



Corporate Leads Tracking Usability Evaluation

May 1, 2012

Overview

The corporate leads tracking application allows managerial control of leads based on county and zip code plus the ability to include or exclude agents within the application. Advanced features allow performing multiple actions within a single transaction.

In April-May 2012 a heuristic evaluation of the Corporate Leads Tracking (CLT) application was performed. A heuristic evaluation applies user centric rules of thumb against an application by reviewing functions and interactions within an application. The basic heuristic inspection method seeks to reduce user frustration, reduce error rate and improve user performance of tasks.

(http://www.useit.com/papers/heuristic/heuristic_list.html)

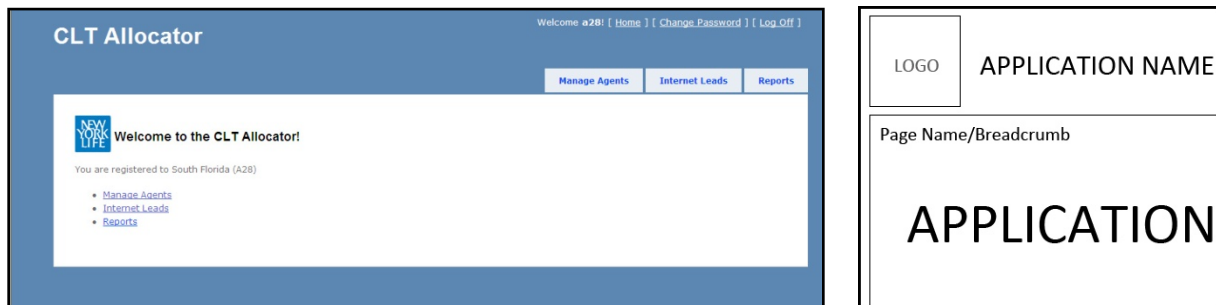
Below is an abbreviated 5 point summary from the enclosed review:

1. Adding actions for OK and cancel for transactions will let users move through the process in a standard format and recover from errors more easily.
2. Revising naming conventions for buttons and page information will improve user understanding of functions.
3. The color red should be modified for omitted items so they do not display as error information.
4. Only items that can be acted upon should be included in transactional lists.
5. Providing additional information at both the county and zip code level will reduce the user's cognitive load and reduce error rate.

Application Layout

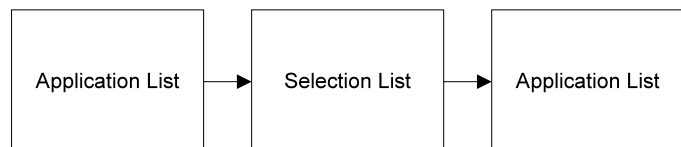
Functionally, the CLT application contains all the correct pieces inherent to New York Life Applications but there are a few items out of order from the expected layout.

As seen on the right, the placement of the logo and application name mirrors the layout of content sites, and moves the logo out of the application area, moving the page name/breadcrumb to left position.



Assigning Agents (by county):

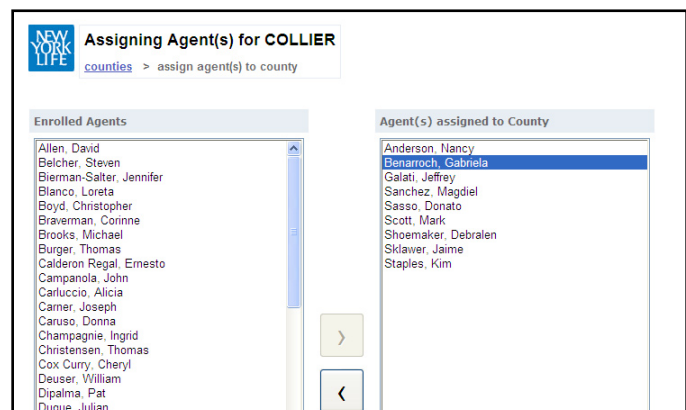
The assignment of agents is a simple process requiring the user to select the county of the assignment and choose from a listing of agents in one list to another list.



