



TDAG
DESIGN

*UX Psychology &
Interaction Design*
CONSULTANT

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UX Audit

CLIENT onboarding flow

Commissioned by

Please Note

This is a redacted version of the full audit. Due to the NDA, images are blurred, the client's name obscured and some pages eliminated.

This document is presented simply an example of UX Audit report

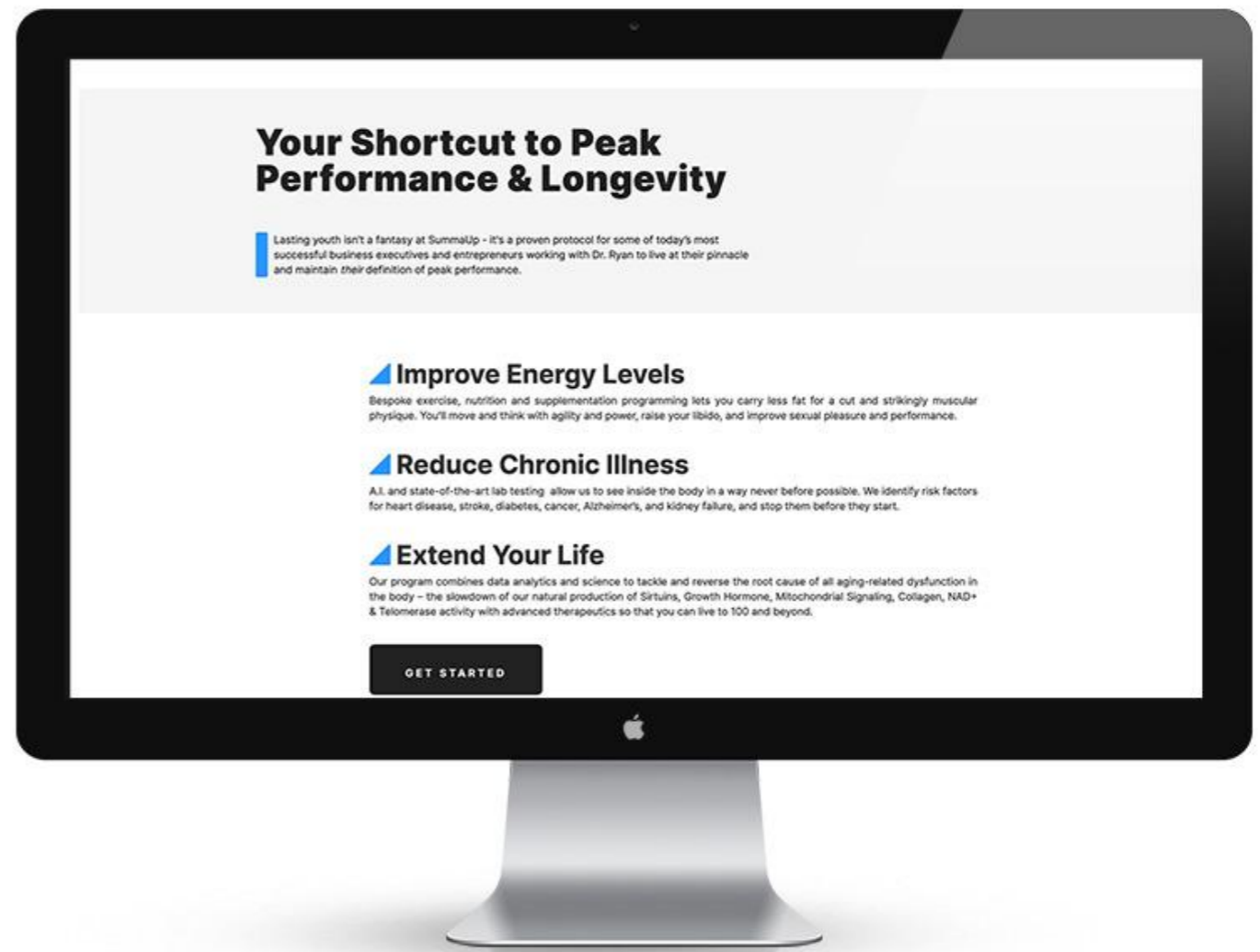
Introduction

CLIENT SITE is a program developed by Dr. *CLIENT* to help you look and feel younger in 90 days. It includes bio-optimized therapy that are highly personalized. While the program is highly rated, the onboarding process is currently taking too long

The aims of the project Reduce the time between first online visit to buying medications. The time from step 1 (online visit) to step 5 (1st order) should be under 14 days in a delightful and pleasing journey. Currently the average is 27 days and median is 20 days for the last 100 clients

This review was a time-limited effort to locate and recommend corrections for the most serious usability problems and should not be considered a substitute for usability testing with real users.

The page should be tested (actual and prospective customers) to identify additional problems, appropriateness of images & text and to suggest improvements.



Audience and Process

Target Audience

1. **Business Owners, Entrepreneurs & Executives Over 40.** They are successful, elite producers in the business and money game but face increasing problems having prioritized their career at the expense of their health & wellness.
2. **Professionals (Dentists/MDs/Lawyers):** Someone semi-retired, doing a (side hustle/hobby) or top income earner but facing concerns about mortality, professional performance drop off and is tired of spending time and money on workout routines, apps, pills and dieting plans that don't work.

Process

Using well established Usability and UX heuristics, the following was analyzed:

- **General Usability**
- **User flow & Interaction**
- **Visual Design**
- **Content, messaging & language**

1 Visibility of System Status
Designs should keep users informed about what is going on, through appropriate, timely feedback.
Interactive mail maps have to show people where they currently are, to help them understand where to go next.

