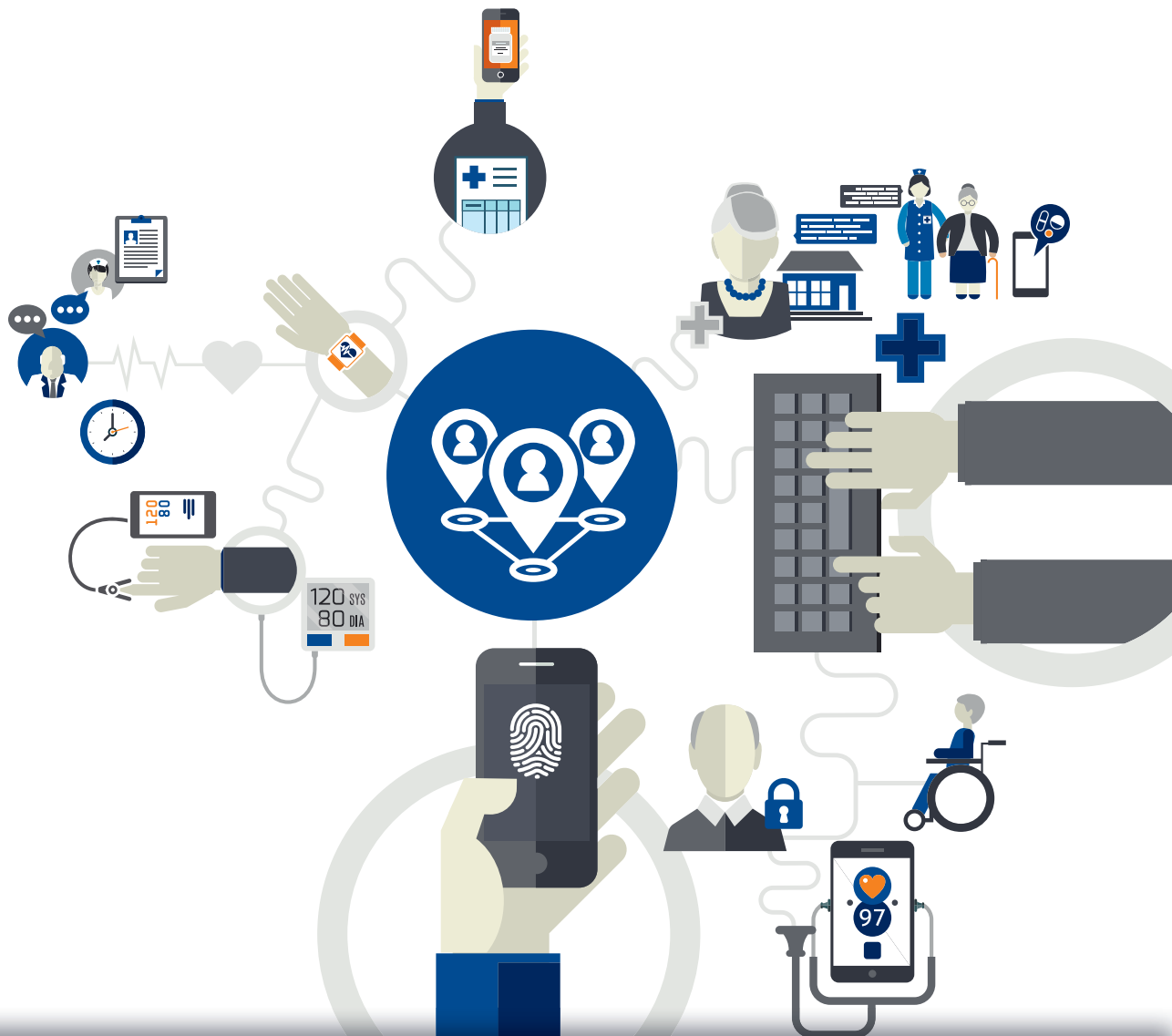


Methodology for developing the online user journey



Self-service only works if it really is easy to use. If online facilities are hard to use, or do not give the whole answer, then people will give up. Even worse, they will then try much more expensive offline channels such as the phone to find the information. They may also be disinclined to try online again.

Getting it right covers many different things, such as the careful choice of words, intuitive navigation, an information architecture that reflects user needs, a search engine that works really well, and, if you have one, an A to Z index that also works well. Alongside this is a commitment to ongoing user testing and analytics of use, all backed up by a management team that really understands why all these factors are critical. In short, writing for the web is a specialist skill and the organisation should be passionate about ensuring the best possible user experience.

Online social care suffers greatly from poor usability, with a few exceptions. How can this trend be turned around?

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1. EVIDENCE OF MAJOR PROBLEMS

TESTING WITH REAL USERS

In the summer of 2014, Socitm carried out a project that examined the quality of the online user experience in the early stages of a period of change affecting all social care organisations whether in the public, private or voluntary sectors. As efficient implementation of the reforms generated by legislation in England depends on much greater use of self-service via the web, the user experience is critical to their success.

Using WhatUsersDo, a specialist online user testing service, we invited 100 mystery shoppers to carry out three social care tasks online on 18 council websites. In more or less each case, one task (applying for a blue badge) received a satisfactory to very good assessment and the other task (finding out about respite care or finding equipment for the elderly) received a poor to satisfactory assessment. The chart below summarises the results.



