesn't meet their expectations for a modern website. This undermines the credibility of the site.

Recommendations:

Carry through the layout, navigation, and aesthetics of the utility company's site to My Account. This way, users will know they are on the utility company's site and won't need to constantly reorient themselves to a new page layout.

Use consistent top-level navigation (see page 26).

Make My Account responsive

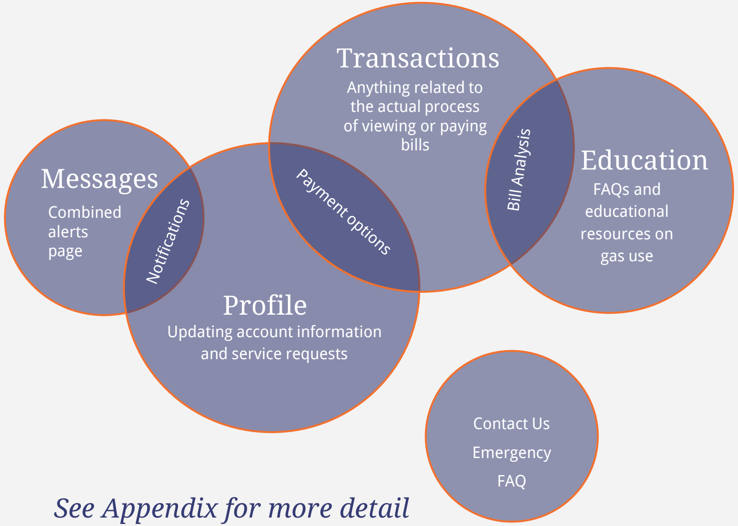
Participants wanted to be able to check their account and pay bills from their phone or tablet.

Most participants did not think they would want an app since they use the site infrequently.

Recommendation:

> Make all company sites responsive in order to meet user expectations of the channel and device of their choice.

Restructure information architecture



See Appendix for more detail

Many items that participants associated with their account and profile are currently spread across multiple areas of the site.

Participants expected to find links for contact information, an FAQ and emergency numbers on the top of every page, and were frustrated when these appeared to be missing or difficult to locate.

Several participants stated that Purchase a Parts & Labor Plan and Update Your Customer Choice were not very important and would rarely click on them.

Restructure information architecture

Recommendations:

Conduct a thorough content inventory and remove duplicate links and content across My Account, companysite.com and third-party sites. Develop a new information architecture based on the content inventory.

Keep consistent top-level navigation across all pages (see page 26).

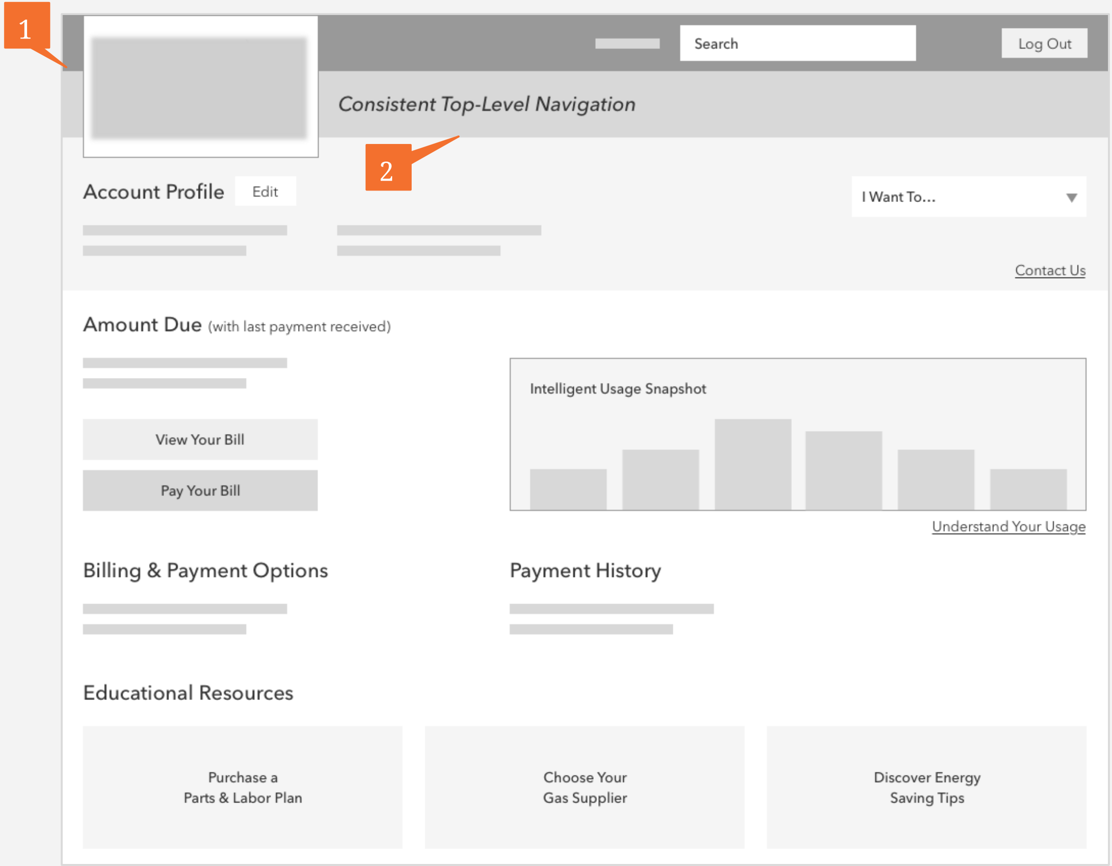
Group all transactional items (View/Pay Bill, Payment History/Scheduled Payments, payment methods and bill analyzer) together.

