# UX Mistakes Made by Financial Institutions

## And How to Avoid Them

A Conversation with April McGee
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# UX mistakes made by financial institutions and how to avoid them

"Financial institutions have to realize that there are different needs for different clients, there are different needs for people in different life stages. It's not a panacea to just create a site or an app, throw it at the customer, and then hands off, that's it. There is still room for the client relationship and customer service. This still needs to be a part of the equation."

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April McGee, VP Eastern Region, discusses trends and challenges doing user experience (UX) design for financial institutions.

**What kind of financial organizations do you work with?**

We cover the gamut—retail and corporate banks, investment firms, brokerage houses, credit card providers, and insurance companies, to name a few. Our clients also include providers of the back-end systems that enable the financial transactions.

"Now more than ever, financial institutions are ramping up their UX initiatives because the positive Return On Investment (ROI) of a good Customer Experience is clear."

**Where does the industry stand with respect to User Experience (UX)?**

As you might expect, some companies are further along than others. Now more than ever, financial institutions are ramping up their UX initiatives because the positive Return On Investment (ROI) of a good Customer Experience is clear. It's been shown that even during the worst downturns, companies with strong, positive, memorable customer experiences outperformed all others in stock performance (see Figure 1). The Customer Experience 'Leaders' reaped gains, whereas the 'Laggards' faltered.
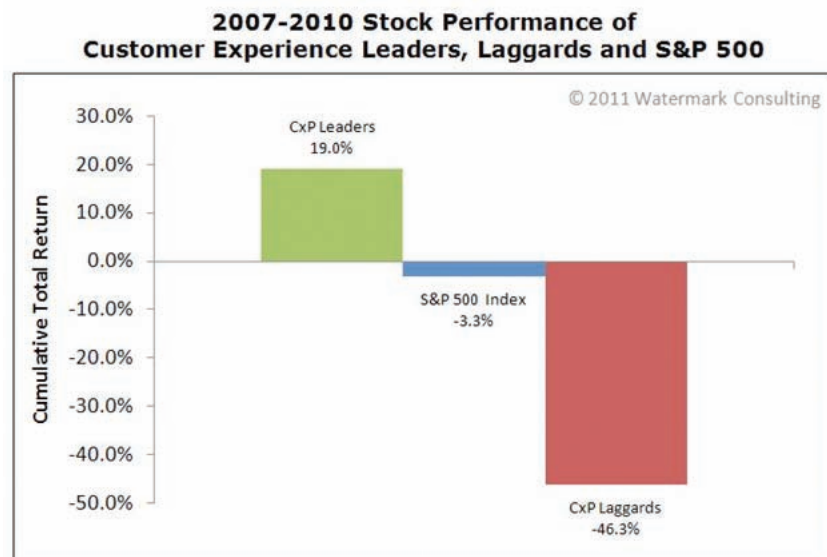


Figure 1. 2007-2010 Stock Performance of Customer Experience Leaders & Laggards vs. S&P 500
Source: Yes, Virginia, There's Still a Return on Customer Experience Investments, Jon Picoult, http://www.watermarkconsult.net/blog/?p=399

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But the recent global economic crisis has taken a huge toll, so the financial services sector has an uphill climb. As a result, they're trying to rebuild and fortify customer relationships by improving the Customer Experience (CX), which is a wise move.

> **Customer frustration is high in the financial space.** The meltdown in the financial sector caused a huge breach of consumer trust. As consumers become increasingly dissatisfied with their financial institutions, they begin to consider other options. And there's no shortage of new players poised to take up the slack in the field of online and mobile financial services. Contrary to popular thought, "increased bank fees" are not the main source of customer dissatisfaction. According to a 2010 JD Power survey, "*poor customer service was the most common reason why customers switched banks.*"[1] The financial sector can ill afford to ignore these warning signals.