Don't make me think

It's a fact: people won't use your website if they can't find their way around it.

It's not rocket science. The good news is that much of what I do is common sense and anyone with some interest in it can learn to do it.

After all, usability really just means making sure that something works well: that a person of average (or even below average ability and experience) can use the thing – whether it's a website, a fighter jet or a revolving door – for its intended purpose without getting hopelessly frustrated.

*Like a lot of common sense, though, it's not necessarily obvious until **after** someone's pointed it out to you.*



Don't make me think: A common sense approach to web usability (Steve Krug, www.sensible.com)

This chart reinforces the difference between the three tasks tested. Here, we show the percentage of all tests for each task that were rated very good. The blue badge test was rated very good by 72% of all testers irrespective of the site tested. Although usually classed as a social care test, this is a well-used online task following a standard national specification, outside the mainstream of social care activity.

On the other hand, the equipment for the elderly task was only rated by 12% of all testers as very good and the respite care test only rated by 8% as very good. These tasks are currently much less well-used, with lots of local variations, but within the mainstream of social care activity.

Moreover, the 18 councils selected (12% of all those in England with social work functions) were in the upper quartile of websites ranked by *Better connected 2014*, indicating that these are good corporate websites for other services and suggesting that those not tested are unlikely to do any better for social care tasks.

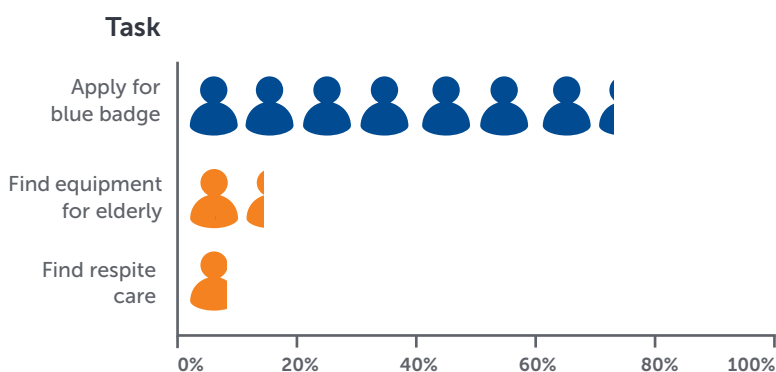


Chart 1: Social care tasks: analysis of 'very good' ratings

ANALYSIS OF RESULTS

The difference in the rating of the online user experience achieved reflects the differing nature of the tasks:

- Applying for a blue badge is a simple task with clear specific criteria set down via national guidelines.
- Equipment and respite care tasks both depend on eligibility criteria embedded in professional and financial assessments, and are obtained from the council as a consequence of such assessments.

By its nature the web exposes complexity and requires clarity to help people through what can otherwise be a maze. The explicit information duties imposed by the Care Act make local authorities responsible for ensuring good advice and guidance is available to all people in their area who have care and support needs. These people may then procure privately, and this further complicates the presentation of unified approaches to online social care tasks.

Indeed, from a customer viewpoint, these are just tasks that require completion; the subtle differences in the nature of the tasks do not matter to them. Councils need to improve on current poor web experiences by concentrating on customer journeys from a number of starting points.

OTHER SOURCES OF EVIDENCE

This research only illustrates what other sources of information have shown before.

In Socitm's *Better connected 2015*, the task 'Find out about breaks for carers of adults' was tested. Reviewers were asked whether relevant pieces of information and pages linked together to make a smooth, coherent journey, how easy the task was to find using the site navigation and how effectively the task was promoted within the site. The report found that only 38% of English councils reached the *Better connected* standard for this task, with performance quite variable, and tending to overcomplicate information for what should be a relatively straightforward task.

Socitm's *Website performance service* gathers data from council websites through a customer survey completed online by users at the end of their visit. Here, nearly 40% of visitors in 2014 seeking social care information and services from council websites failed to find what they were looking for.

The consequences of this research are stark. Every council in the country with social care responsibilities should learn about the systemic problems uncovered by this research, which places a major question mark on the ability of local authorities to deliver the reforms with extensive self-service.

2. COMMON PITFALLS

GENERAL USABILITY ISSUES

Typically these include:

- difficulty in finding a site or relevant site content from a search engine like Google, because the site is not optimised for search terms
- difficulty in finding useful content across the site because the site search is not functioning as intended (or is non-existent)
- poor navigation, including menu navigation, A to Z tools and badly written or explained links
- lack of use of clear call to action buttons, properly placed at right point
- poorly written content with too much jargon, so that users' key questions are not answered (eg eligibility to receive service)
- over-use of images
- poor presentation of directories/ listings, especially the inability to filter, search or browse for relevant items
- links that take the user to external sites without explanation or warning
- reliance on information only available as 'pdfs' to download.

These deficiencies are certainly not confined to social care in local public services, but apply to almost all services in most organisations to a greater or lesser degree. However, having started later with online access than most other services and dealing with a wide range of information needs, social care is one service which is lagging behind. Indeed, *Better connected* reviewers are unanimous in this view from their testing of social care tasks in the past three years, alongside the tasks from all the other common local authority services.

