

## Member Portal Patterns (NOT FORMATTED)

*“Taking your users from “**completely new**” to “**fully capable**” is a journey—and one that can be rather lengthy, at times”*

*-Samuel Hulick, [Bulletproof User Onboarding](#)*

### Critical Paths To Task Completion

Reference: <https://www.useronboard.com/how-paypal-onboards-new-users/?slide=78>



#### **Why I chose this method?**

Find what you are looking for easily

#### **Why it benefits the user?**

Find what they want, or suggest what they need

#### **Why we should consider this as a top principle?**

Our users have voiced not knowing what to do next

If the user decides to skip the “Personalize Your Experience”: we take them to a screen where we re-inforce the option to Personalize, then empower them to go straight to “Complete A Task” and lastly; Explore the app which takes them to the MP landing.

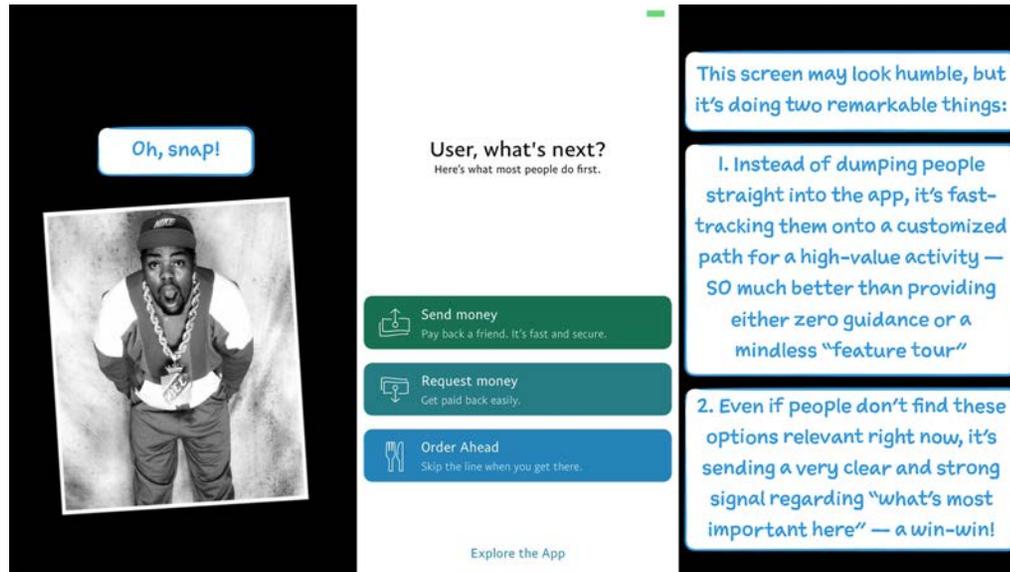
If they choose “Complete A Task” the screen takes them to the top Actions people come to the portal to complete. For the sake of simplicity, I’m only

showing 3 main options here.

PAYPAL UI  
EXERPT FROM SAMUAL HULICK ([www.useronboard.com/](http://www.useronboard.com/))

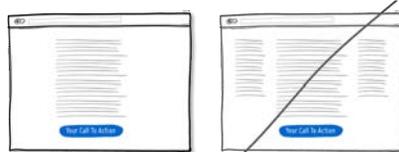
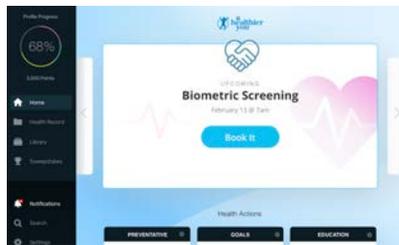
*Instead of dumping people straight into the app, it's fast-tracking them onto a customized path for a high-value activity*

*Even if people don't find these options relevant right now, it's sending a very strong signal regarding "What's most important here" — a win-win!*



# Narrowing Field Of Attention

Reference: <https://goodui.org/#1>



## Why I chose this method?

Keeps users focused on one thing at a time

## Why it benefits the user?

User doesn't become overwhelmed by too many options

## Why we should consider this as a top principle?

Our users don't know where to start on the MP

This gives direct starting point

## VIEWPORT BEST PRACTICES

In order for the user to have an *easy to use experience* with the Member Portal UI, our goal should be to present one concept at a time.

