



CarePass Guest Experience user testing

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Global Retail Train

Agenda

1. **Research Plan**
2. **The Tests**
3. **Executive Summary**
4. **Detailed Findings & Recommendations**
5. **Appendices**

Research Plan

The goal

We set out to validate the main functions of the CarePass guest management experience.

- How does the guest experience compare to expectations?
- Is the lookup/validation clear for guests?
- How easy is it to update payment, complete a CVS account or cancel the membership from the guest dashboard?
- How can the experience be improved?

The method

4 mobile prototypes in InVision

Remote, unmoderated tests via [usertesting.com](https://www.usertesting.com)

- Participants were asked to complete a CarePass management flow presented as a fictional scenario
- They engaged in a think-aloud test of the InVision prototype on desktop

The participants

We recruited participants based on the intended users.

- 5 participants per test
- Active CarePass member within past 90 days
- Never created a CVS.com account

The tests

On-hold (from email)

Steps:

1. Email
2. Guest Lookup
3. Guest Dashboard
- 4. Update Payment**
5. Payment Confirmation

<https://cvs.invisionapp.com/share/4BMVKAG6RWQ>

On-hold (from landing page)

Steps:

1. CVS.com
2. CarePass Join Page
3. Guest Lookup
4. Guest Dashboard
- 5. Update Payment**
6. Payment Confirmation

<https://cvs.invisionapp.com/share/F6MVKAIGKMD>

Complete CVS account (from email)

Steps:

1. Email
2. Guest Lookup
3. Guest Dashboard
- 4. Complete Account**
5. Payment Confirmation
6. Dashboard (activated account)

<https://cvs.invisionapp.com/share/H8MVKAJNFRS>

Cancel membership (from landing page)

Steps:

1. CVS.com
2. CarePass Join Page
3. Guest Lookup
4. Guest Dashboard
- 5. Cancel Membership**
6. Cancel Confirmation

<https://cvs.invisionapp.com/share/WEMVKAKTHA9>

Executive Summary

Executive Summary

CarePass management needs its own section beyond the Join CarePass page

R: Managing CarePass should be part of main navigation. Currently, the entry points – search bar or Join CarePass page – are unexpected for guests.

Majority of participants (~65%) did not have immediate access to their ExtraCare card for the guest lookup

R: Guests may be guided to the ExtraCare lookup. OTP is also a potential solution which focuses guest lookup to one parameter (email).

Main tasks were successfully completed

R: Accessing the guest dashboard should be seamless. Once there, guests easily manage the membership.

Detailed Findings & Recommendations

‘On-hold’ overall

All users successfully completed payment

“The update payment link was one of the first things that stood out to me because it’s in red”

“Before it was yellow, a clear indication that something was wrong. But now it’s green, so good to go.” (on warning banner and success banner)

R: No changes needed for the update payment flow within guest dashboard

The image displays two screenshots of the CVS CarePass dashboard. The left screenshot shows a warning banner with a yellow background and a red exclamation mark icon, stating 'Your membership is inactive.' and providing instructions to update payment information to reactivate the membership and receive a \$10 promo reward. The right screenshot shows a success banner with a green background and a green checkmark icon, stating 'Thanks for updating your information!' and confirming that a confirmation email has been sent. Below the banners, the dashboard shows the user's name 'Tina', their membership type 'Annual', their ExtraCare® card number '123456789012345', their enrollment date '09/29/2018', and their renewal date '09/29/2019'. A 'Billing information' section at the bottom shows the name 'Shirley Jones'.

Home > CarePass Dashboard

Welcome back, Tina!
Member since October 2018

Your membership is inactive.

Please update your payment information to re-activate your membership. When you update payment, your **\$10 promo reward** and benefits will be available.

[Update CarePass payment >](#)

carepass

Welcome back to CarePass, Tina.

Thanks for updating your information!

A confirmation email has been sent to tina@smith.com

Enrollment confirmation

Membership type: Annual
ExtraCare® card: 123456789012345
Enrollment date: 09/29/2018
Renewal date: 09/29/2019

Billing information
Shirley Jones

‘On-hold’ from email

One participant expected to be able to update payment immediately, but understood once on the guest dashboard

