

Helping Customers Complete Tasks

H



Sometimes customers will need help carrying out and completing a task on your Web site. This pattern group describes ways to structure your site to minimize problems and improve your task completion rate.

- H1** PROCESS FUNNEL
- H2** SIGN-IN/NEW ACCOUNT
- H3** GUEST ACCOUNT
- H4** ACCOUNT MANAGEMENT
- H5** PERSISTENT CUSTOMER SESSIONS
- H6** POP-UP WINDOWS
- H7** FREQUENTLY ASKED QUESTIONS
- H8** CONTEXT-SENSITIVE HELP

H1 PROCESS FUNNEL



H1.1

(www.dell.com, May 18, 2002)

Figure H1.1

Dell uses a process funnel consisting of several logical steps that guide customers to quickly configure and purchase a personal computer. Information in a pop-up window shows additional details but keeps customers in the funnel so that they can continue to completion.



* BACKGROUND

All Web applications that lead visitors through stepped tasks—PERSONAL E-COMMERCE (A1), SELF-SERVICE GOVERNMENT (A4), WEB APPS THAT WORK (A10), and ENABLING INTRANETS (A11)—need ways to help people succeed at completing the tasks.

* PROBLEM

Customers often need to complete highly specific tasks on Web sites, but pages with tangential links and many questions can prevent them from carrying out these tasks successfully.

People enjoy completing the tasks they start. Yet all kinds of distractions—including links that lead off the critical path, extra steps, and extra



content—can inadvertently lead them away from accomplishing their goals. These diversions can have legitimate purposes, however, such as providing continuity, giving visitors opportunities to explore, providing instructions, or providing extra details. Striking a balance between these various forces and the actual task can be challenging.

Minimize the Number of Steps Required to Complete a Task • Customers find tasks daunting if there are too many steps. A process funnel should have just two to eight discrete steps. Anything less than two steps is not a process, and a process of more than eight steps is unmanageable. If there are more than eight steps, try to split the process into two or more separate process funnels, or try combining multiple steps into one page. However, this is not always a viable solution because one choice may precede another, and not every page can hold all the information that customers might need at certain points.

Provide a Progress Bar to Let Customers Know Where They Are in the Process Funnel • Showing a progress bar at each step lets your customers know how much farther they need to go to complete the task (see Figure H1.2). It is often not worth your time to make the individual steps on the progress bar clickable because doing so adds more complexity but little benefit for customers.

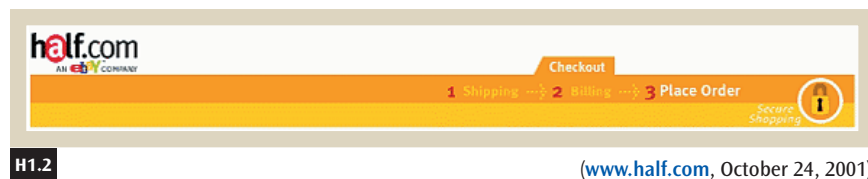
Remove Unnecessary Links and Content While Reinforcing the Brand • Removing links and content unrelated to the task at hand will reduce the number of distractions, making it more likely that your customers will successfully complete their tasks. Remove all NAVIGATION BARS (K2), TAB ROWS (K3), LOCATION BREAD CRUMBS (K6), and EMBEDDED LINKS (K7), leaving only the links and ACTION BUTTONS (K4) that help visitors reach their goals. Take out any content that is superfluous to the task.

Reinforce the Web site brand to minimize any disorientation customers might feel from sudden changes in navigation options. Use the same fonts, images, colors, layout, and logo throughout the Web site so that no matter where they are, people know they're still on the same site.

K2
K3 K6 K7
K4

Figure H1.2

Many Web sites use a progress bar to let customers know where they are in the process funnel and how much farther they have to go.



(www.half.com, October 24, 2001)

Use Pop-Up Windows to Provide Extra Information, without Leading Visitors Out of the Process Funnel

• Sometimes customers need additional information that you have not provided on a page, such as extra help or product details. Provide a link to a POP-UP WINDOW (H6) containing CLEAN PRODUCT DETAILS (F2) (see Figure H1.1), CONTEXT-SENSITIVE HELP (H8), or information from the FREQUENTLY ASKED QUESTIONS (H7) page, to make the extra information less intrusive. Your challenge is to implement this extra content without detracting from the main purpose.

