

# Streamlining Appointment Booking for NYC's Financial Empowerment Center

PROJECTS IN IxD  
AUG 2024–DEC 2024





# Team

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Client:

CIO, PM, IT, Stakeholders  
(Marketing, Counselors)





# Client

**NYC's Financial Empowerment Center (FEC)** provides free financial counseling to **4.5 M+ NYC residents**. People can book appointments online or in-person with their certified financial experts.



# Empowering Teams, Elevating Experiences

#Impact

## FOR END USERS

- Faster, more accessible online booking experience
- Clear, intuitive guidance on next steps



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## FOR OUR CLIENT

- New design infrastructure promoting low-cost, organization-wide adoption
- Addressing counselor concerns
- Higher conversion rates



## Problem

**Despite a 300% surge in website traffic driven by marketing efforts, the online booking completion rate remains low.**

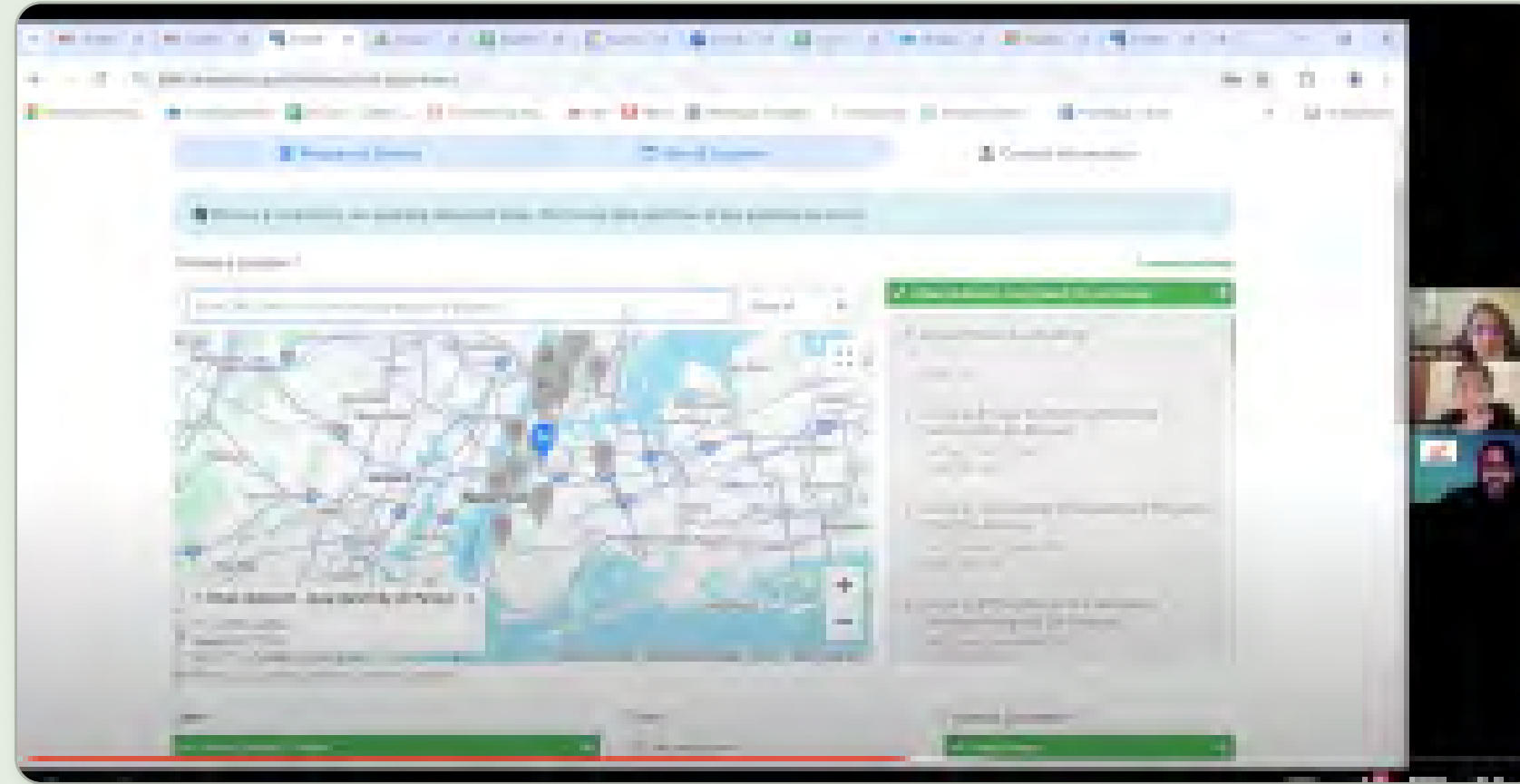


**How might we simplify experience,  
set clear user expectations, & improve  