Group all account-related items (Edit Account Information, messages/notifications, etc.) together.

Group educational resources together and present information in a format that gives users actionable items such as a checklist.

Combined
My Account and companysite.com

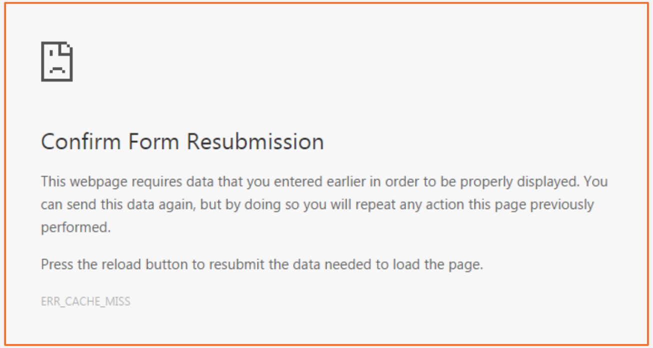
1. Same aesthetic and layout as companysite.com
2. Top-level navigation



Integrate third-party sites

- Use consistent navigation
- Embed third-party tools within My Account
- Include all Payment Center links in navigation
- Clarify Pay by Check workflow
- Consolidate account information
- Give users clear feedback
- Personalize content and integrate tools
- Add valuable self-service features

Use consistent navigation



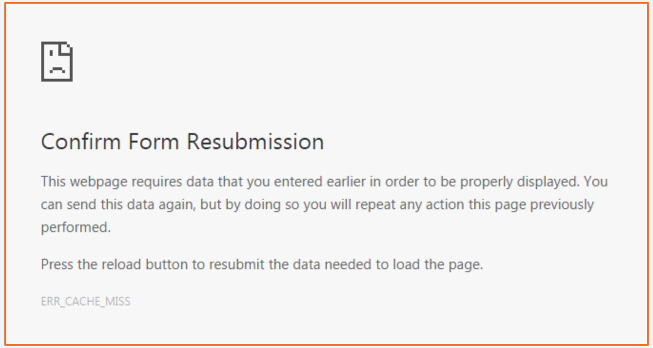
Participants couldn’t use the back button on the browser.

When they tried to use it, they received a Confirm Form Resubmission error, and they did not know how to return to their account homepage.

Many participants did not know how to get back to their account homepage from the View Bill page because the “Go Back” button didn’t work.

The link for Contact Us is below the fold and therefore easy to miss.

Use consistent navigation



Recommendations:

Use consistent top-level navigation on each page of My Account.

Allow users to use the back button on the browser.

Move Contact Us to the top of the page so it is easier to find.

