

Case Study

Glidewell My Account Dashboard

Glidewell Dental's customer portal (My Account) allows customers to rate the cases they receive from the lab based on how well the case met their expectations. The case evaluation benefitted the lab by allowing them to act on the feedback and hopefully improve the case quality over time. This case evaluation feature had been available for months, but was not receiving as much usage as was expected.

How did we know this was a problem?

Over the span of four months, we saw that case evaluations were submitted through My Account at an average of 16.74/week.

16.74 case evaluations/week

But what was telling us this was lower than expected? How could we get a baseline to compare?

We were able to find out that in the previous year, the company received an average of **3,500** evaluations in the mail every week. However, keep in mind that this number is relative to all of the cases sent out by the company, while not every customer is using My Account.

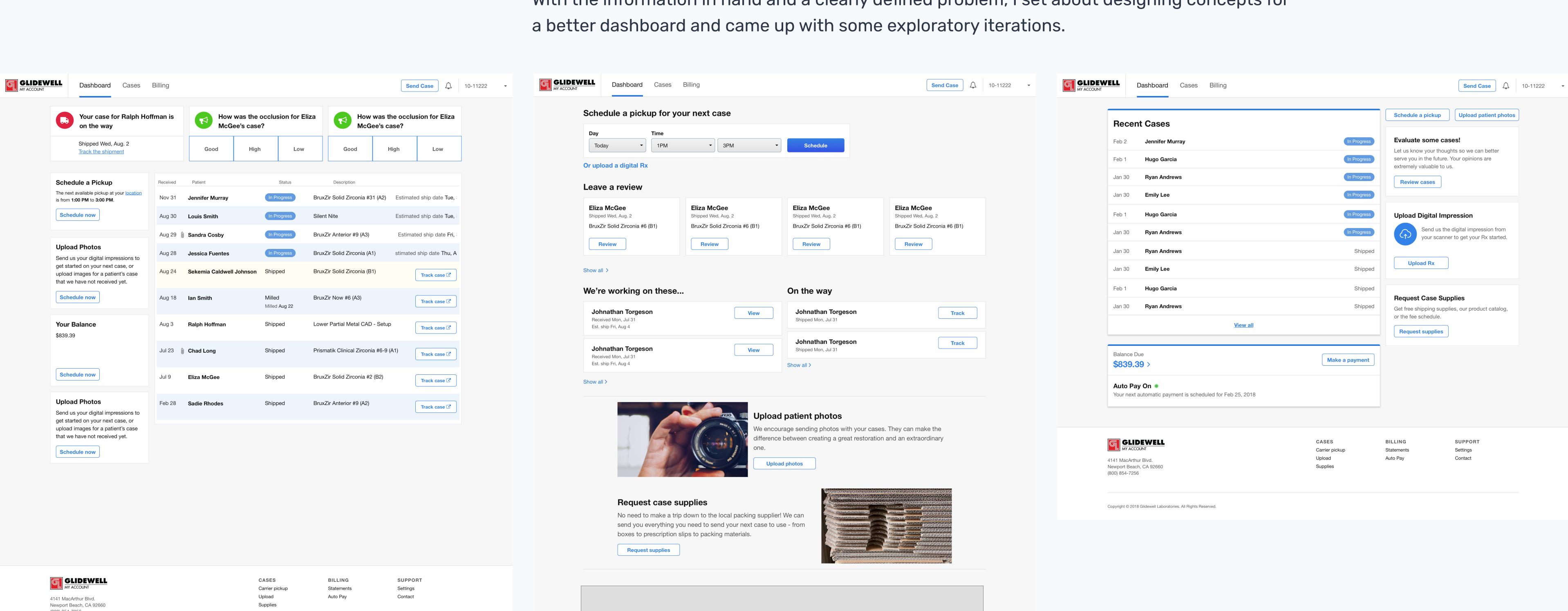
The closest analogy we could find were the number of pickups scheduled using My Account. When customers are ready to send a case in to Glidewell, they will typically call customer service and schedule an appointment with FedEx to come to their office. This feature was also available in My Account, and so we can use the number of pickups scheduled in My Account to get us closer to the expect number of evaluations.

1,332.9 X 7% = 93.30

On average, about 7% of all cases that are sent out receive a case evaluation. Using that 7% with the number of case pickups scheduled through My Account, we come up with 93.30. The math and logic isn't perfect, but this now gives us a reasonable target to aim for, and also lets us know that there is definitely room to improve from the 16.74 case evaluations/week that My Account has been receiving.

