

Information Architecture - Personas and Scenarios for Targeted Website (CISO.com)

INTRODUCTION

This document presents an approach to persona and scenario development for the website www.CISO.com. Below you will find a brief overview of the organization, its website and its target audience. Primary and secondary personas are then presented, along with an anti-persona. These personas should prove helpful in a redesign of the organization's website.

Purpose of the personas: to understand and document user goals and to prevent self-referential design. Purpose of the anti-persona: to develop an explicit understanding of the person for whom we are *not* redesigning the website.

ABOUT CISO

CISO (*actual organization's name changed for confidentiality reasons*) is a national standards association of property and casualty insurers, insurance brokers and software providers. It is a non-profit organization that helps stakeholders in the insurance industry (mainly brokers, insurers and software providers) develop and refine technology solutions, mainly standards such as Extensible Markup Language (XML) and Electronic Data Interchange (EDI). CISO also works with these stakeholders to develop standardized forms that are used to create insurance policies for customers.

CISO WEBSITE

CISO's website, www.CISO.com, was crawled by the Wayback Machine as far back as December, 1998.

A web stats report for the period of September, 2012 reveals that there are **1,033** different pages on the CISO site. These are mostly .html and .cfm (Cold Fusion Markup) pages and PDF files. In September, the site received **2,260** unique visitors out of a total of **5,199** visits. Visitors are mostly from the United States, Canada and Russia. 62.2% of visitors in September used Internet Explorer, with Mozilla/Firefox and Safari in second and third place. The most popular keywords used to find the site from search engines in September were: CISO, insurance, application, forms and habitational.

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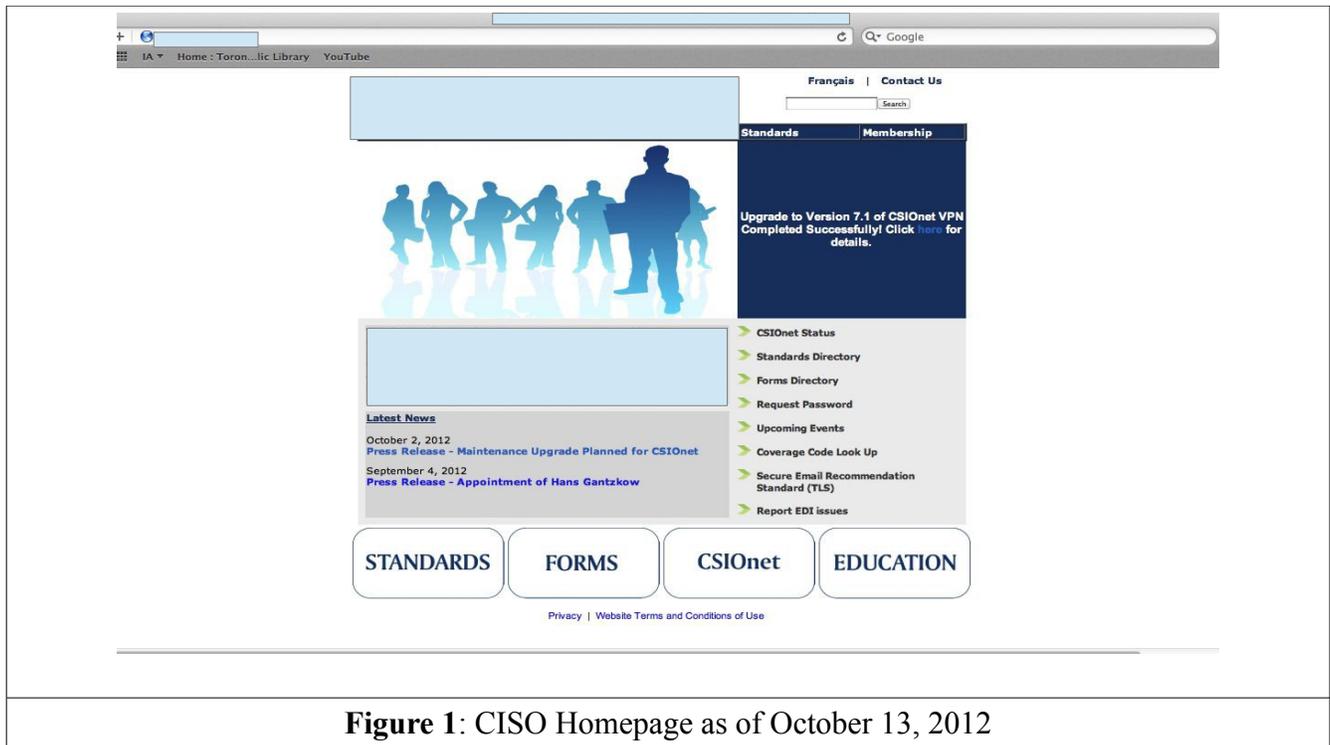


