eMoney Advisor

—

Maximize Your Mobile Experience

YOUR SPEAKERS

Ryan Russell
Co-founder
Twenty Over Ten

Samantha Russell
Chief Marketing Officer
Twenty Over Ten

OUR MISSION

We believe that <u>accessibility, strong design, and functionality</u> should be at the core of your business, defining your brand's reputation and the opportunities for your clients.

twenty over ten

New frontiers — The Facts on Mobile Adoption and Usage

60%
of Internet Access Is Mostly Mobile

90%
of adults in the U.S. have a cell phone

58%
have a smartphone (More than half!)

New frontiers — The Facts on Mobile Adoption and Usage

32%

of adults in the U.S.
own an e-reader

42%

of adults in the U.S. own
a tablet computer

New frontiers — How Mobile Technology Changes Human Behavior

150

of times smartphone users check their devices PER DAY.

67%

of cell phone owners check their phone for messages, alerts, or calls — even when their phone is not sending an alert.

44%

of cell phone owners admitted to sleeping with their phone by their bed because they did not want to miss any calls, text messages, or social media updates while they were sleeping.

New frontiers — Browsing Habits Redefined by Mobile Technology

34%

of smartphone users go online primarily using their phones, and not on a desktop, laptop, or other device.

1.4 billion to 1.6 billion users

Increase in people using a desktop computer to search online in 2015

800 million to 1.9 billion users

Increase in people searching online using a smartphone 2015.

New frontiers — The Facts on Mobile Adoption and Usage

32%

of adults in the U.S.
own an e-reader

42%

of adults in the U.S. own
a tablet computer

Designing for Mobile First

Focusing on mobile first puts your mind in the right place. It forces you to focus on and prioritize the most important features and content in your website.

By approaching your project with the mobile-first mentality, you will start off on the right foot.

New frontiers — <u>mobile responsive</u> design and accessibility

A responsive website responds automatically to the user's screen size, device and orientation without the need for managing separate websites or worrying about legibility.

Establishing Goals

Establishing the Primary, Secondary, and tertiary Goals of your **USERS.**

Define your user goals (not your own). This method of goal-directed design will ensure that your website meets the needs of your audience, rather than your own interests.

What can you do vs. What should you do.

Understanding Your Audience — Creating Personas

A persona is a way to model, summarize and communicate research about people who have been observed or researched in some way. A persona is depicted as a specific person but is not a real individual; rather, it is synthesized from observations of many people.

Example of a Persona

Robert Retiree – Profile

Robert Thompson retired 3 years ago at age 62, after working for 35 years in the Underwriting department of Acme Insurance. At 65 years old, Robert is extremely active. He golfs twice a week in the summer and swims laps three times a week in the winter. He is proud of his garden and spends an hour or two each day maintaining his lawn and flower beds. Robert is also an avid fisherman.

Robert uses a tablet at home, where he has set up a home office that he shares with his wife. Robert is comfortable using his tablet and computer. As an underwriting manager, he learned to use the Web for job-related research, and he used the company's intranet on a regular basis throughout each workday. As a retiree he uses social media, particularly Facebook, to connect with family and friends. He uses the Web daily.

Example of a Persona

Robert Retiree – Characteristics

• Robert's eyesight isn't what it once was. He wears glasses, although some websites are still hard to read because the text is too small or low contrast.

• Robert uses a tablet. It's quick to boot up and portable, more so than a laptop. He primarily uses it in portrait mode since he uses it as an e-reader in addition to searching the web.

• Robert has a moderate understanding of how the internet works and spends time reading various websites and using facebook. He's thinking about getting instagram as well so he can see pictures of his grandkids.

Behaviors And Archetypes

Build on the behaviors and archetypes that your users are already accustomed to. This will go a long way to reducing the learning curve of your website. If your website responds predictably to a user's interaction, then the user will immediately become more comfortable.

As with most good UX principles, if done properly, the user won't even notice, while their increased comfort level will encourage them to continue exploring the website.

User-Centered Design

As mobile devices become the primary point of access for your website and online marketing efforts, **the spotlight is on how to improve the individual elements that together create the mobile user experience.** Components that shape the mobile user experience

- Functionality
- Architecture (structure and organization)
- Content (verbal and visual)
- Design
- Usability
- SEO & Visibility

Functionality

This has to do with tools and features that enable users to complete tasks and achieve their goals.

