



Communication Center

July 2021

A Case Study
by Judith Niosi



Prudential

Executive Summary

The Communication Center goals are to create a centralized area on the Sponsor Center where sponsors and advisors can easily find updates and personalized information they need to act on or be aware of for their retirement plans. To create this, a design sprint was instituted where a resulting prototype showed favorable results when tested, noting its preferred placement to be at the bottom of the Sponsor Center home page. However, this feature was paused due to M&A activity.

Effectively communicate important information to Sponsor Admins, C-Suite, and Advisors to increase market share and improve operational efficiency.

Problem

Customers asked for a quick and easy way to get to applications they need without having to dig around the site for it. A centralized location, customized for each authenticated user, that helps denote what quick actions are needed and other helpful applications that assists with their current role.

Scope + Constraints



Scope

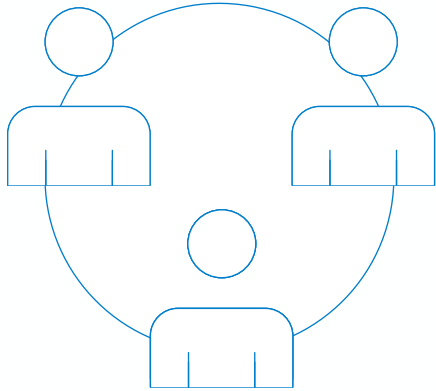
- ❖ Actionable alerts for important daily functions, such as payroll and reporting
- ❖ Goal Setting
- ❖ FAQ's section
- ❖ To Do's that are assignable to others
- ❖ A "What's New" section
- ❖ News - from Pru and ability to add ones own
- ❖ Events – from Pru and ability to add ones own



Constraints

- ❖ Technology challenges
- ❖ M&A activity
- ❖ Funding
- ❖ Staffing

Target Audience + Persona



1. Plan Administrators

2. C-Suite Executives

3. Advisors



Teresa

Plan Administrator

55 Age **Married** Status **New Jersey** Location

A college educated professional who likes to volunteer as a Grounds Helper at Horses for Hope where its program is aimed at promoting therapeutic healing of the mind and body using horses as a catalyst.

Sponsor Center Usage

- Compliance Services
- Reporting
- Payroll Alerts
- Participant Search

Pain Points

- Usability of Participant Search
- Navigating Subplan Functions
- Payroll Alert Lacks Subplan Info
- Prefers Contact With Prudential Over Website Self-Serve Capabilities

Goals / Needs

- Quick Accurate Reporting
- Ease of Submitting Payroll
- Indicative (Sensitive Data) Updates
- Quick Website Performance
- Assist Participants Quickly

Devices Used



Technical Experience

IT / Internet

Mobile / Tablet

Social Media

Personal Internet Use

Email

News / Blog

Social Media

Banking

Pay Bills

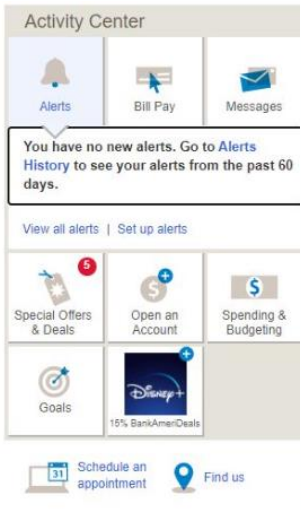
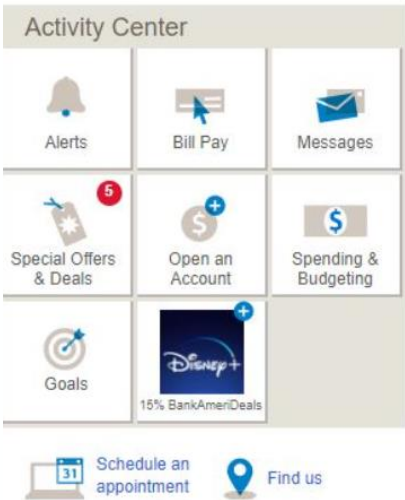
Shopping

