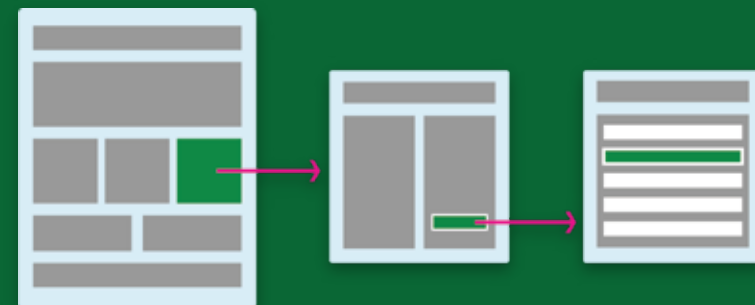




Luis Barriga
Experience Design

Digital Project Presentation

Voya Financial: Plan Health

An enhancement to a dashboard

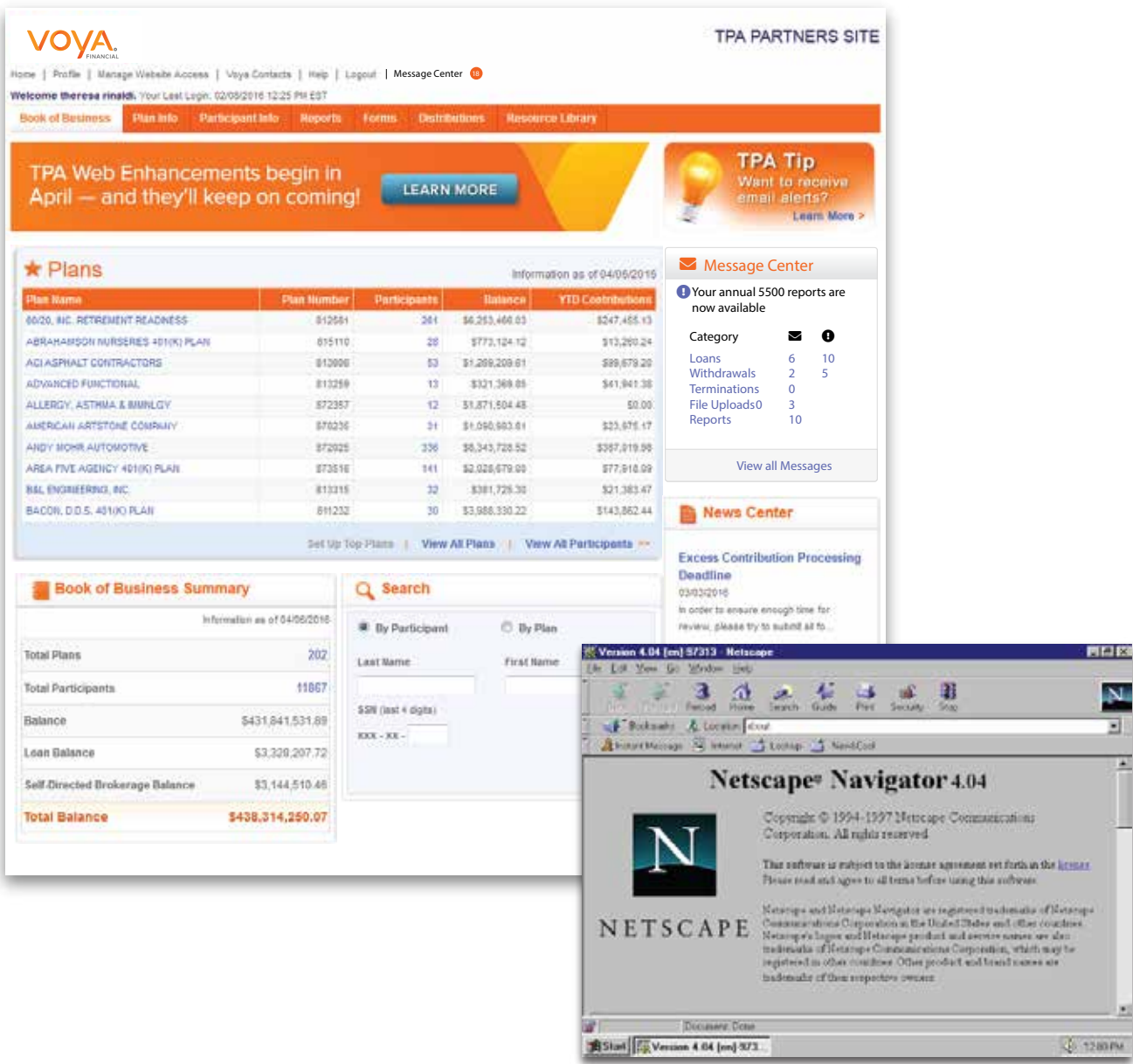
Clients (401k providers) want to understand the health of their retirement plans across all their employees with simple data visualization.

