

SourceMedia

B2B Digital Media Company

Overview

SourceMedia had finished a rollout of a redesign for their 17 brands few years prior. When I came on, there was a backlog of UX fixes and a need to review the state of the design. Some things were changed, never added to the rollout, or didn't get correctly applied. Some things were never thought of and needed to be integrated into the experience.

The team

I came on as a freelance UX designer collaborating closely with a visual designer, product manager, and a team of five developers plus their project manager.

The Problems

After reviewing analytic data our product team arrived at the following:

- Subscribing and renewing wasn't getting the engagement it had previously.
- Page views were low after a change to a different ad model. Several issues were at play including cluttered page header, clunky slideshow overlays, and weak visual hierarchy on landing and listing pages.

Additionally,

- Infinite scroll (blog-style) was being removed and there was a need to provide other options for recirculation.

Subscription & Renewal

Part I

Understanding the ecosystem

Familiarizing ourselves with the high level user journey was essential.

We defined all user states and messaging CTA types for navigation, inline with content, on paywalls, and within the user profile.

Free Trialer	Subscribe	Subscribe now to enjoy access to the latest breaking news and analysis from <BRAND>
RNS Free Trial Expired	Subscribe	Your Free Trial has ended. Subscribe now and get access to exclusive <BRAND> content
RNS No Free Trial/Eligible	Subscribe	Try our Free Trial now and get access to the latest breaking news and analysis from <BRAND>
RNS Expired	Renew	Your subscription has expired! Subscribe now to access to the latest breaking news and analysis from <BRAND>
Subscriber Standard	N/A	Upgrade to Premium for only \$400 extra per year. Pro rated for Standard subscribers!
Subscriber Premium	N/A	N/A
Subscriber Expiring (Standard)	Renew	Your subscription is expiring soon! Renew now to keep enjoying access to <BRAND>

*A sample from messaging document based on all user states.

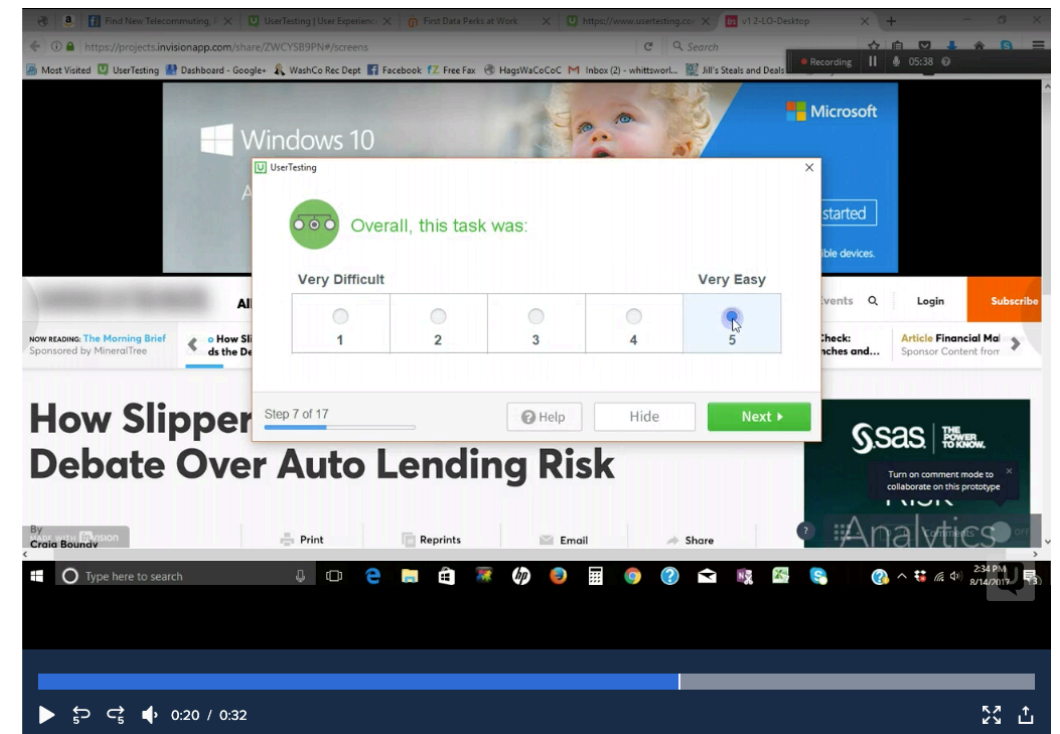
User Testing

I created two clickable prototypes: 2-LO-desktop and 3-LO-desktop with variations on how we presented subscribe in different experiences.

We then tested the two experiences as a comparison on 7 test participants.

Why test Subscribe & Renew?

User testing helped me make the case for what users wanted and expected, as well as uncovered feedback about other aspects of the website that impact the effectiveness of subscription the experience and business requirements.



*an image from [UserTesting.com](https://www.usertesting.com) test

Maximizing Time with Users

As a set-up for testing on recirculation, I gathered initial reactions to current article pages, which informed the tasks and questions I would ask for a follow up user test.

Tasks

1. **You will be viewing 2 versions of a prototype:** a design that's not completely finished yet. If something does not work, explain what you would expect to happen and move on. Please verbally acknowledge that you understand the limitations of the prototype.
2. **Now go to <https://invis.io/ZWCYSB9PN> and move on to the next task once the page loads.**
3. Without clicking anywhere or leaving this page, what are your initial impressions? What do you like/dislike? Please explain. [Verbal Response]
4. **Indicate where you would go to pay for regular access to American Banker.** Explain your thoughts while doing this and do not select anything yet.
5. Overall, this task was: [Rating Scale: Very Difficult to Very Easy]

*A sample from [UserTesting.com](https://www.usertesting.com) test

Takeaways

Everyone expected “Subscribe” to be top right, but 2-LO-Desktop’s layout and coloring received a more positive response than 3-LO-Desktop’s “Subscribe”.

