A Case Study
Sponsor Center Home Page
by Judith Niosi

August 2021

Executive Summary

A great opportunity emerged to make updates to both, design and technology to the Sponsor Center (SC); Because of resource constraints and having to cater to the legacy platform in addition to developing the SC in a new Angular platform, a quick homepage had to be implemented that acts more like a navigation rather than a useful actionable information page. The home page redesign project had gone through design workshops that produced two different designs, where the battle tested design saw further iterations that produced three additional designs to test with. However, a risk defined by the design sprint team of M&A activity was realized. Therefore, the project has been halted where a restart is possible should Prudential's acquiring company, Empower Retirement, see value in it.

Challenge

The home page works as a navigational page and lacks information customers need to get a snapshot on how well their plans are doing.

Current Home pages:

Single-plans →

Multi-plans

Scope + Constraints

Scope

- Actionable alerts for important daily functions, such as payroll and reporting
- Metrics that can filter down to macro levels
- Navigation to match pru.com
- Goal Setting
- FAQ's section
- To Do's that are assignable to others

Constraints

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

Target Audience + Persona

DEFINE
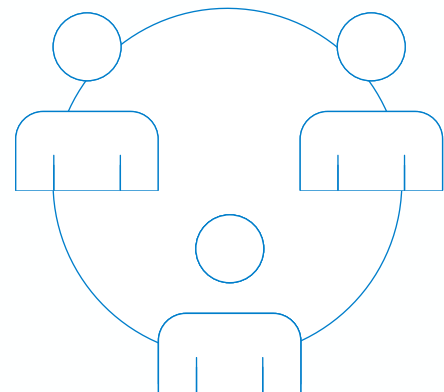
1. **Plan Administrators**
2. C-Suite Executives
3. Advisors

Teresa

Plan Administrator

55	Married	New Jersey
Age	Status	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

Process & Timeline

Design Competition
February 2021

UI Enhanced #1
June 2021

UI Enhanced #3
August 2021

December 2020
Design Sprint

March 2021
User Testing & Analysis

July 2021
UI Enhanced #2
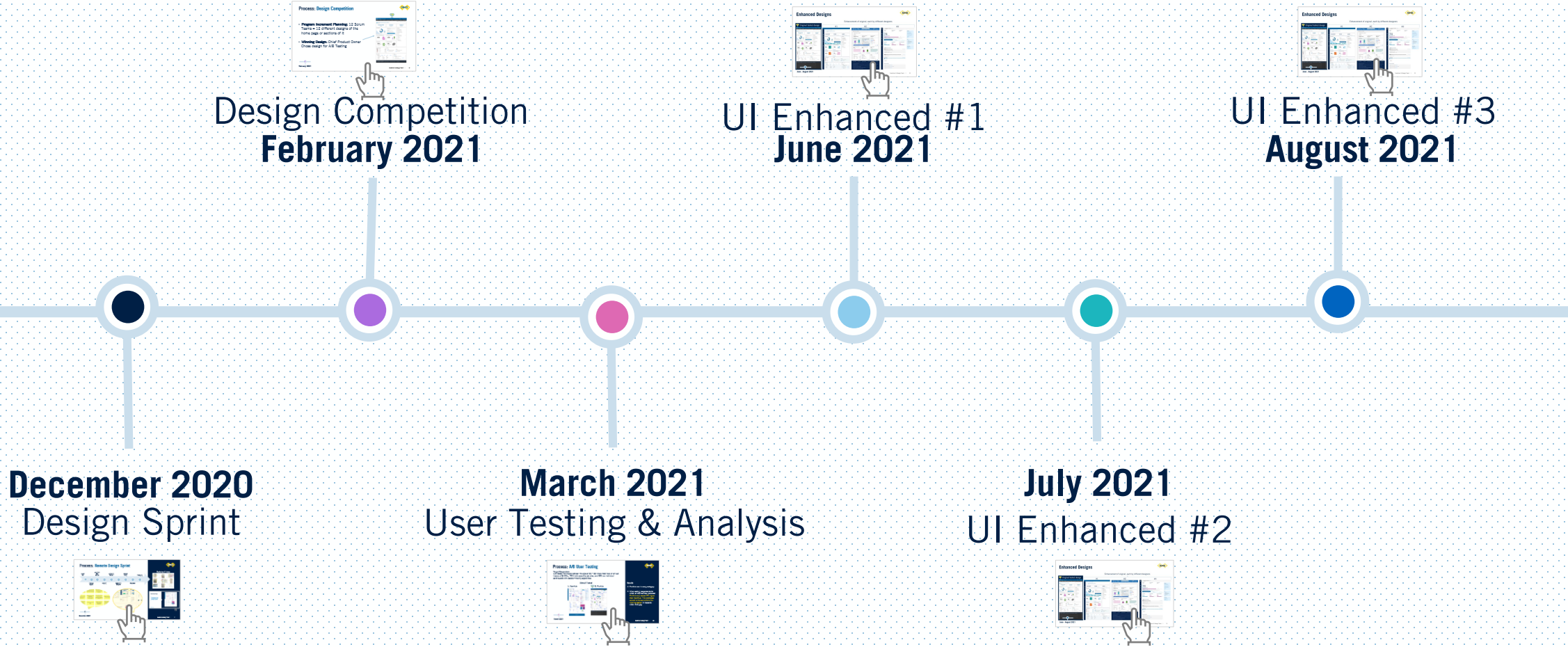
Process: Remote Design Sprint