MOBILE-SPECIFIC ISSUES

Many of these issues are compounded when the customer journey is rendered on a mobile device (eg images that add nothing to the words quickly become a major irritant). Some sites are still not designed for access from mobile devices despite council web teams reporting 50% plus access from tablets and smart phones. Examples of poor practice include:

- The home page has too much text and too many pictures.
- Drop-down menus are overused; they are difficult to use on a smartphone.
- Key information and links are too far on the right of the screen and so are easy to miss.
- Key information appears at the bottom of the page and so requires scrolling.
- Key information is only found in 'pdfs'. Even if the mobile device manages to download it, the 'pdf' is often far too lengthy and detailed for mobile users to read.
- Users are asked to set up an account before being able to use a form.
- Forms use maps that are difficult or impossible to use on a mobile device.
- Overall, the navigation is barely usable.
- The organisation has an app, but fails to promote its availability adequately on the home page or the relevant service pages.

3. AT THE CROSSROADS

A NEW APPROACH

Almost all social care functions are at a critical point where they need to realise that the way in which online user journeys have been created is no longer fit for purpose. This is compounded by automation of pre-existing manual processes that have never been designed with the service user in mind. They need to embrace a different philosophy which will guarantee excellence and consistency.

The table below summarises the changes required for a new approach.

TWO IMPORTANT QUALIFICATIONS

First, this briefing concentrates on the importance of getting right each step in the immediately visible part of the customer journey. You cannot separate the customer journey from the quality of the supporting process. In the first briefing of this series, we analysed in detail, step by step, the application for a blue badge to illustrate a different point about the opportunity for meeting authentication requirements. In doing so, this led to a redesigned process that was much easier for the customer. It illustrates a new benchmark for redesigned processes.

Second, this briefing concentrates on social care tasks. You cannot separate the success of the user journey in social care from the style and approach of the corporate website within which this journey usually starts. Some may be tempted to develop a standalone website if they think that the corporate website is difficult to use. However this ignores the critical points that many users arrive from search engines such as Google and that others expect to go to the corporate website rather than a standalone website that they might not have heard of.

In short, the person responsible for ensuring a quality online experience must be supported by a senior management team in adult social care that is prepared to redesign processes and by a council that is committed to make things easy digitally for all its customers of all its services.

Feature	The old way	The new way
User needs	No research (so focus on needs of service)	Clear understanding
Information architecture	Confusion from too many choices	Driven by top tasks
Content pruning	Not carried out	Severe pruning of at least 75% pages
Content management	Devolved	Centralised
Choice of language	Full of professional jargon	Focused on simple language
User testing	Peripheral	Critical and ongoing
Web performance	Volumes	User feedback
Management style	Project: launch and leave	Continuous improvement

The rest of this briefing analyses why the old way does not work and explains the much better practice required for the new way.

4. THE NEW WAY

USER NEEDS

OLD WAY:
No research

NEW WAY:
Clear understanding



Defining user needs

Any thinking about a service, whether online or offline, must start with the question: what is the user need?

Defining a user need must be strict and honest. For GDS, it's the need the user has of government, not the need of government to impart information to the user.

That's an important distinction, because it means that you'll be able to more accurately measure the success of your services and iteratively improve them to meet the needs of the people who'll make use of them.



Source:

www.gov.uk/service-manual/user-centred-design/user-needs.html

It is very easy for the social care professional to claim a detailed understanding of user needs. After all, professional training emphasises empathy with the user. However, this should not be confused with understanding user behaviour online. The social care professional will tend to look at all the complexities of a policy and want to ensure that the online option covers them, whereas most users will only be interested in the common case. For example, the opening times and location of a day centre may be much more important to most users rather than how day centres might deal with those with particularly complex needs. Or when describing eligibility for financial support, professionals will cover all the exceptional cases, whereas most online users may just want to know what the entitlement is.

These problems result from making unchecked assumptions. The way to avoid them is to seek to understand user behaviour by collecting evidence at an important early stage. In this way you can analyse what is wrong with the current site, be clear about what improvements need to be made and judge whether the new site is delivering the desired outcomes.

An excellent way to achieve clarity is to include users from the outset on a co-production basis, whereby they drive key design aspects. Care, however, should be taken even at this stage, because people often behave differently online from how they might say that they would behave.

Evidence should be drawn not only from current site usage, previously unused information, user feedback and testing. For example, analysis of search terms, especially for failed searches, provides good evidence of what people are looking for, but perhaps unable to find. Other sources of council contacts such as telephone and face to face are invaluable in revealing potential for channel shift, including evidence that parts of the current site are leading to frustration and avoidable telephone calls.

Setting objectives using the range of data collected will help to inform the design and decision-making process and keep all parties focused on getting the right results from the new site. Any new design should be based on evidence from usage.



CASE STUDY

OXFORDSHIRE COUNTY COUNCIL

In Oxfordshire’s experience, the key to a successful adult social care digital presence is the web team’s location in the organisation – and the benefits that this brings.

The team sits in the Customer Service Centre, where almost one third of the staff provides front-line services for adult social care. The centre not only deals with enquiries from the public, but also from professionals and referrers. It is responsible for meeting the directorate service level agreements and key performance indicators. Hence, as well as being the ears, eyes and mouth of the organisation, it is also challenged with being the hands in guiding users into the services that the council and partners are striving to provide.

