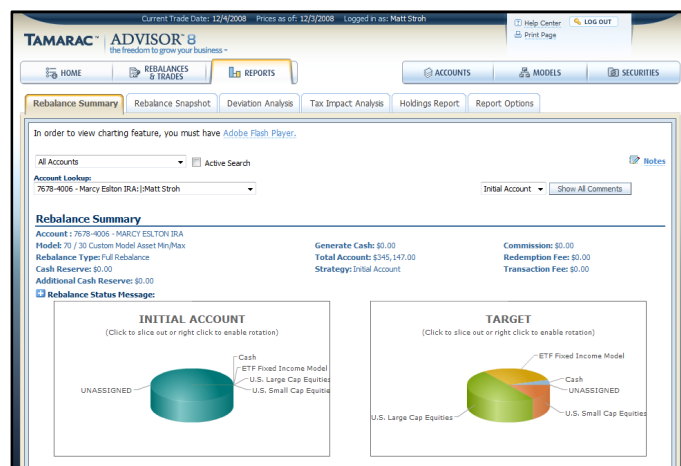


TAMARAC ADVISOR – USER CENTERED DESIGN PROJECT

Challenge

When Tamarac engaged Blink, financial advisors were enthusiastic about the Advisor system, but also felt it was too difficult to learn—and that some tasks took too long to complete.

The Advisor system’s learning curve had financial consequences for Tamarac. Support and training costs were high. The time required for up-front training meant that Tamarac couldn’t roll out the product to new customers as quickly as they wanted, which in turn impacted revenue. Existing customers needed too much hand-holding, which resulted in high support costs.



Busy financial advisors use the Tamarac Advisor system to manage their clients’ portfolios according to risk tolerance and financial objectives.

Based on discussions with Tamarac team, Blink recommended a user-centered design project with three main elements:

1. **User Research** up-front to observe how their users were currently using Advisor
2. **Interaction Design**, informed by the user research, to improve the system’s usability and usefulness
3. **Prototype Testing** with Tamarac customers to validate and refine the interaction design

The total project duration was approximately 4 months.

Phase 1: User Research

Duration: 2 weeks

Blink began by conducting user research to understand how users were currently using the Advisor system, including what barriers they were encountering. Using web-conferencing software, we were able to conduct the research from Seattle, WA with Tamarac customers located nation-wide. Representatives from Tamarac observed all sessions, so they could see first-hand some of the challenges users were facing. Many of these issues had been reported through their customer service department, but actually observing issues in a real-life situation provided deeper insight.

“Observing the user research was an eye-opener. Though we had an idea about what people were doing with our system, we didn’t necessarily understand the “whys.” During the course of the user research, we saw customers were missing helpful features. By observing our customers perform real-world tasks the pain points became much clearer.”

- Jim Peterson, COO, Tamarac

With findings from the user research, Blink recommended a design approach. These recommendations were discussed and refined with the Tamarac team. With the general direction set, we moved forward into design work.

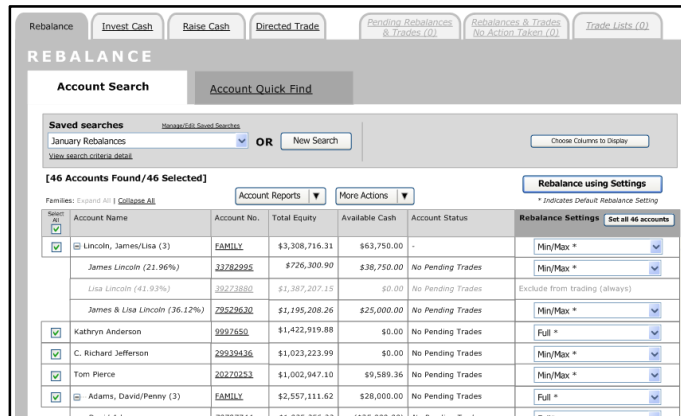
Phase 2: Interaction Design

Duration: 14 weeks

The redesign work was truly a team effort, combining Blink’s background in user experience design with Tamarac’s deep knowledge of financial portfolio management.