Kickoff Call — Interview Experts — Long Term Goal Defined — Mapping — Lightening Demos — Sketching / Crazy 8's — Concept Voting — Storyboard — Prototyping
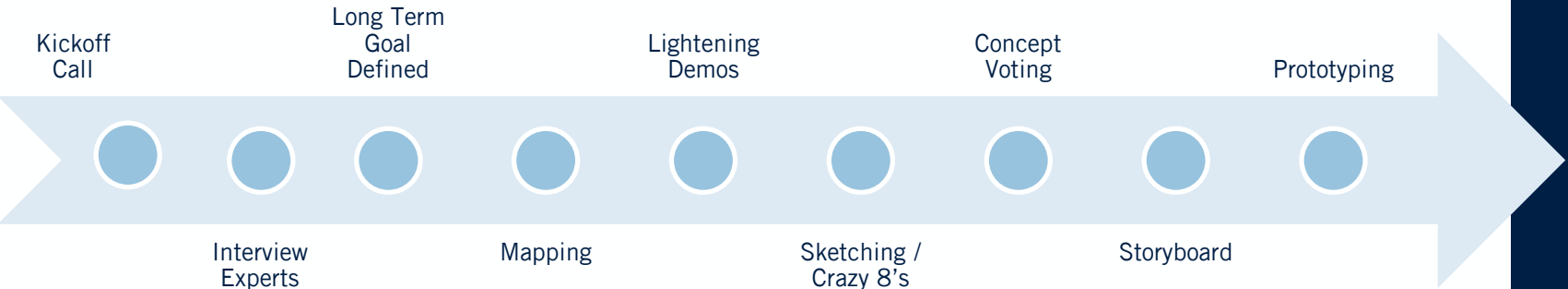
Sketches & Votes
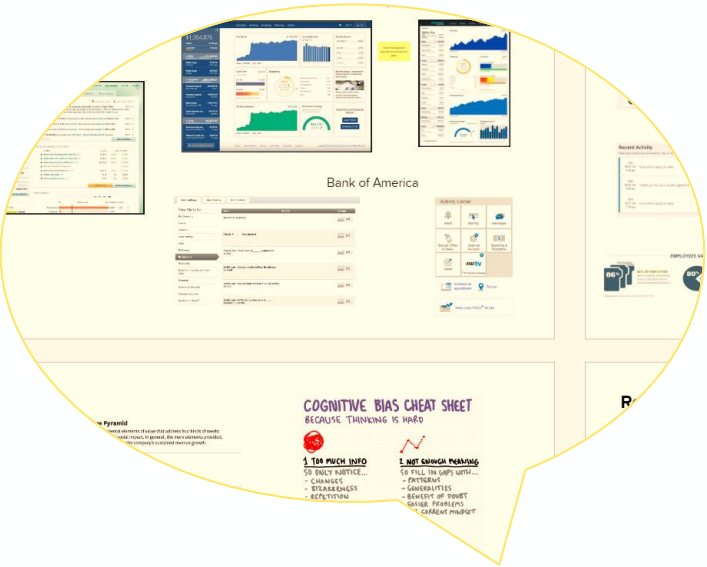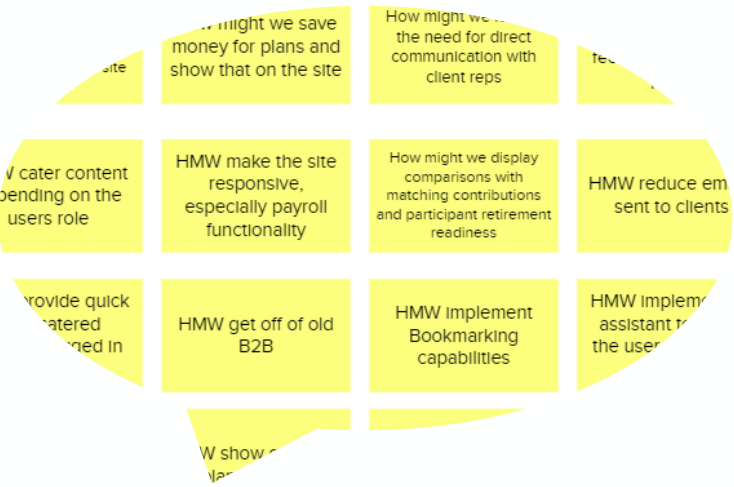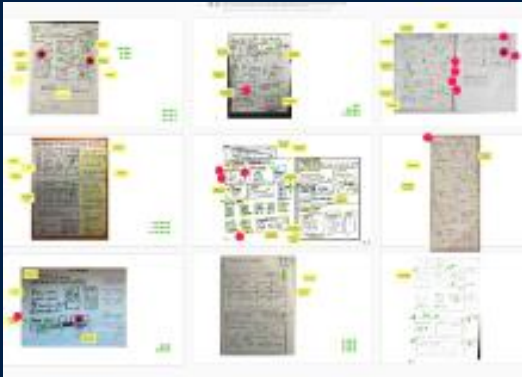
New Home Page