**"[User] satisfaction has trended steadily downward for the past seven years. In fact, when viewed against a host of other industries, banks and financial services are at the very bottom."**

> **Consumer trust in the financial sector is at record lows.** Last year Forrester reported that America's biggest banks were the least trusted.[2] And according to American Banking News, "wealth management was especially castigated by survey respondents, getting the worst ratings…of the financial sector."[3] This the lack of trust was not just due to recent bailout drama—satisfaction has trended steadily downward for the past seven years. In fact, when viewed against a host of other industries, banks and financial services are at the very bottom (see Figure 2).
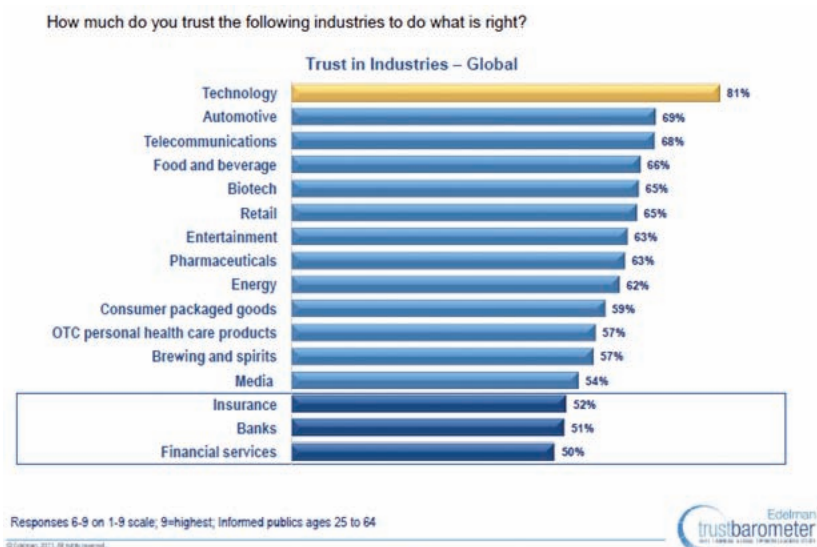


How much do you trust the following industries to do what is right?

**Trust in Industries – Global**

| Industry | |
|---|---|
| Technology | 81% |
| Automotive | 69% |
| Telecommunications | 68% |
| Food and beverage | 66% |
| Biotech | 65% |
| Retail | 65% |
| Entertainment | 63% |
| Pharmaceuticals | 63% |
| Energy | 62% |
| Consumer packaged goods | 59% |
| OTC personal health care products | 57% |
| Brewing and spirits | 57% |
| Media | 54% |
| Insurance | 52% |
| Banks | 51% |
| Financial services | 50% |

Responses 6-9 on 1-9 scale; 9=highest; Informed publics ages 25 to 64

Edelman trustbarometer

*Figure 2. Customer trust in various industries worldwide*
*Source: 2011 Edelman Trust Barometer Key Findings, http://edelman.com/trust/2011/*

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› **Low trust => Low sales.** Forrester explains: "customer advocacy rankings are a predictor of customer retention and attrition, and *customers who rate their financial service firms high are more likely to consider their firm for additional products.*"[4] Since trust is a critical aspect of Customer Experience, improving the experience will help rebuild the trust.

› **Customer Experience is a key differentiator.** What matters most to customers? "*Quality of service and ease of use are what customers care about more than any other factors,*" according to the 2011 World Retail Banking Report.[5] Thus, with CX as the priority, financial institutions have a much better chance of overcoming negative customer perceptions. It's a no-brainer!

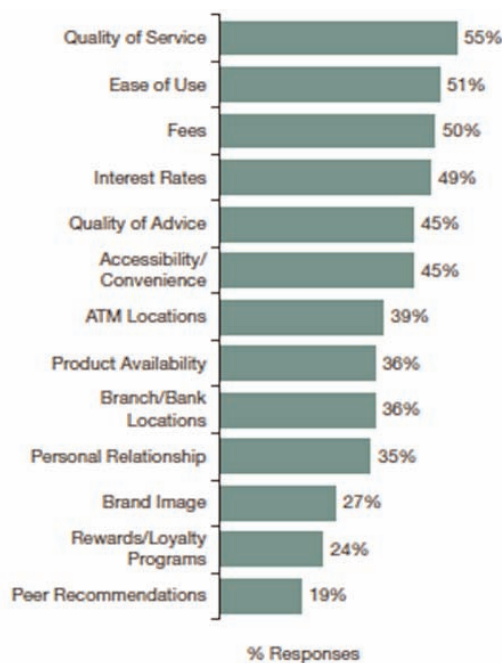**"*Quality of service and ease of use are what customers care about more than any other factors.*"**