This has enabled the web team to understand much better who the real users of adult social care services truly are. The elderly, and people with disabilities only make up a fraction of that user base. People who care for adults, professionals and the voluntary sector are equal stakeholders in the services and the information that the council provides.

Take, for example, the top ten adult social care search terms that were submitted in the past six months:

- Blue badge

- Safeguarding

- Bus passes

- MASH

- Adult social care

- Social services

- Carers

- Meals on wheels

- Personal assistants

- Dial a ride

Table 1a Top ten search terms

It is clear from this list that professionals use the services, or refer clients to them. It is highly unlikely, for example, that a citizen would use the term ‘safeguarding’ or ‘MASH’; in contrast, ‘meals on wheels’ is a term that the general public uses, but not one used by professionals.

Understanding these needs and who is searching are key to providing well written and clearly labelled content and putting it in the right place on the council’s website.

The true benefit of driving the website from within the customer service centre is the ability to listen and react to customer demand. The web team constantly receives feedback from the service centre managers on the challenges that they face and the demands of their clients (both public and internal). Having this clear and regular insight into these interactions allows the web team to assess constantly the effectiveness of the web content and potentially re-organise and re-prioritise the site to meet these demands.

The web team works closely with groups such as the Carers Forum in order to understand what users of the service really need, and, more importantly, how they articulate those needs, so that the team uses appropriate language. From such feedback it recently launched an online carers assessment. The team understood from its relationship with carers that their free time is limited and that does not fit in with the council’s service hours. As a result, the requirement for a 24 x 7 online assessment service was gratefully received. The form was tested and refined with carers, content being updated to reflect changes in policy and service provision, which gave users trust in the useful information that they receive. Within weeks the facility had a 70% take-up, despite very little promotion.

The digital agenda is challenging councils to rethink the way that they provide services, but it is doubly important within adult social care to understand fully the customers, and not assume that digital is best or most appropriate.

Oxfordshire’s current top ten adult social care tasks (based on the past six months) are:

- Request an assessment

- Find an approved personal assistant

- Find a care home

- Get help for alcohol and drug addiction

- Find mental health services

- Get information and advice for adult social care

- Submit an assessment

- Find help for living at home

- Find equipment to help with living at home

- Find out about housing options and care homes

Table 1b Top ten online tasks (2015)

INFORMATION ARCHITECTURE

OLD WAY:

Confusion from too many choices

NEW WAY:

Driven by top tasks

The concept of top tasks focuses on what customers need. People come to council websites to find a piece of information or complete a transaction. In other words, they come to complete a task.

The website's information architecture should be designed around this need, creating a customer journey for each task. The customer journey usually consists of a sequence of clearly linked web pages that contain the necessary information required to complete the task.

The task may be a transaction, in which case the customer journey may include online payments, online or downloadable forms or questionnaires as well as simple information-based web pages. The task should be easy and quick to carry out.

For the concept of top tasks to work, they should:

- be consistently promoted across the site
- be simply and clearly labelled
- be based on hard evidence that they are the most frequently used ones.

The philosophy of top tasks should permeate the whole site and should not be seen as just a minor refinement to what one does already. The council website as a whole should embrace this and each service within it should also embrace it.

GOV.UK is founded on similar principles in order to achieve a consistent user experience for all parts of online central government.

Links to top tasks must be on the home page and on service landing pages; arguably the latter is more important, as many now bypass the home page as they come direct from Google. Top tasks on the home page will most likely contain just one social care link. The service landing page should contain all the top tasks for that service. This approach will satisfy a much greater number of visitors to the site.

Any new design needs to be carried throughout the site, not just applied to the top two or three levels. Our reviewers come across many new sites with improved home pages and top-level navigation and landing pages that then revert to an old design at deeper levels or where third party applications are used. A redesign project should seek to improve the site with a consistent look and feel at all levels, including third party functions embedded in the site. This needs to be planned from the outset.

The design of the information architecture is key to the new site, and is usually much more important than the visual design, although, if done well, that should reinforce the new information architecture.



The service landing page for adult social care at www.wigan.gov.uk shows neatly how the use of top tasks at Wigan Council shapes the design of the information architecture.

CONTENT PRUNING

OLD WAY:
Not carried out

NEW WAY:
**Severe pruning of
at least 75% pages**

The top tasks approach is inextricably linked directly to the need to prune content.

The old way of managing content meant that pages were always added, never removed. Inevitably this led to bloated websites with far too many pages, making it ever more difficult to find information. If top tasks are not recognised, then all tasks have equal weight and importance. In a local authority environment where hundreds of services are managed, over time this becomes unmanageable.

In December 2014, Socitm carried out a survey of web management practices, which was published in *Better connected 2015*. This showed a significant correlation between those sites that had carried out a major pruning exercise and those that achieved a quality online experience, as assessed by *Better connected*. Those who had done so achieved a 39% better performance. A major pruning should aim for a 75% reduction in pages. Those that are not top tasks generally do not require the same depth of content. Even those that are top tasks should be focused on what users need, not what the organisation thinks they need!