Prototype from Design Sprint
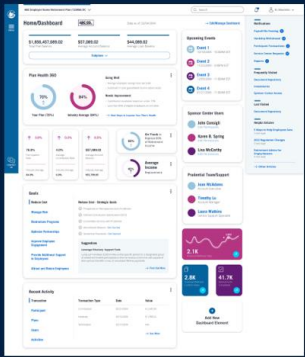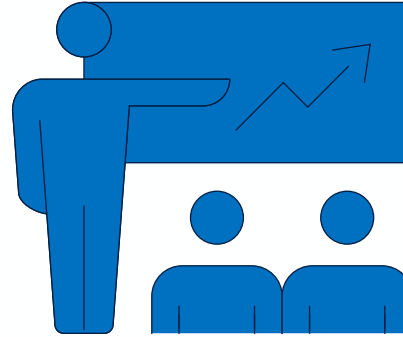
The Chief Product Owner saw an opportunity in getting multiple new home page designed by engaging the program increment planning teams with a Design Competition

Process: Design Competition

- **Program Increment Planning:** 12 Scrum Teams = 12 different designs of the home page or sections of it

- **Winning Design:** Chief Product Owner Chose design for A/B Testing
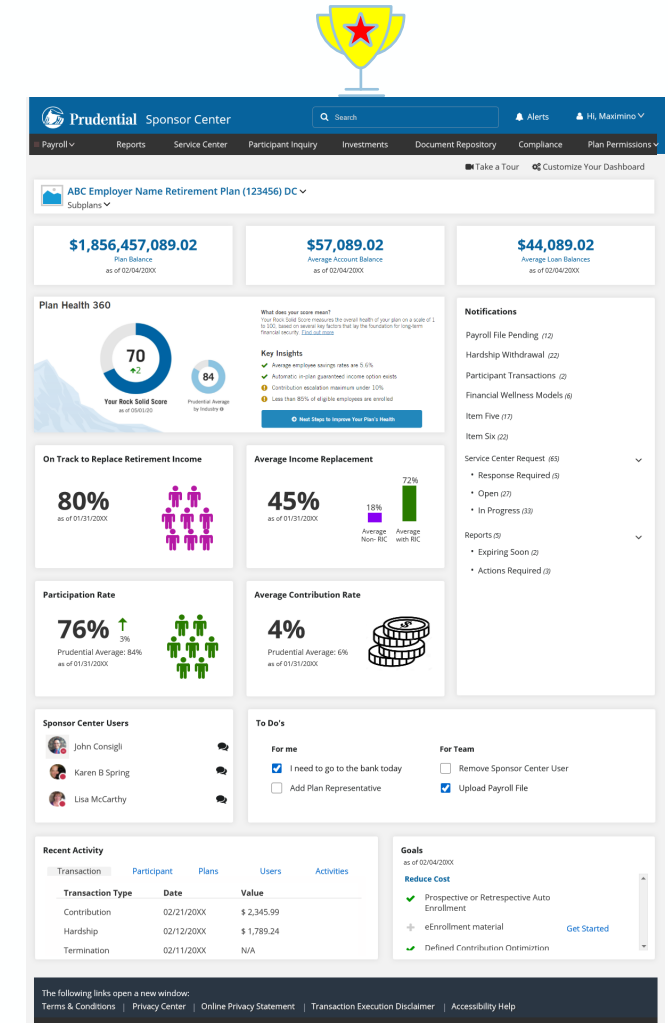
February 2021

Process: A/B User Testing

Target Responders

U.S. based individuals between the ages of 30 – 65 where most have an annual income of $100k+, 72% hold executive job roles, and 28% are individual contributors with decision-making capabilities.

Stimuli Tested

A. NewHub
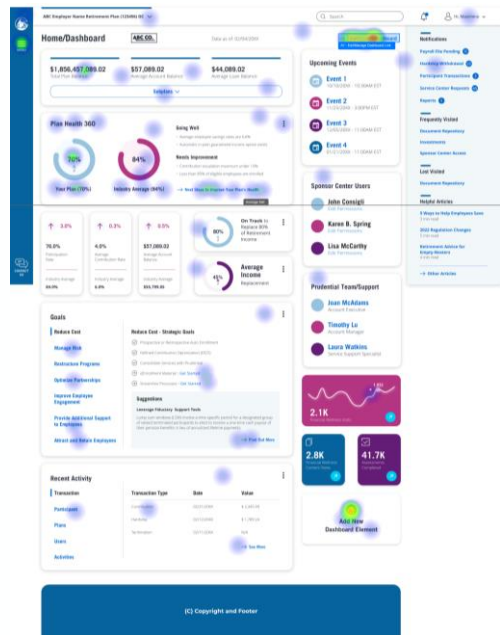
B. PruHub
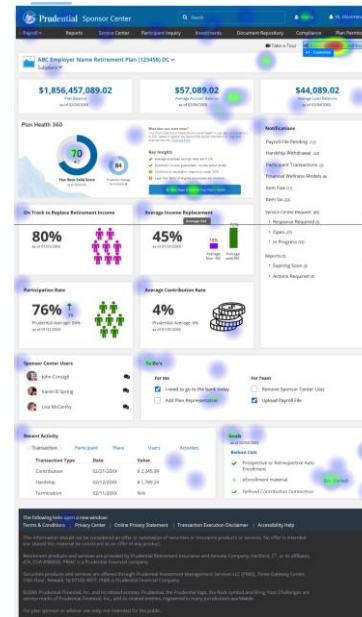
Results

❖ PruHub won in every category.