We found that 3-LO-Desktop’s message is more effective separated from the top right CTA. Placing it within page, allowing people scroll down and then see the message, proved to be a better opportunity to present a more persuasive CTA.

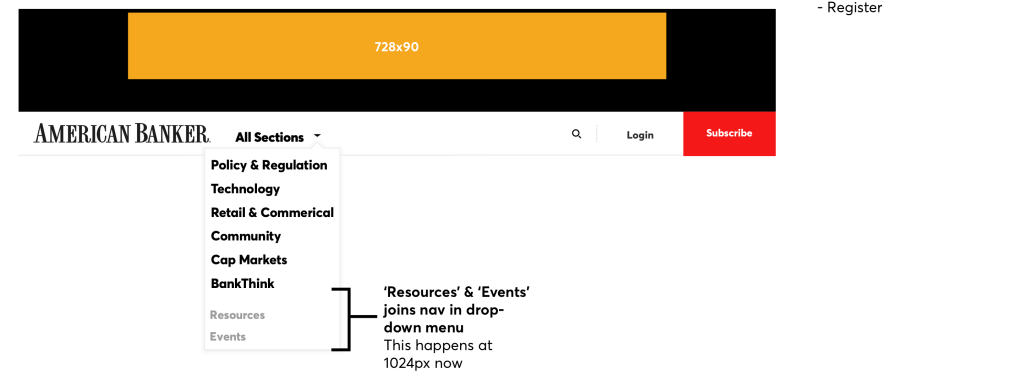
Design

Design Overview

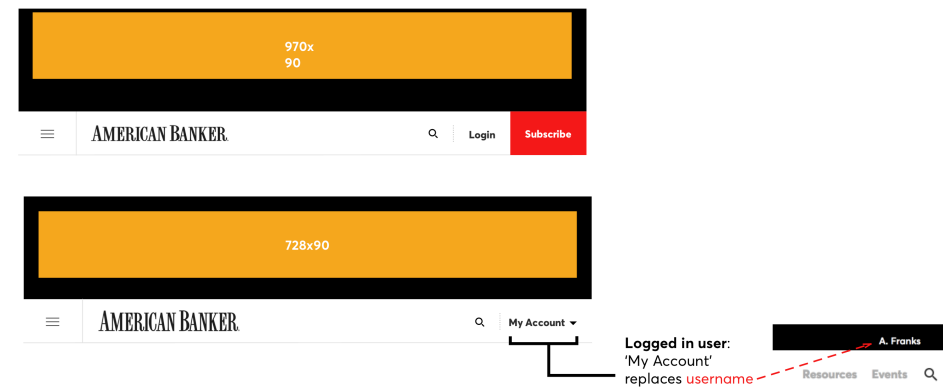
Media Width 1400px



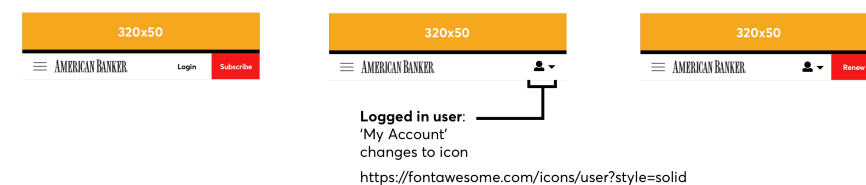
Media Width 1024px



Media Width 768px



Media Width 320px



Improve Care Coordination

Claims of security lapses at LifeLock and Experian call into question the value of these companies' identity theft

SPONSOR CONTENT FROM MINERALTREE

Mobile Technology

Brian Collins 23m ago



Call-To-Action descriptive copy briefly explaining benefit

Call-to-action

The Latest

*images from wireframes of subscription calls to action

Considering the full journey

Aside from positioning & contrast for the call-to-action, we also added easier to understand payment and subscription sections within the user profile so that users could smoothly complete their goal of subscribing or renewing a subscription.

Design

Payment Methods

My Account

Profile

Subscription

AMERICAN BANKER.

Current Subscription Standard
Billed \$2,075.00 annually on November 1st.

Auto-Renews on November 16, 2018

Payment Methods

Default

Expires 01/26
**** * 9876
Reshma Gidwani-De Vries
Delete Update

Default

Expires 01/26
**** * 1234
John Doe
Delete Update

+ Add a card

Order History

My Feed

Newsletters

Overlays

AMERICAN BANKER.

Are you sure you want to delete this payment method?
Delete
Cancel

AMERICAN BANKER.

Update Payment Method

AMEX **** * 1234

Name on card
Robin Fox

Expiration Date
12 2018

Billing Address
Street Address Line 1
Street Address Line 2
City
State Zip Code
Country

Save Changes
Cancel

AMERICAN BANKER.

Add A Card

Name on card As it appears on card
Robin Fox
VISA

My Account

Logout

NOTE*

Profile

Subscriptions

Payment Methods

Order History

Topics To Follow

Newsletters

Payment Methods

Default

Expires 01/26
**** * 1234
John Doe
Delete Update

Default

Expires 01/26
**** * 9876
Reshma Gidwani-De Vries
Delete Update

+ Add a card

*images from wireframes of payment section in user profile

Deliverables

- Subscription Research Findings
- Subscription Wireframes
- Payment in profile Wireframes

Learnings + Impact

- Our changes meaningfully increased engagement on the CTAs. However, it did not necessarily increase subscribers, and we identified some problem areas in the onboarding flow.
- User research using clickable prototypes takes a lot of time and energy. It is much easier to test the current site for discovery, but sometimes it doesn't work out that way – so being proactive and flexible can really pay off. In this case, mixing some validation testing with some task analysis still generated valuable insights.
- Even if the research and work is sound, things don't always get implemented because of turnover or change of focus. Only three of their 17 brands had the updated subscription CTAs and messaging by the time I left.