*Figure 3. Factors that effect why customers leave their bank*
*Source: 2011 Retail Banking Voice of the Customer Survey, Capgemini, 2011:*
*http://www.wrbr11.com/pdf/wrbr11_etude.pdf*

**Are people in the financial sector starting to take UX seriously in their design process?**

You know, it's interesting because we work with so many clients in the financial sector that there's a mix. Some definitely get it. Others view UX as little more

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than the obligatory usability test prior to product launch. Let's be honest, you're unlikely to hear anyone say, "Down with Usability," in those cases. But you can tell where your organization sits on the continuum by taking your "UX pulse." Do you have a written UX strategy? Are the UX activities interwoven throughout the development process? Are they as indispensable as development, marketing, and customer support? Are you following a user-centered methodology? Are UI standards in place? The answers will be very telling.

Our CEO, Eric Schaffer, put it nicely in a conversation with one of our financial clients. He described how a well-rounded, well-balanced diet of UX capabilities, methods, approaches, and touch-points is essential. It has to be integrated throughout the entire corporate culture. And just as you would not eat corn flakes for breakfast, lunch, and dinner and think that you have a balanced diet, you need a full complement of UX activities in order to have a healthy customer experience. "UX corn flakes" are not sufficient.

**Good customer experience doesn't happen by accident**. Business leaders everywhere hold Apple in high esteem for its mastery in the marketplace. And rightfully so. There's an enthusiastic "buzz" around every Apple release. Some call it a roar. Unparalleled "gotta have it" excitement generates long queues of eager buyers. Legions of highly satisfied, died-in-the-wool devotees swear by the Apple brand. Who would NOT want to replicate such success? But what gets overlooked is that an experience this good is NOT accidental. It requires purposeful attention beyond just technology and marketing. Ads and hype make for splashy
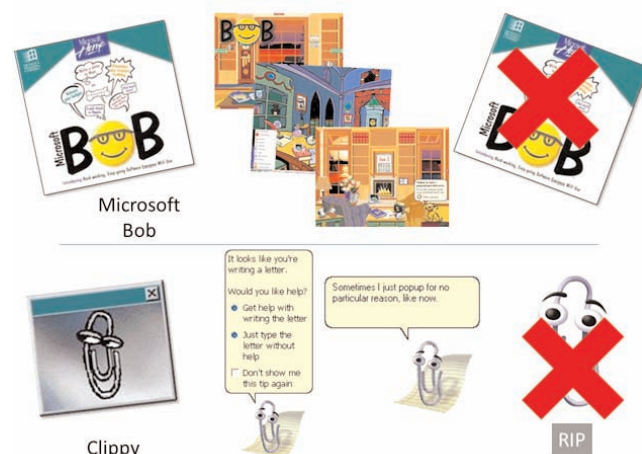
> **"What gets overlooked is that an experience this good is NOT accidental. It requires purposeful attention beyond just technology and marketing."**



*Figure 4. Good Intention + Poor User Experience = Software Oblivion*

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intros but quickly fizzle if the experience doesn't measure up. The "wow" turns to "whoa" before you can blink. Remember Microsoft Bob and Clippy? (See Figure 4) Part of Steve Jobs' genius was that he was in tune with how to craft an excellent experience at the everyday level. One of my favorite Jobs' quotes (in the box on the right) says it all.

> "You've got to start with the customer experience and work back toward the technology—not the other way around."
>
> —Steve Jobs

> **"The future of banking is about connections with your customers, engaging them when and where they need banking to solve a problem or provide a service."**

We cannot all be Steve Jobs, but we can all get in synch with our customers at the experiential level. And in our organizations we can construct an infrastructure to ensure that our knowledge of our customers permeates our culture, our products, and our services. We don't have to be Apple, we can be our own in-the-know selves.

**How can a financial company get ahead of the curve?**

**Know what your customers want before they do.**
Think of the people in your personal life who matter most. How well do you know them? To what ends will you go to find out the little nuances that make a difference to them? If that person is a friend or family member, the answer is obvious. But what if it's your customer? How well do you know what makes THEM tick? When I ask our financial clients to tell me about their customers, most often I'm met with sheepish shrugs of, "we're not really sure." To be fair, they have market demographics, web analytics on page visits, likelihood-to-purchase data—but what they usually do NOT have is an in-depth understanding of their customer's world—the between-the-lines immersion into the customer's day-to-day context.