❖ When asking respondents for which of the two they preferred PruHub only scored 6% higher than NewHub. This prompted several enhancements to the winning design in hopes to widen that gap.

March 2021

Enhanced Designs

Enhancement of original, each by different designers

Original tested design

June - August 2021

#1

#2

#3
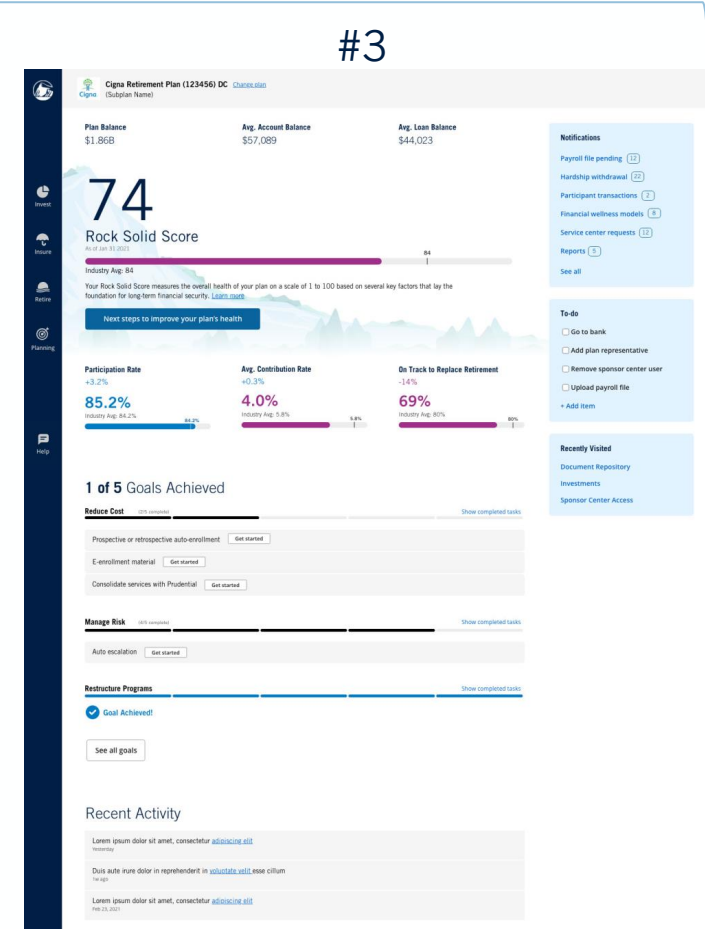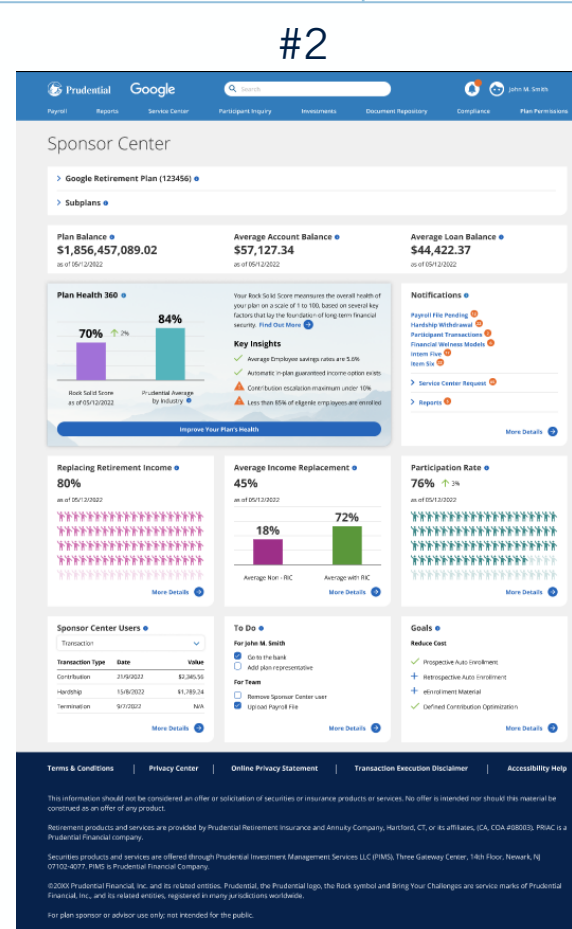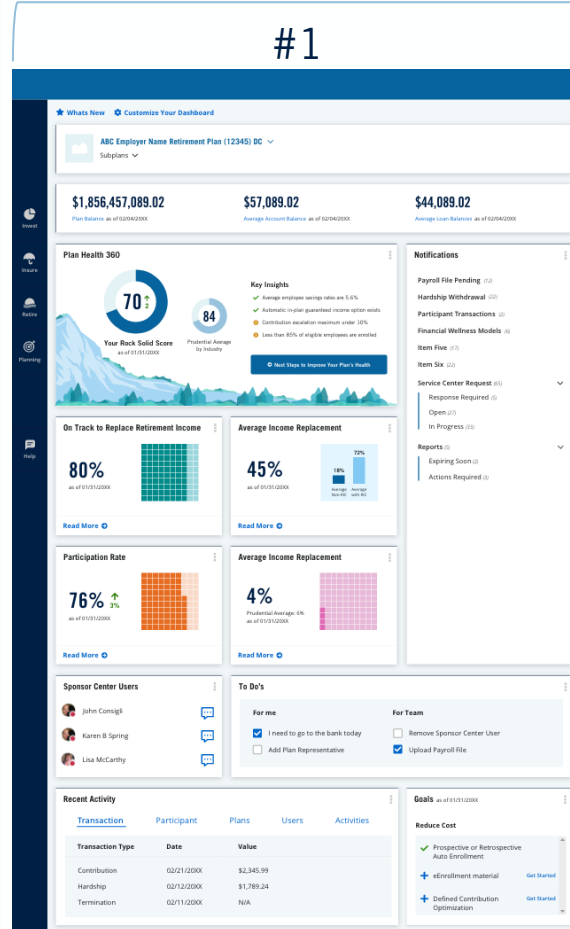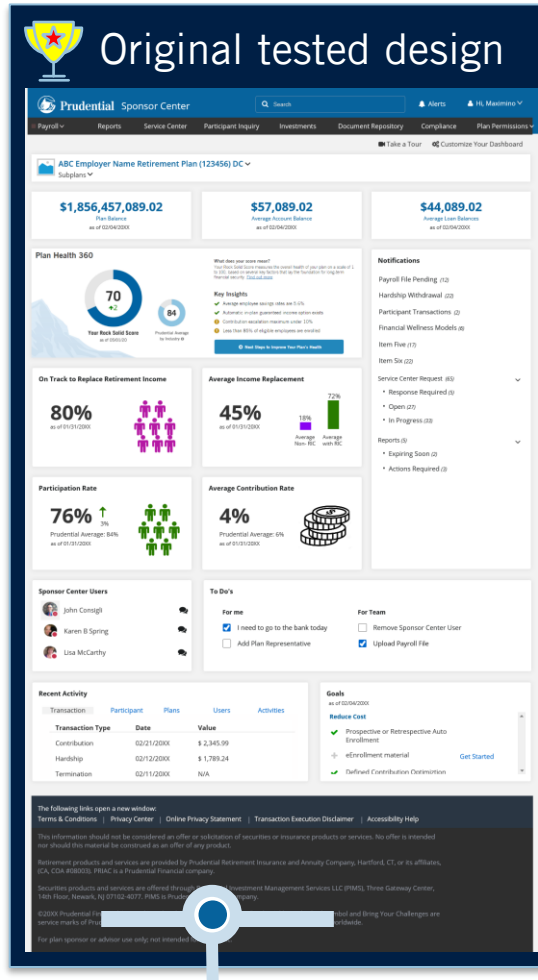
Outcomes

Learnings

❖ To Do's, Notifications, and Goals are important features that should be easily accessible from the homepage