Where do we start?

We took a look at the dashboard first, since it was the very first page users would see upon signing into the site. Right away, we could see there were some simple changes that could be made to improve the experience.



From our dashboard, it is not immediately obvious how to submit a case evaluation. There's actually no indication anywhere on the page to let users know that this is even a feature that's available. Right away our thought was to just add a box on the home screen letting users know that this feature is available. But, why stop there? We saw this as an opportunity to also make some changes to the dashboard that we've been wanting to change for a while.

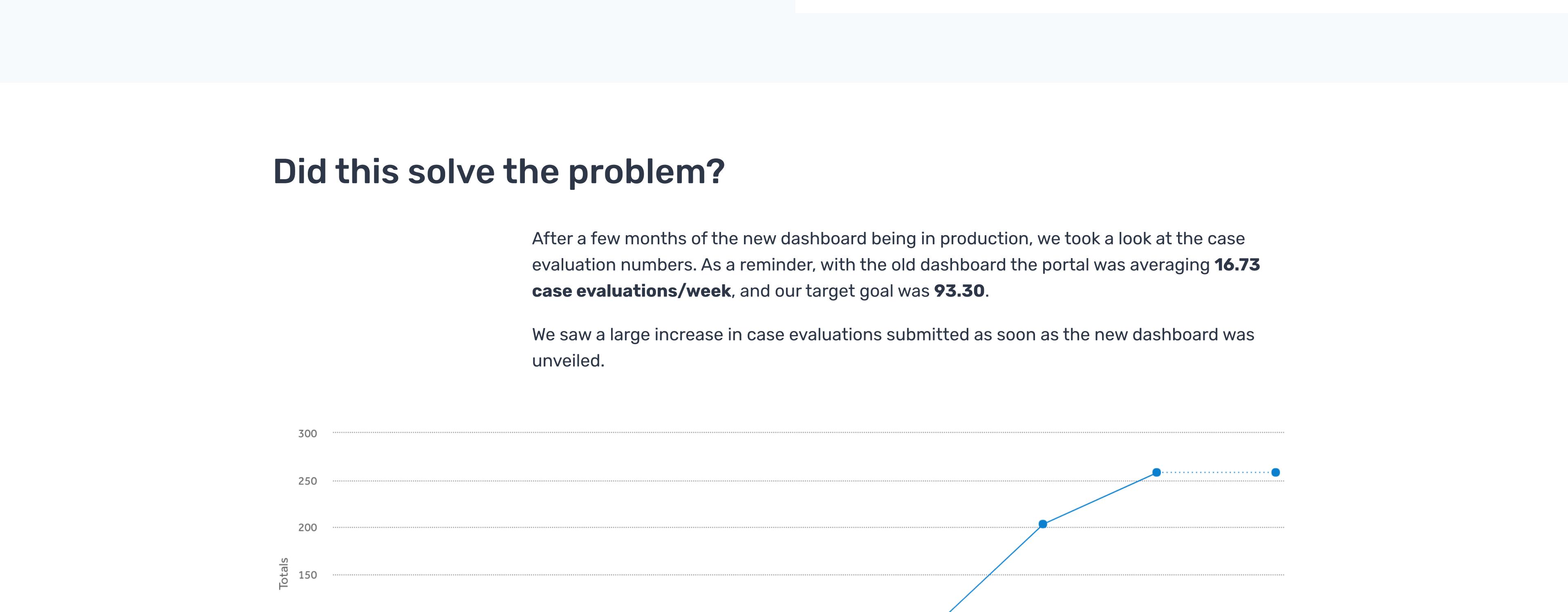
Billing is far too prominent. This was placed in the top right area after a survey was conducted asking users what features they use on My Account, and anything related to their bills came up high on the list. However, with more data (and experience) we realized that something a user wants to do does not necessarily mean they want to use it often. In this case, most of our customers only pay their bill once a month when it is due. We really wanted to de-emphasize the billing section and not have it to be the first thing they see when they sign in.

The case list is the next big part. The number of open and recently shipped cases we found to be fairly meaningless to our customers, when most of them just want to know where their case is and when it will arrive at their office. We also noticed a lot of people clicking on the case list, when none of these cases are clickable.