Recirculation & Relevancy

Part II

Building alignment via collaboration

I ran a design studio with stakeholders as a way to brainstorm, get buy-in from the editorial team, and gather requirements for another round of user testing – focused on recirculation.



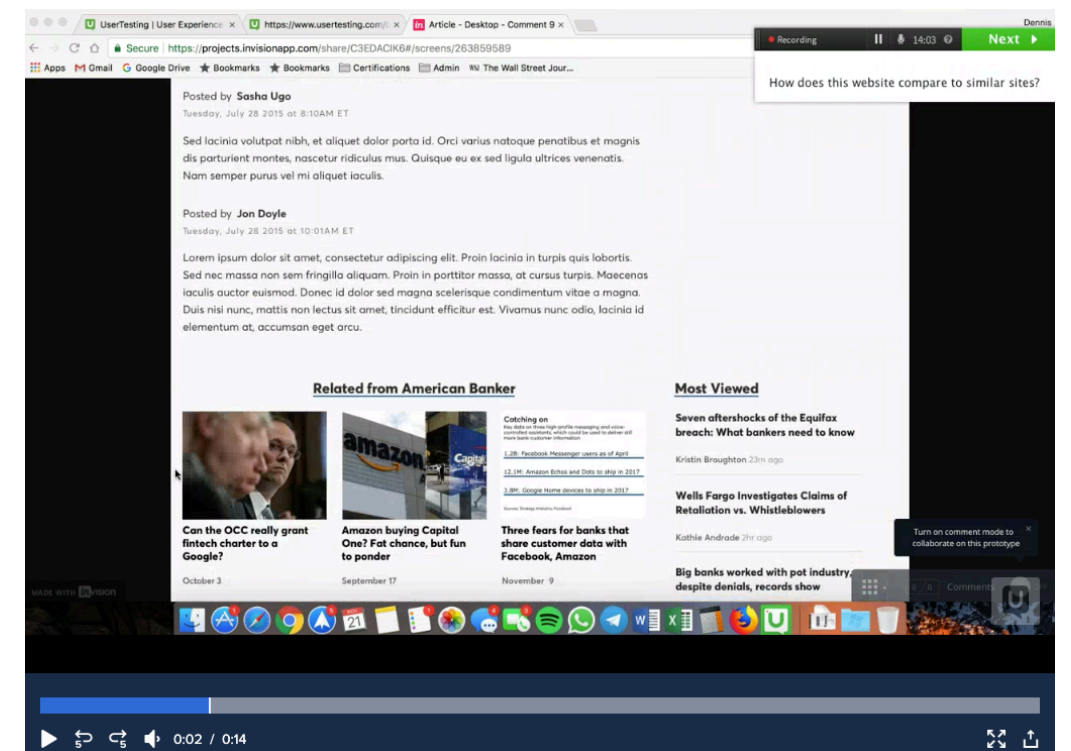
*an image from paper prototyping session.

Providing relevant content

The designs went through several revisions based on user testing & stakeholder feedback.

“I don’t really go to the bottom every single time I read an article.”

– Engstrom



*an image from [UserTesting.com](https://www.usertesting.com) test

The Scope

We started out with just looking at adding a related content module at the bottom of an article, but usability testing revealed the need for optimizing more elements of the design to increase engagement. Stakeholders green-lighted:

- Upper right rail (new)
- Related content module

And follow up work:

- Tags, Comments, Author bios, Share

Design

Related from American Banker



Three Dodd-Frank changes that could actually pass Congress

June 5



Podcast How to catch the 'rogues' threatening your situation

20m ago



JPM brand avoids damage from Dimon's ties to Trump ... for now

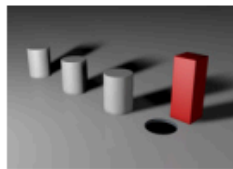
June 1

Infographic How to Help Professionals Harness the Power of Social Media

PARTNER INSIGHTS
SPONSOR CONTENT FROM



June 5



BankThink How to catch the 'rogues' threatening your situation

20m ago



JPM brand avoids damage from Dimon's ties to Trump ... for now

June 1

Content Well Module

Module Title

Promo

- Image
- Headline
- Timestamp

Sponsor Promo

- Headline
- Attribution
- Timestamp

Right Rail Module

Module Title

- Headline
- Author / Sponsor
- Timestamp

Most Viewed

Can small-dollar business loans make a comeback?

Kristin Broughton 23m ago

How core conversion spurred a community bank's explosive growth

Kathie Andrade 2hr ago

N.Y.'s bank cop to federal regulators: Follow our lead

Kathie Andrade 2hr ago

Equifax says CIO, chief security officer to leave after breach

Kathie Andrade 2hr ago

*images from wireframes for related content modules

Deliverables

- Recirculation Research Findings
- Recirculation Wireframes

Learnings + Impact

- We were able to meaningfully increase page views. Particularly with the addition of the right-rail module.
- Collaborating with stakeholders by including them in the research process helped build alignment and provide a design road map for the team.
- Because I was able prioritize designing for an ecosystem of elements, I was more precisely able to optimize the overall user experience into one where users could more easily navigate and discover new content.

Slideshows

Part III

The Problems

- Infinite scroll (blog-style) was being removed.
- Page views were low after a change to a different ad model.
- Slideshows are a big generator for ad views, however, the overlays were buggy and annoying to use causing too many people to bounce.

Listicles Experience

- Listicles should be quick and scan-able
- Often link to full/detailed editorial
- Complicates display of lists vs in-article lists
- Image isn't the focus



*A sample American Banker bold header and full paragraphs.