accessibility to reduce drop-offs?**

# Research



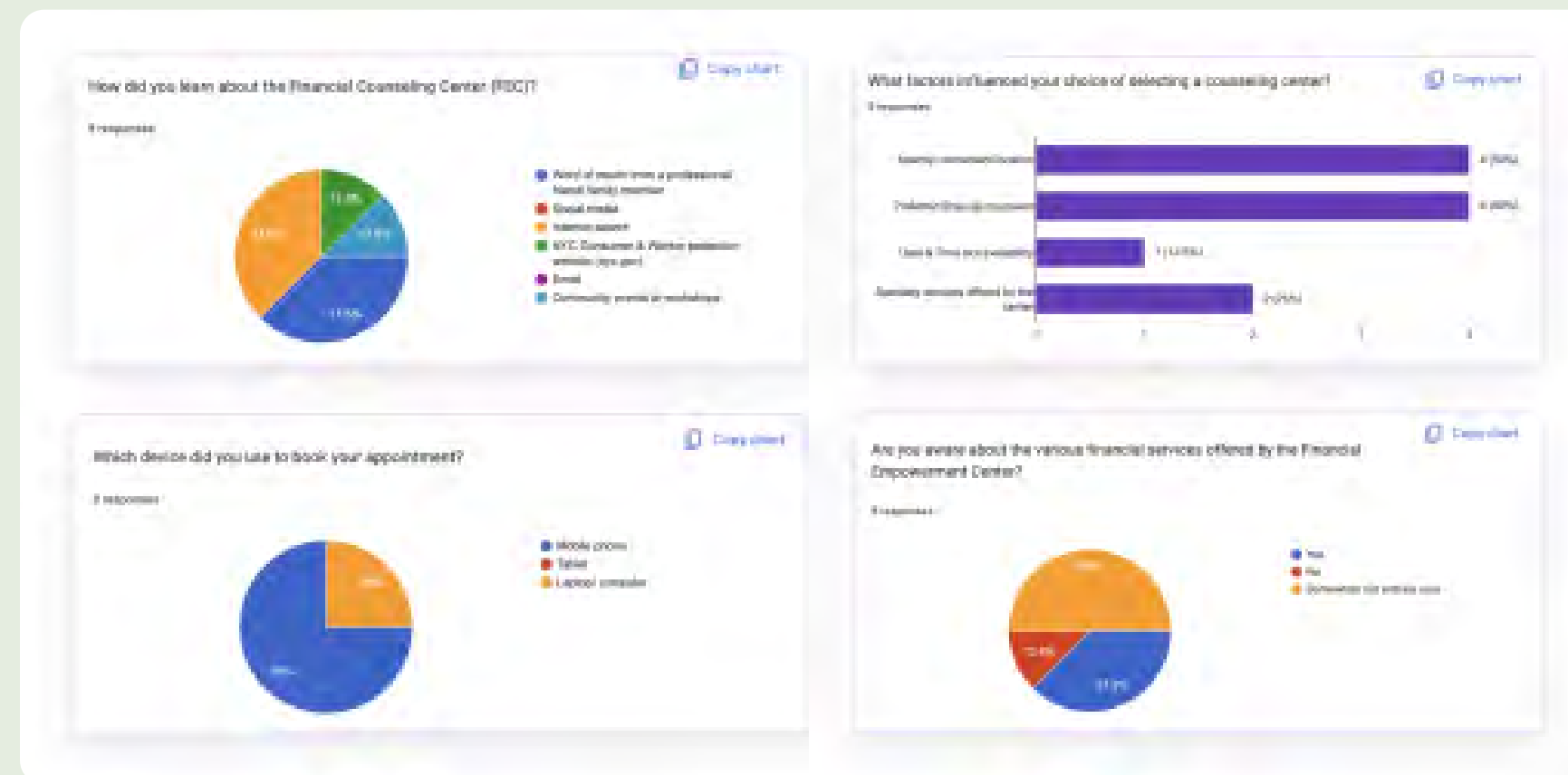




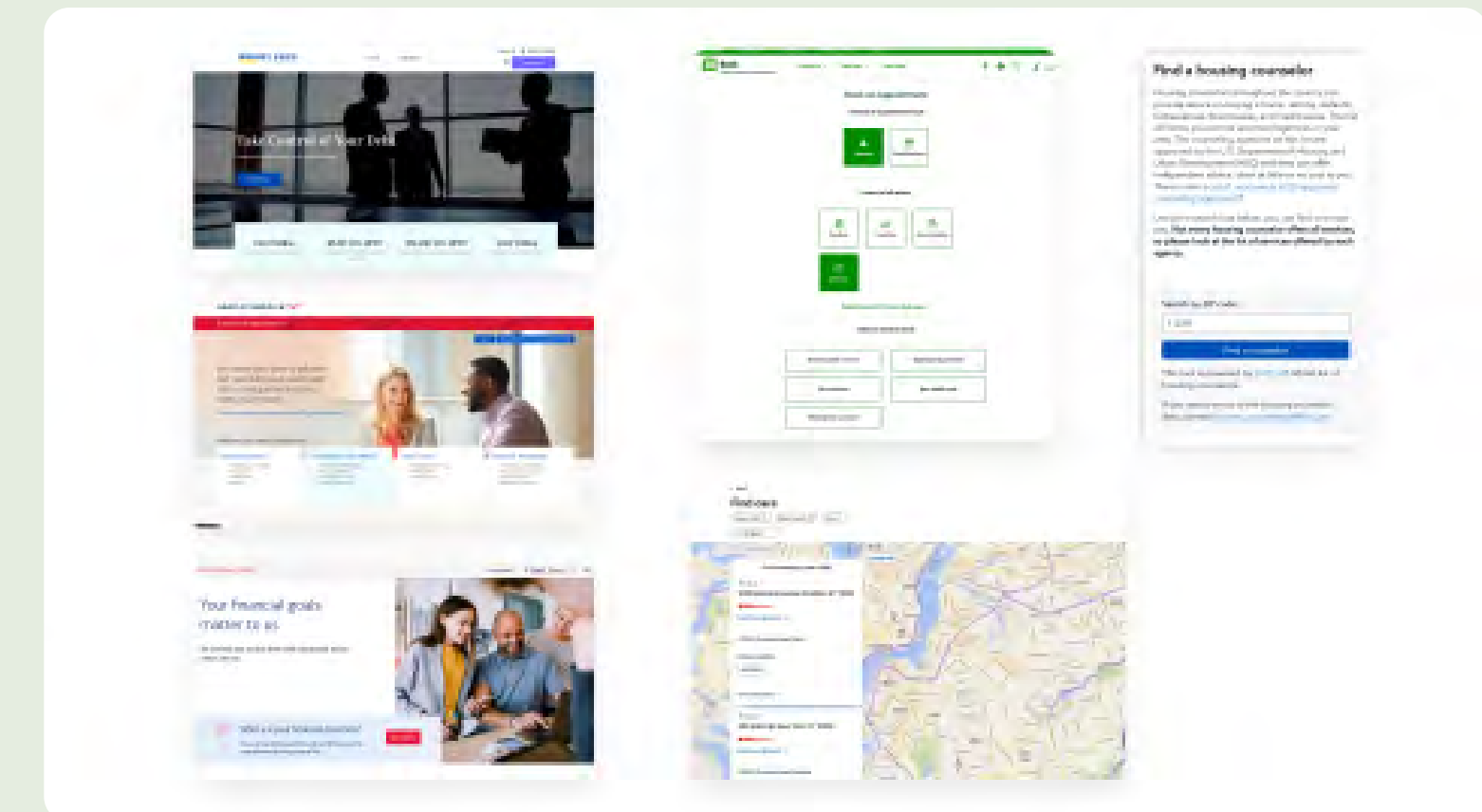
**7 in-depth stakeholder interviews**



**Live polls with 60+ counselors**



**Anonymous client surveys**



**Heuristic evaluation & Benchmarking**

## Top 3 insights that shaped our design

- More than 80% of users accessed via mobile devices
- 20% are older adults & 37% are non-English speakers
- Financial services can be misunderstood, leading to misaligned expectations