H6
F2 H8
H7

Make Sure the Back Button Always Works • Customers often use the **Back** button on browsers to modify answers they have typed in on previous pages. However, if the Web site is not implemented correctly, the information they have already entered may be lost when they hit the **Back** button, forcing them to type everything again. In the worst case, people get a cryptic error message saying that the posted information was lost. You can address this annoying problem by temporarily storing the information they type in on each page, redisplaying this information if customers hit the **Back** button, and then overriding the temporarily stored information on the page if it is changed.

Always Make It Clear How to Proceed to the Next Step • Some Web pages are longer than can be displayed on a customer's Web browser. The problem is that people sometimes get lost if the critical ACTION BUTTON (K4), the one that takes them to the next step, is hidden below the fold. Place HIGH-VISIBILITY ACTION BUTTONS (K5) both high *and* low on the page, ensuring that at least one of the critical action buttons will always be visible without scrolling.

K4

K5

Prevent Errors Where Possible, and Provide Error Messages Whenever Errors Do Occur

• People will always make mistakes, even with the best of designs. You can provide good customer service if you use structured fields and sample input to help PREVENT ERRORS (K12). At the same time, provide MEANINGFUL ERROR MESSAGES (K13) whenever errors do occur.

K12

K13

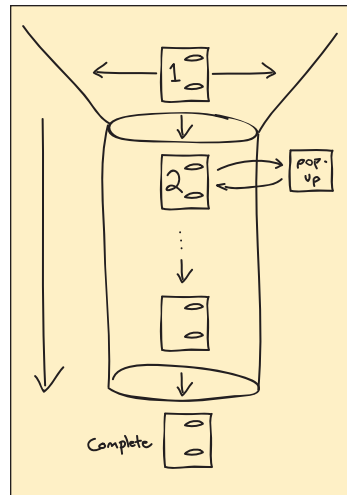
* SOLUTION

Minimize the number of steps required to complete a task, keeping them between two and eight. Remove unnecessary and potentially confusing links and content from each page, while reinforcing the brand to maintain a sense of place. Use pop-up windows to provide extra information, without leading people out of the process funnel. Make sure the Back button always works so that customers can correct errors. Make it clear how to proceed to the next step

with high-visibility action buttons. Prevent errors where possible, and provide error messages whenever errors do occur.

Figure H1.3

A process funnel lets people complete their goals by breaking down complicated tasks into a small number of steps, using pop-up windows for detailed information, and reducing the number of links to only the critical ones, so that people are never distracted.



H1.3

* CONSIDER THESE OTHER PATTERNS

Many kinds of Web sites use process funnels, including sites for PERSONAL E-COMMERCE (A1), SELF-SERVICE GOVERNMENT (A4), WEB APPS THAT WORK (A10), and ENABLING INTRANETS (A11). Customers use process funnels when they finalize purchases through QUICK-FLOW CHECKOUT (F1), when they create new accounts through SIGN-IN/NEW ACCOUNT (H2), and when they post new messages to a RECOMMENDATION COMMUNITY (G4), to name some examples.

Remove NAVIGATION BARS (K2), TAB ROWS (K3), irrelevant ACTION BUTTONS (K4), LOCATION BREAD CRUMBS (K6), and EMBEDDED LINKS (K7) to ensure that customers stay on their paths. However, keep strong SITE BRANDING (E1) so that customers still know where they are.

Design process funnels to PREVENT ERRORS (K12), and provide MEANINGFUL ERROR MESSAGES (K13) when errors do occur.

Track your customers through PERSISTENT CUSTOMER SESSIONS (H5) to avoid problems with the **Back** button, and to save customer-entered information.

Move extra content, such as CONTEXT-SENSITIVE HELP (H8) and FREQUENTLY ASKED QUESTIONS (H7), to POP-UP WINDOWS (H6) to keep the main task page on the screen. Make the next action visible by keeping it ABOVE THE FOLD (I2) and by using HIGH-VISIBILITY ACTION BUTTONS (K5).