In this instance, the viewport shows the ubiquitous left-hand navigation (which does not scroll with page). The nav is intentionally differentiated with heavy contrast between it and the main content.

The focus here is the right-hand content area. The content flows from top to bottom, never showing more than one concept at a time. Yet, the user can see there is more content below but isn't distracted since it only suggests more content without competing for attention.

This gives the user one thing to focus on at a time, instead of showing multiple and possibly disparate content that competes for the user's attention.

**SINGLE COLUMN VIEW** [goodui.org](http://goodui.org)

*This rule can be applied in just about any context:*

*“A one column layout will give you more control over your narrative. It should be able to guide your readers in a more predictable way from top to bottom. Whereas a multi column approach runs some additional risk of being distracting to the core purpose of a page. Guide people with a story and a prominent call to action at the end.”*

## Designing For Zero Data

Reference: <https://goodui.org/#25>

**Why I chose this method?**

Give the user the ability to easily start progression

**Why it benefits the user?**

Empower the user to start progress in each health action category



**Why we should consider this as a top principle?**

The user cannot visually see or do anything with the zero state cards, give them a way to change that immediately

If we give them a first step in each card, they will feel more empowered to do something instead of feeling like they have a long way to go

If the user decides to skip the “Personalize Your Experience”: we take them to a screen where we re-inforce the option to Personalize, then empower them to go straight to “Complete A Task” and lastly; Explore the app which takes them to the MP landing.

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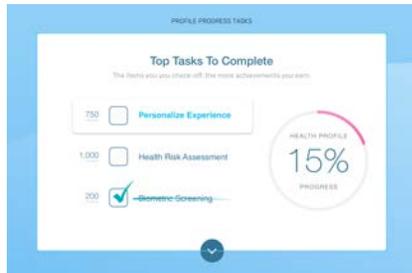
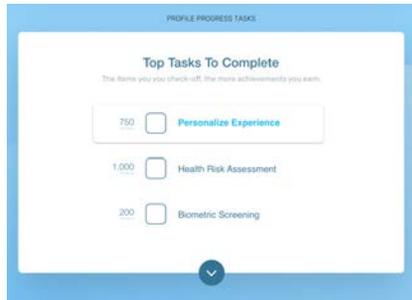
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*Instead of dumping people straight into the app, it’s fast-tracking them onto a customized path for a high-value activity*

*Even if people don’t find these options relevant right now, it’s sending a very strong signal regarding “What’s most important here” — a win-win!*

# Raising The Awareness Of Status

Reference: <https://ux.useronboard.com/bulletproof-user-onboarding-f34ee03f655f>



## Why I chose this method?

Keeping users on track through a prioritized list

## Why it benefits the user?

The user stays focused on what is next

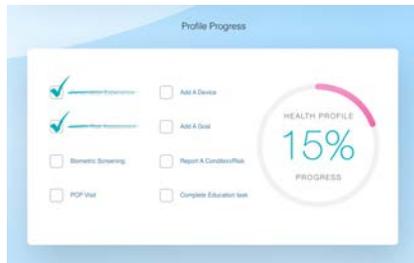
## Why we should consider this as a top principle?

Users currently have trouble knowing what to do next

## Health Profile Progression System

Just as onboarding is a one-time progression, a **health profile progression system** is designed for a one time use only (it's temporary). The goal is to accomplish a 360 degree achievement process. It should have it's own internal code name, maybe the magic 8 ball concept, etc....I don't know. Whatever that specific number of actions that makes HM successful in getting the user to complete the top X actions. It should be noted that onboarding and this progression concept are completely intertwined. If the user can accomplish the magic 8, then the user is now fully Onboard (-ed).

1. Personalize Experience
2. Health Risk Assessment
3. Biometric Screening
4. PCP Visit
5. Add A Device
6. Add A Goal
7. Report A Condition/Risk



## 8. Complete Education task

It is a system designed to get the user to know how far they have come and where they are going, they can see visually they are on a journey. It gives the overall since of completion. Having the progression system located in one area gives the user a complete overview of their progress as a whole.

BUT.....the actual purpose here behind this mechanism is actually to push users to close gaps in their health.