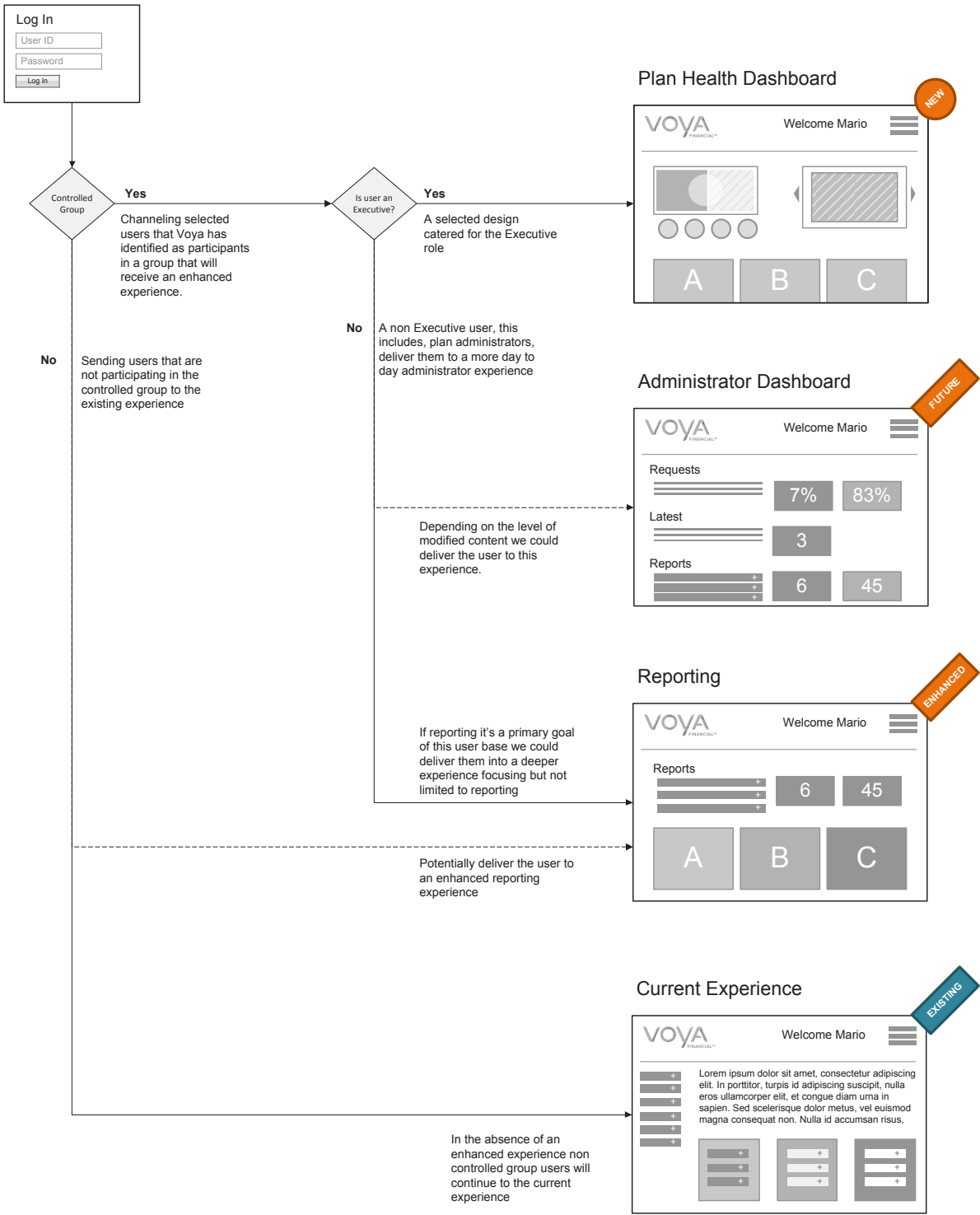
The challenges

Working with a rigid platform with an aging architecture pulling data from multiple sources that is entangled with several redundancies that are clearly impacting the user experience.

Working closely with our technology partners we carefully dissected the current infrastructure and started to reorganize the data.

Pushed against tough deadlines, limited resources and tight budgets. We couldn't spend much time in a utopian approach - MVP it is!





