



...a petite case of redesigning

Onboarding Seniors to “Uttagsplaneraren”

Sophia Schyman

Design Challenge

Pension planning tool minPension had noticed very few used their feature for planning pension withdrawals, called **Uttagsplaneraren**. They suspected it might be too complicated to learn for users who weren't already very well-informed, or strongly motivated.

I was tasked to explore how we could attract and engage more users to the feature.

Case Summary

- Client: minpension.se (pension planning tool with 4,4 million annual users)
- Year: 2021
- My role: UX-Researcher + Concept Designer
- Problem: Very few users in the core segment 60-68 y/o uses the new feature "Uttagsplaneraren", designed to help them plan and withdraw their pensions.
- Desired outcome: Attracting and engaging more users to the feature for planning, called "Uttagsplaneraren".
- Process: Hypothesis Driven & Collaborative
- Output: Prototypes with a more efficient onboarding flow and a decluttered interface with steppers instead of a dashboard. Copy improvements and a restructured blog template to better explain the benefits of the feature (and better align with brand guidelines).

Design Process

Problem Space

Analytics	Problem Statement + Improved Data Reports (for example: goal tracking, cohorts, funnel)	Me	Team
		●	●
Interviews	Insights Report based on five interviews with Customer Support Agents onboarding/supporting users today.	Me	Team
		●	●
Workshops	Three workshops: Declaring assumptions, assess risks & formulate hypothesis + Design Studio Session.	Me	Team
		●	●

Solution Space

Prototyping	Three iterations of Figma-prototypes based on the sketches from the Design Studio Session.	Me	Team
		●	●
Testing	Six remote test sessions with users (who weren't using the feature today), also combined with interviews to add more meat to our research.	Me	Team
		●	●
Demo & Feedback	Demo sessions to show progress & insights for the Product Owner, and get feedback from the team.	Me	Team
		●	●



Some Sketches

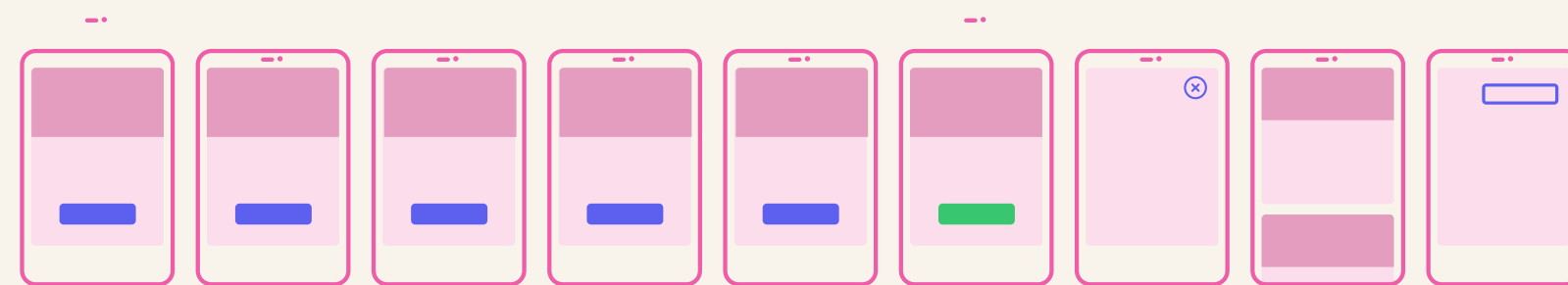
Hypothesis

We believe we will increase the conversion rate for new users, if the onboarding modal and the copy is simplified.

KPI:s to measure

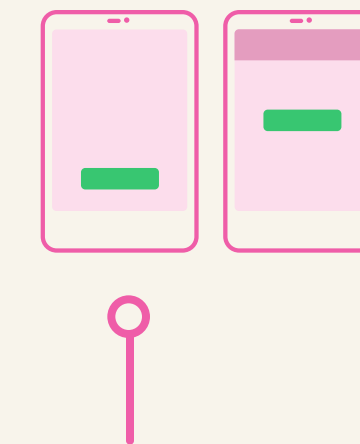
Conversion rate for all goals will increase with XX in the New User-Segment (intentionally left out the numbers).