Remote Design Sprint

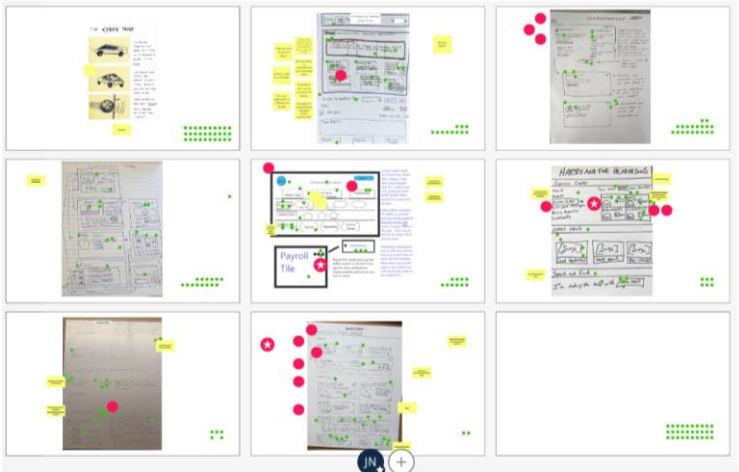
(Scaled to 2 Days)



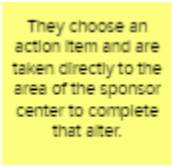
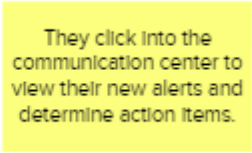
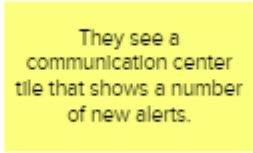
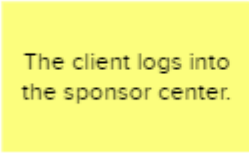
Lightening Demo's