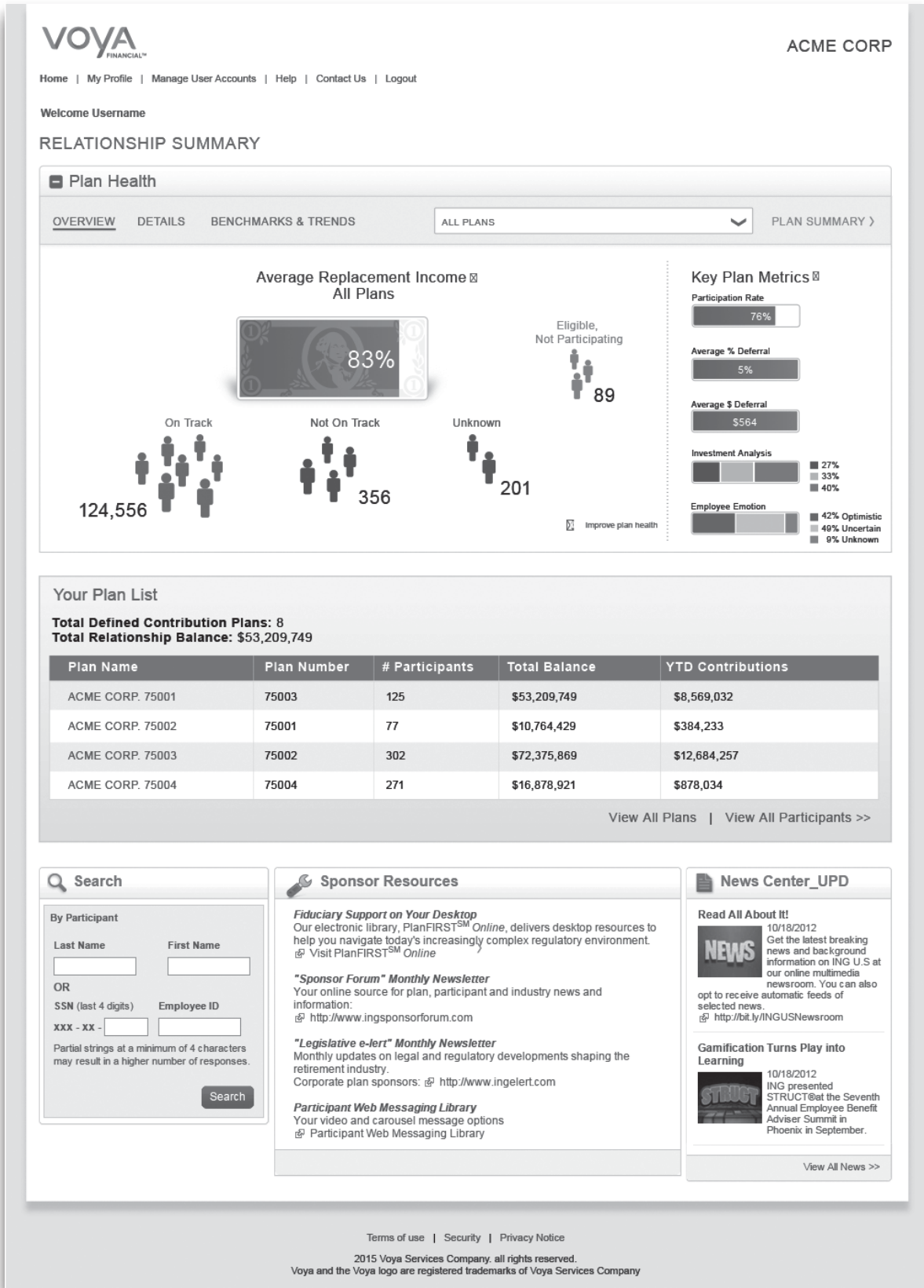
Diving in

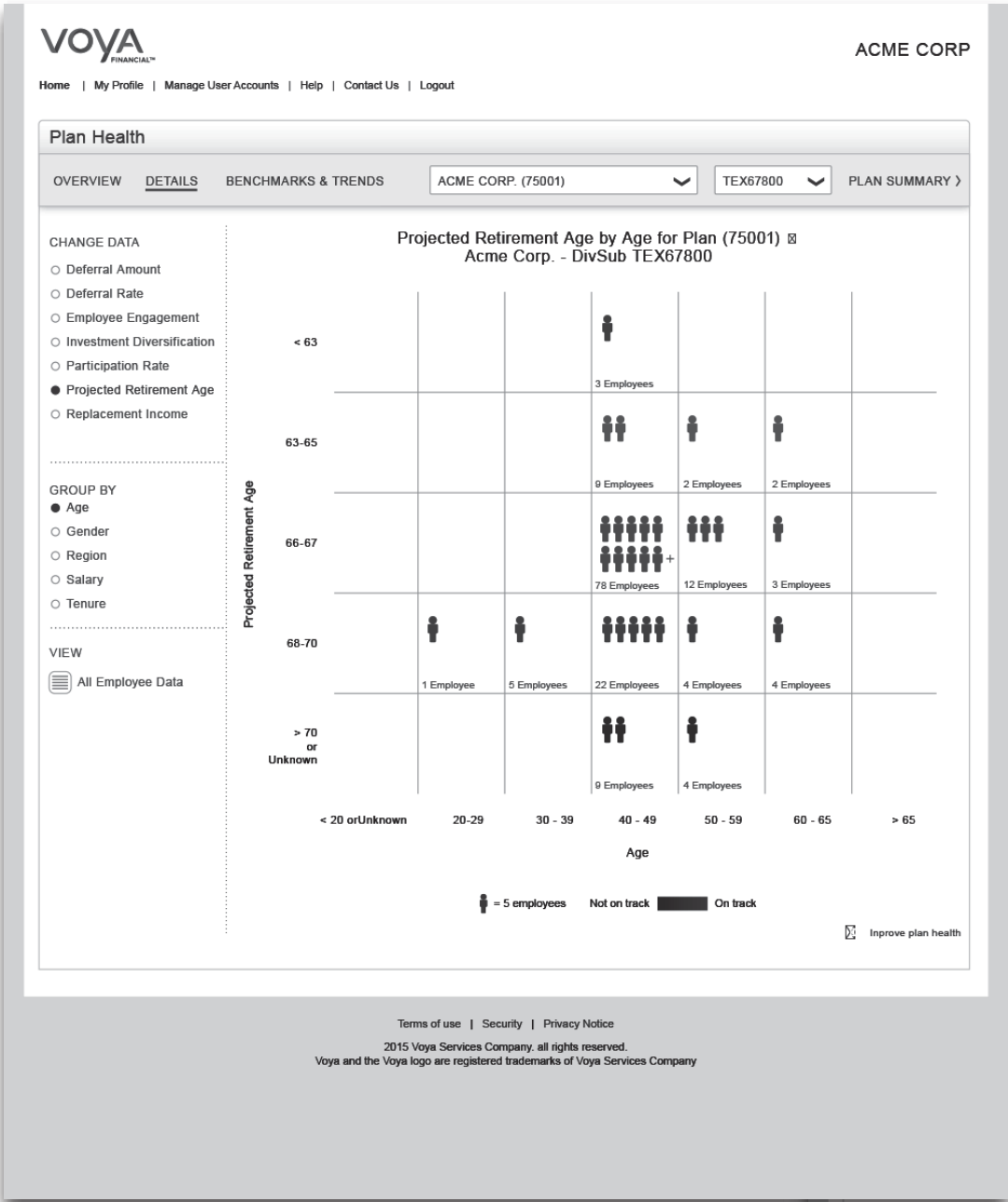
Researching and discovering the nuances of the infrastructure was very enlightening. Armed with this new found knowledge we start mapping out the future (within the limits)