From this onboarding flow:



* took 2 min 30 seconds to read (if you read fast).

To this:

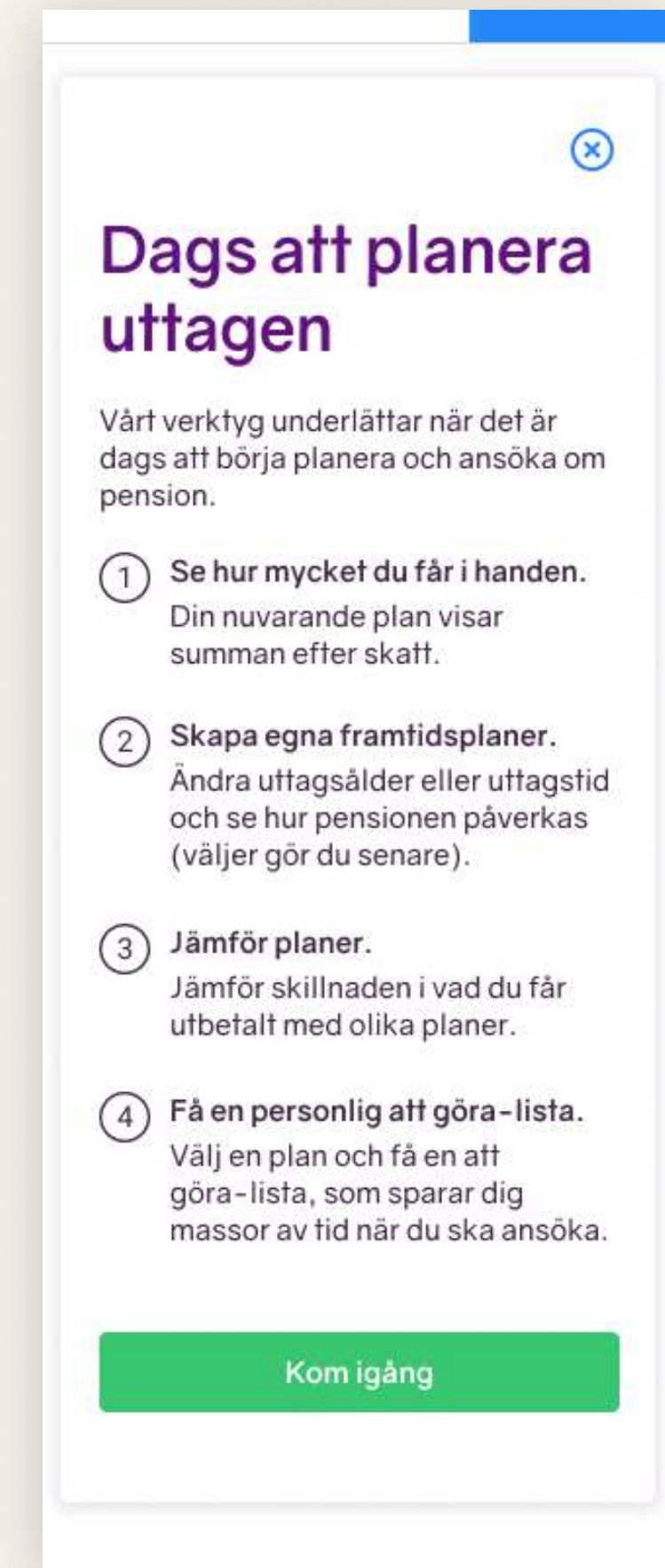


A stepper guides the user

Priming the user that green CTA means next step.

Takes between 10-20 seconds read, and doesn't require the user to remember any instructions.

Final design



Changes & feedback

We can't rely on the user to remember any instructions in the onboarding modal. Most will skim, or not read at all.

Simplified the copy and created a bullet list. The test subjects had no problem to recount the information using their own words, and knew what to expect.

