Introduction

During this project, NIB Thrive was a new player in NDIS plan management game. They were in the process of redesigning their digital workspace (called OTIS), to suit the needs of plan managers.

My role was to conduct UX research and produce concepts aimed at reducing cognitive strain on these users.

By optimising workflows and refining navigation, I created a more streamlined experience. In other words, I redesigned the essential UI elements to focus on what matters. This meant less the navigating the platform and more on supporting clients.

Challenge

As you can see, the original OTIS's structure was clunky. It meant plan managers put a lot of effort into the process of completing tasks, let alone the tasks themselves. A heuristic analysis highlighted the areas of a high cognitive load for the user.

Observing their interactions revealed that plan managers completed tasks in a sequence that felt natural to them. But OTIS organised information to put similar items, like invoices and payment info, together. This worked against their workflow, resulting in jumping between sections and opening numerous tabs, confusion, and time loss.

The information architecture of OTIS was object-oriented and didn't align with the task-oriented navigation style of plan managers.

Solution

To address this, I proposed a three-stage solution:

1. **Simplify:** We removed unnecessary elements, displaying only what was most relevant, easing cognitive load and allowing for quicker task completion.
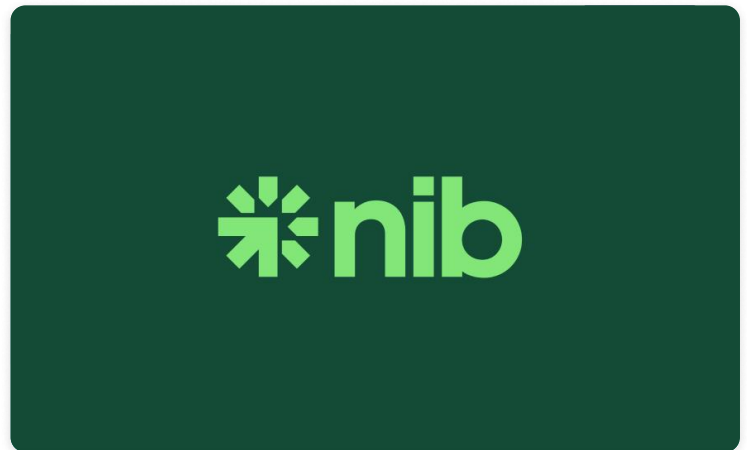

Why are our plan managers struggling

- **High Cognitive Load:** Large amount of information displayed increases cognitive load, making it harder to focus and complete tasks efficiently.

- **Object-Oriented Navigation:** OTIS organizes content by objects which is effective for complex data but inefficient for tasks.

- **Task-Oriented Workflows:** Plan managers often need to perform tasks that span multiple objects, but OTIS's structure forces them to switch between sections, breaking their natural workflow.
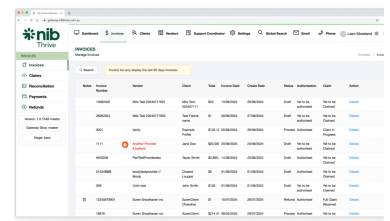
1. Simplify
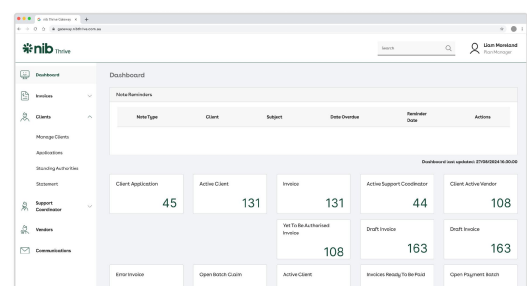
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