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

FOR END USERS

- Faster, more accessible online booking experience

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FOR OUR CLIENT

- New design infrastructure promoting low-cost, organization-wide adoption

- Addressing counselor concerns

- Higher conversion rates

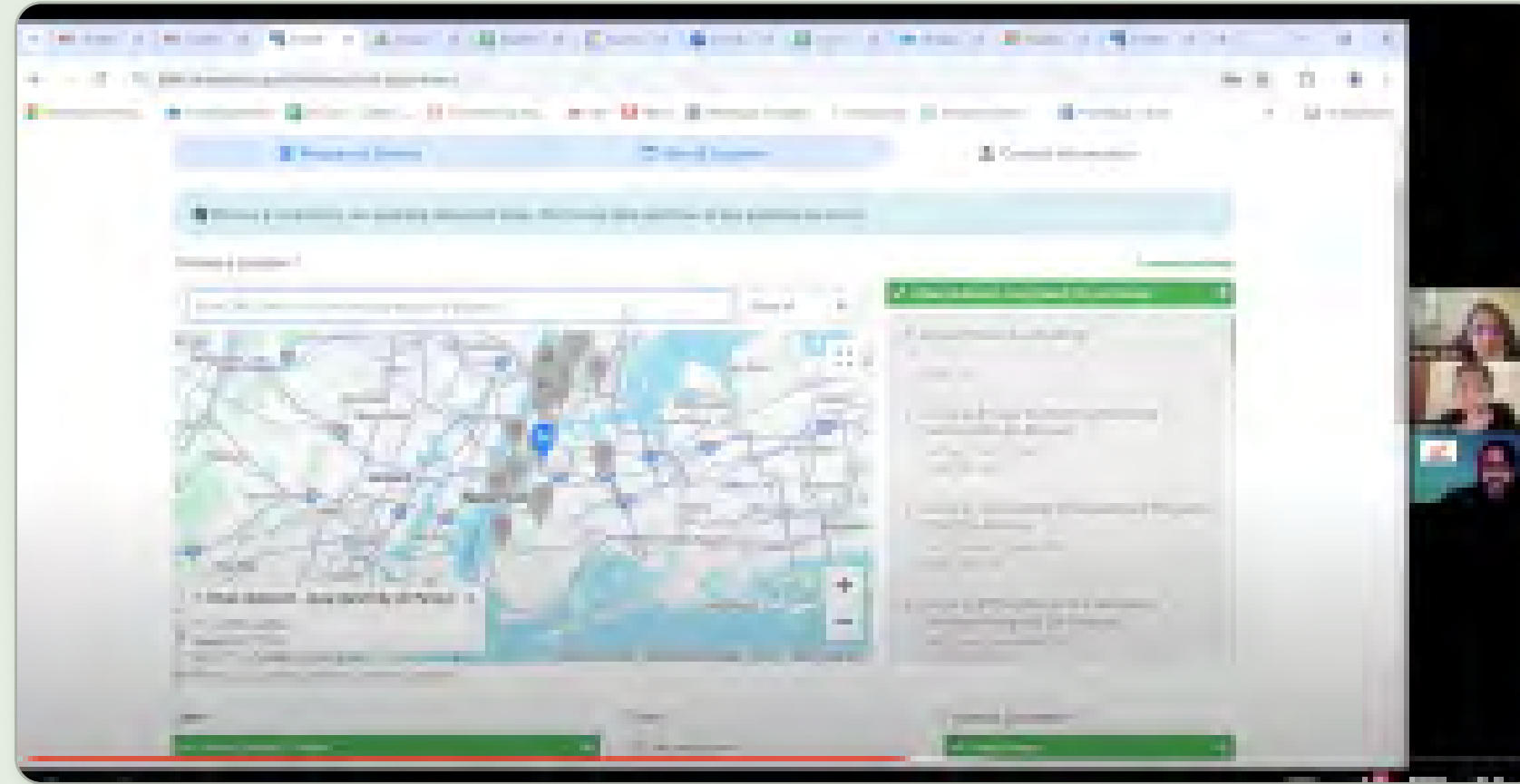# Despite a 300% surge in website traffic driven by marketing efforts, the online booking completion rate remains low.