The customer journey should dictate the content. Every page has a specific purpose and is part of a customer journey. It is not, for example, just an isolated page about some new strategy. Pages that are not part of a task-focused customer journey should be pruned out.

CONTENT MANAGEMENT

OLD WAY:
Devolved

NEW WAY:
Centralised

One trend that has led directly to bloated websites and confused navigation is the way in which content is managed. Local authorities have often committed to devolved management of content. By this we mean that content for the web becomes the responsibility of the service, not the web team, and within a major service like adult social care it might be shared by several people.

Such a model presents major problems. The best person to write content for the web is not the subject specialist, in this case the social work professional. Writing for the web is a job for a web professional who is trained and experienced in usability. This can only be developed as part of a centralised model of content management, corporately for the web team.

Devolving content to large numbers of people across services, who may well be specialists on their service, but are unlikely to be specialists in writing for the web, will lead to poor content inconsistently presented. A little 'writing for the web' training is not, unfortunately, the answer.

It is important, however, that service managers do own what the content says. They should be required to sign off what the website says about their service, but should not do the job themselves either directly or through their own teams.

CHOICE OF LANGUAGE

OLD WAY:

Full of professional jargon

NEW WAY:

Focused on simple language

The devolution of content management brings with it other dangers. The world of adult social care can be very confusing for its customers, both the elderly and their carers. If the professionals write the content, or manage those that do, then there is a great temptation to use the jargon of that world.

Social care web pages should not include jargon or confusing terms. Terms such as 'safeguarding' and 'reablement' are commonly used by social care professionals but not by ordinary people, and so should not be used as page titles or navigation links. These pages should contain information aimed firmly at the lay person.

The key changes occur when an organisation realises that managing the presentation of web information is itself a specialist activity, not to be delegated to people with other jobs to do. It is no accident that the role of user experience specialist or consultant is creeping into some web teams as the champion of the user as a lay person.

Another excellent way of achieving this is to include representatives of the target users in the design and production of the content. When one council did so, they discovered that, when referring to a 'carer's assessment', some carers thought that their loved one would be taken away and put into a care home if they 'failed' the assessment.

The East Riding of Yorkshire has completely re-written its content with real users, breaking it up into separate pages and creating a structure that is both easy to digest and navigate. Care was taken to remove all jargon. The council also applied its site-wide reading age target of 12-15 years old as a key goal.

A useful catalyst for making the change of focus in the language used is the Plain English Campaign. This organisation awards an Internet Crystal Mark to those who, having applied, meet its standards. Currently, 10 councils out of the 152 in England with social care responsibilities have been awarded the mark.

Further information:

www.plainenglish.co.uk

USER TESTING

OLD WAY:

Peripheral

NEW WAY:

Critical and ongoing

How can we ever be sure that the online user experience is right? The simple answer is regular user testing.

The usability issues that lie behind the problems summarised at the start of this briefing are clear evidence that customer journeys have not been tested. Had they been tested properly, the issues would have been identified and rectified.

The best way of ensuring that the site meets customer needs is to test it regularly with those customers. User testing should not be an occasional project of its own linked to the launch of a new version. It should be a regular, ie monthly, weekly or even daily activity with users giving feedback about customer journeys, choice of words and positioning of phrases.

Usability testing has emerged as the best way to find out how people navigate around websites. The key is to measure the specific task from start to finish in such a way that it tests not just the usability but also the accuracy of the content. Fact, not opinion, is what matters. How long did the task take? How does this compare with other council websites that provide the same facility?

In the past proper user testing might have been difficult to organise. The temptation is to use other council employees. After all, as private individuals they are also users of council services. The danger is that they are too close to the flaws in the council website and have learnt workarounds that hide the problems that casual visitors experience.

Now there are techniques for remote user testing that are relatively easy to manage and overcome this kind of difficulty. They have the distinct advantage that testers can use the facilities that they normally use and can do the testing in their normal environment (eg at home), making the testing experience as close as possible to the live experience. The ability to record via video the customer journeys experienced by real people is an extremely powerful way of showing whether the navigation works and the content is right.

WEB PERFORMANCE

OLD WAY:
Volumes

NEW WAY:
User feedback

Historically councils have poor management information about the performance of their online journeys, and this certainly applies to social care. At best they may collect information about total number of visits (note: page hits are completely misleading and of no value).

There is no single way of knowing whether online facilities are working. In the absence of an appropriate set of indicators about web performance, then important decisions (eg about new developments) will be taken in the dark without any understanding of their likely impact.

What is needed is relevant information about both usage and satisfaction, which can also be tracked over time in order to identify trends of improvement or deterioration.

In the first case, usage should cover numbers of visits and reasons why people visit social care pages. Is the website achieving the visits anticipated? Is channel shift from traditional phone and face-to-face services being achieved? This means also having robust data capture methods in place for offline enquiries, especially at a time when they are expected to rise.

In the second case, user satisfaction must be captured at the point of use. Responses to questions such as 'Do you find our website useful?' as part of a more general survey are of little use, because people at best tend only to remember general impressions of visits, and so these are no use for improvement purposes. Online questionnaires offered during or immediately after a visit are, therefore, the best way to gather feedback.