# Our Proposed Solution & Key Design Decisions

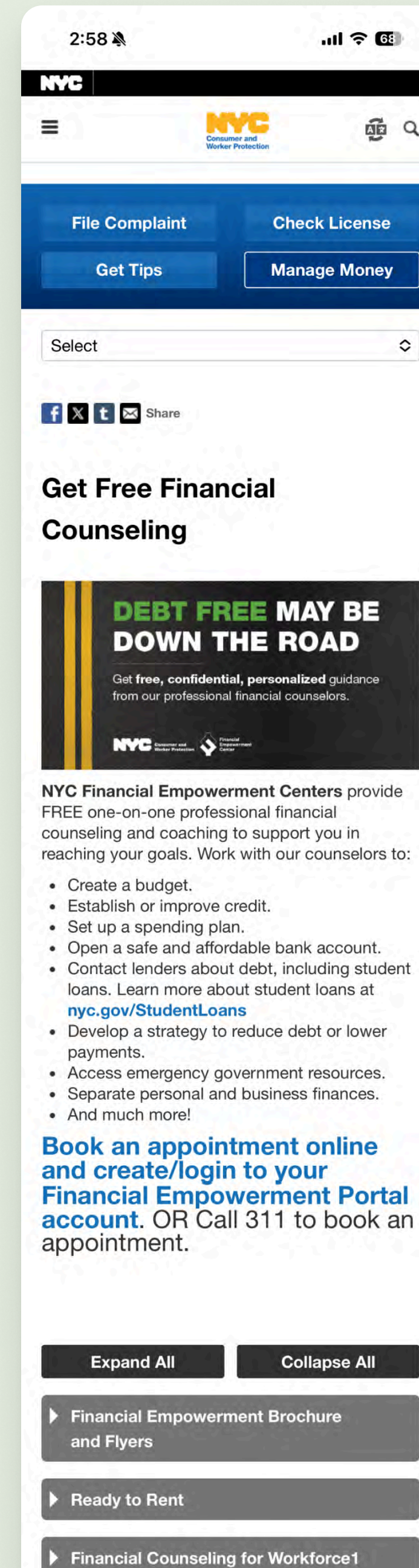
## Design Decision #1

# Clear guidance & manage expectations

- Educate clearer services scope
- Correct users' expectations

## Mobile-first Approach

BEFORE



AFTER

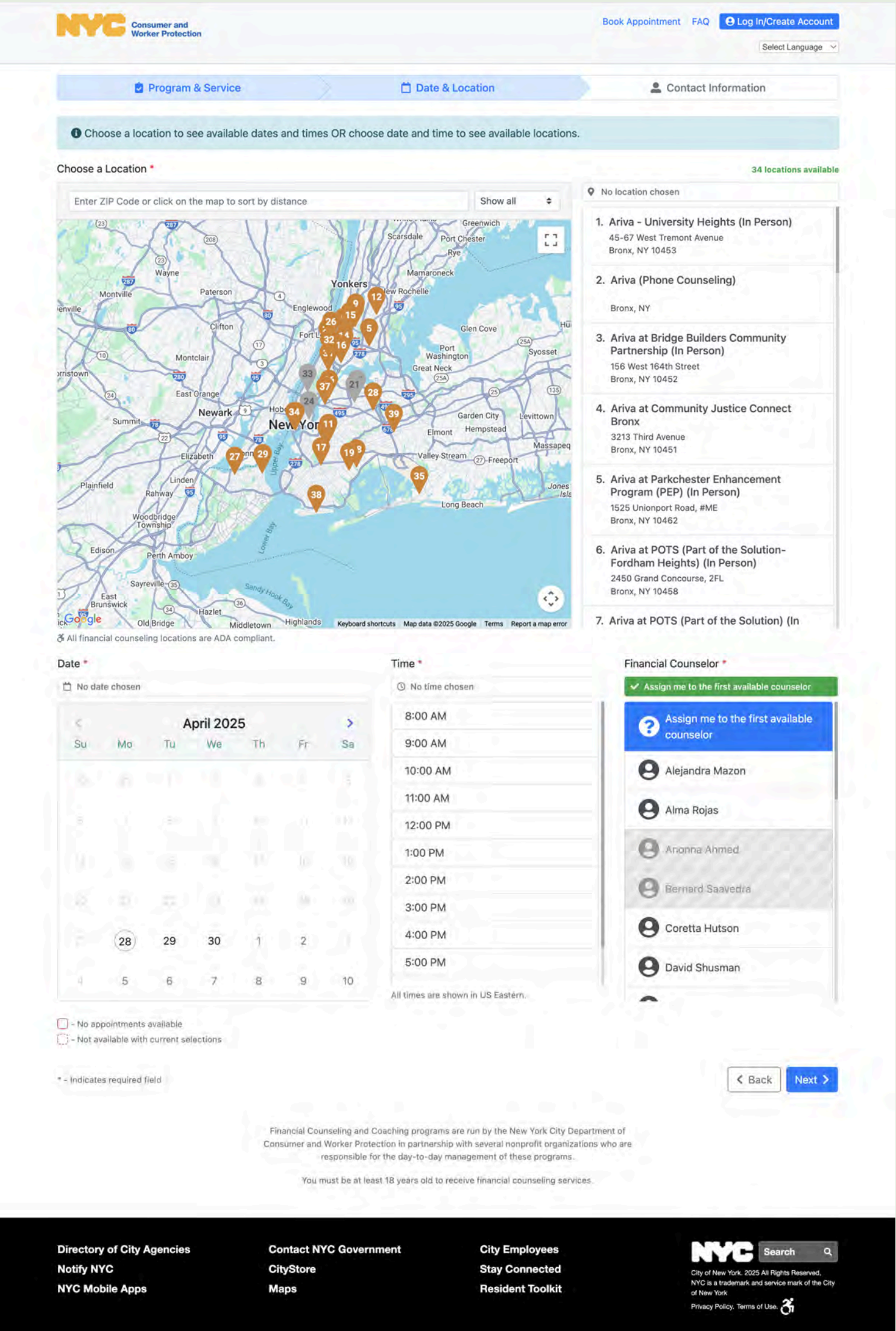




BEFORE

Design Decision #2

Streamlining the scheduling flow by using **Progressive Disclosure** to reduce cognitive load & page loading time



## Design Decision #2

Streamlining the scheduling flow by using **Progressive Disclosure** to reduce cognitive load & page loading time

AFTER





Design Decision #3

Accessibility In Mind

- Digital accessibility (touch target size, color contrast, font size, etc.)
- Language preference upfront
- Options for Accessibility support for the session

13:13

NYC

Consumer and Worker Protection

Our service does not include financial assistance.

Our service is available for individuals aged 18 and older who reside or work in NYC.

To get started, select your preferred language for your counseling session:

English

Spanish / español

Russian / русский

Uzbek / Ўзбек тили

Bengali / বাংলা

American Sign Language

Other

If your preferred language is not listed, please select "Other" and you can be connected to a translator during your appointment.

Next

13:13

NYC

Consumer and Worker Protection

Select any accessibility support needed for your session:

No assistance needed

Sign language interpreter

Visual aids (e.g., large print materials)

Wheelchair-accessible facilities

Assistance with forms or paperwork

Other

If your preferred language is not listed, please select "Other" and you can be connected to a translator during your appointment.

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## Client Feedback

***“Excellent work! Very thoughtful approach to every aspect of the portal”***

*“We’re definitely applying this design to all our other appointment tools”*

*“HUGE improvement from our current status”*

**Thank you!**