> "You can't just ask customers what they want and then try to give that to them. By the time you get it built, they'll want something new."
>
> —Steve Jobs

According to Brett King, author of *Banking 2.0*, "The future of banking is about connections with your customers, engaging them when and where they need banking to solve a problem or provide a service. Banks won't be able to influence people with clever ad campaigns, better rates, or talk of branch networks. The only differentiation will be how you anticipate their needs and service them in their day-to-day life, wherever they may be."[6]

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If you can get beyond features and technology horsepower, and identify the "holes" and unmet needs—then that's the difference between *hoping* you'll have a "next big thing" and taking a systematic approach that optimizes your chances. The more you know about the goals, needs and unvoiced desires of your customers, the better you can anticipate and envision the solutions that'll help them reach those goals.

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Equally important—how do you make sure you arrive at your own goals? Start by determining what your ruler is. What are your measures of UX success? Construct a reliable set of UX metrics that's meaningful to your organization. At a business level, you might gather A/B stats to measure conversion. At a process level, you may measure how many projects implemented full-spectrum user-centered design. At the all-critical customer experience level, you might track task completion, help desk calls, and overall satisfaction ratings. We find that it helps to aggregate this information—perhaps in the form of a UX Scorecard or UX Dashboard (see Figure 5). Start off with baseline measures, and then periodically re-assess to help you monitor how you're doing over time.
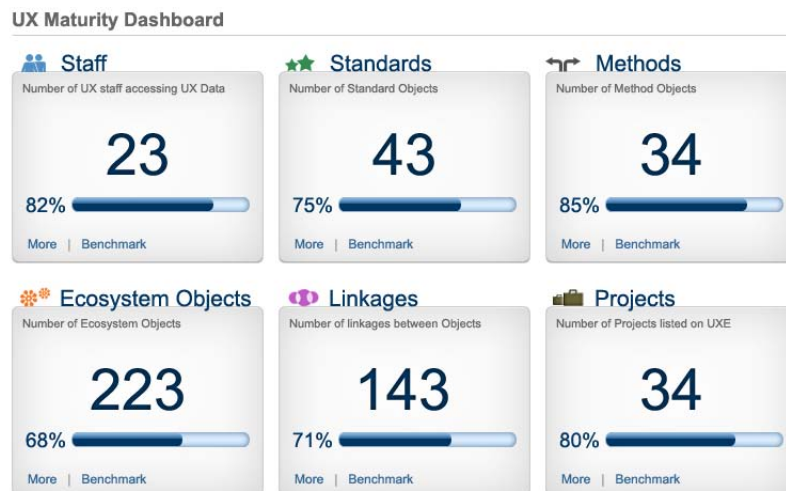


Figure 5. *Sample UX Dashboard - Executive View*
*Source: HFI UX Institutionalization Concept*

However, I've seen clients go about it the wrong way—they just try to make their best guess about their users. I notice that financial clients in particular tend to keep a buffer between the UX team and the end-customers. Instead of actual end-users, I've seen Customer Relationship Managers or Product Managers brought in as "stand-ins." This approach is fine if you're in a pinch. But if this becomes your normal practice, consider it a red flag.

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It's even better if you can take it a step further, and research the user's world from a more holistic viewpoint that includes the major and minor players, that looks across various environments and multiple usage settings—in essence, a robust depiction of the entire user ecosystem. We use this Ecosystem Research as a key approach in uncovering unique, breakthrough solutions.

**How will all this change as the new face of banking emerges?**

Bank branches won't be going away any time soon. In fact, sparkly new branch offices seem to pop up all the time. They do serve a need—especially for small business customers. But let's face it, most customer segments will spend less and less time in bank branches over time. The new face of banking is online, virtual, and mobile. Even the new branches have kiosks and terminals for self-service.

> **"With new avenues for transactions, and new vehicles for currency, the entire concept of banking is transforming. Users are more sophisticated in what they expect, and more discriminating in what they'll accept."**



*Figure 6. Barclays Flagship Bank of the Future, Piccadilly Circus, London*
*Source: http://thefinancialbrand.com/4095/barclays-bank-of-the-future/*

With new avenues for transactions, and new vehicles for currency, the entire concept of banking is transforming. Users are more sophisticated in what they expect, and more discriminating in what they'll accept. A recent article from Global Finance tells us that in the oncoming wave, "digital customers [will be] quick to try, adopt or reject technology, so banks must observe and react fast."[7]

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The shift in customers' preferred banking channels (from in-person to online to mobile) has changed the way people bank. But have banks made the effort to adapt their customer experience to accommodate this migration pattern and stem the tide? Unfortunately, not nearly enough.