GUIDELINES

Prioritize and present your primary CTA. For your purposes, establish your primary call-to-action (CTA) and ensure it's displayed on screen without clicking or scrolling!

If your CTA is to have users schedule a meeting, be sure to utilize a mobile friendly third–party scheduler.

Ensure that fundamental features and content are optimized for mobile. For example, make sure your maps allow users to connect with popular way-finding apps, and make the phone numbers click-to-call.

Information Architecture

This has to do with arranging the functionality and content into a logical structure to help users find information and complete tasks. This includes navigation, search and labeling.
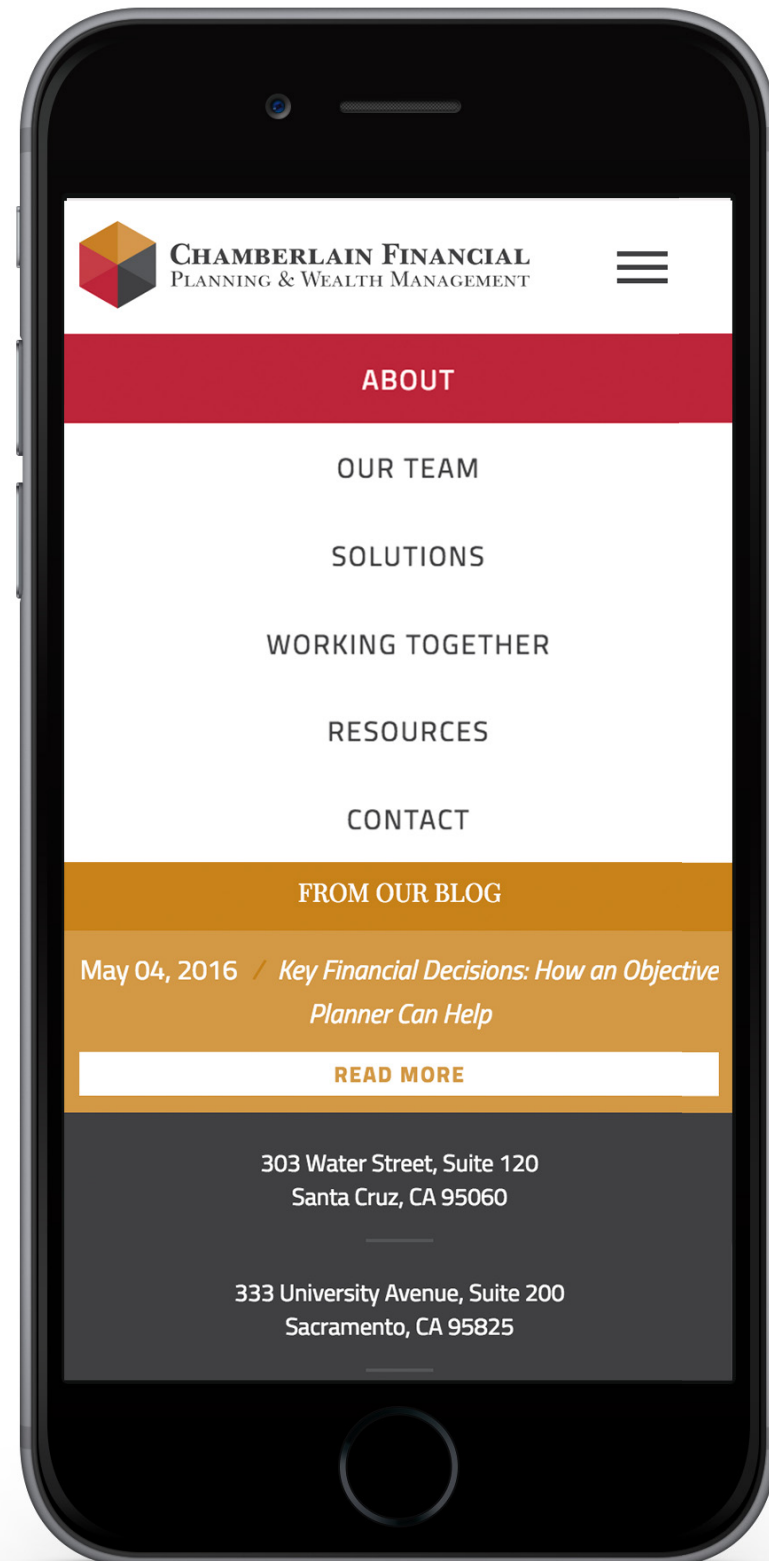

GUIDELINES
Present information based on priority to the user's needs. The most important features should be presented clearly on the landing page. Again, identify your CTA and make it clear up front.