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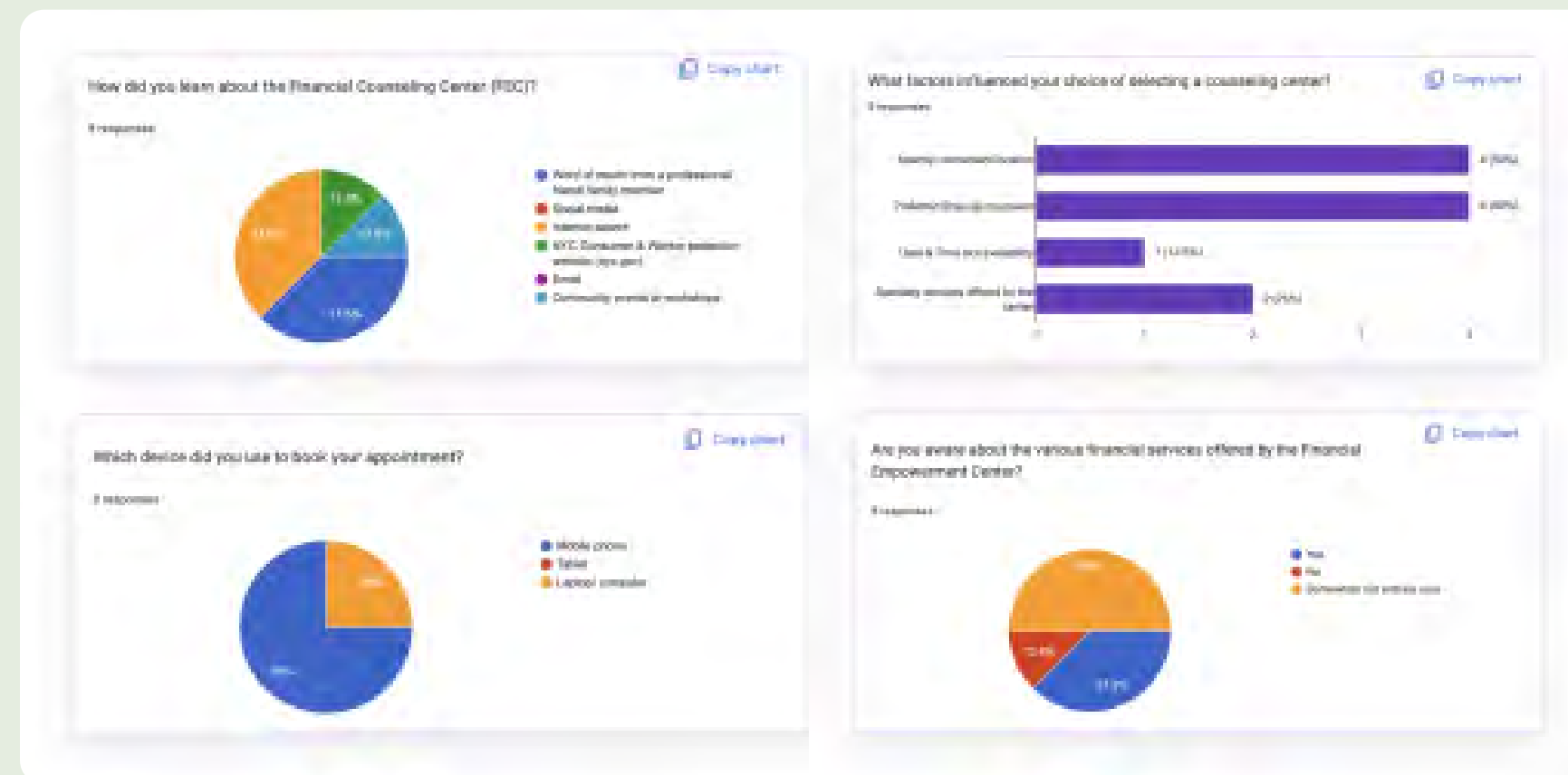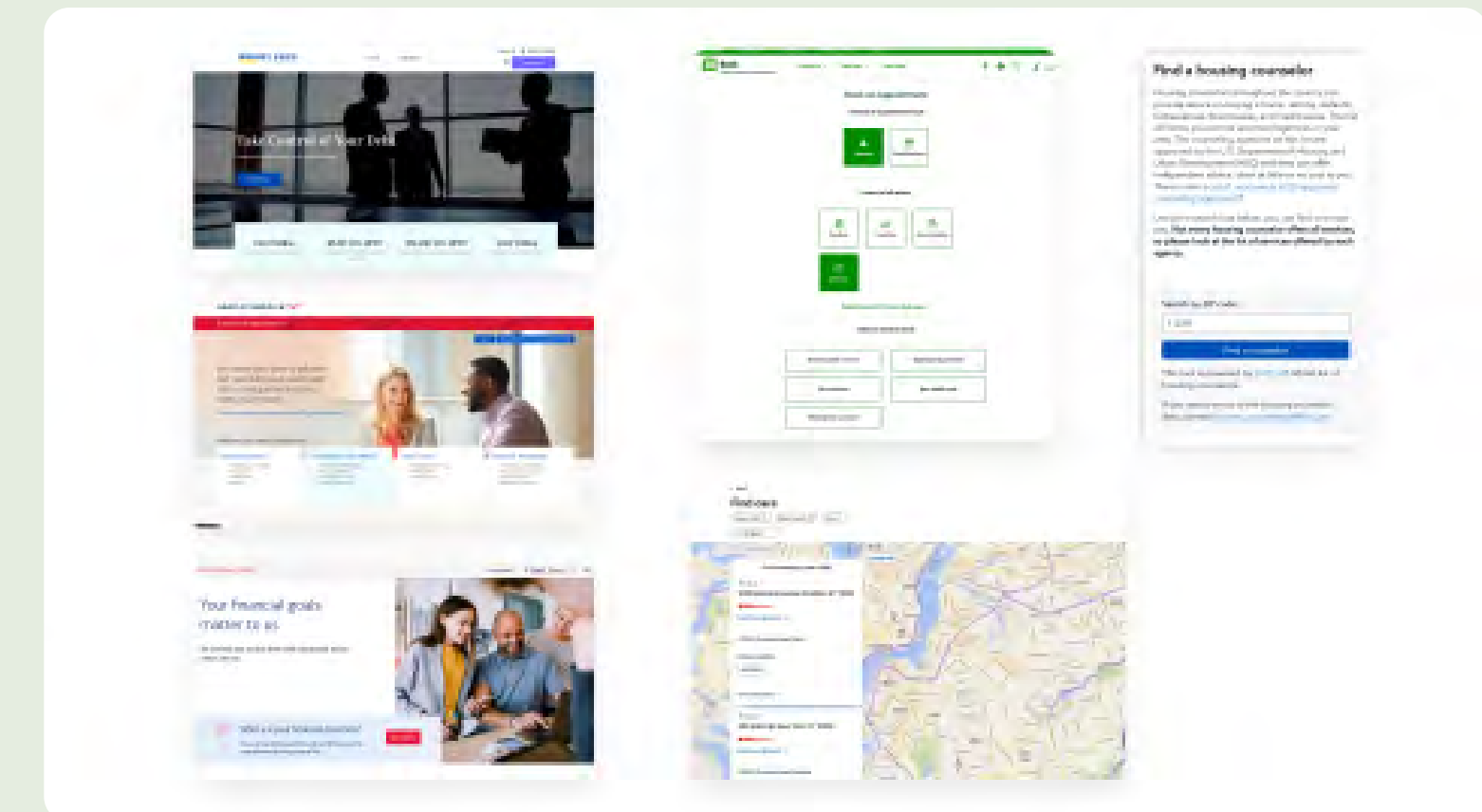
Research