Figure 1: CISO Homepage as of October 13, 2012

CISO TARGET AUDIENCE

It is a public website in the sense that any member of the general public could potentially discover the CISO site through Google. But this probably happens uncommonly because the search engine optimization (SEO) on the site is poor. The homepage, for example, does not possess any keywords or SEO metadata. Most people who are accessing this site are in the insurance industry and likely did not discover it via search engines. CISO has a fairly well-established presence within the insurance industry (especially in Canada), so a lot of the traffic is likely just through word-of-mouth. The user base of the CISO site can be broken down into these major groups:

- Brokers (or someone working at a brokerage firm)
- Employees of insurers/carriers/insurance companies
- Employees of software providers/vendors

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PRIMARY PERSONA - Martha Landsbury - 33-year-old insurance broker from Montreal, Canada



“I don't need to have it all. But I need this form and I need it *now*.”

Photo credit: by Flickr user “jdlasica” (Creative Commons license)

Background

Martha is a true “type A” personality: ambitious, competitive, assertive and even “aggressive when need be,” she says. But she is also an extrovert who enjoys meeting and interacting with people as much as possible. Growing up in Montreal, she loved the arts and originally planned to become an actress. She received a BFA in Theatre from Ryerson University but realized soon after graduating that she didn't want to go through the hardships necessary to establish an acting career. She always knew that she would be good at sales because of her people skills and eventually found an entry-level position at a brokerage in Montreal. She showed her potential and the firm paid for her to complete the Chartered Insurance Professional (CIP) program. She stayed with the firm for 6 years before starting her own brokerage.

Martha is a highly driven careerist who doesn't hesitate to put her personal life on hold in order to advance her professional goals. She considers herself a feminist but doesn't use that word in public because of some of its negative connotations. She recently read Anne-Marie Slaughter's “Why Women Still Can't Have It All” article in *The Atlantic* and decided that she didn't need to have it all; that is, she decided she didn't need children to be happy. She lives with her boyfriend in a house in the affluent Golden Square Mile neighbourhood of Montreal. She usually makes around \$200K/year.

True to her “in charge” personality, Martha remains very hands-on with her work. She has only hired one employee – a personal assistant. She does everything else herself, including checking the CISO website to download the standardized forms that she needs to complete a customer's insurance policy.

More About Martha

Goals (Needs and desires)

To serve her customers quickly and efficiently, Martha needs CISO standardized forms. As she is in Quebec, she needs the forms in both English and French. Her desire is to beat her competition and become the top independent insurance broker in Montreal.

Abilities (What they can do)

Martha's not a very technical person. She doesn't pay attention to things like which browser she's using. She doesn't have a nuanced understanding of file formats and document standards.

Methods (How they do things now)

She uses IE (latest version) on a Dell desktop running Windows XP.

Technology and Web Background

Internet Presence: About average for her industry. She has a website for her firm that her assistant maintains but it doesn't get updated much.