**"The banking industry is motivated to take serious action, but without a UX strategy, the effort can result in costly mistakes that fail miserably."**

**What do you consider the most important mistakes to avoid?**

The banking industry is motivated to take serious action, but without a UX strategy, the effort can result in costly mistakes that fail miserably. But by paying close attention to the following issues, mistakes can be avoided.

1. **Chasing the Poor, Misunderstood 'Wow Factor'** Here's a common scenario: an organization starts off with all the right user-centric steps, only to be side-tracked in the final stages when one or more stakeholders dejectedly declares: "Hmmmm, it doesn't seem to have enough of a WOW factor." What this usually boils down to is that the stakeholder is seeking a "verbal wow" rather than an "experiential wow." They want to hear a chorus of excited exclamations from team members and customers alike. What I tell them is that we do occasionally hear test participants eagerly say, "This is great! When will we get it?" But when we remove bottlenecks from their daily software tools, satisfaction with customer-facing financial UIs is likely to come in other ways.

   To "wow" means to impress. An impressive customer experience is one where the customer is delighted. Delight doesn't come from the latest widget or feature, or even from having the fewest clicks. It comes from helping the customer reach *their* goals, do what *they* want to do. It's when the UI gets out of the way and supports customer activities unobtrusively. By all means, we want to invoke a positive response from our customers. Just realize that it may not come in the form of audible/visible exclamations. It's more likely to come in the form of repeat business, higher usage, and reduced complaints. And in the immeasurable, but invaluable, form of positive word-of-mouth. It may be more of a murmur than a shout. (But squeals of joy are always welcome!)

2. **Amplification vs. Simplification** Applications and websites in financial services are notoriously dense. And not in a good way. Customers are presented

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with screens that are jammed with functions, options, promos, offers, data, advice, reminders and alerts. Snugly hidden under this cacophony of everything is the stuff the customer actually wants. So always keep in mind—simplicity is nirvana. Practice restraint when considering what to add to the UI. Content, even valued content—if presented when users are focused elsewhere—will either be ignored, or worse, be annoying. So, be brutal in what you edit out.

3. **Imitation vs. Innovation** Even top-notch teams sometimes fall victim to the "me-too" syndrome. That's where someone on the project team—perhaps a senior visionary—stumbles upon a "neat doo-dad" or "stylistic element" on another site or in the media and has a "how cool is that" epiphany. Before you know it, a similar thing-a-ma-jig shows up on *their* interface as well. Another common scenario is when someone—perhaps a senior IT manager—designates the next "IT it-thing," fueled by the latest "tech buzz." And while imitation may be the sincerest form of flattery, it's a ready-shoot-aim approach. And it can decimate the customer's experience. Before providing a solution make sure the problem is thoroughly understood. And make sure that it fits your customers and your brand.

4. **User-centered ≠ User-created** Can listening to users ever backfire? Absolutely! It takes a keen ear to translate user feedback into design implication and solutions. One client told me that they schedule and prioritize their product fixes and release updates according to the input from the Customer Feedback button on their site. (I shuddered!) True, only customers can give genuine insight into their needs, tasks and problems. But allowing your customers to self-diagnose and self-treat can be downright disastrous! Remember—users are not designers, so listen carefully, dig below the surface, and turn that raw feedback into an outcome that does the trick!

5. **Market Research ≠ User Research** Budgets are tight all over, so clients in search of cost savings will sometimes ask if they must conduct both Market Research *and* User Research since each one collects data from end-users. They ask, "What more will we learn from User Research that we don't already know from Marketing studies?" or "Can't the UX Team just use the same data? Do we have to go back to customers again?" The last point first—re-purposing marketing data just doesn't work. It's true that both Marketing and UX are focused on customers, but from very different perspectives, and for different purposes. Think of it this way—when your car has a rattle and you take it into the dealer for repairs, who do you want to troubleshoot the car noise? The

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marketing staff? Or the auto mechanics? Each group has a different line of questions, and different training and background that guides what they do with the customer responses. So if we don't expect the auto shop marketing team to make sense of our car problems, nor the mechanics to profile the market segments, then why can't we think of user experience in a similar light?