2 Match between System and the Real World
The design should speak the users' language. Use words, phrases, and concepts familiar to the user, rather than internal jargon.
Users can quickly understand which stovetop control maps to each heating element.

3 User Control and Freedom
Users often perform actions by mistake. They need a clearly marked "emergency exit" to leave the unwanted action.
Just like physical spaces, digital spaces need quick "emergency" exits too.

4 Consistency and Standards
Users should not have to wonder whether different words, situations, or actions mean the same thing. Follow platform conventions.
Check-in counters are usually located at the front of hotels, which meets expectations.

5 Error Prevention
Good error messages are important, but the best designs carefully prevent problems from occurring in the first place.
Guard rails on curvy mountain roads prevent drivers from falling off cliffs.

6 Recognition Rather Than Recall
Minimize the user's memory load by making elements, actions, and options visible. Avoid making users remember information.
People are likely to correctly answer "Is Lisbon the capital of Portugal?".

7 Flexibility and Efficiency of Use
Shortcuts — hidden from novice users — may speed up the interaction for the expert user.
Regular routes are listed on maps, but locals with more knowledge of the area can take shortcuts.

8 Aesthetic and Minimalist Design
Interfaces should not contain information which is irrelevant. Every extra unit of information in an interface competes with the relevant units of information.
A minimalist three-legged stool is still a place to sit.

9 Recognize, Diagnose, and Recover from Errors
Error messages should be expressed in plain language (no error codes), precisely indicate the problem, and constructively suggest a solution.
Wrong-way signs on the road remind drivers that they are heading in the wrong direction.

10 Help and Documentation
It's best if the design doesn't need any additional explanation. However, it may be necessary to provide documentation to help users complete their tasks.
Information kiosks at airports are easily recognizable and solve customers' problems in context and immediately.

www.nngroup.com/articles/ten-usability-heuristics/

Page Strengths

The program is already successful, as highlighted by the numerous positive reviews. However, the full intake process is taking much longer than desired.

- overall design is clean and uncluttered
- color scheme is appropriate and pleasing to the eye
- the icons are appropriate and convey the correct meaning
- the font is easy to read, and contrast is good
- the content and explanations are easy to understand
- the page makes a compelling case for the program
- numerous reviews increase trust
- video testimonials are persuasive



Summary of Findings

The page offers a lot of content, but it is very overwhelming, and some of the content sounds repetitive. It could have more of a “luxury” feel

General Findings

The organization of information and the layout does not always facilitate the completion of the average user’s goal

The abundance of information may feel overwhelming and a little scattered throughout the page.

The language is a bit inconsistent

The onboarding process feels drawn out

The messaging is too frequent and scattered. Too much content and instructions

In the following pages, annotated images will detail all the findings and potential solutions.

Usability

GET STARTED

1

APPLY NOW

Issues identified

1. Multiple buttons but the the text alternate between *get started* and *apply now*. They both lead to the same place
2. This paragraph seems a bit superfluous
3. What are those : *Sirtuins, Growth Hormone, Mitochondrial Signaling, Collagen, NAD+ & Telomerase*?
4. The headline is confusing
5. Is the blue box a button?
6. Not clear if meds are included in the \$14,000 plan
7. Unusual listing of what is included
8. Did not noticed the benefits are accordions. Too much content
9. Two *get started* buttons on top of each other, looking differently: why?
10. What am I signing up for?

Usability Recommendations

Your Investment

▲ **Assessment**

▲ **Plan**

\$1,497

Longevity Diagnostic Lab Testing, 1 Hour Consult & Customized Longevity Playbook

▲ **Assessment**

▲ **Plan**

▲ **1 Yr Of Longevity**

\$14,999

Everything You Need To Look And Feel 10 Years Younger: Meds, Supplements, Weekly Q&A, Coaching, Lab Testing, Accountability & More