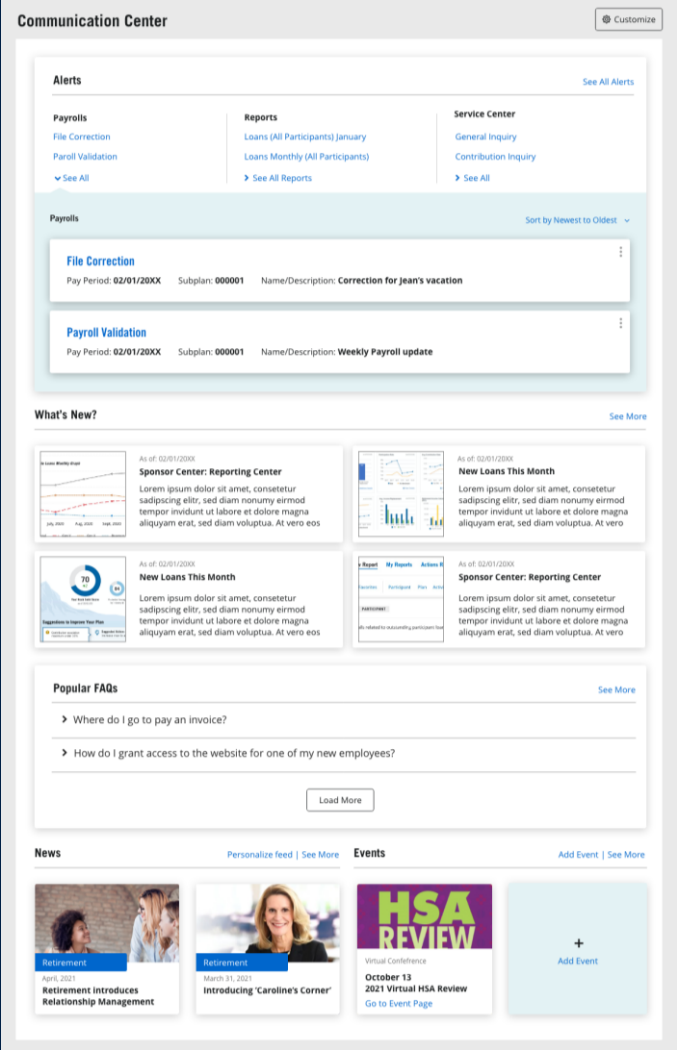
Sketch + Vote



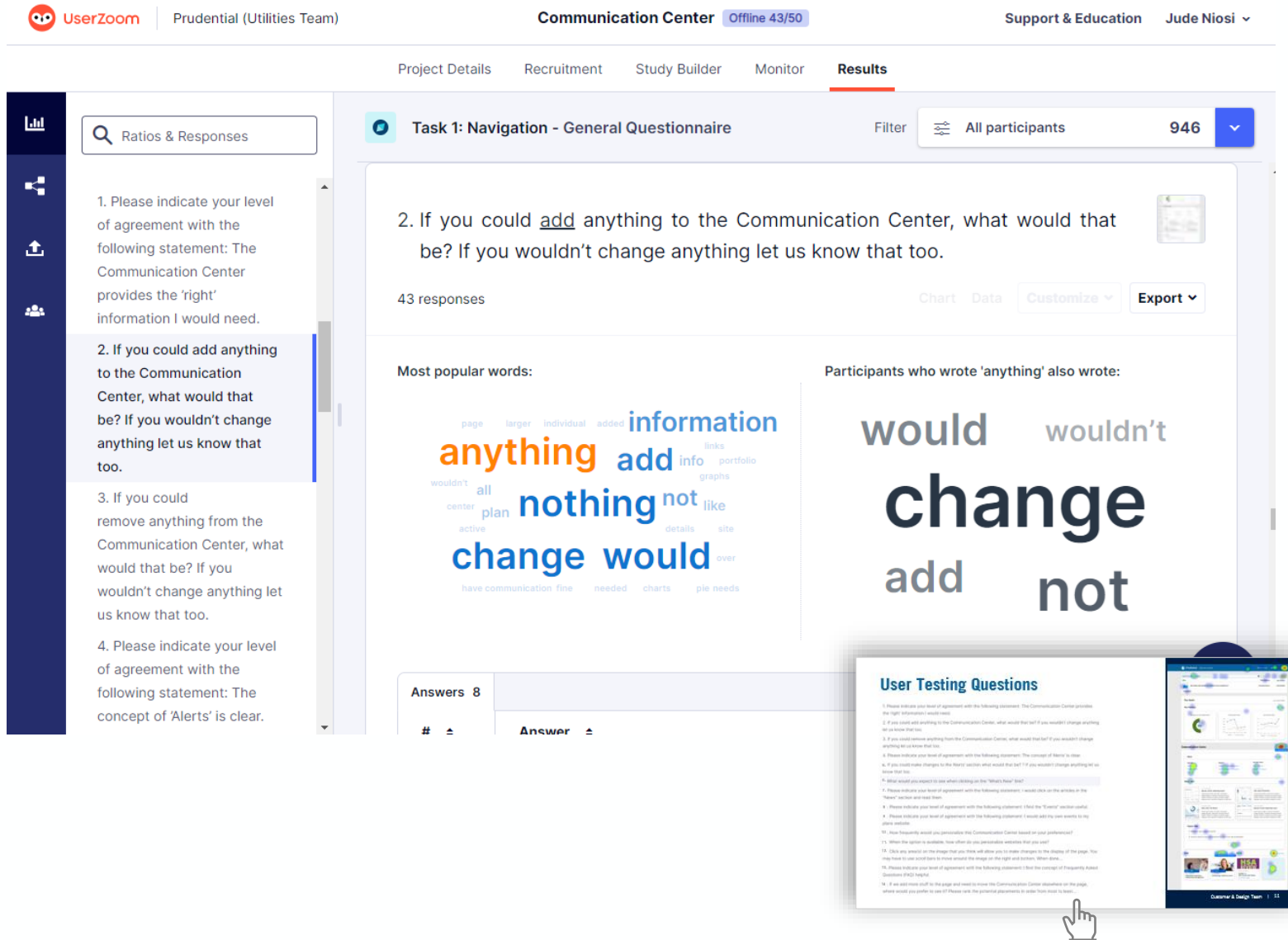
Storyboard



Prototype



Process: User Testing



Results

- ❖ All sections of Communication Center was seen as valuable for day-to-day work needs
- ❖ Less than half of responders would customize their website experience if given a chance
- ❖ Just a bit over half of responders would add their own events in the “Events” section
- ❖ The bottom of the homepage is where responders is the preferred placement for the Communication Center