❖ Search and Page Customization features are not largely used

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 it.
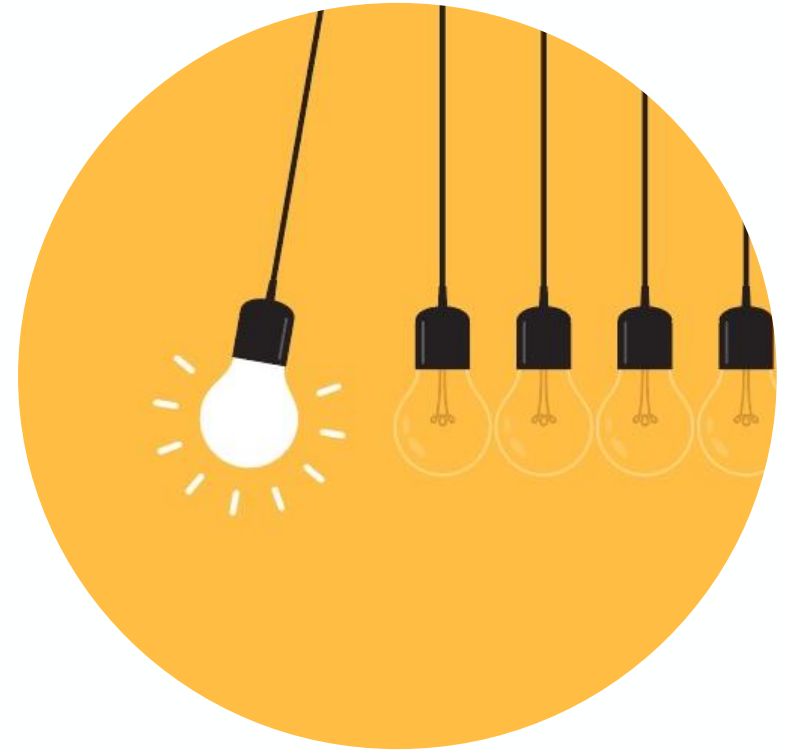
Appendix

Team: Design Sprinters

1. Decider	**2. Facilitator**	**3. UX Design**	**4. DC Segment**	**5. Marketing**	**6. CR & BD**
Michael O'Sullivan & Michael Guzzi	John Consigli & Caryn Gallis	Jude Niosi & Ron Seidel	Anne Thibeault	Dean Houldcroft	Scott Taylor

7. Sales	**8. Technology**
Sheena McConal	Ashu Yadav

1. Advisors Sales Support	**2. Technology**	**3. Key Accounts**	**4. CSM Front Lines**
Michael Mcatamney & Meris Muminovic (CSM Front Lines)	Deepak Maruvapalli	William Evans, Michael Mccann, Karla Nedder, Sandra Jansen, & Carla Schueller	Clyde Rosencrance, Melissa Chiumento, Sarah Beckley, Pamela Herkes, & Christoph Lilienfein

Additional Designers tasked with improving the tested and winning design:

- Adrian Blandori
- Daniel Brun
- Christian Melendez

Process: Design Thinking Applied

Empa-thize

- Focus Groups (Co-creation)
- Online Survey (Medallia)

Define

- Long term Goals
- Business Requirements
- Risks
- Measures of Success
- Minimal Viable Products

Ideate

- Story board
- Customer Journey
- Lightening Demo's
- Sketching
- Wireframing

Proto-type

- Hi-fidelity mock-ups with some interaction

Test

- Quantitative Testing using UserZoom
- Test Analysis
- Reporting of Analysis with product team