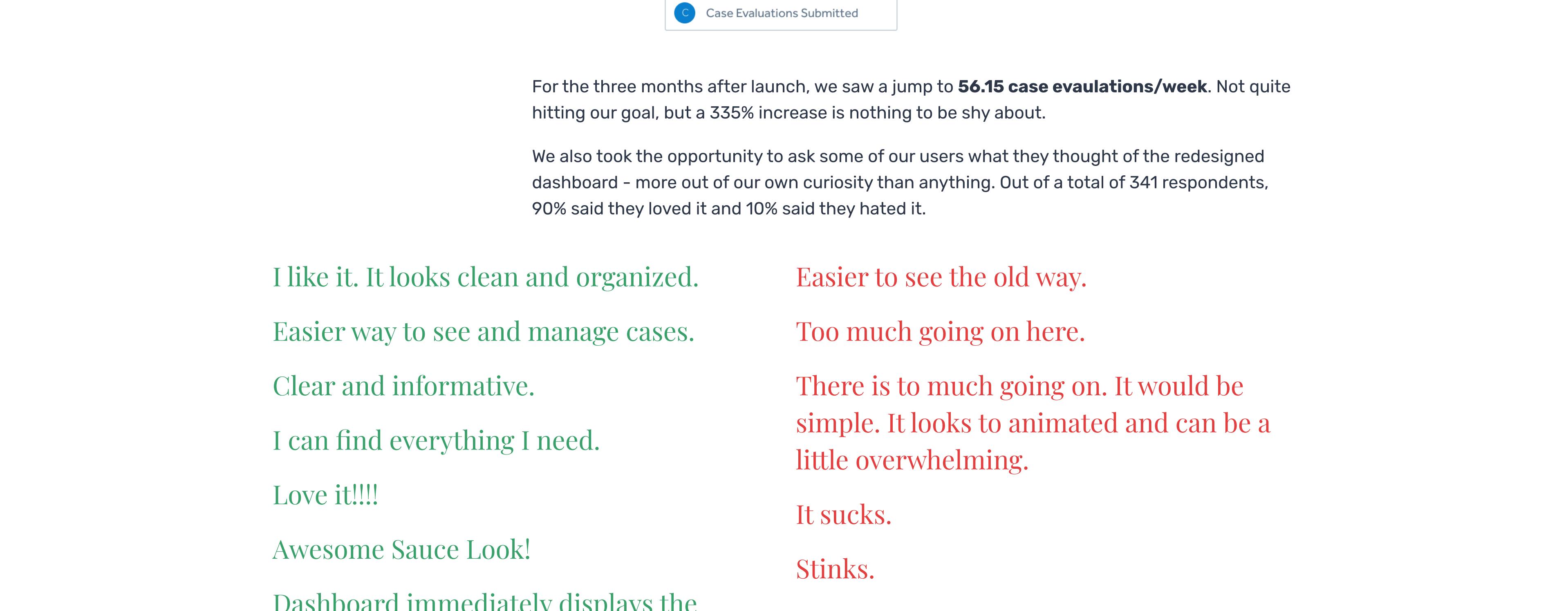
To confirm these were actual problems and not rely solely on a heatmap, we also watched recordings of users navigating the portal. The recordings showed that most of our users would land on the dashboard and then immediately navigate to the feature they needed. Almost none of them looked at the information available on the dashboard or acted on the information available.

Design Quickly

With the information in hand and a clearly defined problem, I set about designing concepts for a better dashboard and came up with some exploratory iterations.



A couple of design critiques later, I moved forward with one of the concepts that resonated well with the team. After some internal usability testing and further adjusting, I arrived at a final design that went into development.



I like it. It looks clean and organized.
Easier way to see and manage cases.
Clear and informative.
I can find everything I need.
Love it!!!!
Awesome Sauce Look!
Dashboard immediately displays the information I need - no need to search!

Easier to see the old way.
Too much going on here.
There is too much going on. It would be simple. It looks to animated and can be a little overwhelming.
It sucks.
Stinks.
frig u

After a few months of the new dashboard being in production, we took a look at the case evaluation numbers. As a reminder, with the old dashboard the portal was averaging **16.73 case evaluations/week**, and our target goal was **93.30**.

We saw a large increase in case evaluations submitted as soon as the new dashboard was unveiled.



For the three months after launch, we saw a jump to **56.15 case evaluations/week**. Not quite hitting our goal, but a 335% increase is nothing to be shy about.

We also took the opportunity to ask some of our users what they thought of the redesigned dashboard - more out of our own curiosity than anything. Out of a total of 341 respondents, 90% said they loved it and 10% said they hated it.