Our starting point was the findings from user research, which included narrative scenarios that described real-world task workflows. These workflows served as the roadmap for creating a new interface that would help users accomplish tasks more quickly and easily.

To communicate the new design, Blink prepared wireframes, grayscale schematics of the new interface.



“The wireframes brought the design ideas to life. Concepts we had talked about in the abstract were now easy for all to grasp and evaluate. The ability to explore design ideas quickly allowed us to more easily come to agreement on the right direction for us.”

- Matt Springer, President/Founder, Tamarac

A key element was working in a collaborative and iterative manner with Tamarac’s project team. This team included representatives from development, product management, and marketing. Design review meetings were held twice a week, during which time Blink captured feedback for subsequent wireframe revisions.

Between review meetings, more informal communication occurred via phone or email. The responsiveness of the Tamarac team as issues and questions arose helped Blink deliver design concepts more quickly.

“I couldn’t have been more pleased with how engaged the Tamarac team was with the whole design process. I know the quality of the designs we were able to deliver was enhanced by their very active participation.”

- Heidi Adkisson, Lead Designer, Blink

Phase 3: Prototype Testing

Duration: 2 weeks

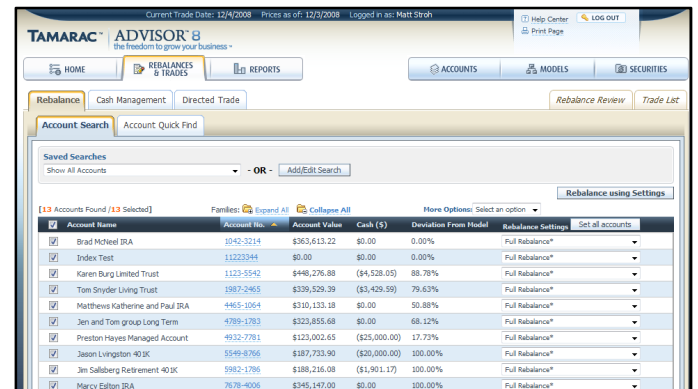
The final phase of the project was testing the new design with current Tamarac customers. Working closely with the Tamarac team, we created a test plan and paper prototype of the system that would identify any areas where we could improve the new design. The testing was conducted in two locales with portable usability equipment: the Los Angeles area and Las Vegas (at a conference attended by financial planners). The testing was observed by members of the Tamarac product team.

“The feedback from testing was overwhelmingly positive in terms of the new task workflows. We learned, however, that some of the terms used could be clearer. With the user feedback we were able to catch those issues before launch.”

- Matt Stroh, VP Marketing, Tamarac

Finalizing the Design

As the project neared completion, Tamarac worked to finalize graphical design treatments for the interface that would reflect their branding. Blink worked with Tamarac during this process to ensure that the final look and feel was consistent with Blink’s usability recommendations.



Rollout

Tamarac implemented the new design in phases, focusing initially on several high-impact changes at the page-level. For the major roll-out, which included the streamlined tasks flows, Tamarac continued to support the existing system for a period of time so that its customers could make the transition to the new system at their own pace.

Results

Improvements in Tamarac Advisor helped Tamarac dramatically reduce its training costs and the time required to get new customers fully operational on the system. Existing customers were significantly more satisfied—reporting how much easier it was to manage portfolios with the new system. Tamarac has an application that’s not only the most robust in the financial industry, but now it is also the most intuitive and easy to use thanks to the efforts of Blink Interactive.

“We had customers saying they didn’t need the help materials at all—that they could easily get their work done now without it. That was a big change from our previous design. We couldn’t be happier with the outcome of the project”

- Stuart DePina, CEO, Tamarac