Questions must be specific, such as 'What information were you looking for today?' and 'Did you find the information you wanted?'. There are a number of tried-and-tested feedback questionnaires in use, including Socitm's *Website performance service*, which is used by a large number of councils for their corporate website.

Finally, packages such as Google Analytics can track the user journey and identify the points where users drop out (eg forms abandoned).

MANAGEMENT STYLE

OLD WAY:
Project: launch and leave

NEW WAY:
Continuous improvement

Many of the problems that lead to poor navigation of customer journeys stem from neglect in previous years. Most organisations have tended to equate website improvement with major investment, often driven by technology developments, and have regarded the task as a major project to undertake. This prospect also creates planning blight on the current site. Everything is put off until that new project can start. In the meantime the current site gets more difficult to use and more unwieldy to support.

Better connected sometimes captures this cycle in action as a four star site slips down to three stars, two or even one star over a period of years. There are examples in each year's report of sites now dropping into this bottom part of the cycle.

If you want to do it properly, it takes time to recover from this decline and develop the new model, capture evidence and design easy-to-use facilities that do really work for the customer. All of this provides the essential foundation for enabling channel shift.

The organisation must move from this cyclical model to one of continuous improvement and refinement, and be prepared to commit the resources to do this. It should focus its improvement plan on the presentation of information rather than on new IT-based facilities (typically, a new content management system). It should use evidence from continuous feedback about usage to drive those improvements. It is important that such feedback relates to the actual customer experience (eg visits or post-visit feedback) rather than to technical measures (eg page views or hits), or to single questions in more general surveys about the organisation (eg How do you rate our website?).

Essentially, the organisation should recognise that the website is a large asset, one in continuous use and capable of delivering major benefits to the user, but sadly capable of creating major dissatisfaction if it does not work for the general public. It is far too valuable an asset for it not to have regular investment through continuous improvement.

5. THREE THINGS TO GET RIGHT

RESPONDING TO MOBILE DEVICES

Any new design should render successfully on a range of devices. Equal effort should be given to the smartphone offering as for desktop, rather than mobile optimisation being added as an afterthought. This is not just about look and feel, but also about what content is displayed. It covers points such as removing pictures from mobile displays, avoiding pages that are too long for mobile and ensuring that the order of content prioritises key navigation at the top, not news or promotions.

Arguably, a more successful approach to ensuring the optimal experience for the widest range of common current user devices is responsive design. This is a technique to make the website respond, and display appropriately, on screens of different sizes.

However, a responsive design is only part of the solution. The better the design of the main website, with effective use of a top tasks approach, the better the mobile user experience is likely to be. Although desktop users may be able to cope with cluttered home pages and poor signposting, a bad customer experience is magnified for mobile users.

A well-designed main website, orientated around top tasks, can work better for mobile access than a separate mobile website or template and can save significant investment and maintenance. In general, less is more when it comes to using council sites on mobile devices. Many of the principles of good design and layout, eg structured pages with relevant links and not overcrowded with text, become absolutely critical on a smartphone screen, because it is so much smaller than a computer screen.

Particular points to note include:

- The site should be quick to load.
- The council's contact details should be prominent, ideally on all pages.
- The design should be task-orientated rather than focusing on news or events.

LINKING WITH THIRD PARTY SITES

Most customer journeys for social care take the user to third party sites, whether developed by suppliers (eg e-marketplaces), or by another part of the public sector (eg NHS Choices, Care Quality Commission or separate social care website used by the council). Integrating them smoothly with the host site often presents major problems for web teams.

Space does not permit us to cover all the issues that may be involved, but here we cover just the basic step of linking with them.

Where a link to a website is provided, it is important to make sure of the following points:

- There is a real reason to go to that site, ie the information required to carry out the task will be found on that website and is essential to the customer journey.
- The name of the website and the organisation responsible for the site are provided.
- The link is provided in the context of the customer journey, not as one of many links in a 'related links' panel.
- The link is presented within a call to action where appropriate.
- Deep links to the most appropriate and useful web page are provided, not just to a home page where there is no obvious route onwards.

EXAMPLES:

"Go to the Care Quality Commission's website to search for details of local care homes and their inspection results."

"Xshire council has moved all social care and health information to a new, improved social care and health website at www.xshirepod.org.uk."

DESIGNING ONLINE FORMS

Online forms should be designed so that they are simple and easy to use.

The form title should reflect the purpose of the form, eg 'Request a carer's assessment' or, if the form is an actual online assessment, 'Carer's self-assessment form'.

Every online form should have an introduction that explains:

- the purpose of the online form
- what information or documents you will need to have to hand in order to complete the online form
- whether you will have to attach any documents to the online form (eg scanned proof of address, etc.) and what file formats are acceptable (eg scanned documents to be saved as image files, 'pdf' or Word documents)
- how much time you are likely to need to complete the online form
- whether or not you can save the form partially completed and if so, how to do this
- who will receive your submitted form and how long you should allow for a response
- who you should contact if you do not hear back within the allotted time frame.

If the applicant is not to complete the form, then it should be designed to ensure that there are fields that identify:

- the applicant's name, contact details and personal details
- the person completing the form on behalf of the applicant.