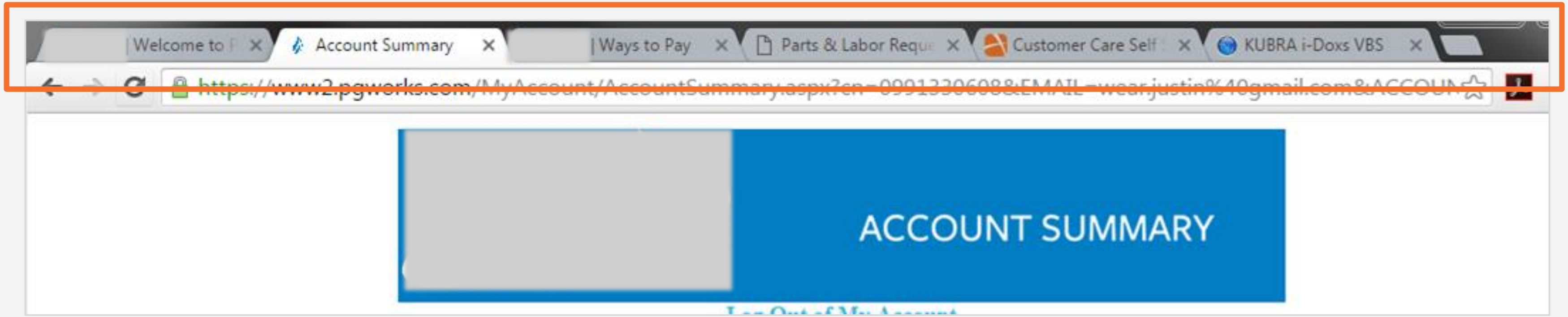
Embed third-party tools within My Account

Participants had to jump back and forth between many tabs because third-party sites and companysite.com are not integrated with My Account.

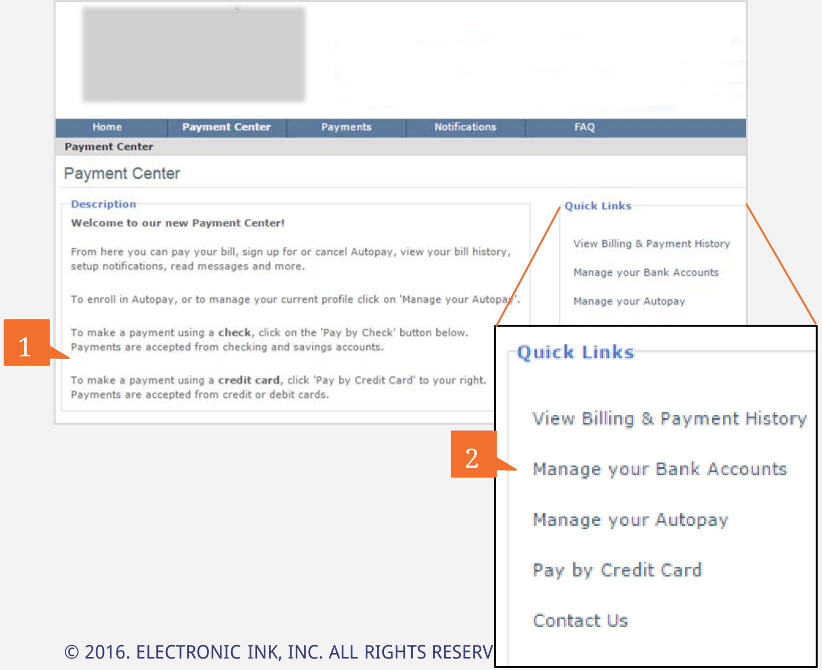
"It's annoying to keep going back and forth [to view bill, pay it, and check account status]." -P04

Recommendation:

Embed all pages and tools within My Account so users can complete all tasks within the same site.



Include all Payment Center links in navigation



Many participants did not read through all the explanatory text (1) or missed important links such as Manage my Bank Accounts (2) in the Payment Center.