7

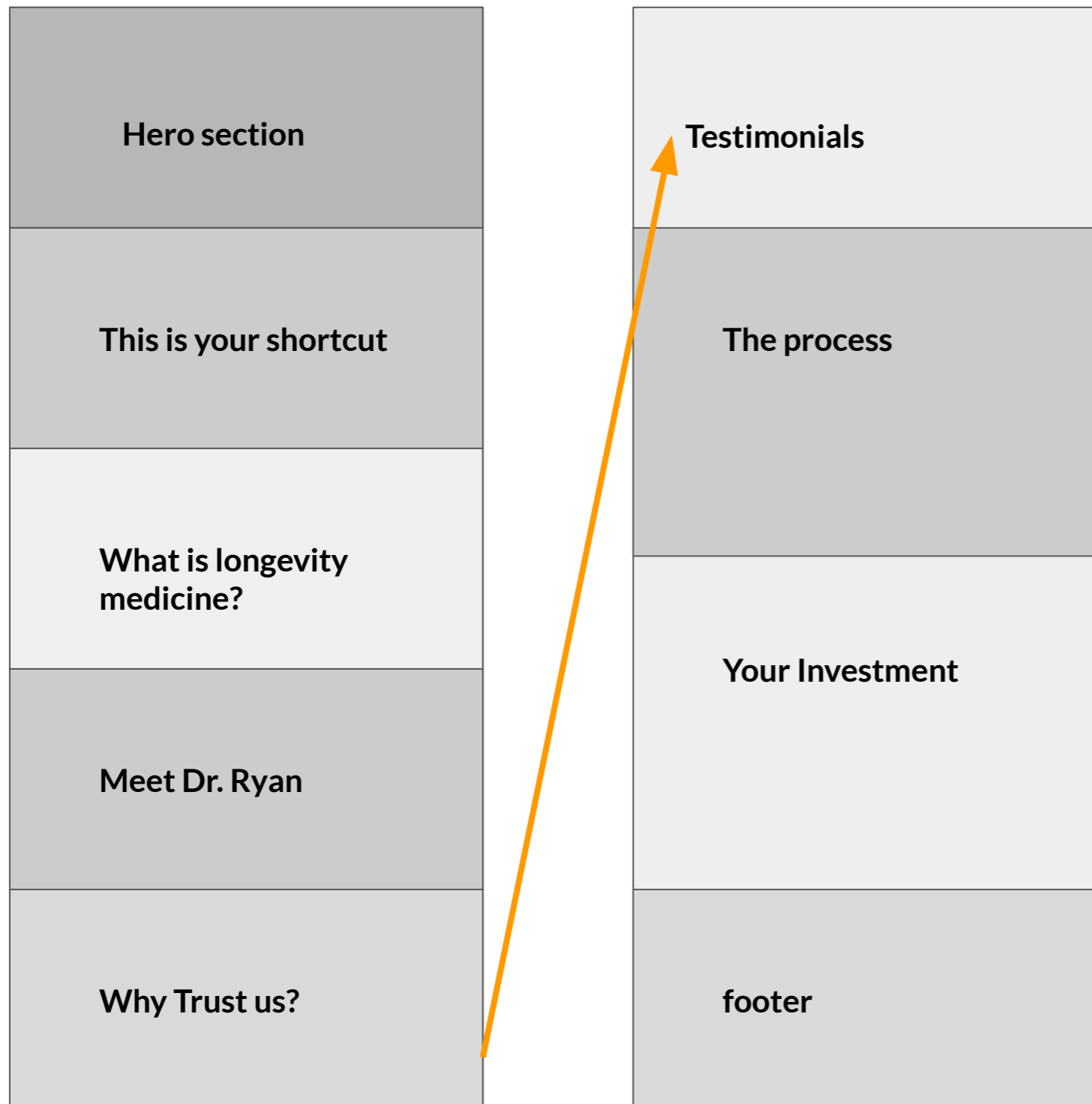
"Superhuman Secrets" eCourse Plus Weekly Q&A	▼	"Superhuman Secrets" eCourse Plus Weekly Q&A	▼
Customized Longevity Blueprint	▼	Customized Longevity Blueprint	▼
× "Never Fall Off" Accountability Not Included		"Never Fall Off" Accountability	▼
× Heart Smart Testosterone Not Included		Heart Smart Testosterone	▼
× Anytime Email Support Not Included		Anytime Email Support	▼
× Access to Therapeutic Accelerators Not Included		Access to Therapeutic Accelerators	▼
× Quarterly Health Optimization Not Included		Quarterly Health Optimization	▼
× "Eat Like a Real Man" Meal Plans Not Included		"Eat Like a Real Man" Meal Plans	▼
× "Slim Down, Bulk Up After 40" Workouts Not Included		"Slim Down, Bulk Up After 40" Workouts	▼

Recommendations

1. All buttons should look similar and have the same text on them. I prefer: *get started*
2. Eliminate the paragraph and move up the benefits
3. Avoid scientific names that may not be familiar
4. Clarify what each term means, if needed
5. Convert the blue box into a regular button.
6. Clarify if meds are included in the \$14,000 plan
7. List benefits in order, starting from what they have in common
8. Make the accordions more obvious. Shorten the explanation
9. Eliminate the get started button on top of the email sign up
10. Be clear about what the email sign up is for