Some Sketches

Hypothesis

We believe more users will create plans, if we add a stepper that will prompt them to the next step.

KPI:s to measure

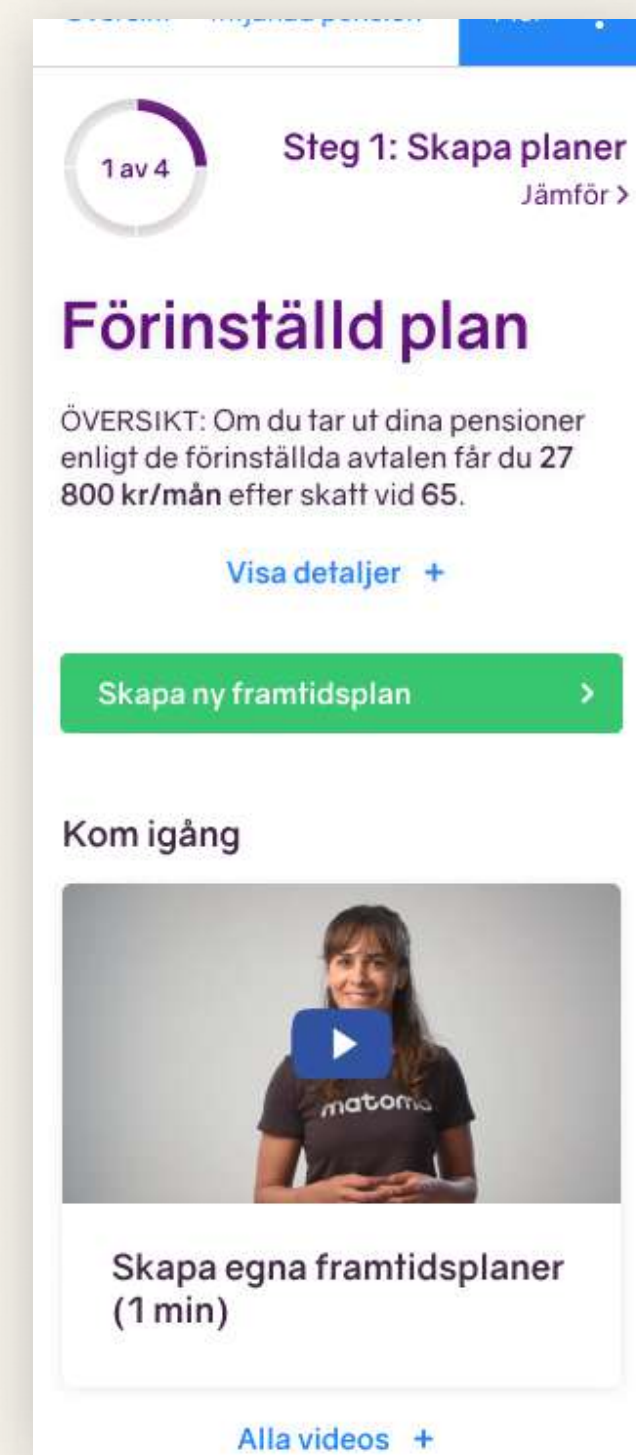
The conversion rate for creating plans, comparing plans and choosing a plan will increase by XX in both the segments New User and Returning User.

From this starting point:



Complicated copy. No clear starting point and 10 options available to the user.

To this:



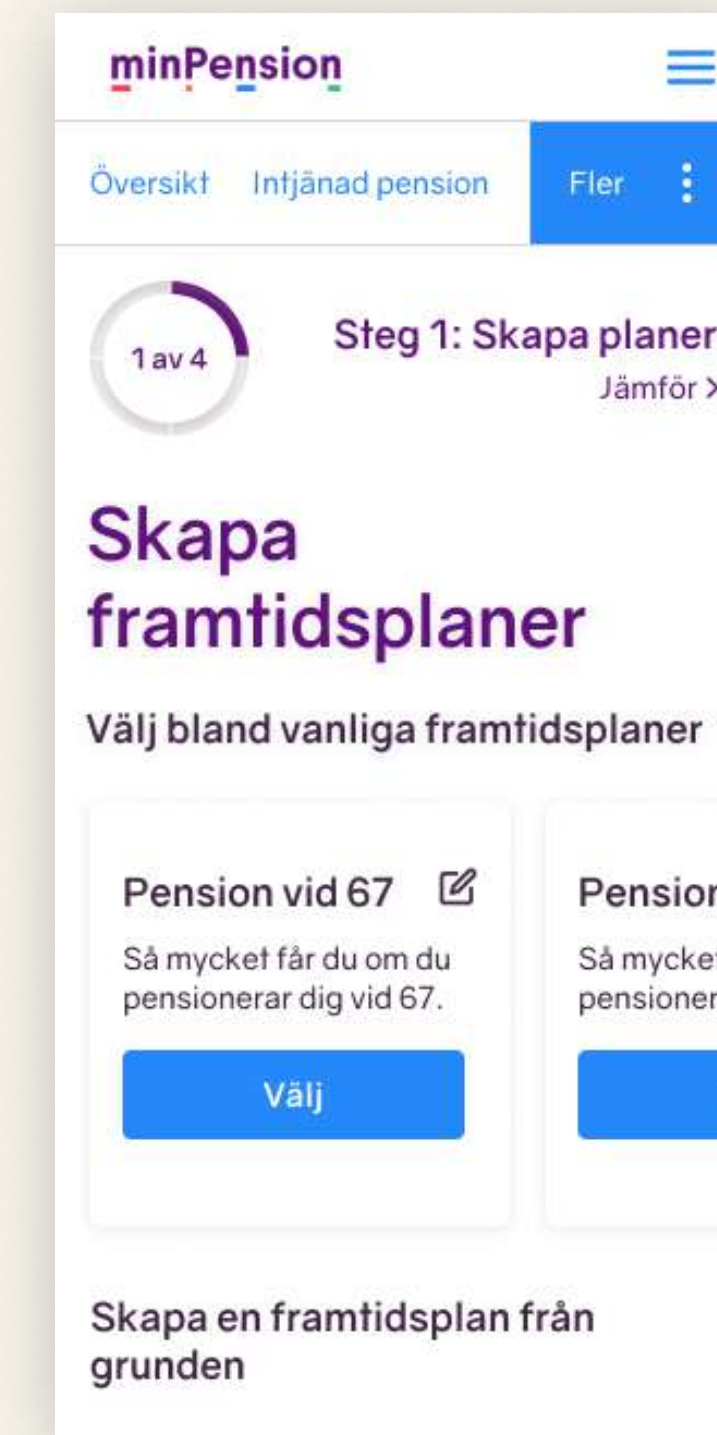
Added stepper.

Decluttered the options, and reduced them to five instead of ten (Hicks Law).

“Key Action” is visually different from all other actions (von Restorff Effect.)