Navigation: While the assignment process works well the facility to complete the action is unclear with the only means of returning to the application list is to utilize the breadcrumb navigation.

This procedure is non-standard, for web applications which usually require an action button to complete a transaction.

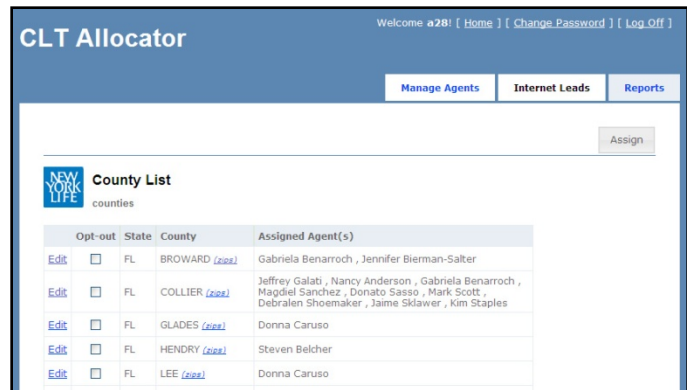
Adding an appropriate “Ok” button on the selection list page would return the user to the application list, enforcing the action taken. Consideration should also be made to include a “Cancel” button which would allow the user to abort an unintended action.



The ‘Ok’ button is the primary button that completes the action the user initiated. The ‘Cancel’ button is the secondary button that takes users back to their original screen without completing the action.

General Display: The display of the list currently defaults to the counties listing for Internet leads. Future versions may contain other leads as well.

The list display is currently set to a smaller width percentage than the page can accommodate. When the user resizes the page the list expands but never to the full 100% width. Current width size is approximately 80%. It would be suggested to extend the width of the table to align with the “Assign” button visually simplifying the display and allowing for more content to be displayed without scrolling.



List Display: The list display has many moving parts other than the display of static information. From the list display the user can edit the overall county assignments, opt the county out from participation and edit the assigned agents via zip code.

This is asking a great deal from a little list. The tasks can be helped by moving the edit option closer to the result of the action, meaning moving closer to the “Assigned Agent(s)”. The current display gives the user the impression that they will be editing the county information, not the Agents associated, as is done with the “Opt-out”.

The “Zips” information is also an opportunity to display information from lower levels. While it is not possible to display all the associations within this display it is possible to provide rolled up information such as the number of counties and the number of counties that have assigned agents.

Reviewing the use case of making sure that agents are assigned to counties either at the county level, the zip code level, or both, providing a display such as “BROWARD [32/88]” tells the user there are 88 zip codes in Broward county, 32 of which have assigned agents. This cues the user to know how to proceed.

The Opt-out functionality (discussed separately under “Managing Agents”) should also be visually consistent where opted out counties would appear grayed out.

Assigning Agents (by Zip Code):

While the zip code functionality is robust, it does not provide an overall view of the county. It forces the user to remember the assignments at the overall county level.

Shown to the right (top) is an illustration of Broward County, below is the detail from that county.

From the county list you cannot tell if agents are assigned at the zip level; from the zip level you cannot tell if agents are assigned at the county level. As a result, in the above illustration, Gabriela Benarroch is assigned at both levels, at zip code 33097 and also the entirety of Broward



County List

counties

	Opt-out	State	County	Assigned Agent(s)
Edit	☐	FL	BROWARD (zip)	Gabriela Benarroch , Jennifer Bierman-Salter , David Allen
Edit	☐	FL	COLLIER (zip)	Jeffrey Galati , Nancy Anderson