To grossly overgeneralize, marketing is geared more toward buying patterns than usage patterns. It focuses more on customer opinions about products, rather than observing what people really do. And probing further to understand the reasons *behind* the behaviors—that's where UX comes in. And whereas marketing uses humongous sample sizes, we can accurately and reliably identify usability issues with very modest sample sizes.

**"Getting the UX team directly in front of real users is the first step to having a robust understanding of customer mental models, motivations, expectations, and task flows."**

To sum it up, getting the UX team directly in front of real users is the first step to having a robust understanding of customer mental models, motivations, expectations, and task flows. Without talking to real people from your actual target markets, you run the risk that the design will be a poor match for what users really need or want. When that happens, the design will be perceived as a hindrance, rather than a help.

6. **Fire-fighting vs. Fire-proofing** Whether your UX team is small or large, the volume of UX work always seems to be greater than the staff on hand. And while it may seem tempting to aim for maximum coverage—and exposure—for your UX efforts by scattering a little bit of UX attention across many projects, don't go there! The mad-dash, finger-in-the-dike approach of "fighting fires" from one release to the next, or swooping in to conduct a hasty test or review just prior to unleashing a product into the market—these are unlikely to produce substantive gains. In fact, they are classic warning signs that long-term success is unlikely. Here's why:
   > First, your UX staff will feel frustrated, overwhelmed, and burnt out.
   > Second, the UX team will be seen as ineffectual because their efforts will be too little too late.
   > Third, management will start to question the value of UX. Talk about a vicious cycle!

It's far better to "fire-proof" your UX efforts to give them the best chance of success. This means selectively targeting a few high-value projects early

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enough in the development cycle that changes can be incorporated in a way that makes an impact. Don't be afraid to be picky. Inevitably you'll have to include a few quick-and-dirty, fast-track projects, too. But if your goal is to establish reliable UX success, be sure those projects are the exception, not the norm.

7. **Lack of "UX Insiders"** When a company is very small or is just getting a UX program underway, it makes perfect sense to bring in a UX consultant or two to beef up the ranks and provide skills that do not yet reside in-house. But as things get underway, the development team grows and the list of UX projects grows, so relying solely on external consultants becomes a liability rather than a benefit. No one knows your business better than you. You know the players, and the intricacies of the domain; you have the history and ongoing relationship with your customers; you get the internal scoop on business direction, and only an insider can navigate the delicate landscape of internal politics that can either advance or kill a project.

Yes, there are advantages to having an impartial viewpoint. At times, you simply need an "outside authority" to back up what the internal staff has been saying all along. But relegating pivotal roles to an external UX consultant is risky. Why? Because without the in-group perspective, the continuity, the shared knowledge. and team trust there's a severe disadvantage. It can only be overcome by being immersed in the daily work culture. Therefore, strive for a mixture of internal and external UX staff.

**How do clients address the growing number of modalities and mechanisms that their customers now have as a means of interaction? How can they prevent a disjointed experience for the customer?**

The financial sector is to be commended as one of the early pioneers in going to online services. However, with the latest transition from web to mobile to ubiquity, there's now a major challenge to create a cohesive customer experience across many different channels. Most financial service providers have multiple touch points with their customers, e.g., internet, mobile/handheld, kiosks/ATMs, call centers, branches, etc. Often these different channels are managed and implemented by separate internal teams—in separate organizational silos. Silos increase the likelihood that the customer experience will be fragmented and disjointed—this can wreak havoc for customers.

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**"Define a strategy that ensures a cohesive experience across all the channels, with special emphasis on creating a seamless transition from one channel to the next."**