Mobile Usage: She uses a BlackBerry Curve handset purchased in 2010. She uses it mostly to check and respond to emails and occasionally tweet. She doesn't like to download forms on her handset because she finds them too detailed to work with on a small screen.

Social Networking: Twitter and LinkedIn. She uses Twitter fairly regularly, but only for professional interactions. She follows people and companies in the insurance industry. She stays involved in a few LinkedIn discussion groups related to insurance.

Information Architecture – Personas and Scenarios for Targeted Website (CISO.com) MARTHA'S SCENARIO

Martha was recently contacted by a customer shopping for vehicle insurance for the car that he just recently purchased. Before he can start driving, he is required by law to buy insurance. Naturally, then, he is very impatient and wants to get the insurance out of the way as quickly and painlessly as possible so he can start driving his new car. He has also contacted two other brokers to see who can find him the best deal. Martha needs to get a series of quotes to him as quickly as possible so that she can secure this new customer. Martha visits the CISO site by typing www.CISO.com into her browser's URL bar. The results of this use case are described below:

USE CASE (MARTHA)

Home > About CISO mouseover > CISONet mouseover > Membership mouseover > Scrolls down homepage > Clicks Forms image > Scrolls down page > Clicks Automobile Personal Lines anchor link > Scrolls back up > Types “Quebec” into search bar > Returns home

Martha had a frustrating experience on her first attempt at accomplishing her goal of finding the Quebec auto insurance application at CISO. This was her first time visiting the CISO website in a while, so she couldn't remember how to access the forms page. She checked the drop-downs of three headers in the global nav (CISO, CISONet and Membership), thinking that Forms could be under one of them. She then scrolled down to the bottom of the homepage and saw the large Forms image that was below the fold. Clicking on that, she entered the Forms page and stared at it for a few seconds, not sure where to go. She then scrolled down a bit and saw the “Automobile Personal Lines” anchor link. Clicking on that jumped the page to a table with links to PDF forms. The table struck Martha as cluttered and disorganized, so rather than looking through it she scrolled up and entered “Quebec” into the search bar. The results merely provided a link back to the Forms page rather than a link to the direct PDF file she needed.

RECOMMENDATIONS

1) The Forms image below the fold (and perhaps the other three) should be removed. Links that are directly relevant to user goals, such as the Forms link, should be positioned above the fold. **2)** The Forms page reveals a local nav with many menu items. Why isn't this in the global nav? It should be. Instead, the Forms link is actually under the Standards header in the global nav. There might be a logical reason for this, but brokers who rarely think about standards won't buy it. Finally, **3)** clearer content organization should be applied to the tables and **4)** the search functionality should be revised to return specific file types rather than just general pages.

SECONDARY PERSONA - Florian Peppino - 37-year-old IT Manager from Toronto, Canada



Background

Born in Rosario, Argentina, Florian emigrated to Toronto with his parents and younger sister in 1997, right after Florian finished his undergraduate degree in information systems from the National Technological University. His family had been planning the move for a while, primarily due to Argentina's sluggish economy and the probability that Florian could find a higher paying job in Canada. He had been taking English lessons since high school, so his English was already pretty good once he got to Canada. Florian is a very personable and likeable guy who quickly made new friends upon his arrival to Toronto. It also didn't take long for him to find a technical support position at a software company, a job for which he was already overqualified. The company turned out to be one of the top suppliers of software to the Canadian insurance industry. They build and maintain broker management systems (BMSs) to expedite the flow of information between brokers and carriers. Florian gradually worked his way up in this company to become an IT Manager.

Florian makes about \$100K/year. He is single and lives alone in a two-bedroom condo in the Forest Hill neighbourhood of Toronto. He is not an impatient and quick-tempered person, but he often wonders why something is not being done more efficiently when he encounters an issue. Brokers often have technical issues with their systems and they tend to get frustrated rather quickly when their BMS is not functioning perfectly. As such, Florian needs to keep a cool head at all times in order to not get overwhelmed by his job.

“So... why aren't you guys using responsive design?”