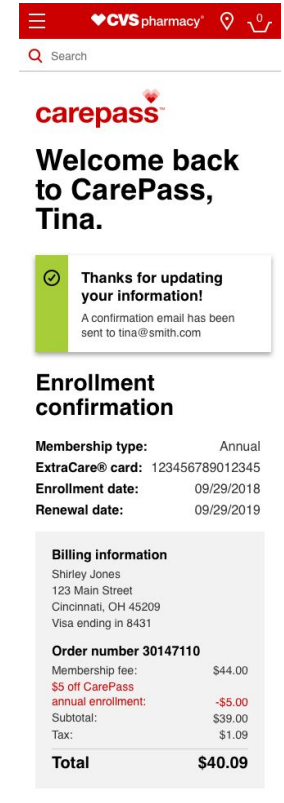
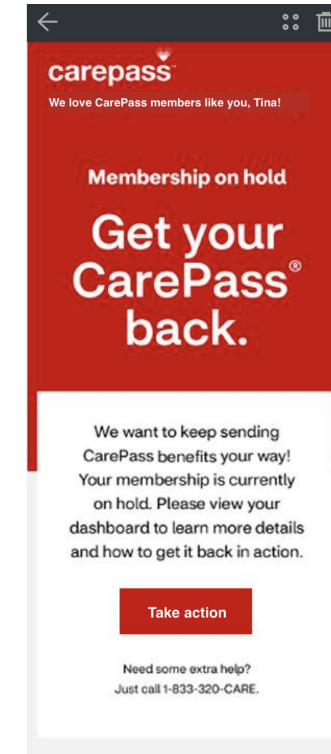
R: Add messaging in the email referring to guest management or bring them to that experience directly

“... wait what am I signing up for? Because first, I want to know why I’m on hold.”

R: Add messaging in the email referring to a possible payment issue

Two participants noted the amount of text under the receipt

R: Remove/shorten description text under each benefit



It's rewarding.
Shop with your \$10
promo reward.¹

‘On-hold’ from landing page

All users expected to manage CarePass from the hamburger menu

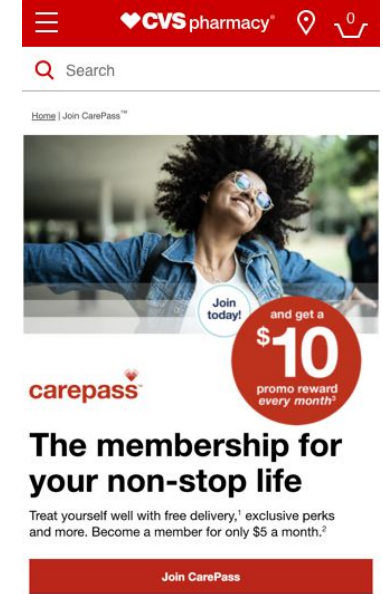
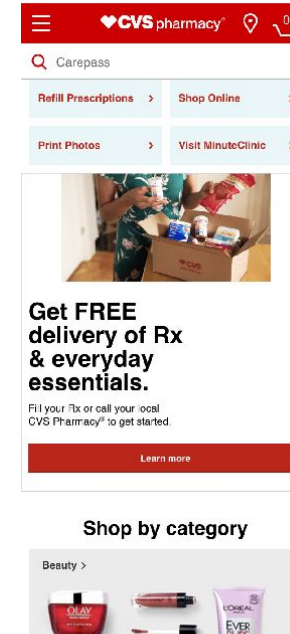
R: Add CarePass management to site navigation

One user thought they only needed to give one of the inputs on the lookup page (email or EC card)

R: Revisit language of instructions on lookup

“I didn’t even know you could type CarePass in the search bar. I thought it was just for products.”

R: How often do people search CVS for specific pages? This could be removed if not a use case.



Complete CVS account from email

All users successfully completed an account

“So I have to complete an account to access my benefits... I thought I just did that.”

”It’s a lot of signing up to do... If it was all done in one process that would make the whole experience much better. I just think it’s too lengthy.”

One user expected to complete the account right after lookup, and another expected to after the link from the email

R: If possible, we should bring users directly to the complete page from the email. Going through the dashboard after lookup instead of the action they expect from the email can be confusing

[Home](#) > CarePass Dashboard

Welcome back, Tina!

Member since October 2018

Don’t miss out on all your CarePass benefits

Complete a CVS.com account to access all your benefits!



Free one to two day shipping from CVS.com®⁴



Free prescription delivery¹

Complete account

Cancel membership from landing page

All users successfully cancelled the membership

“I should’t have to scroll down to FAQs to manage my account.”

(guest lookup can be found in FAQs of the Join CarePass page)

R: Managing CarePass can have a subsection within this page

Two users suggested making the cancel screen more personal (e.g.

We’re sad to see you go)

R: Cancel page can have information on benefits to entice members to stay

Membership info

Next payment

Your next payment \$5.00 is scheduled for 11/12/2018.

ExtraCare®
4765183482161

CarePass membership plan
Monthly (\$5.00/month)

Have questions or want to cancel your membership?

[Read our FAQs](#), call Customer Care at 1-833-320-2273 or [cancel your membership online](#).



Search

Cancel your CarePass™ membership

Please tell us why you're canceling your CarePass membership.

Reason

Select

Anything else you'd like us to know?