Zipcode List

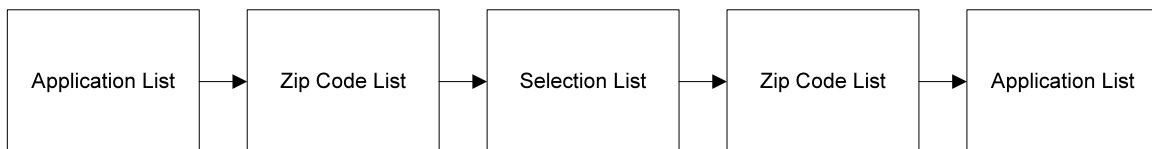
[counties](#) > [zipcode\(s\)](#)

	Opt-out	Zip	City	County	State	Assigned Agent(s)
Edit	☐	33097	Coconut Creek	BROWARD	FL	Gabriela Benarroch , Walker Ellis
Edit	☐	33075	Coral Springs	BROWARD	FL	Alan Weissbaum
Edit	☐	33004	Dania	BROWARD	FL	Suzannah Richards
Edit	☐	33441	Deerfield Beach	BROWARD	FL	Jay Pollack
Edit	☐	33442	Deerfield Beach	BROWARD	FL	Walker Ellis
Edit	☐	33443	Deerfield Beach	BROWARD	FL	Waiese Moshe

Providing a display such as “BROWARD [32/88]” on the County level (top) would showcase the information at the lower level. Adding the information below above the zip codes would provide the appropriate context:

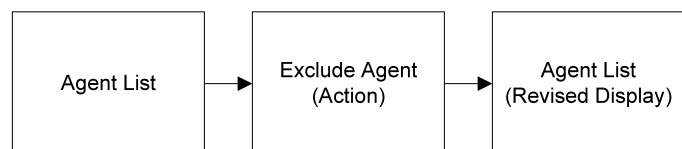
Overall County Assignments:		
FL	BROWARD	Gabriela Benarroch , Jennifer Bierman-Salter, David Allen

As with the Assigning Agents (by County) function, adding appropriate “Ok” and “Cancel” buttons would return the user to the application list, and enforce the action taken.



Managing Agents

When managing agents the user views a complete list of agents to be affected and has the option to exclude an agent by ticking a checkbox. Once completed the display changes to indicate the agent is excluded.



Excluding Agents: The action of excluding agents is a simple one that all occurs on a single page. This matches the primary use case of excluding an agent from leads. Potential problems occur when an agent is currently assigned to a county or zip code.

When an agent is removed, all previous associations made are also lost. This is done without any cue to the user of the ramification of their actions. Simply re-checking the box does not reestablish the associations.

It is recommended that the system be smart enough to recognize associations and message the user. List the lost associations and give the user the option to continue or cancel the action. If there is no current association, the system would behave as currently implemented.

Display of Excluded Agents: When viewing the excluded agents list it is difficult to relate the display to the intended purpose.

The exclusion display breaks some general conventions. Excluded items are red. Red traditionally is used to indicate error or warning. The red color combined with the reversed (white) text places more emphasis on the excluded items than their active counterparts. This fight for focus makes it difficult to navigate the list.

To the right is an illustration of possible remediation.

First Name	Last Name	Exclude	Email
Gina	Adly	☒	gady@ft.
David	Allen	☐	dallen4@f
Cohinta	Alzate	☒	calzate@f
Omar	Amador	☒	oxamador
Carol	Anderson	☒	canderso
Nancy	Anderson	☐	neanders

First Name	Last Name	Exclude	Email
Gina	Adly	☒	gady@ft.
David	Allen	☐	dallen4@f
Cohinta	Alzate	☒	calzate@f
Omar	Amador	☒	oxamado
Carol	Anderson	☒	canderso
Nancy	Anderson	☐	neanders

Sorting of Columns: There are many table lists within the application that would benefit from a sortable display. The excluded agents list would benefit the most having the ability to sort the exclusions separate from the inclusions. This could also be accomplished by including a “Hide Excluded” checkbox, to remove excluded items from the display.

Assigning Agents

The “Assign” button is a bit of a misnomer, since the entire county list is about assigning agents to counties or zip codes, leading to the initial confusion about the function.