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

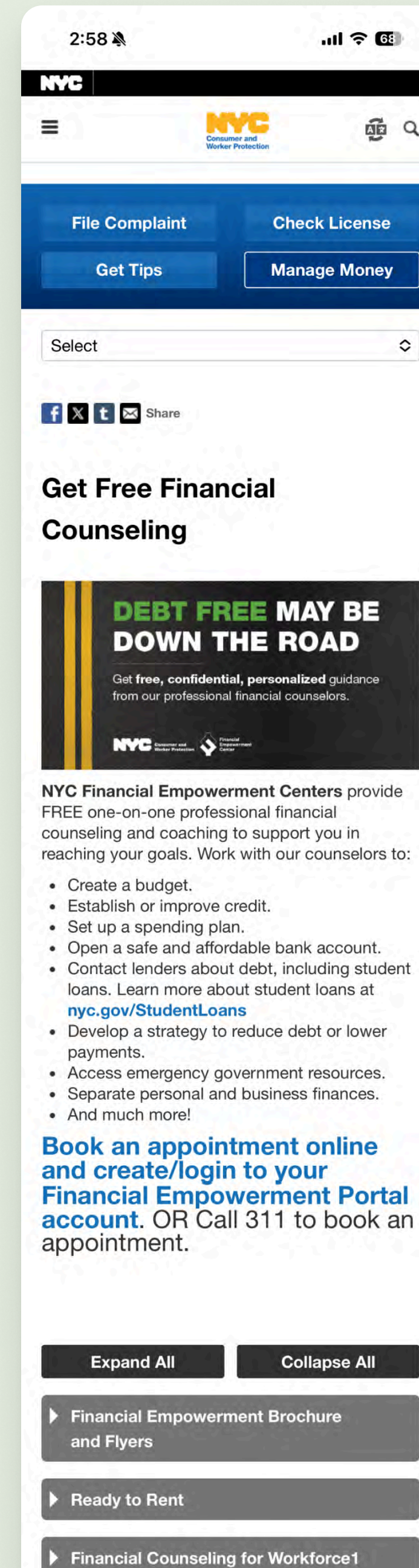# Our Proposed Solution & Key Design Decisions