Online forms should be easy to complete and questions should be arranged in a logical sequence. Where possible, there should be more than one question per page, because it is much quicker for people to scroll up and down a list of questions than to have to click backwards and forwards through many pages.

Form fields should:

- be clearly labelled
- be marked as mandatory where applicable
- have 'help' links that will provide a further explanation of the information required, particularly if the question is complicated or very specific
- be large enough to display all the text required to answer the question without the need for the applicant to scroll to see what they have typed
- use rules to ensure that exactly the right formats are entered for dates, phone numbers and email addresses.

As part of the submission process, provide:

- message stating that the form has been successfully submitted
- reference number
- name of who the form has been submitted to and the time frame for responding
- option to print out and/or save a copy of the completed form
- if an account has been created and it is possible to log in to track progress, how to do this
- if the applicant is required to post any additional documents or proofs to the council, a list of what is required, a postal address and a reminder to include the online form reference number if required.

All online forms should be designed to work as well on a smartphone as they do on a conventional PC, laptop or tablet. Make sure that any help features on the form work on smartphones too. When designing the online form, also make sure that links and form fields are spaced adequately so that they are easy to tap with a finger.

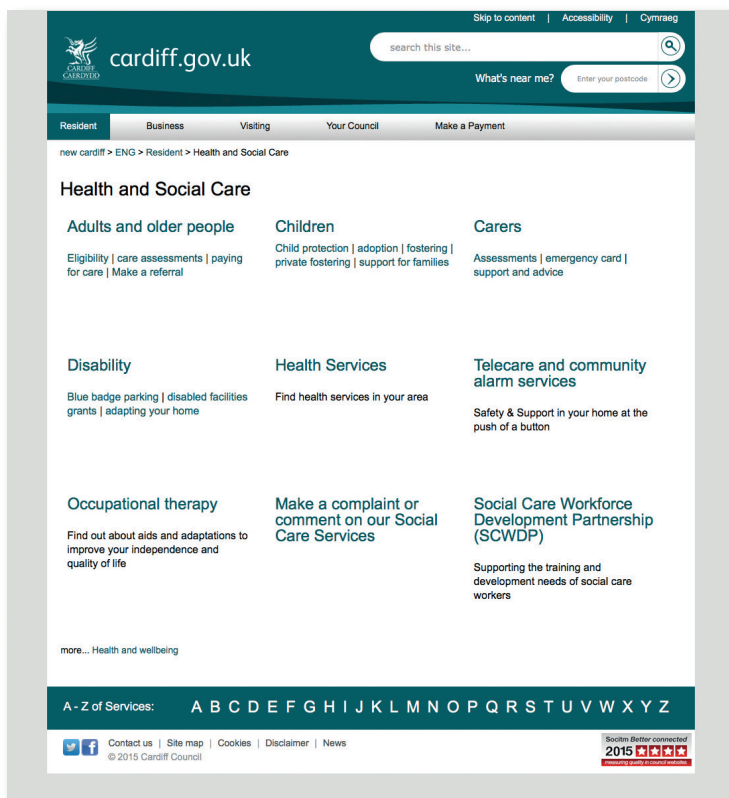
6. THREE CASE STUDIES TO LEARN FROM



CASE STUDY

CITY OF CARDIFF: A NEW DESIGN

In *Better connected 2015* we recounted the major improvement from one star site to four star site of the Cardiff website. The home page of the old website presented a baffling array of navigation options, including a 'Popular Pages' panel which stretched credibility by attempting to persuade our reviewer that the council's corporate plan for 2013-17 was popular with website users!



Better connected reviewer in 2015

This council has worked hard on creating a site that is highly functional and transactional, and I was especially impressed to find reminders that contacting them online is cheaper – a great way to encourage channel shift. There is a lot to like about the site and the quality of the content is a major plus point – I would congratulate this council for developing some very clear and concise web content which gets to the point and strikes that tricky balance between providing sufficient detail without putting off the user with lengthy pages. Overall, this is a fine website with excellent content and decent support for mobile devices.



In the new website care has clearly been taken to design landing pages that are easy to use. Out has gone long lists of links with no explanation what may lie behind a named link and in has come a concise list of links which look as if they have been very carefully selected, based on evidence of customer usage or demand for the described services. This is particularly noticeable on landing pages for what might be regarded as complex subjects such as health and social care. On the old site, this landing page offered a confusing range of choices of link.

On the new site, the health and social care page is a truly transformed user experience. Gone are the baffling choices of multiple links and in their place is an unambiguous navigation tree that has clearly been designed to route me to the right information first time.

Cardiff's rigour in this respect is to be congratulated. The new page is infinitely better than the old one, and will make the customer journey so much easier. But this new approach requires the council to adopt ongoing diligence to ensure that the landing page does not become cluttered with additional links over time.



CASE STUDY

BOURNEMOUTH BOROUGH COUNCIL: GETTING HELP AT HOME FOR AN ELDERLY PERSON

Bournemouth BC has a modern website that is designed to promote top tasks, making it easy for people to find the information they need quickly and easily. However, the success of this site is not just about design.

The site's social care section is notable for its clear use of language. It avoids technical words and instead uses ordinary words that people are likely to use to describe their own situation.

The information provided about social care services is easy to understand. Complex topics have been simplified as much as possible.