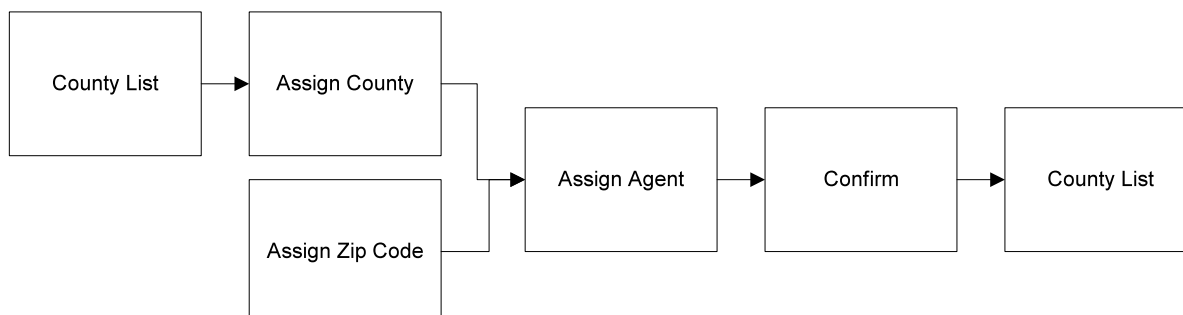
The button coupled with the checkboxes on the screen can lead the user to believe they need to select the appropriate checkboxes to begin the process.

This idea is reinforced as the user clicks the button to interact with the overlaid form by clicking checkboxes, similar both in size and placement to the previous screen. As a result counties may be opted-out in error.

The screenshot shows the 'CLT Allocator' application with the 'Assign Agents' dialog box open. The dialog prompts the user to 'Select one or more Counties or Zipcodes where you would like to Assign Agents.' It features a table with columns for 'State', 'County', and 'Assigned Agent(s)'. The 'State' column is set to 'FL'. The 'County' column lists various Florida counties, and the 'Assigned Agent(s)' column lists the agents assigned to each county. The 'Continue' and 'Cancel' buttons are located at the bottom right of the dialog.

State	County	Assigned Agent(s)
FL	BROWARD	Gabriela Benaroch, Jennifer Berman-Salter
FL	COLLIER	Jeffrey Galati, Nancy Anderson, Gabriela Benaroch, Magdiel Sanchez, Donato Sasso, Mark Scott, Debraleen Shoemaker, Jaime Sklawer, Kim Staples
FL	GLADES	Donna Caruso, Christopher Boyd
FL	HENDRY	Steven Belcher
FL	LEE	Donna Caruso
FL	MARTIN	Dennis Farrar
FL	MIAMI-DADE	David Walter
FL	MONROE	Philip Miani
FL	OKEECHOBEE	Linda Tewksbury
FL	PALM BEACH	Iris Kozak
FL	SAINT LUCIE	Mark Scott

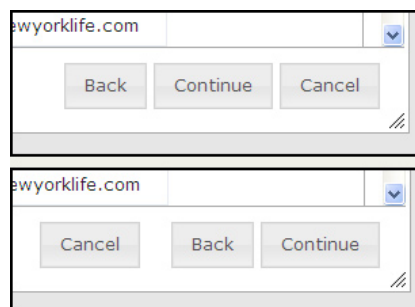
It would be suggested to change the checkbox on the county list screen to another input method such as an image, button or toggle to achieve the same result. Additionally the button would be better named “Assignment Wizard” to indicate its true function.



Once inside the Assignment wizard the user has the option to switch between zip codes and counties. This interaction is non-standard, and may lead to selection errors.

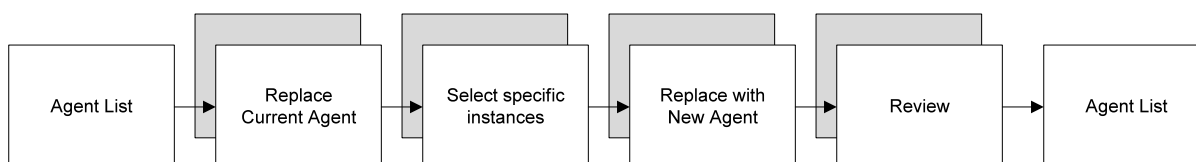
If this function was core to infrequent use it would be necessary to redevelop the function. This however is a “power user” function, allowing users a large amount of flexibility. Issues resulting from the use of this function are presented on a confirmation screen which should be sufficient to help correct most errors.