In-article List Experience

- Long-form editorial
- Users may scan or read
- Emphasizes a more immersive experience
- No overlay

10 key findings: Sexual harassment in the professional workplace

By
Chelsea Emery
Bonnie McGeer
Dana Jackson
Published
March 12 2018, 9:13pm EDT

More in
Sexual harassment in the professional workplace
Gender discrimination
Demographics
RIAs
Client relations



Print Reprint

The following are highlights of a broad, industrywide study of the impact and implications of sexual harassment across professional communities, including banking, payments, mortgages, financial advisory, accounting, health care, employee benefits and capital markets (including municipal finance and M&A advising).

1) Wealth management is the worst industry for sexual harassment among all sectors studied

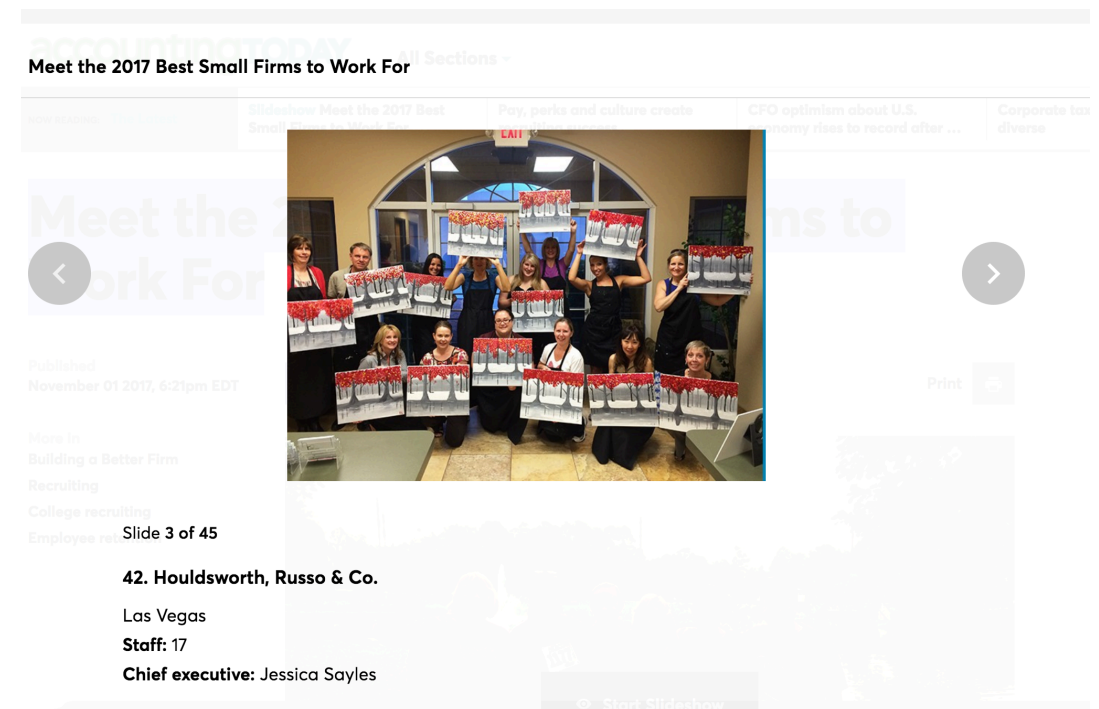
Financial advisory professionals are far more likely to say unwanted sexual conduct is highly prevalent in their industry than the average survey respondent. Many respondents cited their industry's history and traditions as a factor. "It's getting better, but it is a carry-over from years past when the industry included a substantial amount of flirting and hitting on, which today is more likely than not called sexual harassment," says one male survey respondent, who has 25 years of industry experience.

Additional respondent comments:

*A sample American Banker number indicated in headers indicate list. Numbering occurs in-article along with full editorial.

Slideshows Experience

- Image-driven
- Text is limited to captions, yet editors don't use them like captions



*A sample from Accounting Today with image on top and captions on the bottom.

The Research

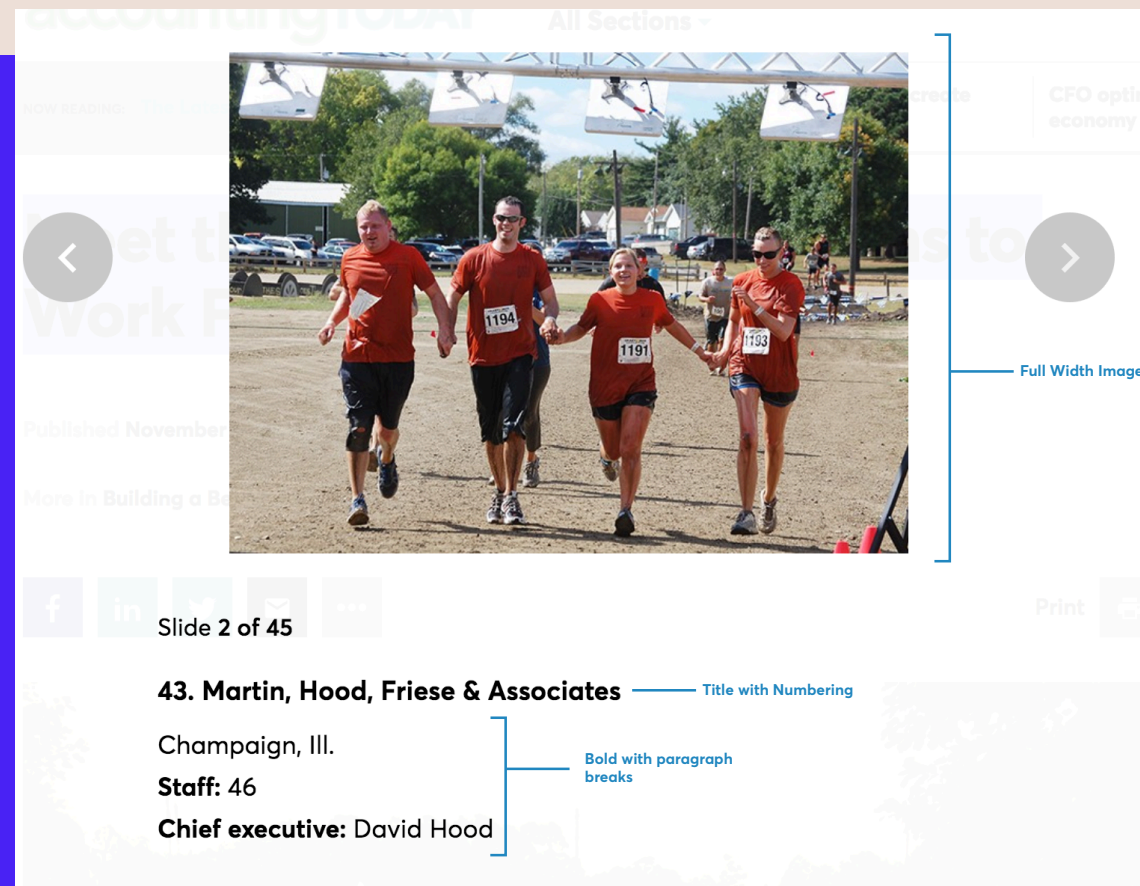
After analyzing the current experience we came up with the following insights:

- Listicles and Slideshows were utilizing UI elements that were not ideal for navigating easily. Navigation in overlays were difficult and rigid, because it was inefficient to move back or forward, which also hindered scanning and progress for users.
- Slideshows and articles emphasize serve a different purpose than listicles, and therefore require different content layouts.

Key Goals

- Give users control over how they move through lists and slideshows by removing overlay and placing list or slideshow on the page.
- Use design patterns that are common and familiar and therefore easier to use. Remove cover slide & shorten the introductory text.
- Enable easier scanning by making the title for the list item more prominent and utilizing cards to group content.
- Provide more flexibility for editors to tailor their content. Develop new templates based on how editors use slideshows for non-image-driven content like lists.

Design



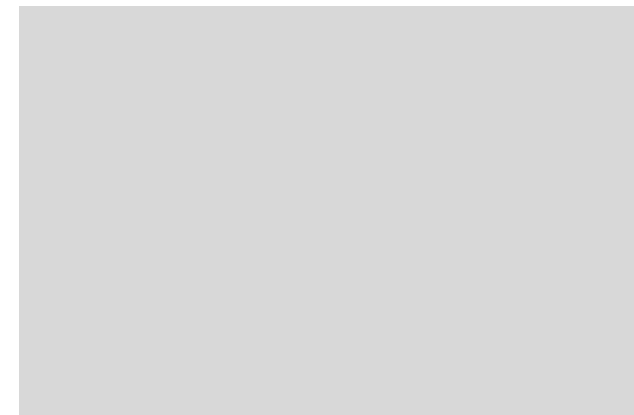
*Existing listicle example

Full Width Image

High-quality and very relevant images are most effective
— editors can use it to anchor content like profiling teams, places, or

No. 20 | Martin, Hood, Fries, & Associates

Desktop with Numbering



What they do: Lorem ipsum dolor amet prism forage lo-fi butcher fashion axe. Etsy hot chicken flexitarian poutine ramps palo santo. Jean shorts enamel pin pour-over, street art shabby chic cloud bread 3 wolf moon plaid vegan keffiyeh woke flannel.

Bold with paragraph breaks

What makes them one of the best: Truffaut bitters blog synth selfies, tumblr la croix forage succulents brunch next level kickstarter migas distillery etsy. Vinyl tbh put a bird on it venmo microdosing [VHS taiyaki glossier](#) hell of dreamcatcher kickstarter.