THIS MAY NOT BE APPARENT AT THE MOMENT, BUT REALLY THINK ABOUT THE POTENTIAL HERE.

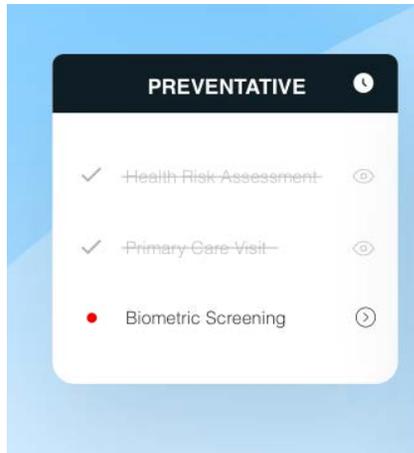
For instance, there will come a point where this current progression system will actually be completed when it hits the 100% threshold. It will end.

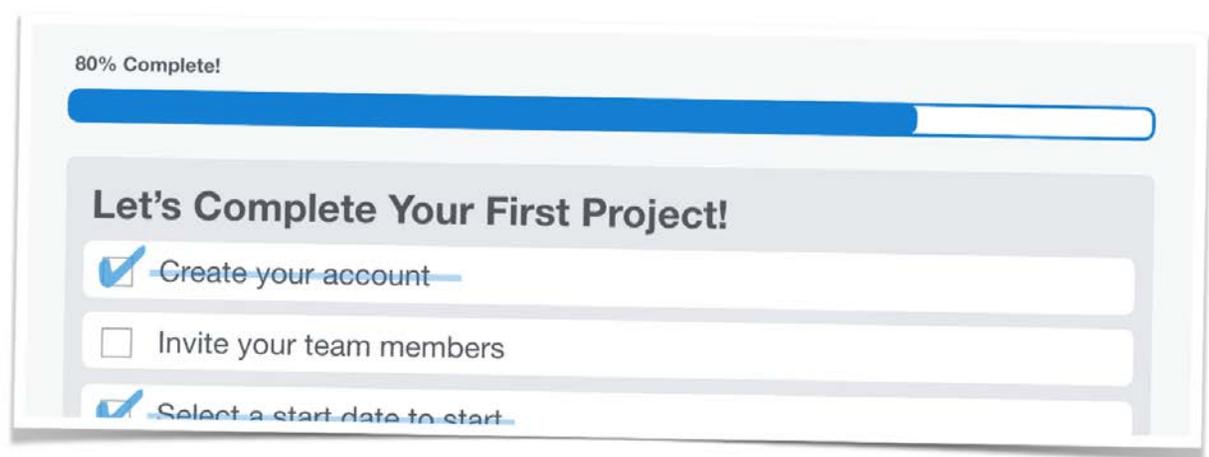
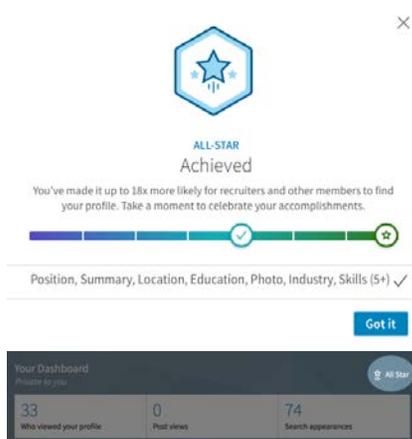
If they hit the 100% mark, it means we have successfully helped this person complete all the top tasks we want them to hit.

**This system may seem simple, but if people are actually utilizing this system; we have created a break-through user flow that will keep the user on track and PROVE OUR PRODUCT WORKS IN MAKING PEOPLE MORE HEALTHY.**

After the 100% mark, we would go into a maintenance mode, which will actually have a different focus. Thus, no more "Health Profile Progress" because it has served its purpose.