- Journey maps
- Taxonomy buildouts
- Sketches and wire-frames
- Visual comps and mock-ups
- Usability research
- Style guide updates
- Success measurement and metrics

Wire-framing

Identified and utilized the top portion of the dashboard to display the plan health summary visualization. The intent is to provide the user a quick glance of their plan’s health as soon as they log in, with the ability to sort and filter in place and dive deeper if needed.





GROUP BY

●

Age

○

Gender

○

Region

○

○

VIEW

All Employee Data

Projected Retirement Age by Age for Plan (75001)

Acme Corp. - DivSub TEX67800

Projected Retirement Age

< 63

63-65

66-67

68-70

> 70 or Unknown

< 20 or Unknown

20-29

30 - 39

40 - 49

50 - 59

60 - 65

> 65

3 Employees

9 Employees

2 Employees

2 Employees

78 Employees

12 Employees

3 Employees

1 Employee

5 Employees

22 Employees

4 Employees

4 Employees

9 Employees

4 Employees

5 employees

Not on track

On track

Inprove plan health

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Plan Details

Continue with the data visualization, the user will be able to navigate the details of any or all plans.

User Accounts

Help

Contact Us

Logout

BENCHMARKS & TRENDS

ACME CORP. (75001)

TEX67800

PLAN SUMMARY >

Replacement Income For Plan (75001)