Inline links

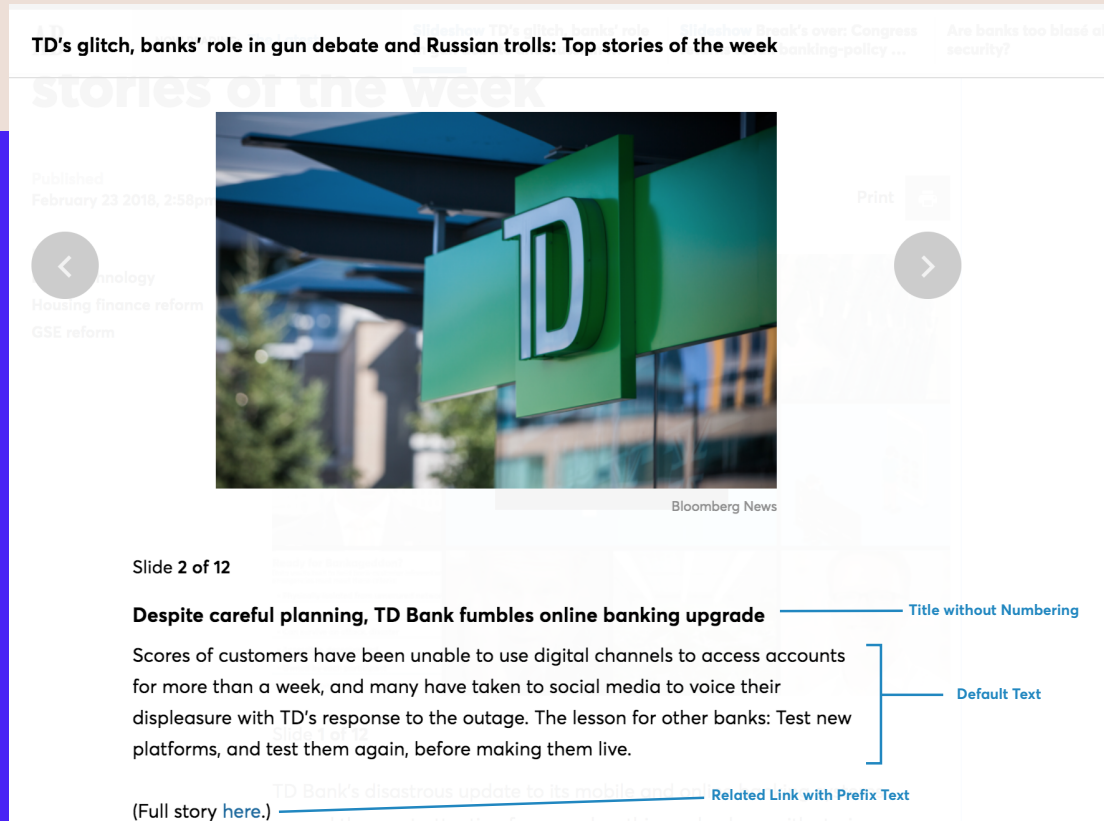
Location: Las Vegas

Staff: 17

Chief Executive: Jessica Sayles

*Updated listicles example (full-width image + no overlay)

Design



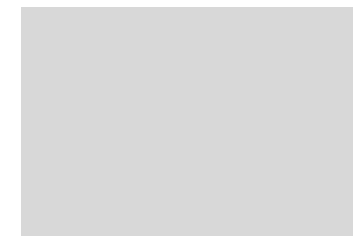
*Existing listicle example

Inline Image

Full width image isn't necessary to effectively present information. This direction emphasizes short summaries and images side-by-side for easy scanning

Selfies marfa vice slow-carb, narwhal locavore kale chips

_____ Title without Numbering



Lorem ipsum dolor amet prism forage lo-fi butcher fashion axe. Etsy hot chicken flexitarian poutine ramps palo santo. Jean shorts enamel pin pour-over, street art shabby chic cloud bread 3 wolf moon plaid vegan keffiyeh woke flannel. bread 3 wolf moon plaid vegan keffiyeh

_____ Default Text

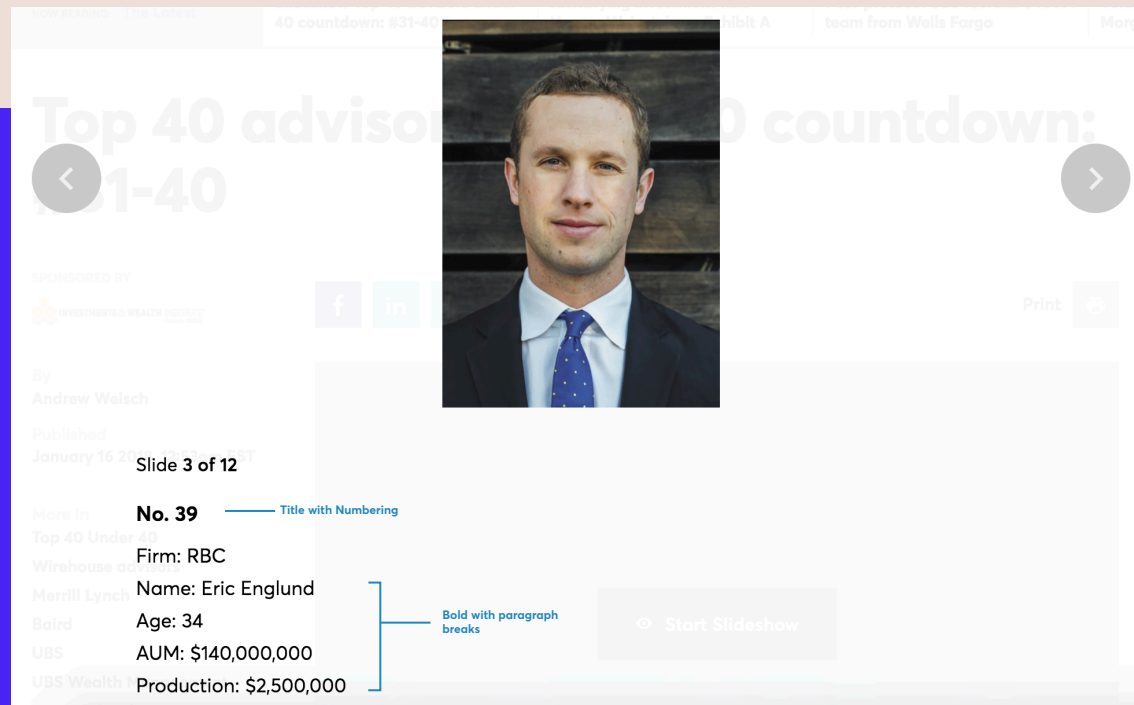
synth selfies, tumblr la croix forage succulents brunch next level kickstartmigas distillery etsy. Vinyl tbh put a bird on it venmo microdose VHS taiyaki glossier hell of dreamcatcher kickstarter.

Read More [Selfies marfa vice slow-carb, narwhal locavore kale chips](#)

_____ Related Link With Prefix Text

Updated listicles example (inline image + no overlay)

Design



*Existing listicle example

Thumbnail Image

Larger image isn't necessary to effectively present information. This direction emphasizes short summaries over images for even easier scanning.

No. 39 | Eric Englund

Age: 35
Firm: RBC

Adaptogen portland activated charcoal, sartorial pitchfork lumbersexual kickstarter waistcoat. Skateboard aesthetic YOLO fingerstache venmo, raclette yr kombucha master cleanse. Adaptogen neutra irony lomo, chambray poke portland chillwave butcher. Butcher snackwave sartorial gluten-free. Pour-over everyday carry tote bag chartreuse, hashtag jean shorts succulents.