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EXERPT FROM SAMUAL HULICK ([www.useronboard.com/](http://www.useronboard.com/))

*Taking your users from “completely new” to “fully capable” is a journey—and one that can be rather lengthy, at times. Progression Systems are SUPER helpful for helping users make their way along each stage of that journey.*

*They often take the form of to-do lists (with items that get crossed off as the user completes them), or completion meters (like LinkedIn’s infamous “thermometer of agony”), or some combination thereof.*

*Regardless of how they’re displayed, the important part is to highlight the most important activities inside the app—and, of course, to demonstrate the progress users are making as they complete those activities!*

- **Are They “Integrated”?**

*While they may not be a COMPLETELY “natural” part of the app, they’re also far from distracting or interruptive of the organic flow within a product. Think of them as providing a great “fallback option” for the user, rather than an element that’s*

competing for their immediate attention.

- **Are They “Empowering”?**

As with the Empty States above, any onboarding experience is only as empowering as you choose to make it. That said, Progression Systems are among the patterns most closely aligned with spurring users to do things of actual consequence, which the “empowerment” concept is all about.

- **Are They “Steadfast”?**

Yes, totally! They’re specifically designed to work over the long haul (think in terms of multiple visits, not just the first). Pro tip: if someone reaches “100%” progress, you can also always just graduate them to “Level 2” and start them off on a new series of quests!

## Raising The Awareness Of Competence

Reference: <https://goodui.org/#58>



### Why I chose this method?

Incentivizes users to accomplish more

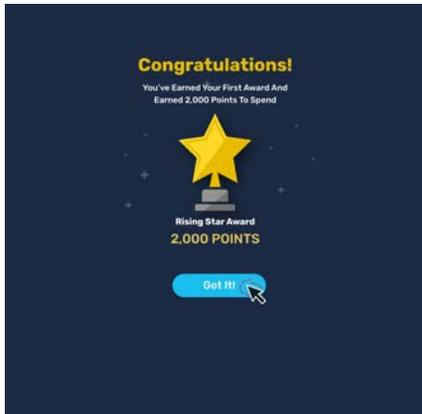
### Why it benefits the user?

User feel rewarded

### Why we should consider this as a top principle?

Users currently do not get any positive feedback

This positively affirms and empowers users by rewarding them



## Evidence Exists For A **+160%** Effect From This Idea



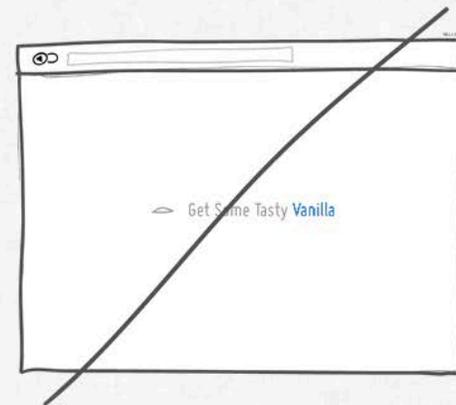
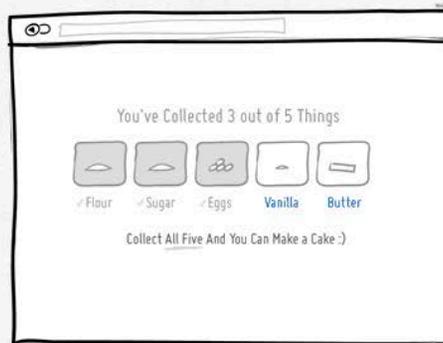
idea  
**58**

EASE OF USE  
CONVERSION

## Try **Set Collections** instead of independent items.

Evidence Exists For A **+160%** Effect From This Idea

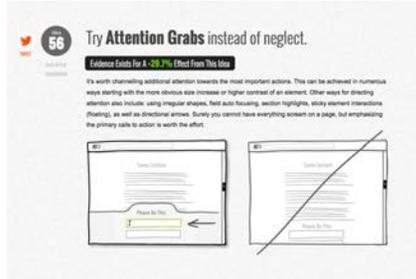
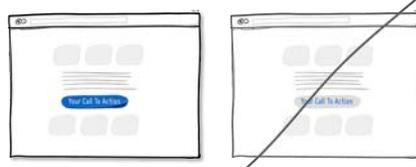
People are motivated to collect things. Whether physical or virtual, seeing a closed set of things to collect from establishes a goal to strive for. Often obtaining the complete set can motivate even further by carrying added benefits of synergistic qualities (a cake is bigger and better than its individual ingredients). Perhaps, showing items which have been already collected, also reinforces behavior by showing past actions as achievement. Finally, the motivation to collect a complete set might be stronger if the number of items is known to be finite (overlying scarcity).