ACME CORP. - DivSub TEX67800

Projected Retirement Age

4/14

5/14

6/14

7/14

8/14

9/14

10/14

11/14

12/14

1/15

2/15

3/15

4/15

Past Year

■

My Plan

—

National Average

—

Voya Plans My Size Average

—

National Average

Inprove plan health

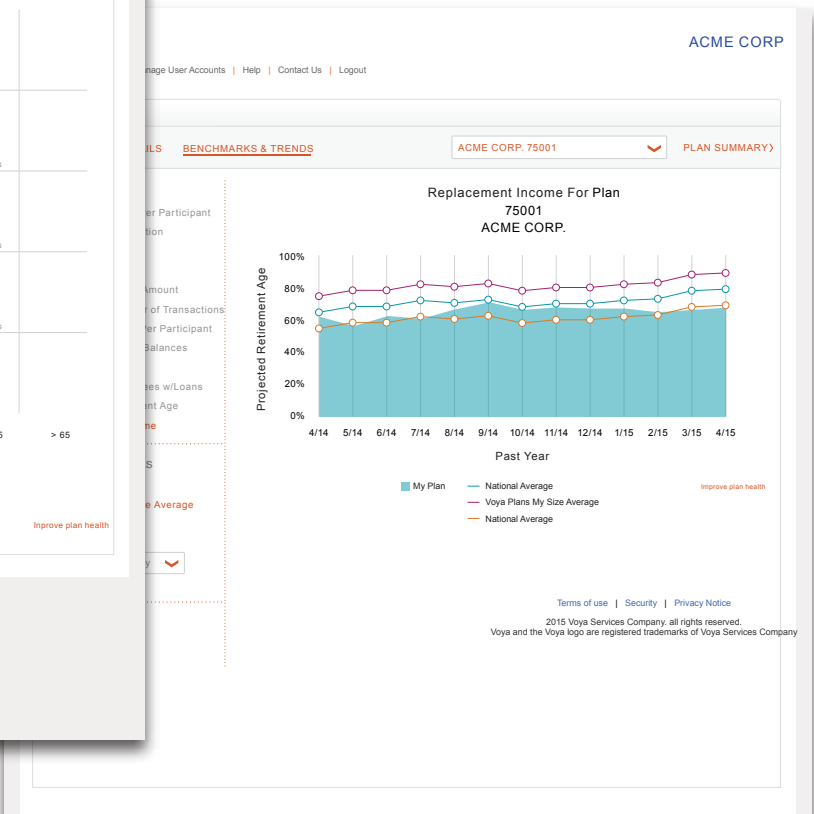
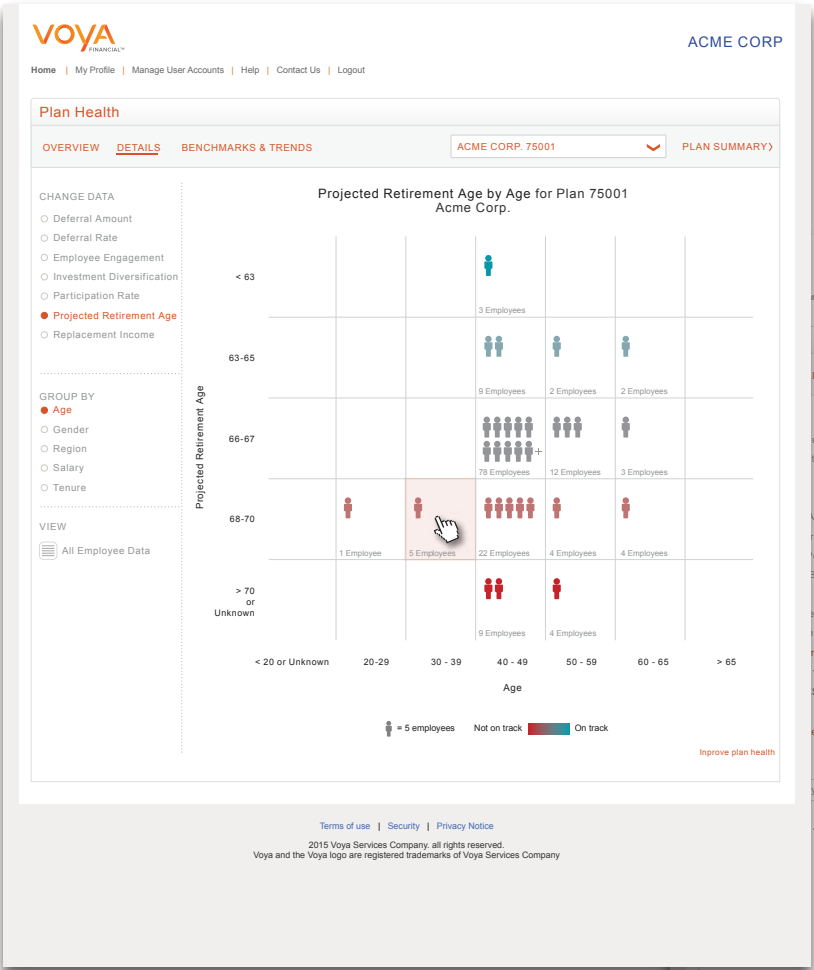
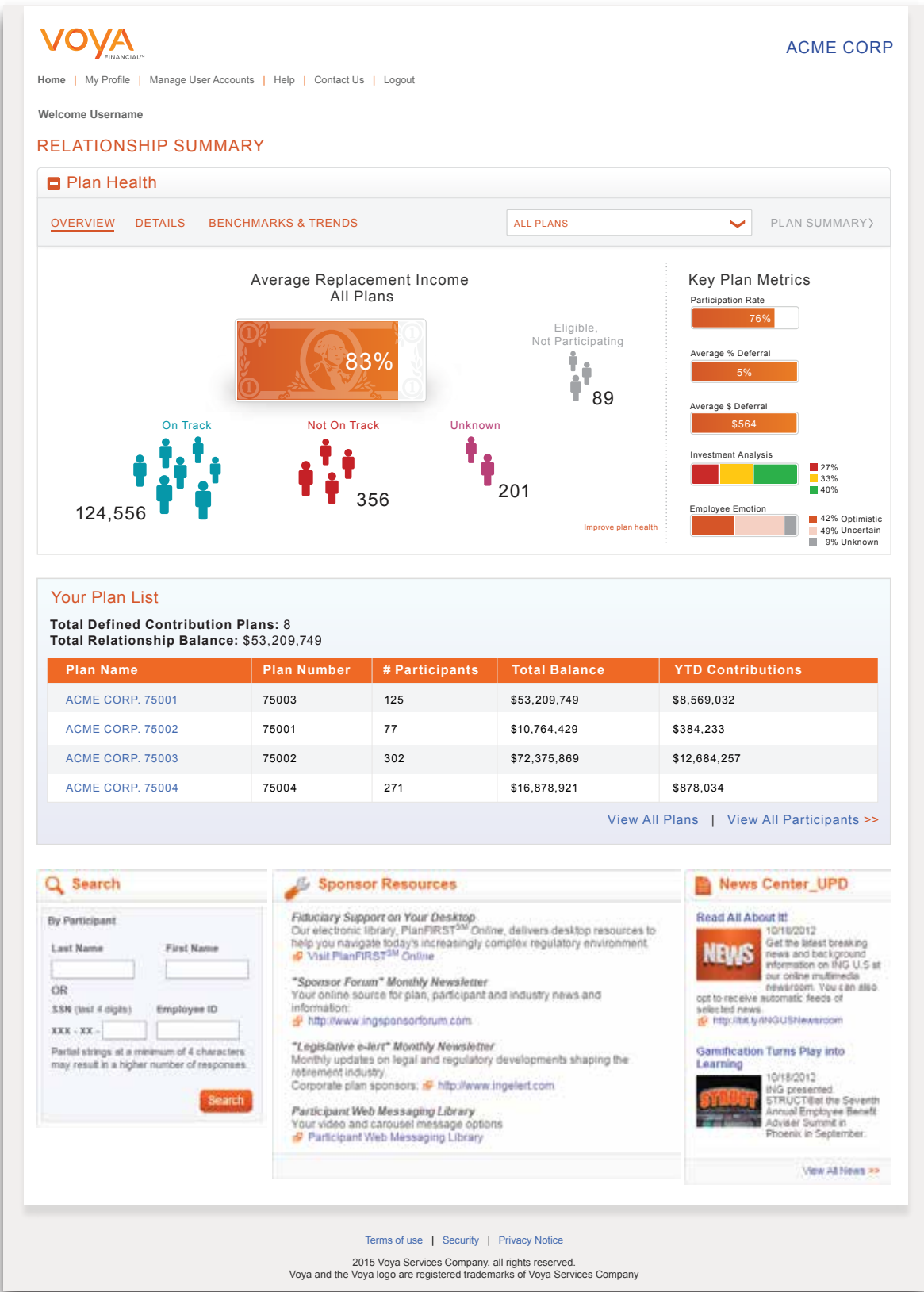
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Visual Direction