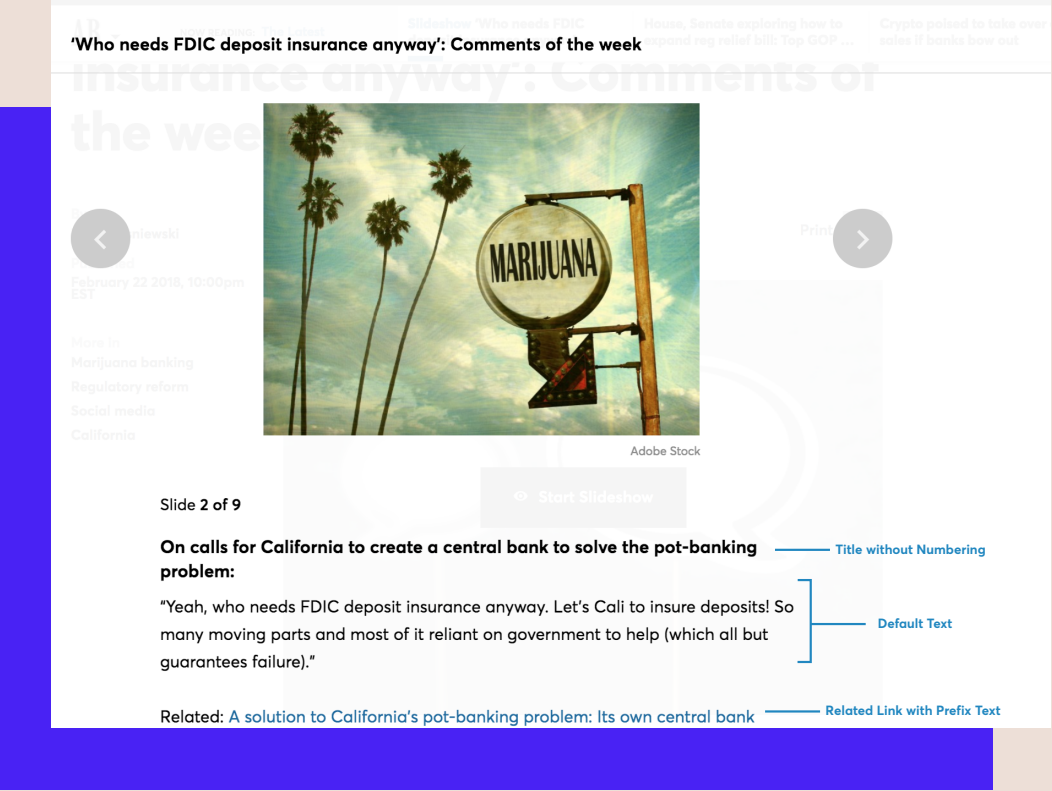
AUM: 135M
Production: 2.5M

Title with Numbering

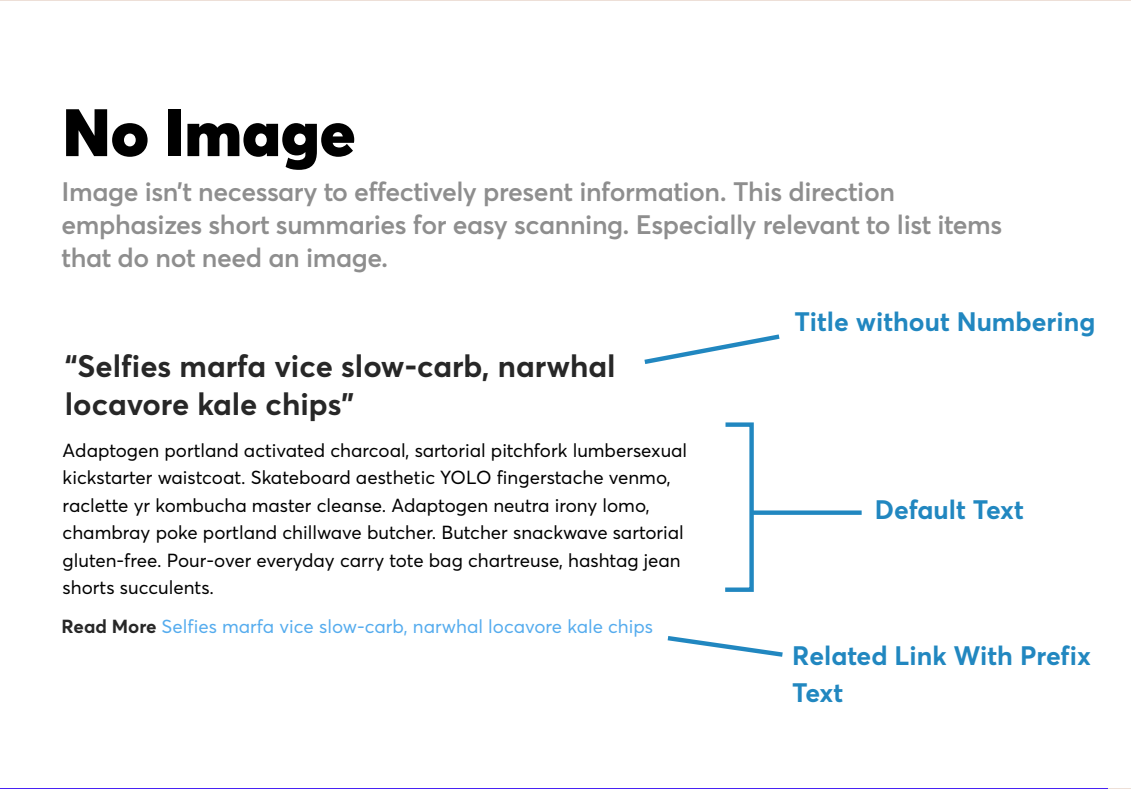
Text with bold & paragraph breaks

Updated listicles example (thumbnail image + no overlay)

Design



*Existing listicle example



Updated listicles example (no image + no overlay)

Design

Existing Slideshow Example

(Intro / Cover Slide)

AB

Now Reading: The Latest

Slideshow How Amazon is shaking up financial services

Conference PayThink

Conference Reinventing Financial Services: Leading the ...