GET STARTED

Usability Recommendations - 2



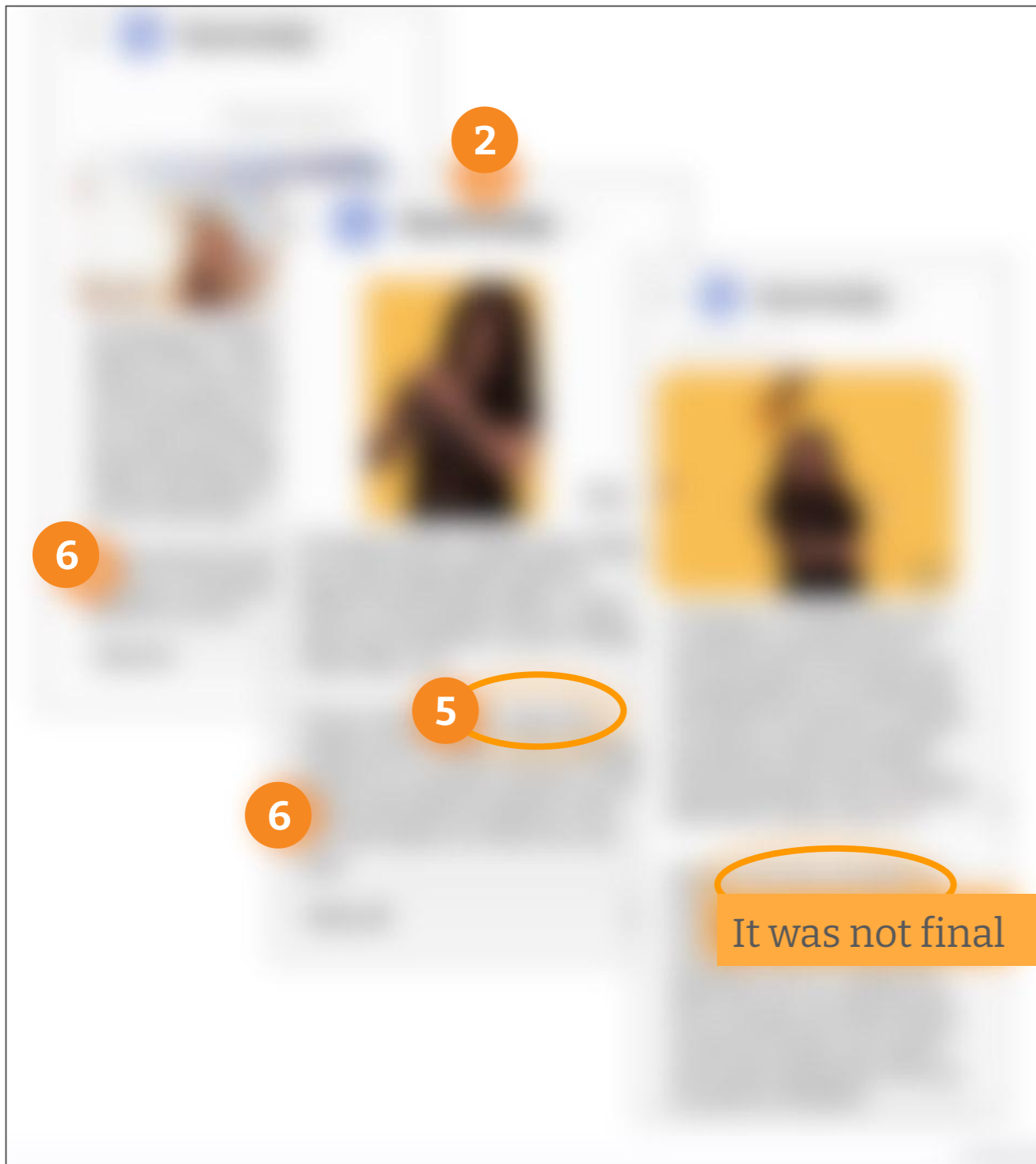
Recommendations

Reorganize content in more logical order

Rename some sections

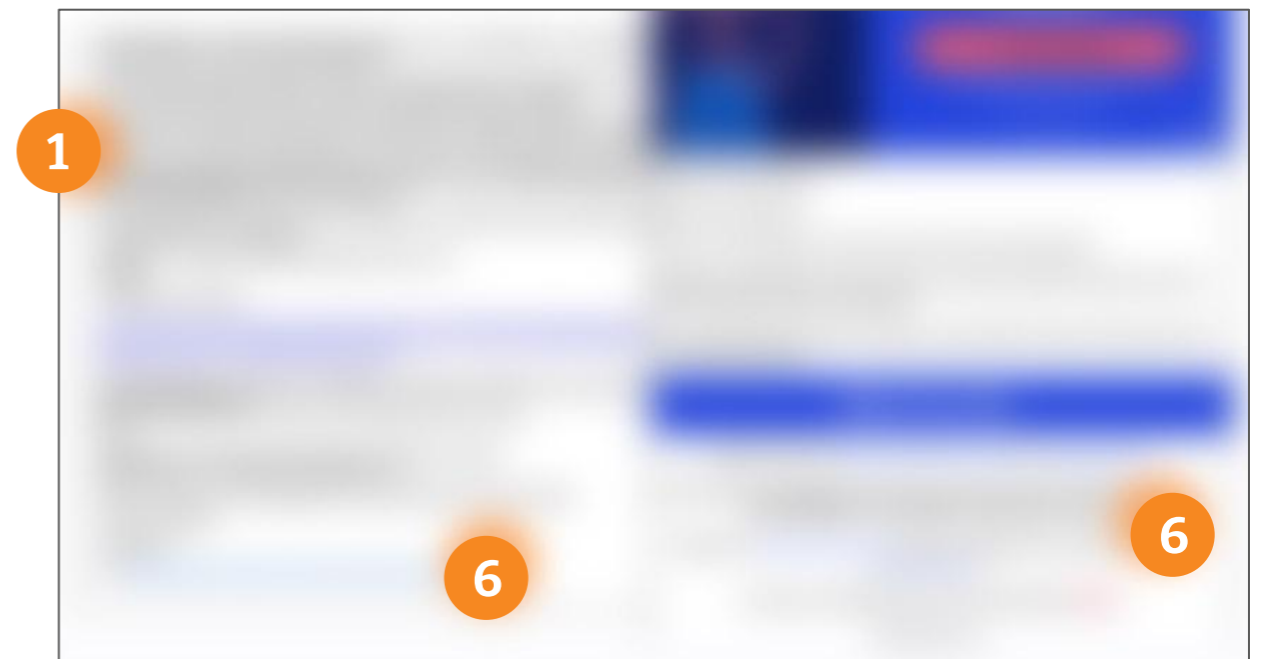
User flow & Interaction Issues

Ease of interaction & completion and consistency with online conventions.