Information Architecture

GUIDELINES
Enable mobile users to navigate to the most important content and functionality in as few taps or key presses as possible. Try to avoid any more than 2 levels of pages.

Navigation optimized for small screens is usually broad and shallow instead of deep. Each click for a user should have purpose. Every additional level also means more taps, more waiting for a page to load and more bandwidth consumed.

Design tip: Make sure the tap size of the navigation item is at least 30 pixels wide or tall (we recommend 44px minimum).
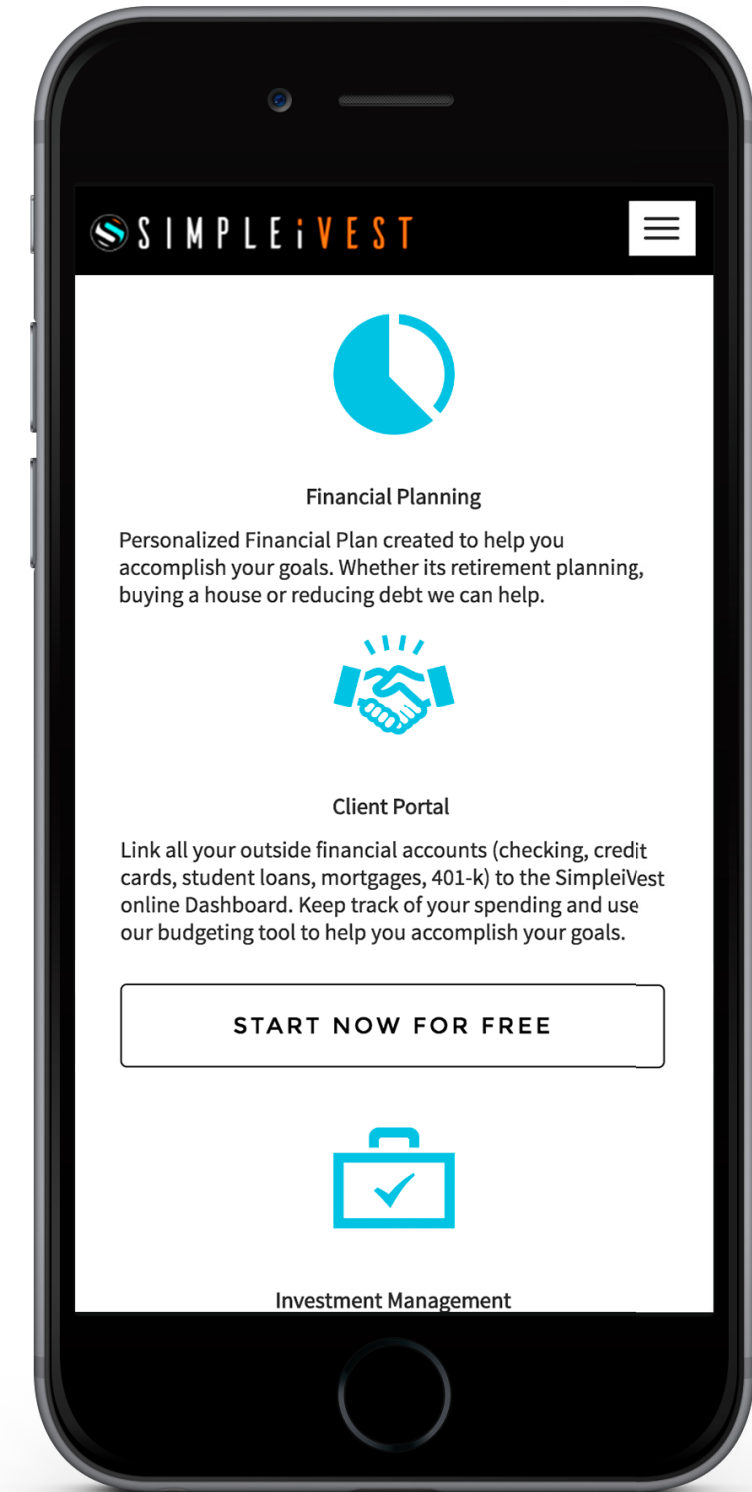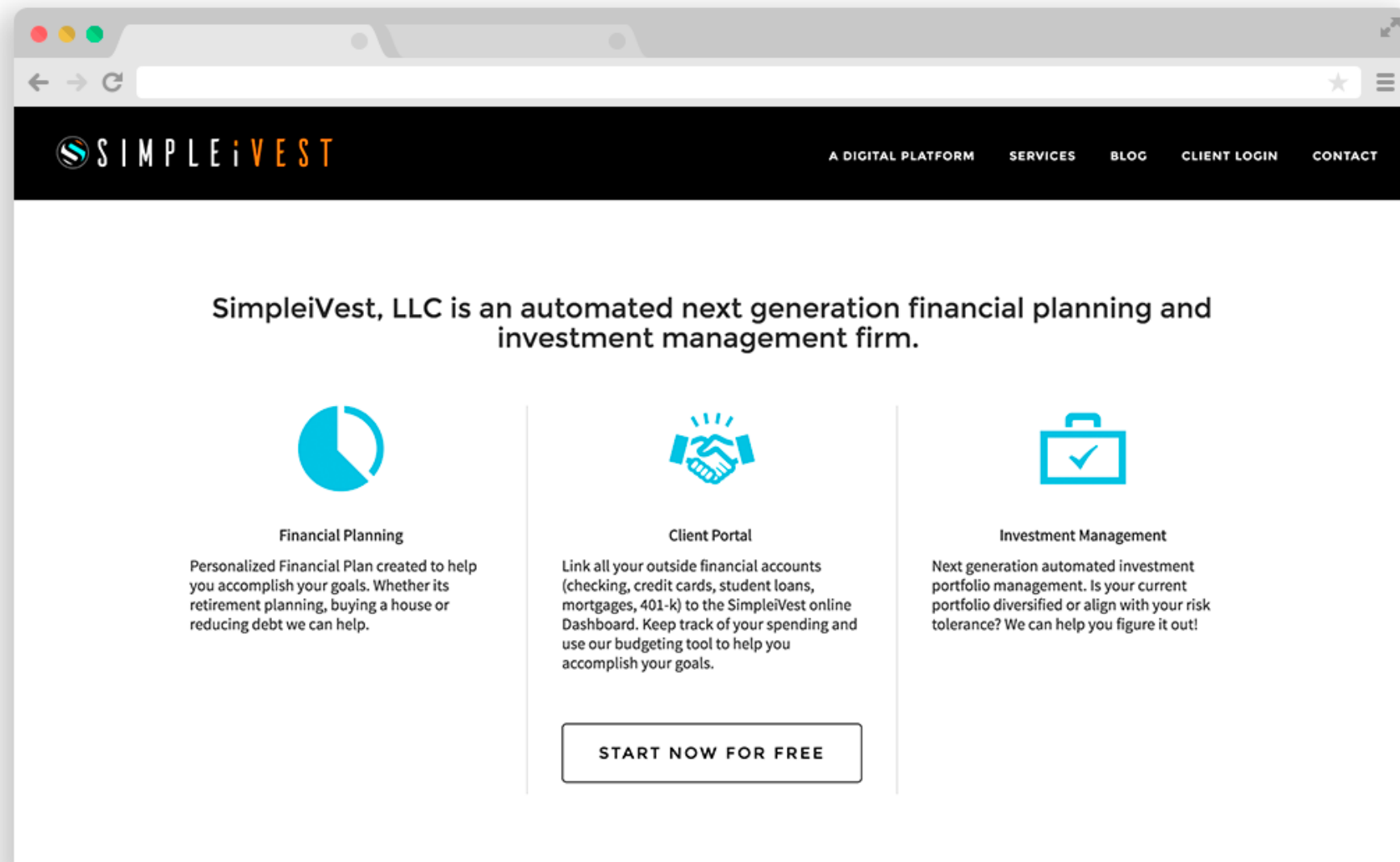
Content

This includes materials in different formats, such as text, images and video, that provide information to the user.

GUIDELINES
Ensure that content is mobile appropriate. Chunking content allows users to easily scan to find what they are looking for. (i.e. copy should be written for shorter attention spans on mobile devices).

Present an appropriate and balanced mix of content to users (product information, social content, instructional and support content, marketing content).

SIMPLEiVEST

A DIGITAL PLATFORM   SERVICES   BLOG   CLIENT LOGIN   CONTACT

SimpleiVest, LLC is an automated next generation financial planning and investment management firm.