# Focus Of Attention Hierarchy (Hero Section)

Reference: <https://goodui.org/#11>

Reference: <https://goodui.org/#56>



## Why I chose this method?

Shows the user the primary action they should do next

## Why it benefits the user?

Reduces ambiguity on priorities

## Why we should consider this as a top principle?

Our users have trouble knowing where to look first

This gives them exactly where to look first

Evidence Exists For A **+29.7%** Effect From This Idea

*Making your calls to action be a bit more prominent and distinguishable in relation to the elements surrounding them, will make your UI stronger. You can easily increase the contrast of your primary calls to action in a number of ways. Using tone, you can make certain elements appear darker vs. lighter. With depth, you can make an item appear closer while the rest of the content looks like it's further (talking drop shadows and gradients here). Finally, you can also pick complementary colors from the color wheel (ex: yellow and violet) to raise contrast even further. Taken together, a higher contrast between your call to action and the rest of the page should be considered.*

It's worth channelling additional attention towards the most important actions. This can be achieved in numerous ways starting with the more obvious size increase or higher contrast of an element. Other ways for directing attention also include: using irregular shapes, field auto focusing, section highlights, sticky element interactions (floating), as well as directional arrows. Surely you cannot have everything scream on a page, but emphasizing the primary

calls to action is worth the effort.

## ***Persuasion tactics based on the rule of reciprocity***

Reference: <https://goodui.org/#2>



### **Why I chose this method?**

Giving the user free incentives provides motivation

### **Why it benefits the user?**

Any user will be more motivated by getting value for free

### **Why we should consider this as a top principle?**

Users currently don't have incentive to take on tasks

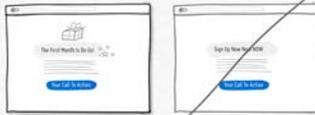
This is just one way of giving the user a reason to do something

<https://goodui.org/#2>

*A friendly gesture such as providing a customer with a gift can be just that. Deeper underneath however, gifting is also an effective persuasion tactic that is based on the rule of reciprocity. As obvious as it sounds, being nice to someone by offering a small token of appreciation can come back in your favour down the road.*

## 2 Try Giving a Gift instead of closing a sale right away.

A friendly gesture such as providing a customer with a gift can be just that. Deeper underneath however, gifting is also an effective persuasion tactic that is based on the rule of reciprocity. An obvious one: rewards, being nice to someone by offering a small token of appreciation can come back in your favour down the road.

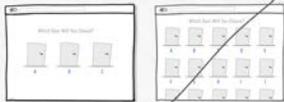


# Reduction Of Task Switching

Reference: <https://goodui.org/#75>

## 75 Try Less Choice instead of giving too many options.

The amount of choice should be questioned and possibly limited, as first noted in [1982](#) and recently [revisited](#) in an awesome write up by [Conover](#). Apparently the more choices there are, the harder decision making may become. What's even more interesting is that with more choice our satisfaction is also at risk of diminishing as expectations, regret and self-blame tend to increase. However, not all choices are bad that bad as it may also [reduce freedom](#). As the [Tversky](#) [paradox](#) (with less choice leading to higher decision) is still struggling to be replicated, we prefer to take somewhat of a middle ground approach and test this further.



### Why I chose this method?

Shows the user the primary action they should do next

### Why it benefits the user?

Reduces ambiguity on priorities

### Why we should consider this as a top principle?

Our users easily get overwhelmed by the abundance of actions to take  
This approach simplifies the decision process for the user to make a choice

Instead of showing every single action, here we should just show a few so as not to overwhelm. And of course, at the same time imply there is more that what is being shown

The amount of [choice should be questioned](#) and possibly limited, as first hinted in [idea #7](#) and recently [rediscovered](#) in an awesome write up (by ConversionXL). Apparently the more choices there are, the harder decision making may become. What's even more interesting is that with more choice our satisfaction is also at risk of diminishing as expectations, regret and self-blame tend to increase. However, not all choice is all that bad as it may also [reaffirm freedom](#). As the [famous jam study](#) (with less choice leading to higher decisions) is still struggling to be replicated, we prefer to take somewhat of a middle ground approach and test this further.