Photo credit: by Flickr user “ILRI” (Creative Commons license)

More About Florian

Goals (Needs and desires)

In order of importance, Florian's main goals when accessing the CISO site are: **1)** use the EDI validation tool, **2)** download XML and EDI standards and **3)** download standardized forms.

Abilities (What they can do)

Florian's technical skills are superb. He has a strong understanding of computer science, web development and networking hardware.

Methods (How they do things now)

Florian switches between Windows, Mac and Linux for testing purposes at work but prefers to use Mac. His machine of choice is the MacBook Air with solid-state drive.

Technology and Web Background

Internet Presence: Above average, but anonymous. Florian is an active contributor to Slashdot and the technology section on reddit.

Mobile Usage: High. Florian is very attached to his iPhone and always buys the latest release. He originally tried accessing the CISO site through his phone, but found it almost unviewable and very difficult to navigate.

Social Networking: Florian uses an anonymous account on Twitter for following subjects of interest to him, such as user experience, hacker culture and Argentine politics.

Information Architecture – Personas and Scenarios for Targeted Website (CISO.com) FLORIAN'S SCENARIO

Florian recently received a call from a frustrated insurance broker who was having issues receiving policy documents from a carrier. The documents were being delayed and not arriving in a timely fashion. Florian's initial inclination was that perhaps there were some anomalies in the EDI syntax of these documents. In order to test this theory, Florian had to use the EDI validation tool on CISO's website. Florian initially accessed the site through his iPhone but quickly realized that the site was not optimized for mobile. He then switched to his MacBook Air and found the site by typing “CISO” into Google. The results of this use case are described below:

USE CASE (Florian)

Home > Types “validation” into search bar > Presses back > Scrolls down and reads through links on homepage > Scrolls back up > Standards mouseover > Clicks EDI Standards > Clicks Online EDI Validation (goal complete)

Florian's attempt at accomplishing his goal on the CISO site wasn't disastrous, but it certainly could have been accomplished much more quickly. He tried finding the validation tool by using the search bar on the homepage, which returned the results of three pages rather than the validation tool itself. The top hit was for a page that merely contained the word “validation” in the copy of the page (totally irrelevant to Florian's goal). Florian then pressed the back button in his browser and looked at the CISO homepage again. He noticed a series of links on the right-hand side of the page and read through them, expecting the EDI validation link to be on the homepage. It wasn't. He then scrolled back to the top of the homepage and looked at the global nav. He clicked the EDI Standards link under the Standards header and finally saw the link to the EDI validation tool on this page.

RECOMMENDATIONS

1) Implement a “Best Bets” feature into the search functionality. Finding the EDI validation tool is one of the main goals that vendors have when they visit the CISO site. When “validation” is typed into the search bar, the user is *almost certainly* a vendor looking for the EDI validation tool. A static page that merely contains the word “validation” and doesn't link to the EDI validation tool should not be anywhere near the top of the search results for this query. 2) Put the EDI validation tool link on the homepage. 3) Optimize the site for viewing on mobile devices. Investigate the possibility of incorporating responsive design into future redesigns of the CISO site.

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ANTI-PERSONA - Tim Liebman - 27-year-old electrician from Madison, Wisconsin



“The hell... 'standards association'? What does that even mean?”

Photo credit: by Flickr user “Tobyotter” (Creative Commons license)

Background

Tim was born and raised in Madison, Wisconsin, where he still lives with his parents as he attempts to become financially independent enough to move out. Tim struggled academically and just barely managed to finish high school. He strongly disliked school and knew university wasn't in the cards for him. But he knew he was athletic and good at working with his hands. After seeing a U.S. Army recruitment campaign that offered apprenticeships and training in the trades, he decided to enlist. He completed his four-year tour of duty in Afghanistan in 2010, where he found electrical work to be the trade that he liked most. After extensive training, he worked as an aircraft electrician in his final year of duty.