Financial Planning

Personalized Financial Plan created to help you accomplish your goals. Whether its retirement planning, buying a house or reducing debt we can help.

Client Portal

Link all your outside financial accounts (checking, credit cards, student loans, mortgages, 401-k) to the SimpleiVest online Dashboard. Keep track of your spending and use our budgeting tool to help you accomplish your goals.

Investment Management

Next generation automated investment portfolio management. Is your current portfolio diversified or align with your risk tolerance? We can help you figure it out!

START NOW FOR FREE

SIMPLEiVEST

Financial Planning

Personalized Financial Plan created to help you accomplish your goals. Whether its retirement planning, buying a house or reducing debt we can help.

Client Portal

Link all your outside financial accounts (checking, credit cards, student loans, mortgages, 401-k) to the SimpleiVest online Dashboard. Keep track of your spending and use our budgeting tool to help you accomplish your goals.

START NOW FOR FREE

Investment Management

Content

THE USE OF MULTIMEDIA IN MOBILE

Use multimedia when it supports the user's tasks in a mobile context, or adds value to the content of your website and blog.

Design tip: Always give the user control over multimedia content by not auto-starting video or sound, by allowing the user to skip or stop multimedia content and by being mindful of the bandwidth it takes up.

Design

This has to do with the visual presentation and interactive experience of mobile, including graphic design, branding and layout.
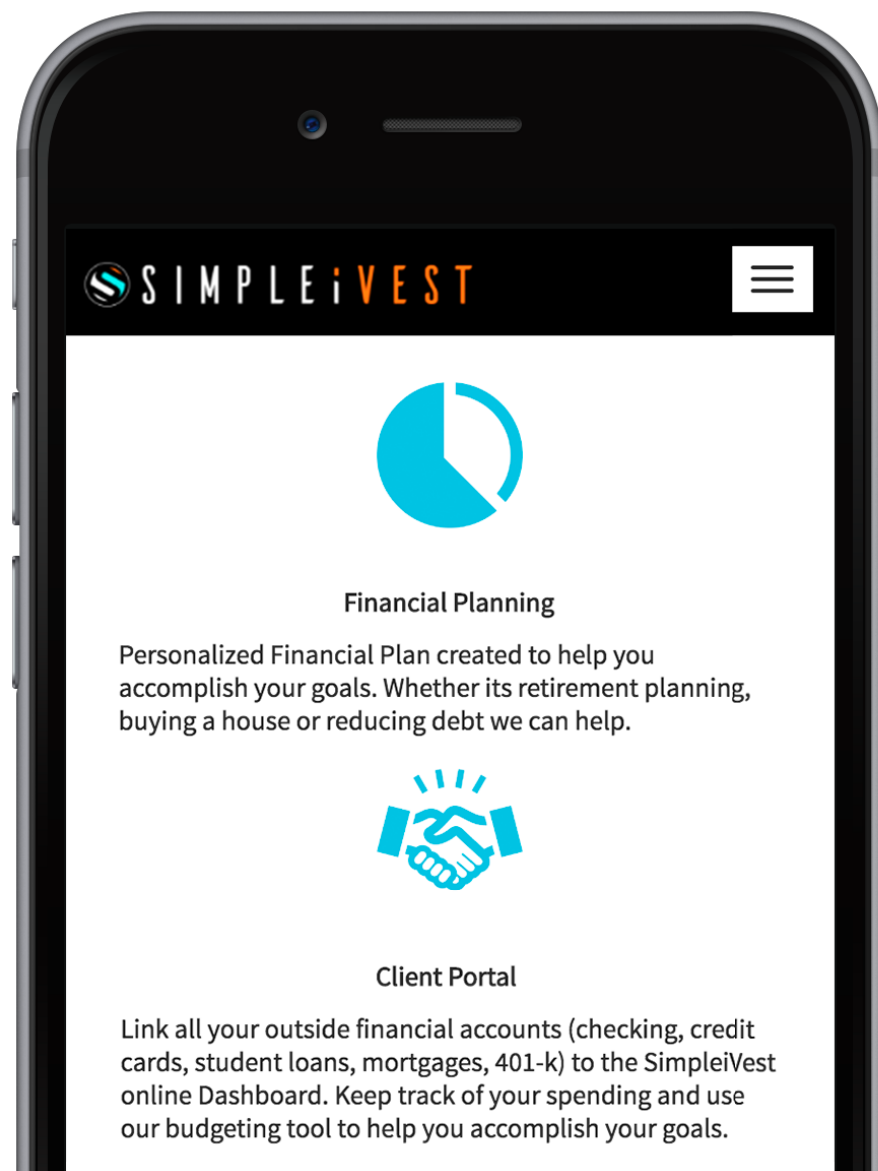
Design for glanceability and quick scanning. Glanceability refers to how quickly and easily the visual design conveys information.