Design Decision #1

Clear guidance & manage expectations

- Educate clearer services scope
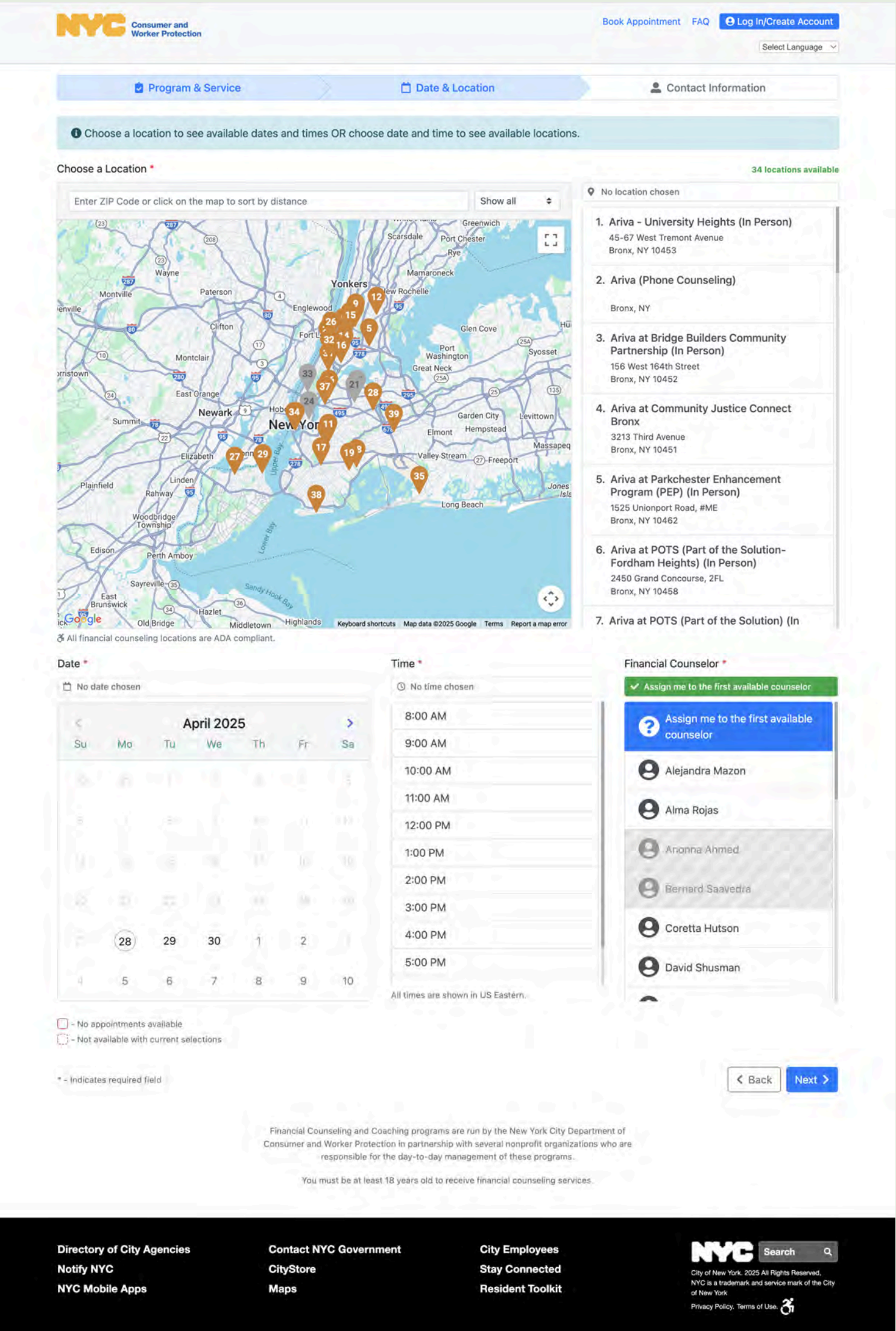- Correct users' expectations

Mobile-first Approach

BEFORE

AFTER

Design Decision #2

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

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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

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!