Maximum 120 characters.

Submit

Nevermind, keep my membership

1-800-679-9691 | [Contact Us](#) | [Feedback](#)
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Search

Thanks for trying CarePass™

You're all set. Confirmation of your cancellation was sent to your email address on file.

Your membership expires on 04/10/2020.

1-800-679-9691 | [Contact Us](#) | [Feedback](#)
| [Terms of Use](#) | [Accessibility](#) | [Privacy Policy](#)
| © 1999 - 2018 CVS.com



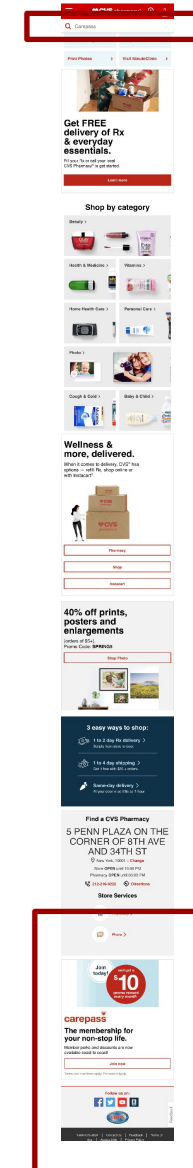
Landing page overall

“I didn’t even know you could type CarePass in the search bar. I thought it was just for products.”

“We can join, but what about making changes?”

“Join Now is like if you're a first time user. My understanding is that I'm an existing member so Join Now is the last place I'd look.”

R: The two ways to manage CarePass – from search or from the Join CarePass page - are not intuitive for users. CarePass management needs its own section within the site navigation.



Search “CarePass” in the search bar

Link to Join CarePass at the bottom of the CVS homepage

Appendices

Appendix A

Screener Questions:

1. Where have you shopped in the past 90 days (either online or at a physical store)? Select all that apply.

- Walgreens [May Select]
- CVS [Must Select]
- Walmart [May Select]
- Rite Aid [May Select]
- Target [May Select]
- None of the above [Reject]

2. Of the following, which have you done in the past 90 days at CVS?

- Visited a MinuteClinic [May Select]
- Enrolled and/or used ExtraCare deals [May Select]
- Enrolled and/or used CarePass membership [Must Select]
- Filled and/or refilled prescriptions [May Select]
- Used the CVS app [May Select]
- None of the above [Reject]

3. What companies do you have an online account with? Select all that apply.

- Amazon [May Select]
- Walmart [May Select]
- Target [May Select]
- CVS [Reject]
- None of the above [May Select]

Appendix B

Test Script 1 ('On hold' from email):

- Imagine you've gone to check your email and see a message from CVS. When you open it, this is what you see. Please describe what this email is about in your own words. [Verbal Response]
- Without clicking anything yet, describe what would you do next. Remember to think aloud. [Verbal Response]
- Click on the 'Take Action' link in the email.
- What would you do on this page? Please explain in as much detail as possible. [Verbal Response]
- Do you have access to your ExtraCare number right now? Verbal response only (Please do not provide any of your information). [Verbal Response]
- What would you expect to happen after filling in the information and clicking 'Manage my membership'? [Verbal Response]
- Click on the page to simulate filling in the information, then click on the 'Manage my membership' button.
- What would you do on this page? Please describe in detail. [Verbal Response]
- Did you see the 'Update CarePass payment' links on the page? [Verbal Response]
- Click on the 'Update CarePass payment' link.
- What would you do on this page? Please describe in detail. [Verbal Response]
- Click on the page to simulate filling in the information.
- Click the 'Finish' button
- What is this page telling you? Please describe in detail. [Verbal Response]
- What benefits do you see here? [Verbal Response]
- Are you able to take advantage of any benefits right now? What information is helping you make that assessment? [Verbal Response]
- What else would you do at this point? [Verbal Response]
- What is your overall opinion of this process? [Verbal Response]
- If you were sitting down with the lead designer of this experience, what advice would you give him/her based on your experience? Would you advise him/her to change anything about the experience? [Verbal Response]

Appendix C

Test Script 2 ('On hold' from landing page):