Upon returning home, Tim – like many ex-servicemen – found that everyone in his hometown seemed to have a newfound level of respect for him, but the job market wasn't so inviting. The few openings in his field that were available seemed to require a university degree. Tim has a bit of a short temper and can get easily frustrated, so he didn't take this situation well. But his parents were very supportive and offered to let him live at home again until he got his feet back on the ground. Tim felt ashamed to have to do this, but eventually accepted the offer.

Tim has a girlfriend in Madison and recently purchased a 2009 Pontiac Solstice, largely in an effort to impress her. The purchase maxed out most of his savings. Now he needs to buy insurance for the car and happened upon the CISO website through his Google searching on the subject.

More About Tim

Goals (Needs and desires)

To purchase car insurance for his new Solstice. He needs as low a quote as possible because his savings are limited and he's currently unemployed.

Abilities (What they can do)

Tim isn't particularly computer savvy. He doesn't even like spending much time on the Internet. He can perform basic Google searches but he doesn't have a refined understanding of search strategy, e.g. Boolean.

Methods (How they do things now)

He has been using Google to search for car insurance. His queries have been simplistic, e.g. “insurance” and “car insurance”.

Technology and Web Background

Internet Presence: Below average for a twentysomething male. Although he reads news sites from time to time, he doesn't post anywhere online and doesn't engage in much social networking.

Mobile Usage: Average for a twentysomething male. He has a Nokia smartphone and uses it to talk and text but doesn't have a data plan.

Social Networking: He has a YouTube account to watch videos but doesn't post or even read comments. He mostly watches UFC (mixed martial arts) and war-related videos.

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TIM'S SCENARIO

An analysis of the CISO search engine hits from September, 2012 reveals that the CISO site was accessed from search engines on the query “insurance” 175 times. This is the second most popular keyword hit, behind “CISO” at 671 hits. It is likely that a person searching on such a general query as “insurance” would not be part of the insurance industry. They might very well be an “average Joe” who is searching for information and advice on buying insurance policies. This is certainly true in the case of Tim. He's a young guy with a new car, anxious to purchase vehicle insurance so he can start driving. Not being particularly savvy with search strategy, he starts his search efforts simply by typing “insurance” into Google. He sifts through a few pages in the SERP before arriving at this link: “CISO – Home”. He clicks on it. The results of this use case are detailed below:

USE CASE (TIM)

Home > About CISO mouseover > Clicks Mission, Vision and Values > Presses back > Scrolls down homepage, reads text > Scrolls back up > Membership mouseover > Clicks Request Membership > Clicks back to Google SERP

Arriving on the CISO site, Tim reads the slogan “moving insurance information forward”. That sounds like it could be useful to him, as he's looking for an insurance policy. He clicks into the Mission page and reads a few lines. He doesn't really understand it. Clicking back, he reads through the text on the homepage. He's now getting the sense that this site isn't meant for him, but still isn't 100% sure. He clicks into the Request Membership page, thinking you need membership rights to access insurance quotes. He reads on this page that membership is intended for insurance companies and leaves the site by clicking back to the Google SERP.

RECOMMENDATIONS

1) Be clearer on the homepage that this page is meant for brokers, insurers and vendors within the insurance industry. Right now, these names are only mentioned in the small explanatory “mission statement” text. For example, the large space currently being used by generic iStockphoto images could be used more productively. There could instead be images/links that represent “brokers”, “insurers”, “vendors” and their respective goals. 2) Consider making the entire site an extranet that cannot be accessed by the general public. It could still return results in search engines, but the initial screen might be a log-in page for CISO members only. This would make it clear that the CISO site is not meant for viewing by the general public and prevent users such as Tim from wasting their time on the site. 3) Consider working out a “linking partnership” deal with brokers to redirect traffic from users like Tim to their site. When Tim visits CISO, there could be a link pointing to a list of broker websites that are more relevant to his goal of buying an insurance policy. In exchange, we could receive links to the CISO site from the broker sites.