The visual styles of the application will need to fit the current styles and not look out of place. With some room for modernization, the app looks and feels like it belongs but it starts a new direction on the design system where the rest of the dashboard will move to in future iterations.



Validating the design direction with actual users



- 1 What is the orange dollar at the top telling you?**

87% of participants responded that the number in the dollar bill was the representation of a Replacement income average score, **6.25% of participants** said it was a score but did not know what it was of **6.25% of participants** thought the score meant how close they were to achieving retirement.

Severity: Low

Recommendation

Place a help icon that the user can interact with and find a quick description of what they are looking at
 - 2 Can you tell me which plan or plans you are looking at?**

Success: All participants understood that they were looking at an All Plan Health Summary view
 - 3 If you wanted to see only Plan Acme Corp. 75001, how would you do that?**

81.5% of participants attempted to navigate to the requested plan by selecting a plan from the plan list, out of those users 93.75% said that they could also navigate via the dropdown list of plans located at the top of the Plan Health widget, 18.75% of users went directly to the dropdown list of plans, 66.6% of this group said that they would also expect the plan list below to navigate to the same location.

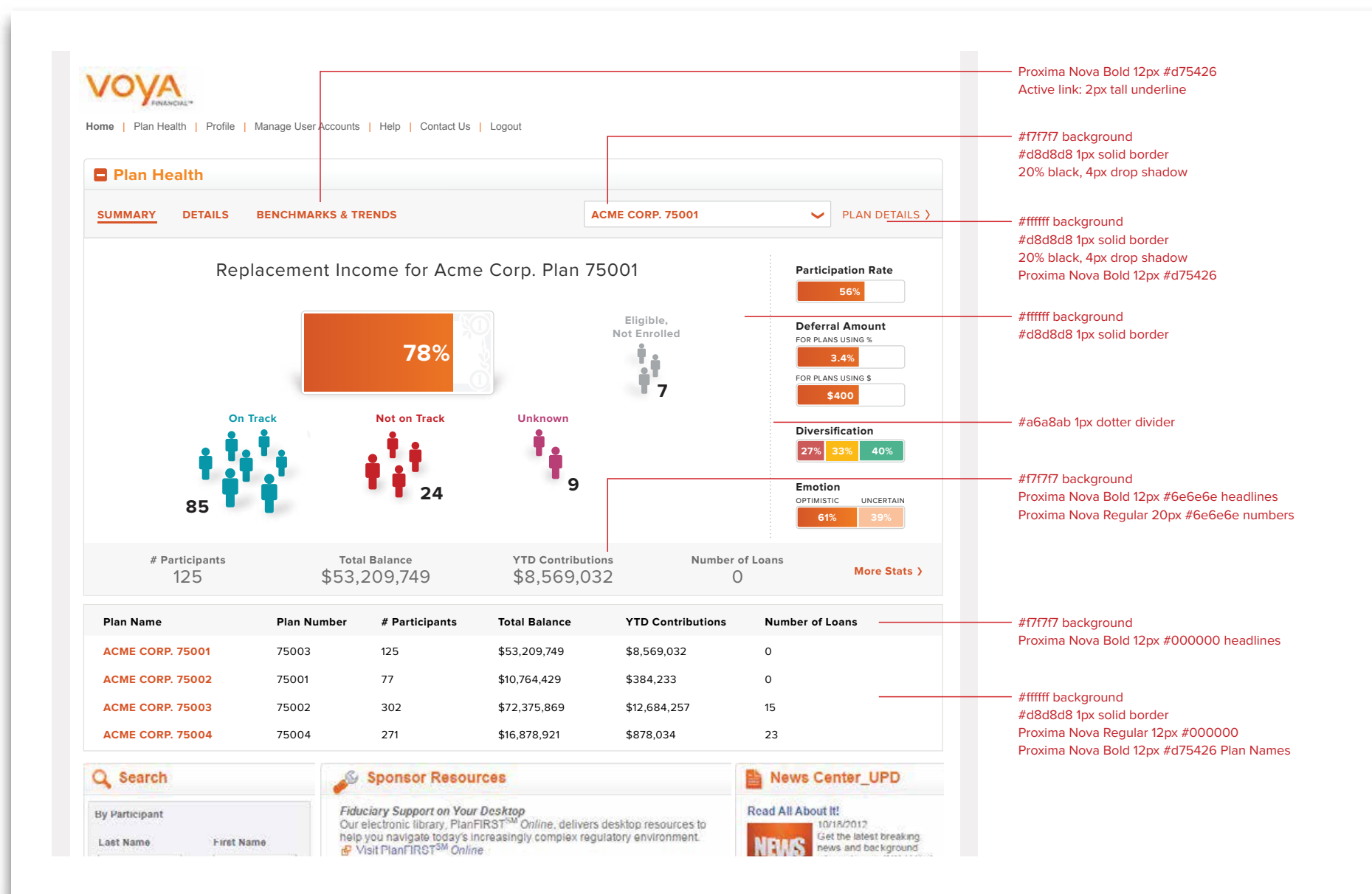
Severity: Low

Recommendation

Increase the "Plan Health" title font size and add a title to the Plan list below, this will create significant separation

Style Guide

Prepared a style guide to help the technology team with the implementation of the design and the additions to the pattern library.



Thank You!