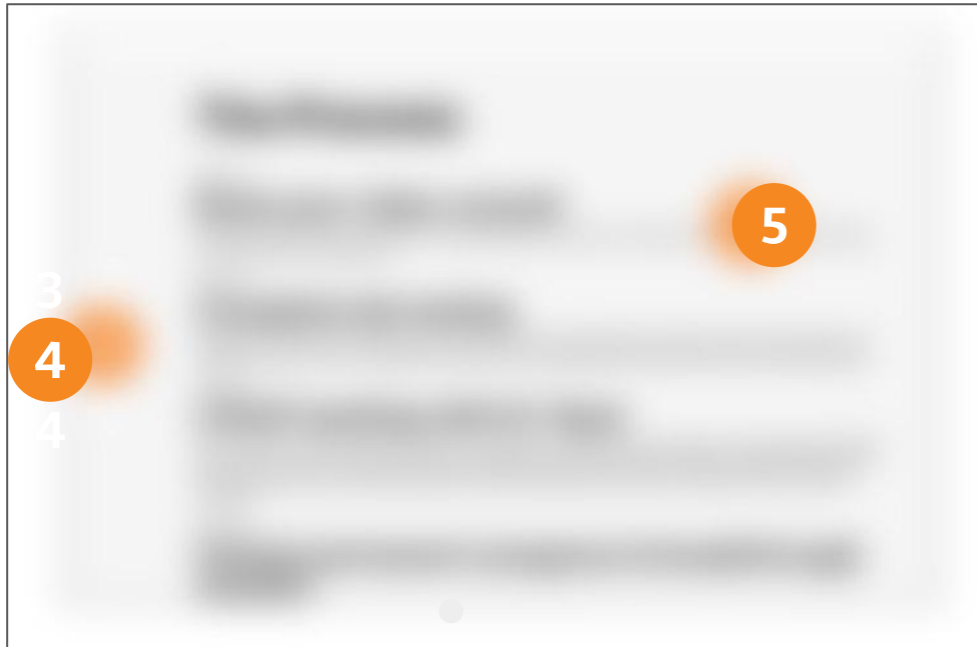


Issues identified

1. The onboarding flow is overly complex
2. There are too many email, SMS, videos and instructions
3. Each piece of communication is way too long
4. The site make it look simple but it is not
5. Step 1 is booking consultation, but then I am asked to skip it
6. Multiple download links, and multiple videos: hard to keep track



User flow & Interaction Recommendations



Email Sequence (after sign up)

1. Day 1 (aug 22): 5 emails 3
2. Aug 24- 31 : replays email
3. **Sept 2: lab results and Thank you for booking**
4. **Sept 3: Our story**
5. **Sept 4: Primer for trainer + Video link**
(same as below)
6. **Sept 5: Primer for trainer + Video link**
7. **Sept 6: Injection primer**
8. Sep 7: replays and QA
9. **Sept 8: membership summar**

Recommendations

1. Streamline the onboarding
2. Streamline communications: ask for contact preferences (SMS, email or both)
3. Fewer and shorter communication
4. Step on the site should match reality
5. Either make consultation optional or do not encourage customers to skip it
6. Send one single welcome package, with all the information, video links and cheatsheet. It could be a nicely design Welcome pdf (or even a printed welcome box)

6 Emails in bold can be combined in 1 package

Onboarding Flows

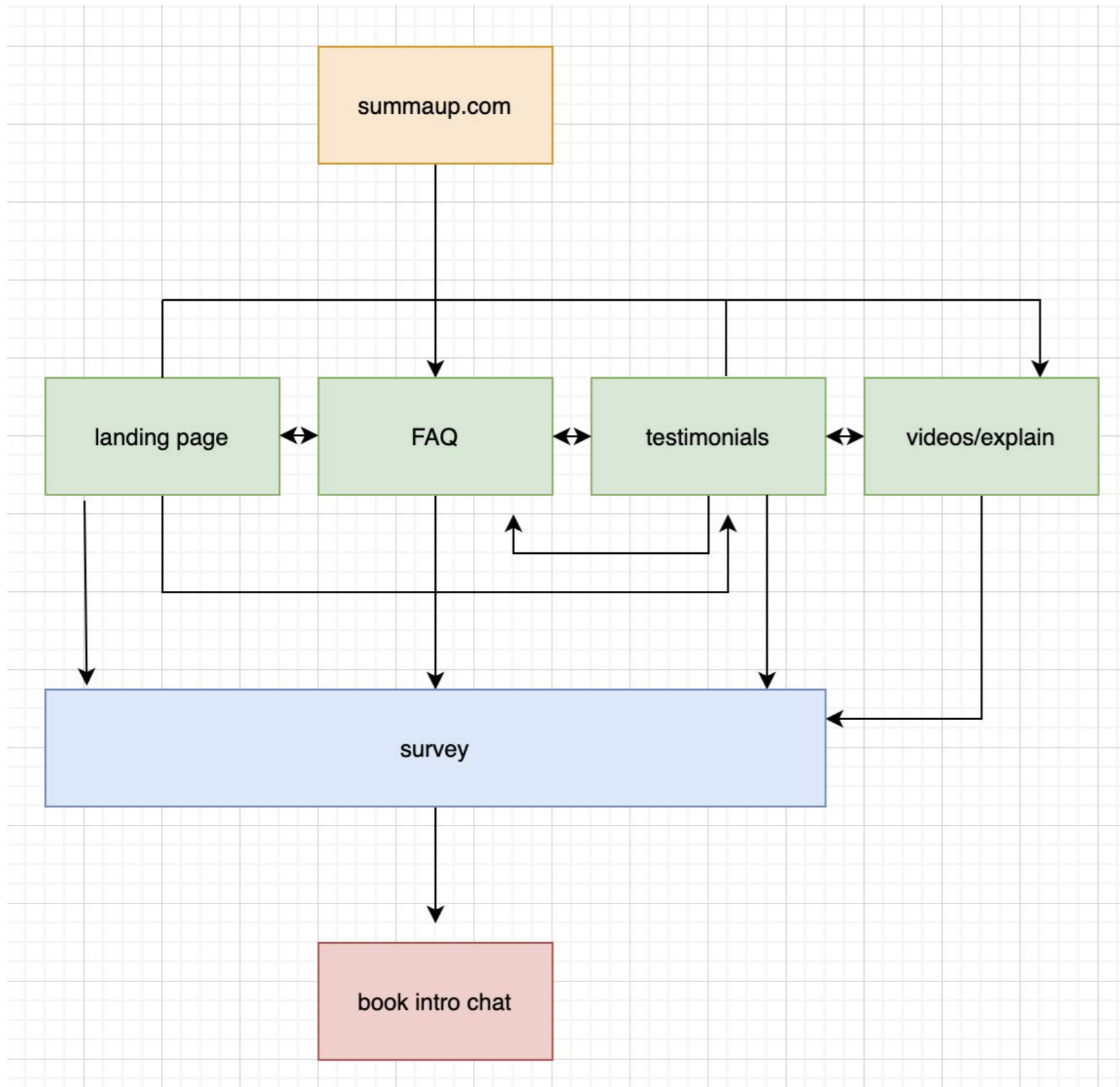
Described Flow (in shared doc)