Button placement within the wizard however should be modified to avoid unintended user action by placing the cancel button to the left of the back and continue, with additional space between them as indicated bottom right.



Replace Agent

The replace agent function is an advanced function that allows the user to perform many actions within a single wizard. While the process is relatively straight forward, there is some thinking necessary to overlay the right agent. As a result, the process is error prone. A suggestion to help alleviate the



ambiguity of where you are starting in the process is to use terms like “Current Agent” and “New Agent” modifying current commentary... “Select the **Current** Agent(s) whom you like to Replace”.

There are a couple of data issues uncovered through the process. In the step of selecting a Current Agent the list contains all names, and does not eliminate Agents that are not assigned, resulting in an “unassigned” message. It would be better to remove Agents from the “current” list that do not meet the criteria of reassignment.

Similarly, if a county or zip code is excluded the relationship is shown but cannot be selected because of its current status. In the instance to the right Collier County was the only relationship, leaving the user with no way to move forward.

Replace Agents

Select one or more County where you would like to replace.

County

☐	State	County	Assigned Agent(s)
☐	FL	COLLIER	David Allen

Redesign

Below is a re-imagining of the look and feel and layout of the county screen

The screenshot shows the 'CLT ALLOCATOR' web application. At the top, there is a header with the 'NEW YORK LIFE' logo, the title 'CLT ALLOCATOR', a 'Log Off' button, and a navigation bar with links for 'HOME', 'MANAGE AGENTS', 'LEADS', and 'REPORTS'. Below the navigation bar, there is a 'Leads | Counties' section with an 'Assignment Wizard' button. The main content is a table with columns for 'State', 'opt-out', 'County', 'Assigned Agents', 'Internet Leads', 'Orphan Leads', 'Other Leads', and 'Zips'. The table lists 12 Florida counties, each with an assigned agent and a 'Zips' count (e.g., 10/24, 0/20, 0/6, 23/23, 9/9, 0/32, 0/32, 33/33, 41/56, 45/46). The 'opt-out' column contains toggle switches, and the 'Assigned Agents' column lists the names of the agents assigned to each county.

State	opt-out	County	Assigned Agents	Internet Leads	Orphan Leads	Other Leads	Zips
FL	☒	BROWARD	Gabriela Benarroch			edit	10/24
FL	☒	COLLIER	Jeffrey Galati , Nancy Anderson , Jennifer Bierman-Salter , David Allen			edit	0/20
FL	☐	GLADES	Donna Caruso				0/6
FL	☒	HENDRY	Steven Belcher			edit	23/23
FL	☒	LEE	Donna Caruso			edit	9/9
FL	☒	MARTIN	Dennis Farrar			edit	0/32
FL	☒	MIAMI-DADE	David Walter			edit	0/32
FL	☒	MONROE	Phillip Miani			edit	33/33
FL	☒	OKEECHOBEE	Linda Tewksbury			edit	41/56
FL	☒	PALM BEACH	Iris Kozak			edit	45/46

- **Refined Look and feel**
Lighter, more polished with elements located consistent with other NYL Applications
- **Usability Enhancements**
Application elements aligned to improve usability. Table on/off color scheme makes reading easier.
- **Tab Layout**
Tab layout reflects site hierarchy with “Home” included
- **Link Placement**
Action links closer to point of action
- **Next Level Content**
Zip code links reveal information contained at sub county level
- **Future Features**
Sub-tab structure to support other types of leads allows users to remain on the same screen and view leads in an easy to follow format
- **Opt-out toggle**
Visually distinct on/off switch to avoid mis-identification of form elements.