For example, that same 2011 World Retail Banking Report I spoke of earlier also said that while customers found the Internet and the Branch to be most important, their satisfaction with service in those channels was mediocre. In contrast, customers reported that the mobile channel was least in both importance *and* satisfaction. Resolving these customer pain points presents a huge opportunity. (Note: Mobile penetration is quite high in regions such as Africa and Asia; however, mobile banking penetration on a global scale is still somewhat low: ~ 20%.)
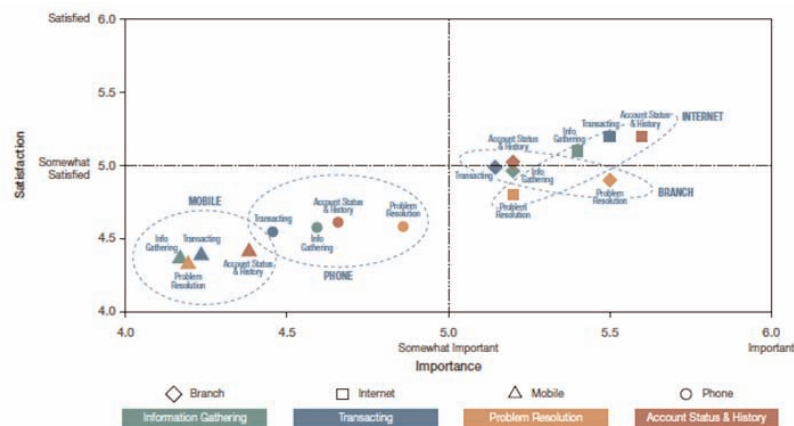


*Figure 4 Global Customer Importance vs. Satisfaction of Channels by Lifecycle*
*Source: 2011 Retail Banking Voice of the Customer Survey, Capgemini, 2011;*
*http://www.wrbr11.com/pdf/wrbr11_etude.pdf*

Financial clients must get their arms around these anomalies, and leverage the opportunities:
› Find out how customers conceptualize different channels for different types of tasks (Information Gathering, Transacting, Problem Resolution and Account Status & History)
› Identify and leverage new opportunities to share data across channels
› Define a strategy that ensures a cohesive experience across all the channels, with special emphasis on creating a seamless transition from one channel to the next.

**The single-channel option** While cross-channel strategy is center-stage, the new venue of single-channel banking has emerged with mobile-only services in Japan, Namibia, UK, and elsewhere. This approach has its own demographic and warrants its own unique strategy.

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> **"Make no bones about it—when you design for everyone, you design for NO-ONE! It simply doesn't work. So just how *do* you come up with a design that works for a broad variety of users?"**

**I imagine in the financial sector it could be difficult. Their clients include such a cross-section of society—private citizens, the guy who owns the deli down the street, Fortune 500 companies. How do you create a design that works for everyone?**

Make no bones about it—when you design for everyone, you design for NO-ONE! It simply doesn't work. So just how *do* you come up with a design that works for a broad variety of users? First of all, you must segment your population and prioritize which segments are most critical (e.g., the 80/20 rule). This is a very difficult, sensitive, and political call that many teams are reluctant to make, insisting instead that their key target is EVERYONE. While that may be true in some sense, to create a good customer experience, you must design the interaction so that the customer *feels* that you've tailored specifically for them, not for everyone. That's one of the basics of good design. Then have a concrete, common depiction of those key segments that the entire team knows and references, e.g., personas. They're a great way to keep everyone on the same sheet of music throughout the design process.

**Is there a trend towards persuasion design in the investment and banking communities?**

Yes. Although banking and investment interfaces are tools for the most part, the institutions recognize that user experience is not just about UI efficiency, it's also about trust and relationship. The user experience must reflect how people relate to the institution, the economy, and their finances. The recent global turmoil has made people "antsy" and apprehensive. And with today's volatility, even your most loyal customers may no longer trust you. It's a mistake to gloss over those customer feelings—it's much better to characterize them, and address them in the user experience. We use the acronym "PET design™" to describe our methodology of designing for Persuasion, Emotion and Trust.

For example, customers should easily be able to go online and find the lowest interest rates or highest yields. And reviewing their credit card statements to confirm their transactions should be straightforward. Following basic usability practices will ensure that the steps are intuitive and optimal. But when the choice is about family protection, or educating their children, or overcoming financial distress, that's a different story. They'll be more inclined toward an institution

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that's attuned to their underlying emotional characteristics and needs. Emotions are critical to decision-making, even for something as seemingly "bland" as encouraging customers to sign up for paperless statements.

For example, several years back we conducted PET research to help one of our financial clients design their customer self-service interface. The client was planning to introduce and promote several new features through the interface, including the option for paperless statements. Our analysis indicated that the clients' customers were reluctant to go paperless because paper records gave them a sense of being in control. We used that finding as input to the design. PET design requires an understanding of the deep emotional drives and blocks of your customers so you can design accordingly. This unique edge gives the clients a means to distinguish themselves from their competitors.