Maintain visual consistency with other touchpoints and experiences (mobile, app, Web, print and real world) through the use of color, typography and personality.

Design

Guide users from the initial and most prominent element of the design to other elements to help them complete their tasks. This is known as visual flow. A good design brings together visual elements as well as information architecture, content and functionality to convey the brand's identity and guide the user.
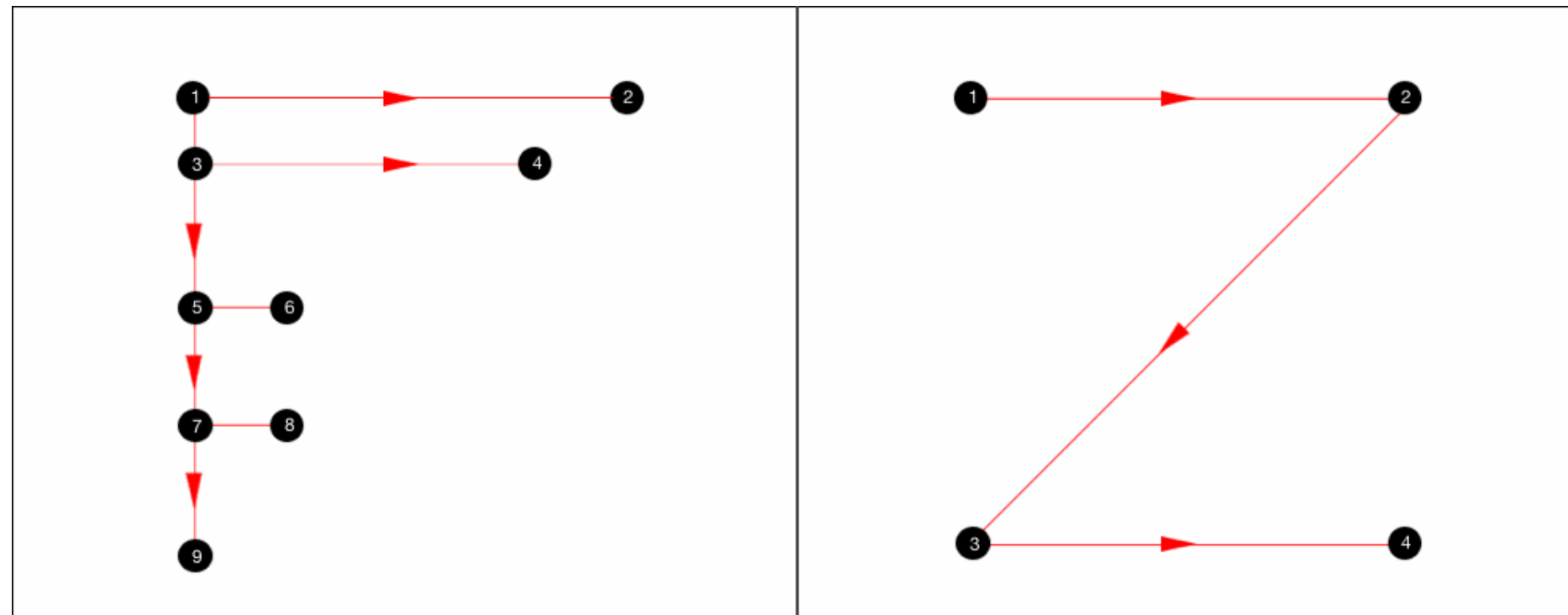
Usability

This is the overall measure of how well the information architecture, content, and design, work together to enable users to accomplish their goals.

Make it clear to the user what can be selected, tapped or swiped (this is known as affordance), especially on touchscreen devices. One of the big findings of Nielsen Norman Group's usability studies of the iPad was that users didn't know what was touchable or tappable.

Notepod exemplifies how color contrast between a call to action and its surrounding elements can be effective in drawing user attention directly to it. The surrounding elements are all black, while the call to action button is a bright blue color.