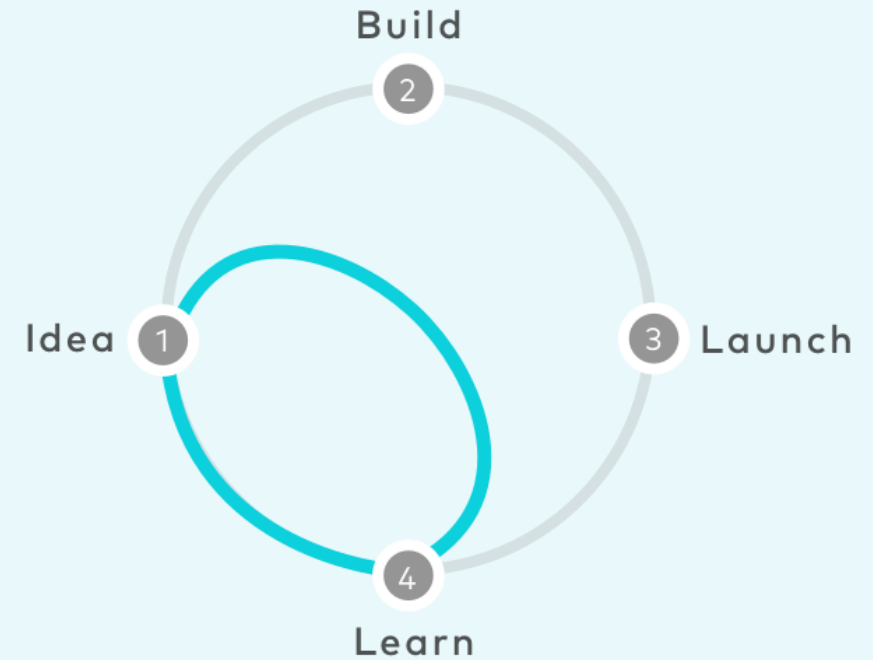
Outcomes

Learnings

- ❖ Ability to customize experiences on websites are not well utilized
- ❖ Though all sections of the Communication Center was deemed valuable, a “Center” for them needs further investigation

Next Steps

M&A activity, identified as a risk during the Design Sprint sessions, has been realized with Empower Retirement acquisition of Prudential Retirement. The project is now paused but readily available should Empower like to proceed with this project.