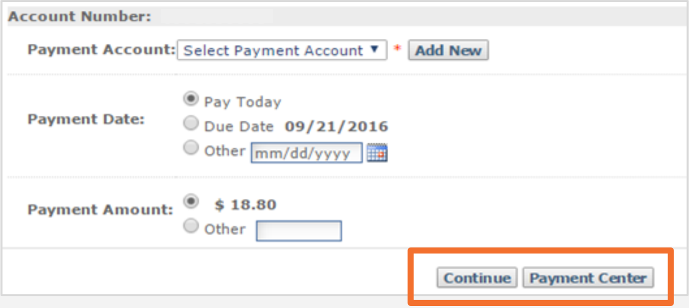
These links are off to the side and not visually emphasized, which makes them easy to miss.

Their label implies a shortcut but they are not included in the top-level navigation, so users may not ever be able to find them.

Recommendation:

Embed Payment Center within My Account and include all links in the top-level navigation.

Clarify Pay by Check workflow

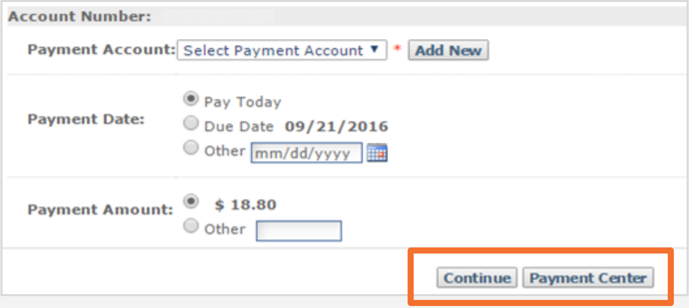


Some participants did not know what “Pay by Check” meant and were not sure if that was the correct step to pay their bill online.

The button labels on the Pay by Check screen (“Continue” and “Payment Center”) confused some participants.

Buttons in the Pay By Check workflow look very similar, and it would be easy to for a user to click the wrong one and lose their progress.

Clarify Pay by Check workflow



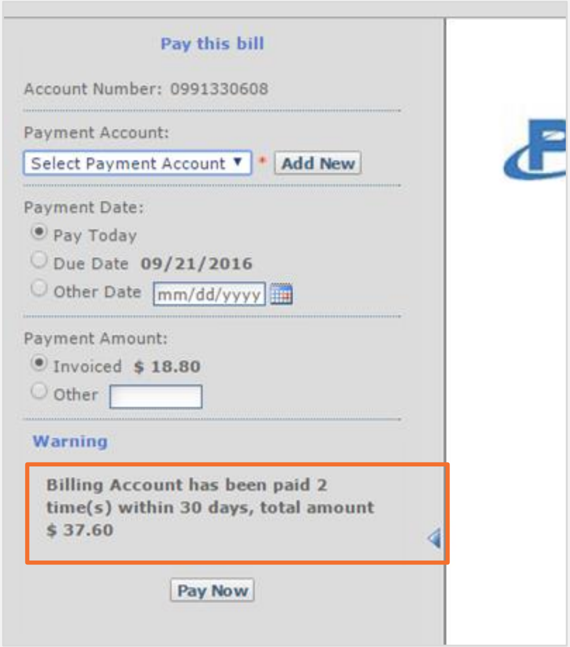
Recommendations:

Change “Pay by Check” to “Pay by Bank Account” in Payment Center.

Change the button in the Pay by Check workflow from “Payment Center” to “Exit.”

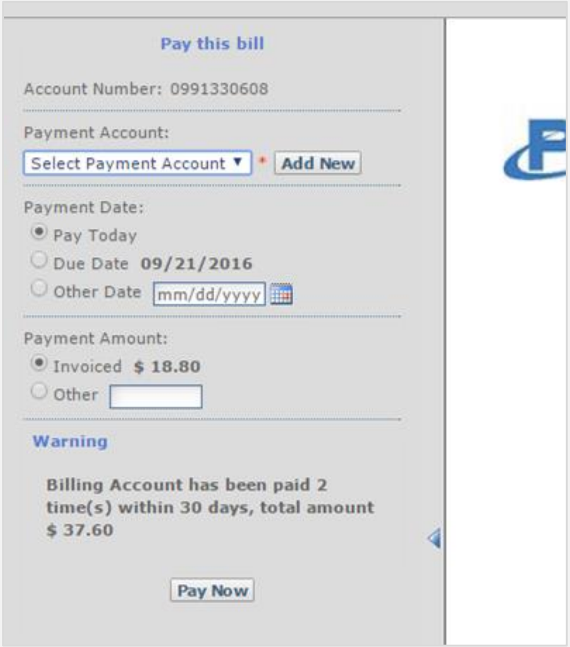
Indicate a clear next step: the continue or confirm button should be visually distinct from each other.