Usability
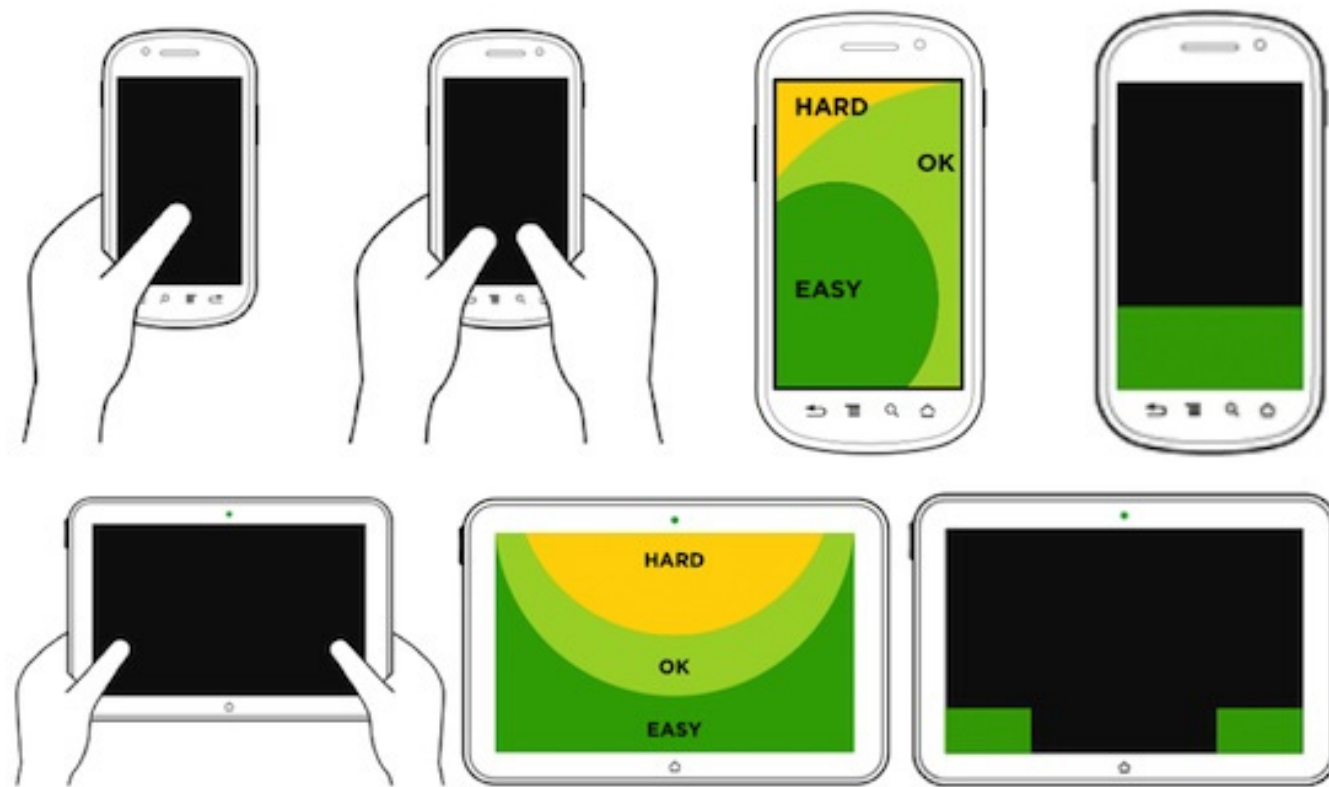
For touchscreen devices, ensure that touch targets are appropriately sized and well spaced to avoid selection errors. Also, place touch targets in the appropriate screen zones; for example, put destructive actions such as those for deletion out of the "Reach" zone.

Don't reinvent the wheel. Rely on learned behaviors. Follow conventions and patterns to reduce the learning curve for users and to make the mobile experience more intuitive. Every button should look and act the same, etc.