New Home Page

Original Design from Design Competition

Other Versions

New Home Page

Enhanced # 1

Other Versions
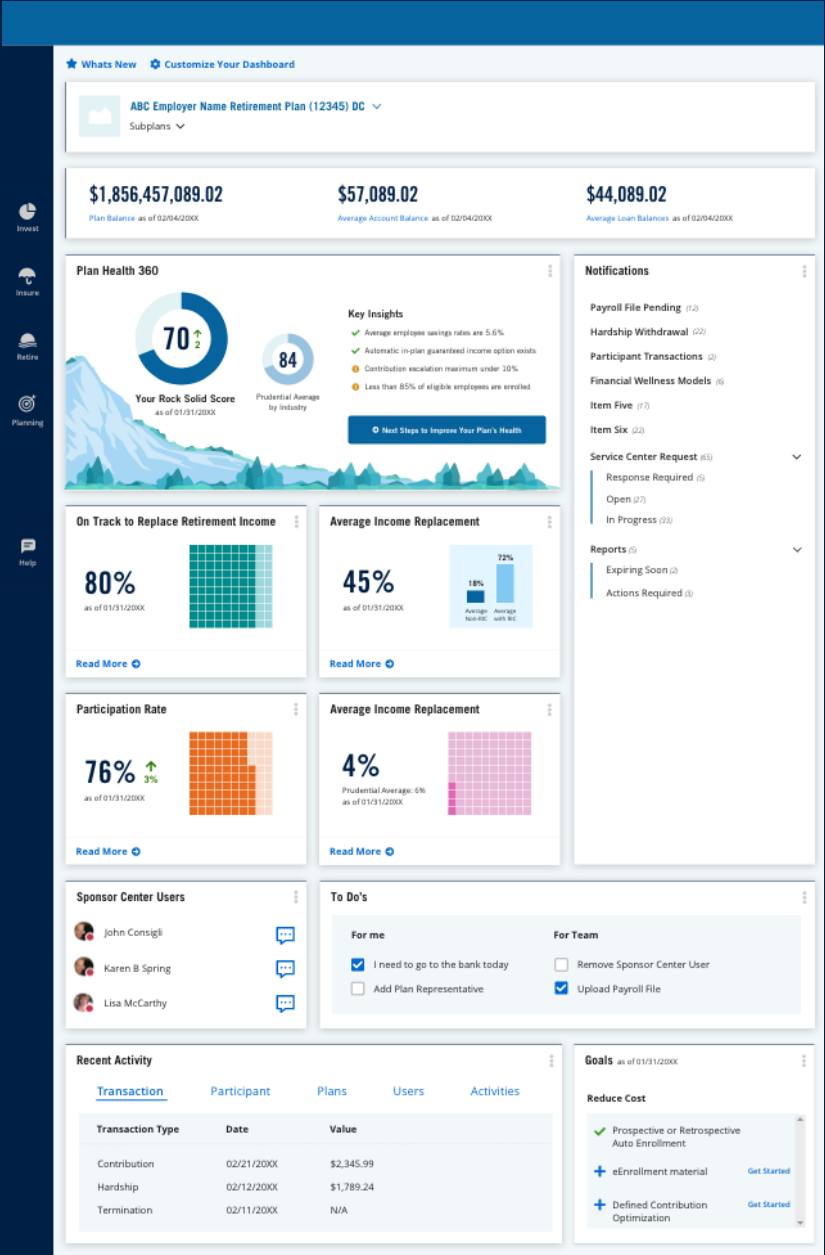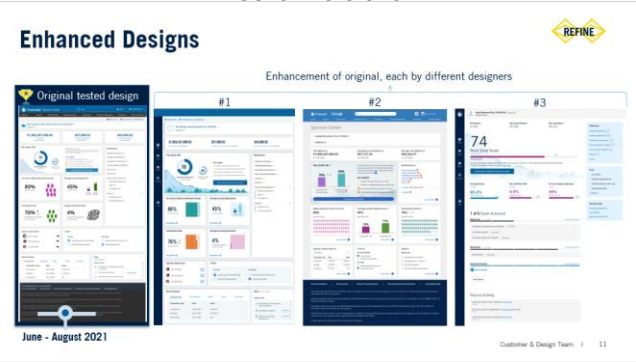
New Home Page

Enhanced # 2

Other Versions

New Home Page

This is the latest version of the home page redesign

Other Versions

New Home Page

Prototype from Design Sprint