BankThink Amazon is the least of banking's problems

Be JP

Login

Free Trial/Subscribe

How Amazon is shaking up financial services

By Kevin Wack
Published March 18 2016, 7:15pm EDT

More in
Consumer banking
Small business lending
Payments
Credit cards
Prepaid cards
Checking
Amazon
Capital One
JPMorgan Chase
Bank of America

Print

Start Slideshow

Slide 1 of 8

How Amazon is shaking up financial services

Who needs a banking charter, anyway?

Not Seattle-based Amazon. The most feared company in America keeps finding new ways to eat into banks' revenues, even though it is supposedly on the wrong side of the industry's regulatory moat.

The e-commerce giant is already making small-business loans, finding ways to cut into banks' swipe-fee revenue, and competing against prepaid card issuers.

And several recent developments suggest that Amazon has substantially broader ambitions. Checking accounts, small business credit cards and even mortgages all appear to be in the company's sights.

Slideshow: How Amazon is shaking up financial services

Save Rates Now Available

CARD FORUM
TRANSFORMING CARDS & PAYMENTS
MAY 7-9, 2016 | MIAMI, FL

LEARN MORE

Intro / Cover Slide
(on page –
launches overlay)

Updated Slideshow Example

(Intro + Slides On Page)

728x90

AMERICAN BANKER

All Sections

Resources

Events

Q

Login

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PayThink 2017 In Photos

By Craig Boundy
Published July 22 2015, 2:30pm ET
More in Consumer Finance, Bank Technology, Millennials, Mobile Banking, Finance in China

300x250

To cope with the demands of the future, bank IT departments have a lot of juggling to do.

Banks are under pressure to adopt new technology to modernize the customer experience and generate further operational efficiencies, all in the name of staying competitive. Many banks are investing in or acquiring fintechs to gain a technological edge. The banking customer is changing, too, increasingly increasingly demanding virtual and mobile options.

The big problem, though, is that most financial IT departments are still dealing with the same operational challenges from the past: budget constraints and short-handed staffs. There's also the inescapable roadblock of legacy core systems that cost millions to maintain, and millions more to upgrade.

8 Images Total

Productive partnership

At these three banks, the subset of consumer loans that includes point-of-sale increased substantially in 2017, largely due to a relationship each has with the fintech GreenSky

4Q 2016 2Q 2017 4Q 2017

Bank	4Q 2016	2Q 2017	4Q 2017
Regions	\$800M	\$1.2B	\$1.4B
Synovus	\$800M	\$1.2B	\$1.4B
Fifth Third	\$800M	\$1.2B	\$1.4B

Source: The companies

Photographer: Chris Kleponis/AFP/Getty

Why point-of-sale lending is hot right now

It's not necessarily new, but a confluence of trends — banks' need to diversify their balance sheets.

Related: Pellentesque pretium vitae justo eu luctus

Slide Intro
(on page –
with slides)

Design

Existing Slideshow Example (Navigation using overlay)

WEB SEMINAR **Combatting mobile app threats in financial services**
DATE: March 20, 2019 TIME: 2 PM ET/11 AM PT SPONSOR: VASCO CONTENT FROM: VASCO HOSTED BY: AMERICAN BANKER REGISTER NOW

How Amazon is shaking up financial services

Slide 2 of 8

Small-business lending

Amazon began making loans to its small-business clients in 2011, using transaction data from the e-commerce site to underwrite 12-month loans of up to \$750,000.

Amazon said last June that it had originated \$3 billion in loans, including \$1 billion over the previous 12 months.

Amazon Lending is only open to companies that sell products through Amazon, which limits its competitive impact on the banking industry. But there are signs that Amazon would like to grow its footprint in small-business lending.

CNBC reported last month that Bank of America is providing capital for Amazon Lending. Amazon and B of A have been tight-lipped about the partnership, but CNBC said that the alliance should help Amazon provide credit to even more merchants.

Related

Rate wars: Leaders and laggards in repricing consumer deposits

Dems' Dodd-Frank clash, Bank of Amazon and Fintechs to Work For: Top stories of the week

'What a load of horse hockey!': Comments of the week

End of slideshow

Related

'Permission to commit legal extortion': Comments of the week
WALL STREET JOURNAL

How digital banking is changing customer behavior

Banks' sluggish support of mobile payments

The biggest fintechs in the market

Overlay Slides
Visitor navigates to individual slides and must view one slide at a time

Updated Slideshow Example (Navigation using scroll)

Joe Krutel, Ballers (portrayed by Rob Corddry)
While Ballers' Strasmore is mild-mannered, Joe Krutel is over-the-top.

A retort to an argument that the Crapo reg relief bill would harm the banking system:
"What a load of horse hockey! Stop the lunatic hype please."
Related: [Dear Congress: Reg relief bill is a giveaway for large banks](#)

End of slideshow

Related

'Permission to commit legal extortion': Comments of the week
WALL STREET JOURNAL

How digital banking is changing customer behavior

Banks' sluggish support of mobile payments

The biggest fintechs in the market

On Page Slides
Visitor scrolls down the page to view intro and individual slides; scrolling enables easier navigation

Deliverables

- Listicle & Slideshows Wireframes

Learnings

- We were able to increase page views and time spent on the page substantially with our changes.
- Scrolling isn't categorically a bad thing. Debunking this myth required plenty of discussions and examples of the problem and design research from similar sites.
- The solution was simple. However, providing templates to editors required some training with the CMS. And limitations of the CMS can complicate things. For instance, not allowing preset templates for editors.