Do not rely on technology that is not universally supported by your audience's devices, including Flash.
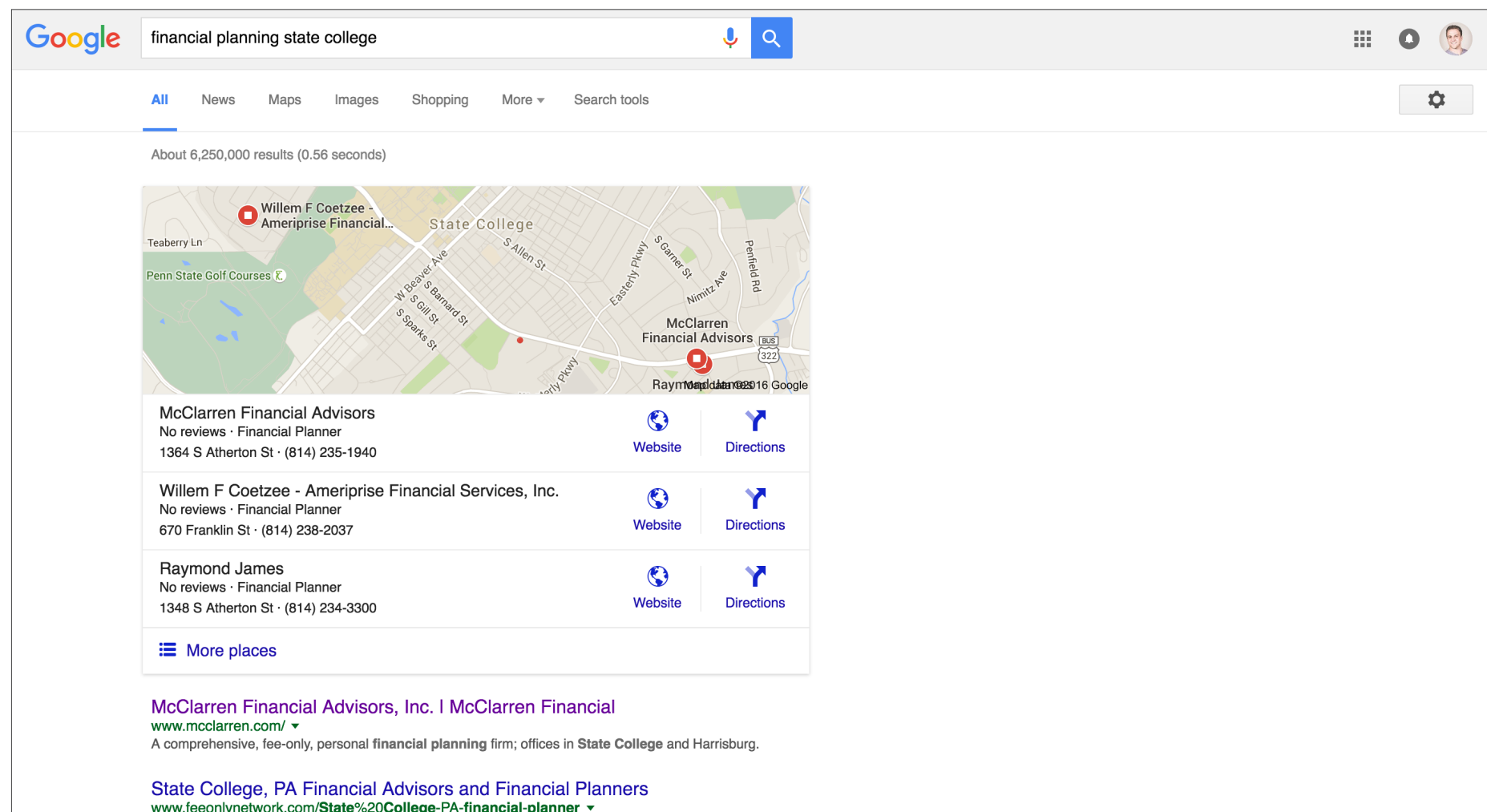
Usability

USABILITY AND USER INPUT

Limit input to essential fields. Or, as Luke Wroblewski says in his book Mobile First, "When it comes to mobile forms, be brutally efficient and trim, trim, trim." Limit registration forms to the minimum fields required, and use shorter alternatives where possible, such as a ZIP code instead of city and state.

Disable features such as CAPTCHA where not appropriate.

SEO & Visibility

This has to do with the methods by which a user finds a website and the factors that encourage repeated usage.

GUIDELINES
Ensure findability by optimizing for mobile search and discovery, such as by keeping URLs short.

Utilize Google My Business, and implement Google Analytics

Visit https://www.google.com/webmasters/tools/mobile-friendly/

eMoney

Advisor

—

Thanks!

twenty over ten

—

Contact us at hello@twentyoverten.com
Visit www.twentyoverten.com