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**I've heard you say, "Don't sacrifice superior service on the altar of self-service." I found that interesting because most people think if an interface is more usable it would make it easier for people to do self-service. Could you explain what you mean by this?**

At one point, the big push towards customer self-service played up the fact that it saves time and money. Some companies transitioned online and essentially said, "Here, you do it. You take care of yourself. Troubleshoot your own systems. Diagnose your own software problems. Manage your accounts. Make your own investment decisions. Here's your log-on, here's your password, here's your account. Have at it. Log-off when you are done. Oh yeah, and send me an email if you need help." You think I'm exaggerating? In fact, a few went so far as to intentionally "bury" their contact number deep within the site, thinking that would discourage customers from calling. All it did was make them angrier.

In today's world, some customer segments would be fine with that. In fact, they prefer online as their primary mode of contact. But let's not forget that our clients are at different life stages and have different needs. We can't just create a site or app, toss it over to the customer, and then disappear. There's still plenty of room for a spectrum of customer service activities, including "high-touch" interactions. To maintain good relationships, the spectrum still needs to be part of the equation, but in a form that's both cost-effective and efficient. Do your research and get ahead of the curve to discover just what that form will be for you.

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**Moving forward, what should be the UX priorities for financial institutions?**

1. **Get a better handle on your customers**—their context, operations, pain points, desires, emotions and outages. Institute a program of Ecosystem Research to gain an in-depth understanding of your users. Look at the entire picture—who the users are, what channels they prefer and why, document their habits and use patterns. And it's OK to take small steps. Incorporate a few insights from each project, and continue to shape, refine and deepen your knowledge of the customer and your depiction of them in their environment with each subsequent project.

2. **Create a set of UX design standards and templates** based on that customer knowledge. Not only will it enable you to deliver a cohesive experience from your client's point of view, you'll save time and money by defining resources that you'll re-use throughout design and development. Don't forget to make it a team effort—involve folks from various areas of product development: marketing, business, IT, customer support, etc. And put a governance body in place to help the teams employ and adhere to the standards.

3. **Institute a program of continuous UX improvement** with goals, metrics and accountability. For a successful customer experience, your usability efforts must consist of a defined UX strategy, a user-centered methodology, and must be ingrained into your organization's business and development processes—it can't be a one-shot deal.

4. **Build your "Corporate UX Memory."** It's one thing to get your team, projects, and processes geared up and rolling, but how can you protect all the UX Intellectual Property that starts to accumulate? E.g., project documents, design templates and guidelines, user personas, metrics, and most importantly: the learnings and implications. Be sure you have a solid way of safeguarding those assets. Not from theft, but from dis-use! What good is a template if it never gets re-used? You don't want it to get piled under on a corporate file server and forgotten. So investigate reliable ways to keep your assets fresh and easily accessible to the team.

5. **Finally, it's wonderful to be novel and engaging. But remember to be simple, practical and useful as well.** And be true to yourself. Above all, be an ally to your customers—help them carry out their tasks and achieve their goals!

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# UX mistakes made by financial institutions and how to avoid them
## — A Conversation with April McGee

## About April McGee



April McGee, MS, CUA, CXA
VP Eastern Region
Human Factors International

April McGee has over 15 years professional experience in usability engineering during a 23-year tenure at Bell Labs, AT&T and Lucent Technologies. Currently she is VP Eastern Region with Human Factors International, Inc.

She has a proven track record with telephony products and services as well as network and element management for broadband data systems. Strengths include user interface design, usability testing, development of UI guidelines and requirements, and delivering bottom-line customer satisfaction. Adept at simplifying complex procedures. Talent for facilitation of cross-cultural and cross-functional teams. Also experienced in system integration, system test and customer support.

April was awarded a U.S. patent for an innovative user interface to an award-winning voice/data/video collaboration system (MMCX). She has won several awards, including the Worldbeater Award, for integrating product prototype into user interface requirements, and she is a member of the Human Factors and Ergonomics Society as well as the Usability Professionals Association (UPA).

Currently, April is responsible for implementing a user-centered approach to user interface architecture. Using techniques such as data gathering, developing task flows, usability testing, and expert reviews, her goal is to help clients optimize their efficiency, productivity and user experience.

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