1. Client sees advertisement on IG/FB, does a google search, or is referred
2. Client visits main landing page -
3. Clients fill out a lead qual survey
 - a. 50% get screened out (cannot afford service, not a priority or are not the correct role)
 - b. 50% proceed to next step
4. Clients book a time on this site -
5. Clients receive a sms message - 20% skip the online zoom meeting and go to the step 7
 - a. 80% confirm message or default to the online visit.
 - b. Of this 80% - 33% do not show despite confirming
6. Online Visit is completed next, client decides to
 - a. 30-50% sign-up to assessment and plan phase
 - b. Client joins and pays \$1k (Access to our course, community, Lab test emailed)
7. Client takes lab test and prints it out and goes to closest lab site
8. 7-10 Days later, client gets an email with lab results and zoom link
9. Client meets with clinical staff and has a longevity plan (accountability, behavioral interventions and therapeutics list)
10. Client completes first order

Experienced Flow

1. Client sees a paid advertisement on IG/FB, does a google search, or is referred
2. Client visits main landing page
3. Clients fill out a lead qualifying survey
4. Clients book a time on this site
5. Client receives a flurry of communications (SMS and Emails)
6. Clients receive a sms message - 20% skip the online zoom meeting
7. Client skip meeting and pays \$1000
8. Client receives a flurry of communications (SMS and Emails)
9. Client books a lab test
10. Client receives a flurry of communications (SMS and Emails)
11. Get blood drawn at home
12. Get lab cost refunded
13. Clients gets blood results
14. Client receives a flurry of communications (SMS and Emails)
15. Client books a visit with Dr. Ryan
16. Client has zoom meeting with Dr. Ryan

Recommended Site Map



Recommendations

1. I would recommend break down the important content in multiple pages
2. The survey should stand on its own, in a separate page
3. The video should be on its own section, so it can be easily accessed at any time
4. A new page with all testimonials (in various forms) could be a good idea