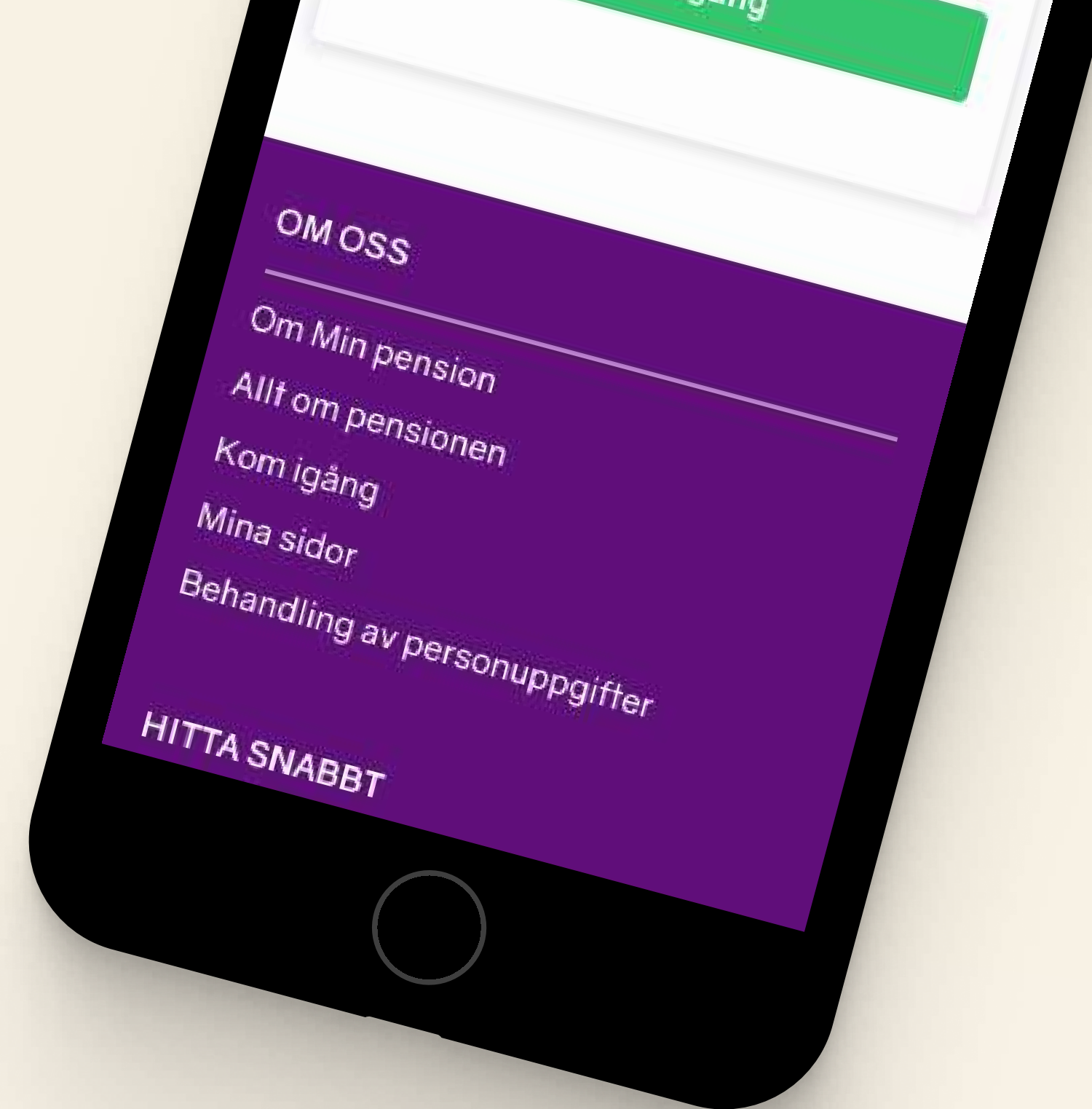
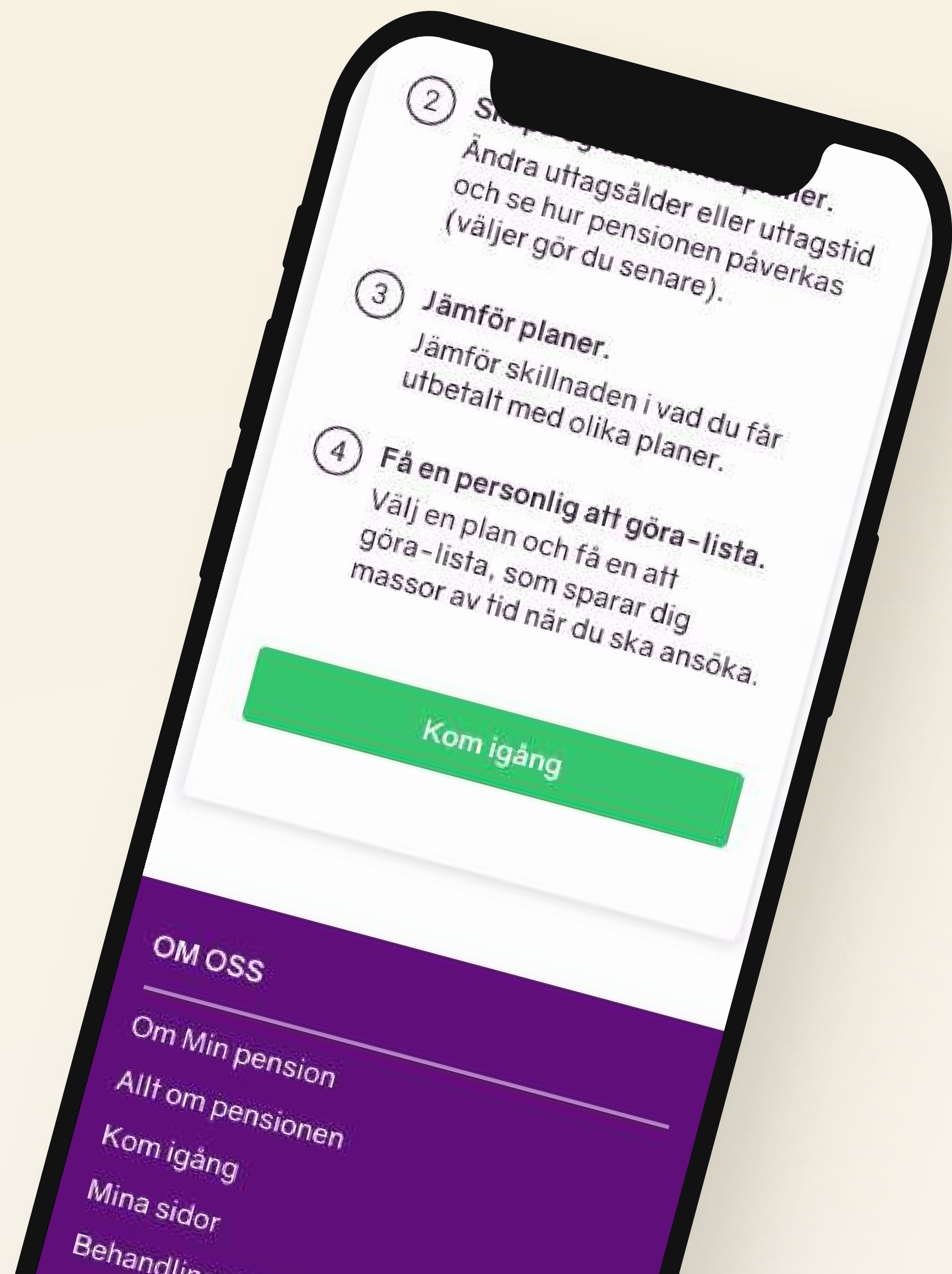
Help & video is always in the bottom. Accessible but less intrusive.

And this:



Most users are wondering the same things “what happens if I retire a year early or later”.

Offer preset plans to lower the threshold of creating a retirement plan.



Want to See More?

[Check out the prototype](#)

Otherwise, thank you for your time.

A Reckless Gardener at Your Service

Sophia Schyman, UX-designer in the Making

I am a seasoned Content Manager enroute to becoming a UX-designer. I want to design services that aims to make the world a better place.

Greenfluencer, reckless gardener, diehard fan of the designer extraordinaire and ideologist William Morris. And a second hand enthusiast. That's me.

I believe the **value of design is equal to the total sum of problems solved**. Opting for the the sweet spot between creative and data driven, I strive to design services that make a real impact on both business and users. Curiosity is my infinite resource and Lean UX my bible.

In Summary:

- UX-student at STI, Stockholm Technical Institute (grad June 2022).
- Bachelor in Media Technology from Södertörn University College (2014).
- Have a diploma in Conversion Management.
- Freelancing Content Manager.
- ... worked 7 years in Marketing as Content Manager for startups like Steamery Stockholm, Bounce and as Marketing coord. for TT News Agency.