Appendix

Team: Design Sprinters

TEAM

1. Decider

Karen Spring

5. Service

Mark Higgins

2. Facilitator

Jude Niosi, Caryn
Gallis/John Consigli

6. Customer Rel.

Austin Imhof

3. UX Designer

Aurore Harkin
Ron Seidel

7. Business Dev.

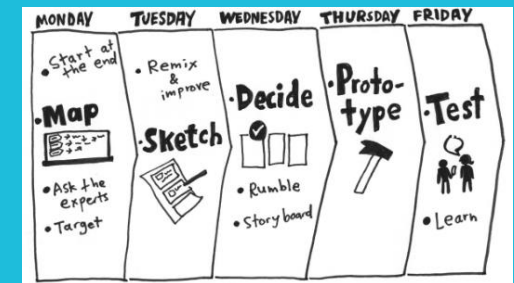
Steven Fitzpatrick

4. UX Writer

Aaron Pfannebecker

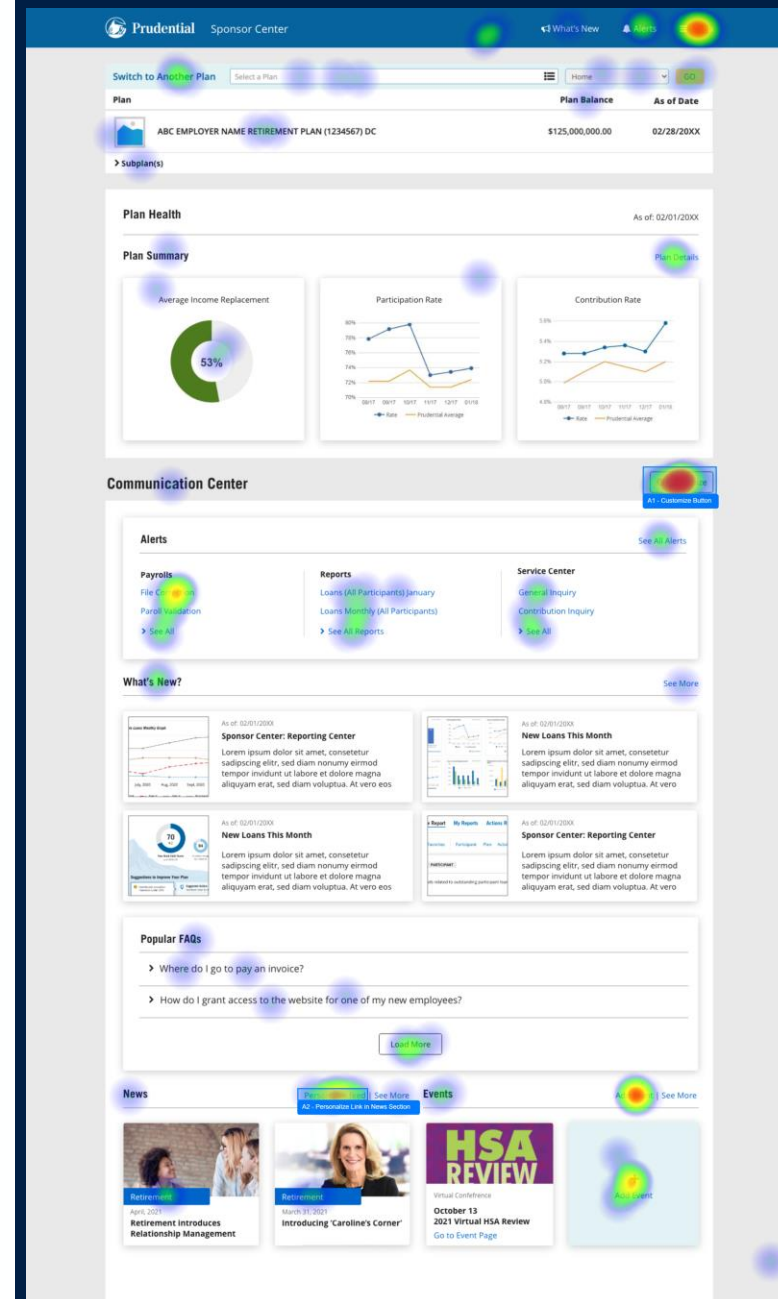
8. Technology

Kenneth House



User Testing Questions

1. Please indicate your level of agreement with the following statement: The Communication Center provides the 'right' information I would need.
2. If you could add anything to the Communication Center, what would that be? If you wouldn't change anything let us know that too.
3. If you could remove anything from the Communication Center, what would that be? If you wouldn't change anything let us know that too.
4. Please indicate your level of agreement with the following statement: The concept of 'Alerts' is clear.
5. If you could make changes to the 'Alerts' section what would that be? If you wouldn't change anything let us know that too.
6. What would you expect to see when clicking on the "What's New" link?
7. Please indicate your level of agreement with the following statement: I would click on the articles in the "News" section and read them.
- 8 . Please indicate your level of agreement with the following statement: I find the "Events" section useful.
- 9 . Please indicate your level of agreement with the following statement: I would add my own events to my plans website.
- 10 . How frequently would you personalize this Communication Center based on your preferences?
11. When the option is available, how often do you personalize websites that you use?
12. Click any area(s) on the image that you think will allow you to make changes to the display of the page. You may have to use scroll bars to move around the image on the right and bottom. When done...
13. Please indicate your level of agreement with the following statement: I find the concept of Frequently Asked Questions (FAQ) helpful.
- 14 . If we add more stuff to the page and need to move the Communication Center elsewhere on the page, where would you prefer to see it? Please rank the potential placements in order from most to least...



Mural Whiteboard

For details, check out [thesprintbook.com/remotetemplate](#)

DESIGN SPRINT

The sprint gives teams a shortcut to learning without building and launching

Communication Center

Effectively communicate important information to Sponsor Admins, C-Suite, and Advisors to increase market share and improve operational efficiency.

TEAM


1. Decider Karen Spring	2. Facilitator Julie Weiss, Caragh Gault/John Conright	3. UX Designer Austin Marklin Ron Seidel	4. UX Writer Aaron Pfannebecker
5. Service Mark Higgins	6. Customer Rel. Austin Inhof	7. Business Dev. Steven Fitzpatrick	8. Technology Kenneth House

ICE BREAKER

18 minutes - 2 minutes each
Use a sticky, write your name and title on it, place in your preferred ice cream flavor area

Vanilla	Chocolate	Other
Katelyn Housley —UX Development Jude UX Leader Steven Fitzpatrick — Client Service Manager	Scott Taylor Office of Client Mgmt	AJ / MGR: Office of client mgmt. Choc Chip Cookie Dough Mark - Business Excellence & Solutions John Conright UX leader Bank Robbery Aaron Pfannebecker Copywriter Karen Spring Product Owner

This template was created by Steph Cruchon (Design Sprint Ltd.), Jake Knapp, John Zentasyk, and Jackie Colburn. The authors retain all rights, except for duplication and use in facilitation of remote design sprints. v 1.4 - Jan 2021



MAP

MAP

calendar map editor

How to change your calendar

1. Click on the calendar icon in the top right corner of the page.

2. Click on the calendar icon in the top right corner of the page.

3. Click on the calendar icon in the top right corner of the page.

4. Click on the calendar icon in the top right corner of the page.

5. Click on the calendar icon in the top right corner of the page.

How to add a new calendar

1. Click on the calendar icon in the top right corner of the page.

2. Click on the calendar icon in the top right corner of the page.

3. Click on the calendar icon in the top right corner of the page.

4. Click on the calendar icon in the top right corner of the page.

5. Click on the calendar icon in the top right corner of the page.

How to delete a calendar

1. Click on the calendar icon in the top right corner of the page.

2. Click on the calendar icon in the top right corner of the page.

3. Click on the calendar icon in the top right corner of the page.

4. Click on the calendar icon in the top right corner of the page.

5. Click on the calendar icon in the top right corner of the page.

CALENDAR MAP EDITOR

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4. Click on the calendar icon in the top right corner of the page.