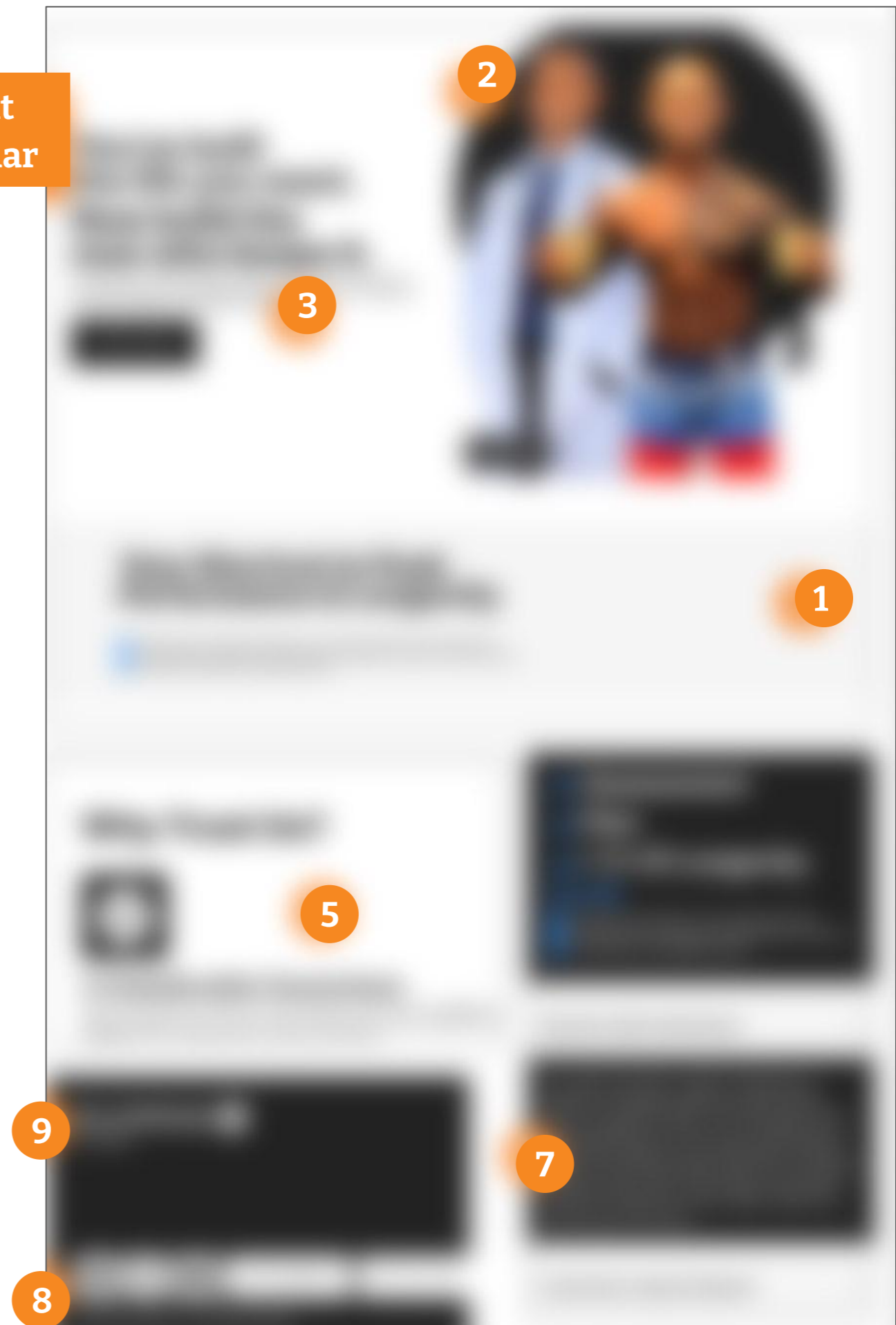
Visual Design

font weight
is too similar

Visual design elements help the user complete common tasks. A usable page is aesthetic and minimalist and uses accepted conventions.

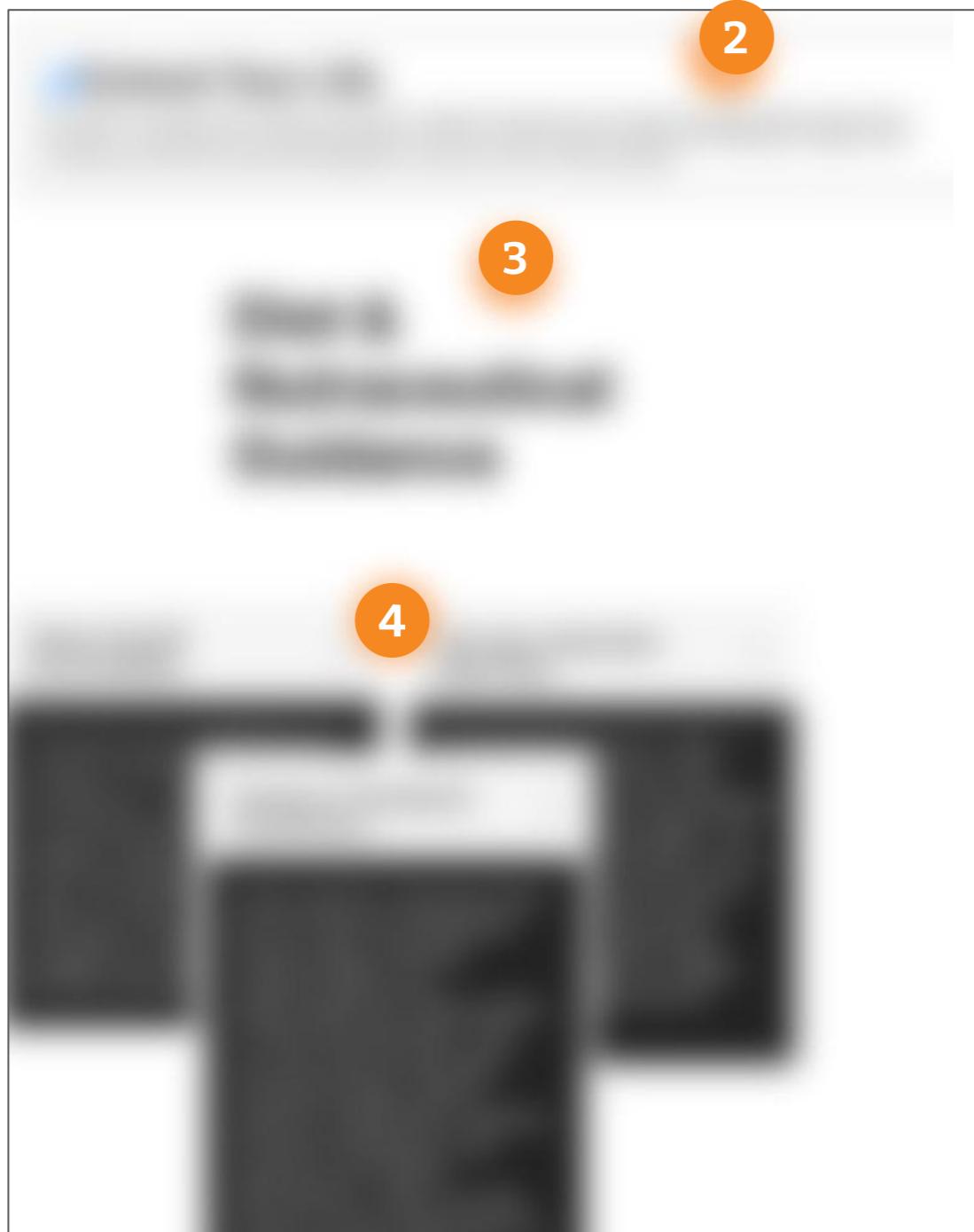
Issues identified

1. Light gray box disappears on certain screens
2. The Dr. **CLIENT** with the medals looks smaller than the other
3. Justified text create uneven white space
4. Buttons are inconsistent
5. Why trust us area: icon and text are not aligned in the best way
6. Without an accent color, a lot of the text look similar
7. Plan description: too long
8. Social icon are not following the style guide
9. Logo in the footer looks clickable
10. Overall a bit too sterile