Give users clear feedback



- Participants who viewed an invoice in the Payment Center weren't sure if it was paid or not.
  - They noticed the warning ("Billing Account has been paid 1 time(s) within 30 days, total amount $xx.xx") when viewing their bill but were not sure if it meant that particular bill had been paid.
  - Warnings on the bill and in the Pay by Check workflow are small and easy to miss.
- Error messages are not clear or are missing in Payment Center.
  - For instance, when trying to pay her bill, P05 couldn't select a payment date, and she did not know if it was because it was past due or because it was already paid.

Give users clear feedback



Recommendations:

Indicate that a specific invoice has been paid on the invoice itself and within the payment workflow instead of simply indicating that a payment was posted to the account.

Show errors in bold, red text with a clear explanation as to why the error occurred and what needs to be fixed.

Consolidate account information

Participants expected to make any edits or changes to their account (such as updating personal information, selecting email notifications and reminders, updating payment methods) in one place, including inputting service requests and transferring service.

Recommendation:

> Allow users to edit anything relating to their account (including payment methods, notifications/reminders, and personal information) in one place.

Personalize content and integrate tools

“I want to get in, pay bill, and get out. But if there are other reasons to stay, it’s not giving me a really good idea of why I should be doing that.” - P06

There is useful content and advice on My Account, but it is buried: participants did not know it existed or had to dig for it.

> For example, in Bill Analyzer, participants spent a lot of time and many clicks to find out how weather affected their bill.
>
> Warnings on the bill and in the Pay by Check workflow are small and easy to miss.

Participants expected to receive personalized advice on how they could reduce their gas usage and save money.

Participants who filled out the forms on their homes, appliances, etc. were not sure if the data was saved.

Personalize content and integrate tools

Recommendations:

Bring the usage information to the forefront (see page 16-17).

Personalize results and recommended actions to advise users on how to save money on bills and reduce gas usage. This could also be an opportunity to market services such as Budget Plan.

Demonstrate to the customer that there is a value to giving personal information: have users take a lifestyle quiz and base recommendations on their answers, allowing users to edit their responses as part of their profile (for example, Stitch Fix or Trunk Club).

Add valuable self-service features

Most participants wanted as much self-service online as possible, and said they prefer to do things online rather than calling someone.

> They wanted to input service requests, transfer service or terminate service online.