5. Click on the calendar icon in the top right corner of the page.

Parking Lot

sponsors from co-creation wouldn't use calendars

Do we need a resource link/section?



SKETCH

This is an example of a sketchbook page showing various wireframes and design ideas for a mobile application. The sketches are organized into a grid with labels like 'Home', 'Notes', 'Work', 'A1', 'A2', 'A3', 'A4', 'A5', 'A6', 'A7', 'A8', 'A9', 'A10', 'A11', 'A12', 'A13', 'A14', 'A15', 'A16', 'A17', 'A18', 'A19', 'A20', 'A21', 'A22', 'A23', 'A24', 'A25', 'A26', 'A27', 'A28', 'A29', 'A30', 'A31', 'A32', 'A33', 'A34', 'A35', 'A36', 'A37', 'A38', 'A39', 'A40', 'A41', 'A42', 'A43', 'A44', 'A45', 'A46', 'A47', 'A48', 'A49', 'A50', 'A51', 'A52', 'A53', 'A54', 'A55', 'A56', 'A57', 'A58', 'A59', 'A60', 'A61', 'A62', 'A63', 'A64', 'A65', 'A66', 'A67', 'A68', 'A69', 'A70', 'A71', 'A72', 'A73', 'A74', 'A75', 'A76', 'A77', 'A78', 'A79', 'A80', 'A81', 'A82', 'A83', 'A84', 'A85', 'A86', 'A87', 'A88', 'A89', 'A90', 'A91', 'A92', 'A93', 'A94', 'A95', 'A96', 'A97', 'A98', 'A99', 'A100'.

DESIGN PROCESS

The design process is outlined in four stages:

- Notes**: Gathering information and ideas.
- Ideas**: Brainstorming and sketching initial concepts.
- Crazy 8**: Rapid prototyping and exploring multiple solutions.
- Solution Sketch**: Refining the chosen solution and creating a final sketch.

DESIGN SOLUTION


The final design solution is a mobile application for "HARRY AND THE HENDERSONS". The app features a "Sponsor Center" with a list of services (e.g., "Sponsor Center", "Participant Meetings", "Tailgating Reunions", "Investments") and a "Latest & News" section. The news section includes a table of news items:

News	News	News	News
100%	100%	100%	100%
100%	100%	100%	100%

The app also includes a "Search and Find" section with a search bar and a list of results (e.g., "Good Updates", "401K news", "Tax Changes").

The collage displays a variety of design work for a project named 'DECIDE'. At the top left, a small sketch shows a hand interacting with a device. Below it, a large section titled 'DECIDE' features a grid of nine wireframes, each representing a different screen or component of the system. These wireframes are annotated with yellow sticky notes and red circles, indicating areas of focus or feedback. To the right of the wireframes, there are several smaller sketches and diagrams, including one labeled 'Vanilla Shake' and another showing a 'Communication Center' interface. At the bottom, there are three larger digital mockups: a 'Vanilla Shake' interface, a 'Communication Center' dashboard with charts and data, and a 'What's New' section. The overall layout is organized and professional, showcasing the design process from initial sketches to final digital mockups.

1. PROTOTYPING



PROTOTYPE

PROTOTYPING

The Prototype Mindset

- You can prototype anything.
- Prototypes are disposable.
- Build just enough to learn, but not more.
- The prototype must appear real.

Use this space to write text, collect images, split up the work, whatever!

PROTOTYPING

What do you want to test?

Write a list of questions you want answers to. This will help with user testing

1. Write here

Are we Providing the right Information?

When you click on What's New, what do you expect to see?

Is the concept an Events Section something you would use?

As for feasibility, would there would be your preferred location of Communication center?
Yes, maybe, right side, left side, or bottom?

What would you add to the the communication center?

When you click on What's New, what do you expect to see?

Would you personalize this section or ignore it?

Is the concept of Alerts clear to you?

Is the concept News Article something you're interested in?

Is the concept of a central location for all communication needs clear? Would you use it?

Do you see the need to add your own events?

Would you see a need for an FAQ section?