Content, messaging & language

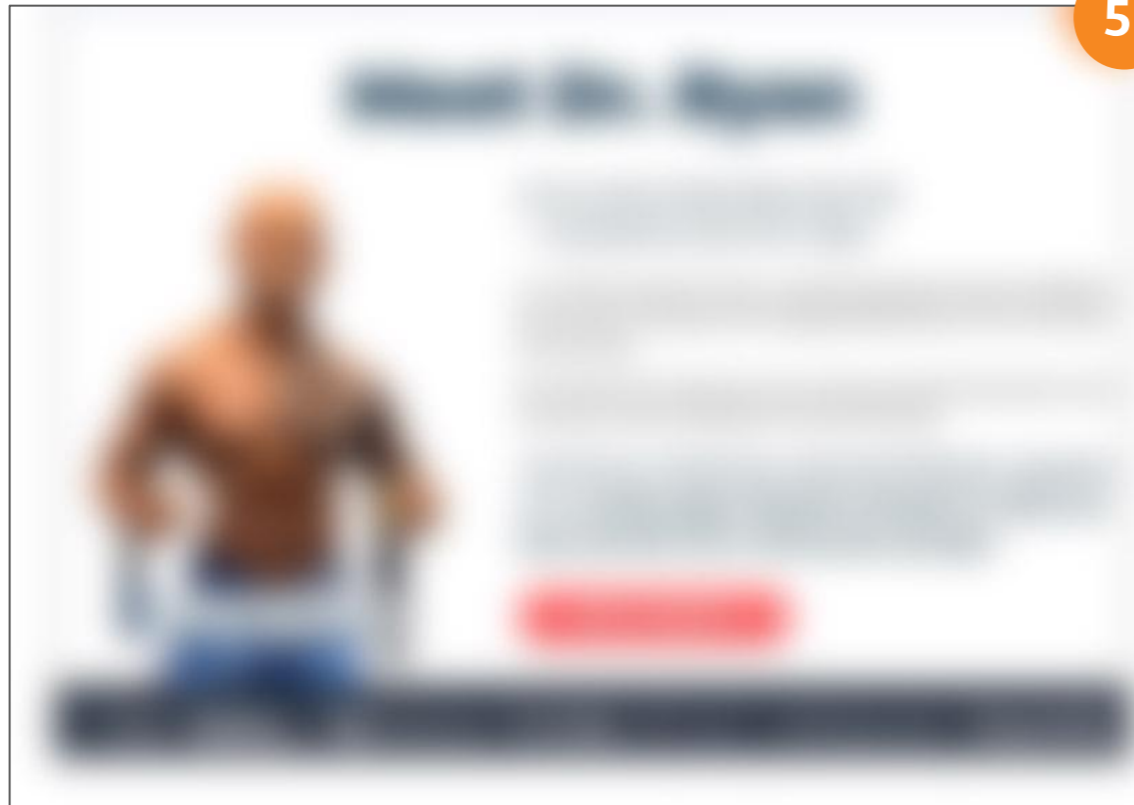
Content should be short and to the point, to support scanning, with ample use of headings and lists.



Issues identified

1. Content can be verbose
2. Some of the words may not be easily understood:
3. Some of the text sound a bit awkward:
 - Bespoke exercise
 - supplementation programming
 - state-of-the-art lab testing (you don't use own lab)
 - blistering energy
 - Diet & Nutraceutical Guidance
 - Longevity Maven
4. Inconsistent tone: from formal and scientific to overly colloquial
 - slim down, bulk up (very colloquial)
 - data-driven recommendations....optimize your performance (formal)
5. The *Meet Dr. Ryan* section is missing in new design

Content Recommendations



Recommendations

1. Edit and condense content for impact
2. Use easily understood words, or explain complex terms
3. Edit the text and wording
4. Choose a consistent voice and tone. Formal and scientific, colloquial or something in between
5. The *Meet Dr. Ryan* section should be brought back: this would be the perfect place for Dr. Ryan's photos

Recommended Priorities

Based on the findings from the UX Audit, I recommend to prioritize the following:

1. Communication— communication should be streamlined: fewer messages, shorter and better designed. Create a welcome packet to condense all info

2. Visual Design — inconsistencies should be eliminated to improve the User Experience and sales. Add a little more color to warm it up. Add a few more images to let customer imagine the results. Communication (emails, sms) should be designed as well.

3. Content Organization & Hierarchy — there is a lot of great information on the page, but it sometimes feels disjointed. Reorganizing the content and its hierarchy should be paramount. Also, hiring a UX writer to help rewrite the content to be simpler and more persuasive is recommended. **There are conflict between videos , survey and website about pricing and financial commitment**

4. Usability — naming and look should be consistent. Explanations should be short and to the point. Step by step should correspond to the actual flow

Thank You

for trusting me with your UX Audit

I am available to help you implement all the recommendations and test the results, if needed.

Bizaw d'Alho