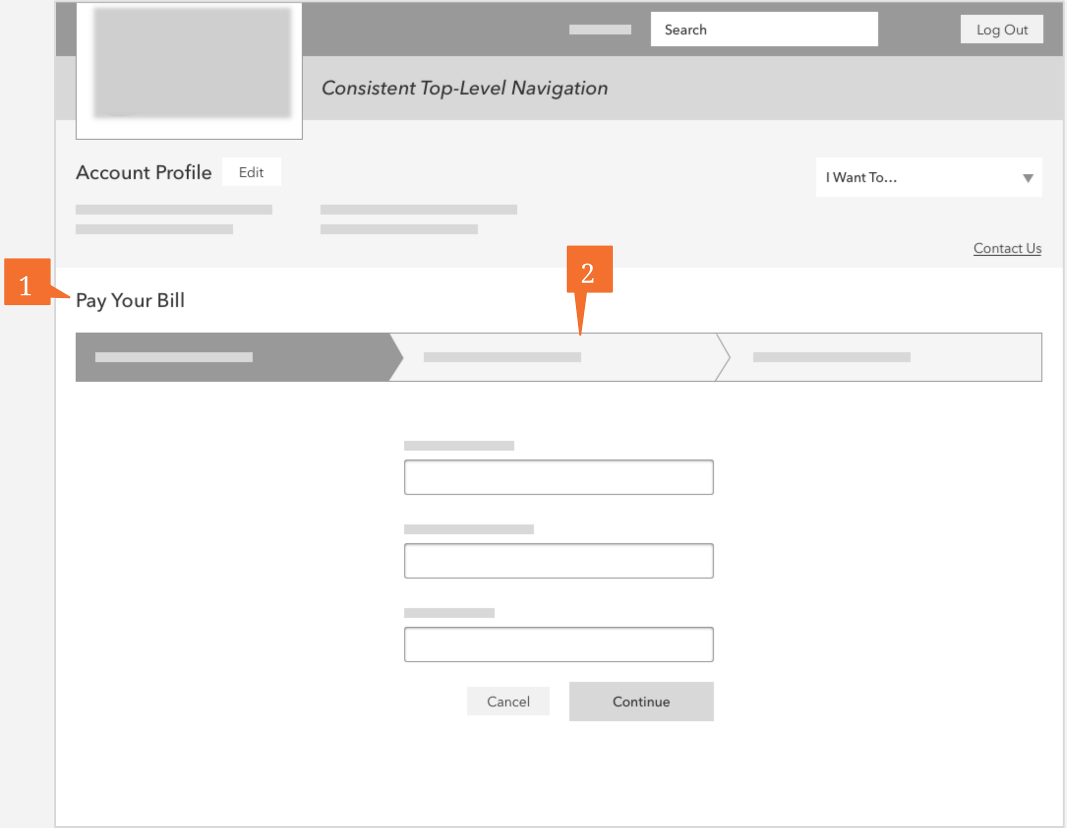
Participants also wanted information on what to do when moving so they could take care of their gas service change ahead of time.

Several participants wanted to chat or submit questions online.

Recommendations:

> Allow users to make service requests, transfer, or terminate service, and chat or contact a company representative online.
>
> Include a moving guide in the FAQ or user's profile.

Integrated screen design



1. Embedded bill pay workflow
2. Form progression shown

4

Conclusion

Conclusion

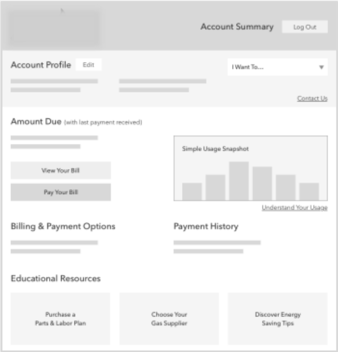
Participants wanted to quickly look at their account status and pay their bill.

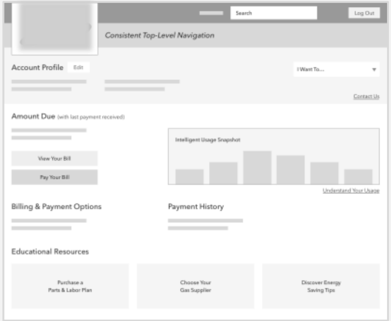
Multiple third-party sites and new tabs made navigating My Account and completing tasks difficult.

Participants thought the information in the bill analyzer was helpful, but it was hard to find and not personalized to their lifestyle, which limited its value.

Additional self-service functionality would improve the usefulness of My Account to participants.

Next Steps





Simplify

Improve labeling and visual design on My Account homepage to help users find content more easily.

Combine

Use the companysite.com framework to reorganize site architecture and improve navigation.

Integrate

Embed all functionality directly within My Account and add personalized advice and self-service features to augment My Account's value to users.

Thank You

Questions?

5

Appendix

How We Get There

Improved user experience

Simplify

- Wireframes
- Usability Testing
- Aesthetics
- UI Specifications

Combine

- Content Inventory
- Wireframes
- Usability Testing
- Aesthetics
- UI Specifications

Integrate

- Review third-party capabilities and contracts
- Workflows
- Wireframes, testing, aesthetics, UI spec
- System architecture and integration

Participant Details

Participant No.	*Gender*	*Age*	*Login Frequency*	*Autopay*
P01*	M	27	A few times a year	Yes
P02*	M	35	About once a month	No
P03*	M	34	A few times a year	Yes
P04	F	29	Every few months	No
P05	F	33	About once a month	No
P06	F	45	A few times a year	No
P07	F	56	A few times a month or more often	No
P08	M	39	About once a month	No

*Electronic Ink Employee

Card Sort Results