- As a CarePass member, how would you go about making any changes to your membership? Please be as detailed as possible. (Example: If you wanted to change the card you use to pay for membership) [Verbal Response]
- Launch URL: <https://cvs.invisionapp.com/share/F6MVKAIGKMD>
- You have been taken to a new page. When you see the page, move on to the next step.
- You are on CVS.com. Without clicking on anything on this page yet, describe where you would go to make a change to your CarePass membership? Please be as detailed as possible. [Verbal Response]
- Search for "CarePass" in the search bar or click on the "Join now" button under the CarePass section.
- You are now on the CarePass landing page. Imagine you want to learn how to manage your CarePass membership. You signed up for CarePass in-store and haven't created an account before. Please describe what this landing page contains in your own words. [Verbal Response]
- What would you do next? Remember to think aloud. [Verbal Response]
- Click on the 'Look up your membership' link on the landing page.
- What would you do on this page? Please explain in as much detail as possible. [Verbal Response]
- Do you have access to your ExtraCare number right now? Verbal response only (Do not provide any card information). [Verbal Response]
- What would you expect to happen after filling in the information and clicking 'Manage my membership'? [Verbal Response]
- Click on the page to simulate filling in the information, then click on the 'Manage my membership' button
- In your words describe in detail what you would do on this page? [Verbal Response]
- Did you see the 'Update CarePass payment' links on the page? [Verbal Response]
- Click on the 'Update CarePass payment' link.
- What would you do on this page? Please describe in detail. [Verbal Response]
- Click on the page to simulate filling in the information and then click the "Finish" button.
- What is this page telling you? Please describe in detail. [Verbal Response]
- What benefits do you see here? [Verbal Response]
- Are you able to take advantage of any benefits right now? What information is helping you make that assessment? [Verbal Response]
- What else would you do at this point? [Verbal Response]
- What is your overall opinion of this process? [Verbal Response]
- If you were sitting down with the lead designer of this experience, what advice would you give him/her based on your experience? Would you advise him/her to change anything about the experience? [Verbal Response]

Appendix C

Test Script 3 (Complete account from email):

- imagine you've gone to check your email and see a message from CVS. When you open it, this is what you see. Please describe what this email is about in your own words. [Verbal Response]
- What would you do next? Remember to think aloud. [Verbal Response]
- Click on the 'Verify details now' link in the email.
- What would you do on this page? Please explain in as much detail as possible. [Verbal Response]
- Do you have access to your ExtraCare number right now? Verbal response only. (Do not provide any card information) [Verbal Response]
- What would you expect to happen after filling in the information and clicking 'Manage my membership'? [Verbal Response]
- Click on the page to simulate filling in the information, then click on the 'Manage my membership' button
- What would you do on this page? Please describe in detail. [Verbal Response]
- Why or why not would you create a CVS.com account at this point? Please be specific about the reasons of why you would make this choice. [Verbal Response]
- Click on the 'Complete account' link.
- What would you do on this page? Please describe in detail. [Verbal Response]
- Click on the page to simulate filling in the information and then click the "Create account" button.
- What is this page telling you? Please describe in detail. [Verbal Response]
- What benefits do you see here? [Verbal Response]
- Are you able to take advantage of any benefits right now? What information is helping you make that assessment? [Verbal Response]
- What else would you do at this point? [Verbal Response]
- What is your overall opinion of this process? [Verbal Response]
- If you were sitting down with the lead designer of this experience, what advice would you give him/her based on your experience? Would you advise him/her to change anything about the experience? [Verbal Response]

Appendix E

Test Script 4 (Cancel from landing page):

- As a CarePass member, how would you go about making any changes to your membership? Please be as detailed as possible. (Example: If you wanted to cancel your membership) [Verbal Response]
- Launch URL: <https://cvs.invisionapp.com/share/WEMVKAKTHA9>
- You have been taken to a new page. When you see the page, move on to the next step.
- You are on CVS.com. Without clicking on anything yet, please explain in words where you would go to make a change to your CarePass membership? [Verbal Response]
- Search for “CarePass” in the search bar or click on the “Join now” button under the CarePass section.
- You are now on the CarePass landing page and want to cancel your membership. You signed up for CarePass in-store and haven’t created an account on this page before. Please describe what this landing page contains in your own words. [Verbal Response]
- What would you do next? Remember to think aloud. [Verbal Response]
- Click on “How can I cancel my CarePass membership?” under the FAQs; then click on the relevant link to cancel plan.
- What would you do on this page? Please explain in as much detail as possible. [Verbal Response]
- Do you have access to your ExtraCare number right now? Verbal response only (Do not provide any card information). [Verbal Response]
- What would you expect to happen after filling in the information and clicking ‘Manage my membership’? [Verbal Response]
- Click on the page to simulate filling in the information, then click on the ‘Manage my membership’ button
- What would you do on this page? Please describe in detail. [Verbal Response]
- Click on the ‘Cancel your membership online’ link.
- What would you do on this page? Please describe in detail. [Verbal Response]
- Click on the page to simulate filling in the information and then click on the “Submit” button.
- What is this page telling you? Please describe in detail. [Verbal Response]
- What else would you do at this point? [Verbal Response]
- What is your overall opinion of this process? [Verbal Response]
- If you were sitting down with the lead designer of this experience, what advice would you give him/her based on your experience? Would you advise him/her to change anything about the experience? Please explain in detail. [Verbal Response]