Information about social care strategies and policies have a very low profile and so they do not get in the way of the tasks that the vast majority of people are looking for.

The site presents essential content within web pages instead of within 'pdf' leaflets or Word documents, both of which create more complex customer journeys.

The image below illustrates how Bournemouth has very clearly presented the main adult social care topics on its landing page.

They have used a grid layout which is easy to scan. The consistent layout uses:

- **Topic name** – this links to another page containing more tasks relating to that topic.
- **Topic description** – maximum of two sentences.
- **Two top tasks for that topic** – these link straight to information that will enable people to complete the task.

The language used on this page is easy to understand. For example, 'Get care and support' instead of the more commonly used header of 'Assessments'; 'Protecting adults from abuse' instead of the usual term 'Safeguarding adults'. The terms assessments and safeguarding are commonly used within the social care community, but for people who are new to social care, their significance and meaning are not obvious at all.

It is very easy to quickly scan this landing page and spot the link in bold font for 'help to stay independent at home'.

The page about staying independent at home uses the same grid structure to present the main services that will help people to stay independent at home. Again the use of commonly seen headings with a single obscure term such as 'adaptations' has been avoided. Instead Bournemouth uses a clearer heading 'Adapting your home', which immediately provides a clear context and a good indication of information that you will find if you follow the link.

<p>About Adult Social Care Care and support for vulnerable adults and their carers. Find out how we develop our services and meet our duties under the Care Act.</p> <p>→ What we do → How we review Adult Social Care</p>	<p>Types of Support We're here to help you find the right support so that you can live safely and independently.</p> <p>→ Help to stay independent at home → Disability services</p>	<p>Get Care & Support See who can have services, find out how we assess your needs and apply for help.</p> <p>→ Who can have social care services → Apply for care and support</p>
<p>Paying For Social Care Support You may have to pay for services you receive. How much you pay depends on what you can afford.</p> <p>→ Paying for care → Paying for care in a care home</p>	<p>Protecting Adults from Abuse Some adults may be at risk of being abused. If you think someone is being abused, call us or Dorset Police.</p> <p>→ What abuse means → Keeping people safe</p>	<p>Carers We offer support, advice, information, emergency back-up scheme, help to take a break and training to help you care.</p> <p>→ Carer's Allowance → Assessing your needs as a carer</p>
<p>Care Act How care and support can help you.</p> <p>→ Levels of care and support → Deferred Payments</p>		



CASE STUDY

ROCHDALE BOROUGH COUNCIL: OVERCOMING USABILITY ISSUES

Problems with third party software

Across all services, local authorities rely on third party software for many important tasks (eg planning for viewing a planning application). This has largely been developed by a software company specialising in a business application rather than in expertise of ease of use by the general public. As a result the customer journey may not be an intuitive process, being spoilt by features in the software that render it difficult to use (eg inappropriate terminology, request for registration without explanation). Moreover, the supplier's main customer is usually the head of service, who is likely to be unaware of these issues, rather than the head of digital delivery or web manager.

Or sometimes the problem lies in the poor integration of the software with the host site, where the content editor has not taken the trouble to make the best use of the software supplied.

It is a major bugbear for all web teams in local authorities that they have to integrate third party software to complete common tasks in services such as social care where that software has not been designed with ease of use by the public firmly in mind. Sometimes the reasons are historical, but more worryingly the problems are sometimes found in newly commissioned software (eg for some social care applications).

The way to avoid this issue is simple enough, at least for any new pieces of software to be commissioned. No procurement of any ICT solution that is to be used by the public in websites (or indeed mobile apps) should be made without the active involvement of the web manager, or the person responsible for digital delivery, to ensure that ease of use is an essential criterion for the selection of the right system.

For third party software that is already in place, the issue is quite different. Most web managers in this position will accept the situation with some reluctance, believing that there is little that they can do to change things, especially if the supplier has many customers thought to be satisfied with the software. Our case study is a story of how with determination and passion one can overcome barriers to achieving usable online services, even in sensitive areas such as housing benefit claims.

Online housing benefit claims

In April 2008, the council procured the BECS system from Team Netsol, but the web team was not involved. BECS is now used by over 70 local authorities. In 2011, a new web manager was appointed. One of her first tasks was to build up the online take-up of BECS. The business case for this project had indicated that only 18% of claims were then being made online and set a target of 60%.

The web manager collected evidence from the feedback of both staff and claimants that the system did not meet the required standards of usability for use by the public. From a customer perspective, the facility just had to become easier to use, especially as many believed that an online housing benefits service would not approach anything like 100% take-up.

Faced with a major challenge, she decided to tackle, first of all, the usability of the total system, believing strongly and rightly that the online facility just had to be easy to use, if she was to succeed in achieving her personal objective of persuading all claimants to go online.

Many issues related to the website; some related to the product being used. Team Netsol were provided with a list of issues that they were keen to resolve. Being equally committed to improving the customer experience, the supplier was very receptive to the process and after some initial doubts accepted most of her suggestions.

The web manager then undertook a lengthy process of user testing that included testing with employees in customer services (ie one-stop shop), in the contact centre (ie over the phone), in revenues and benefits and in adult social care (who have a role in supporting clients about housing problems), and also with welfare rights advice workers (expert practitioners in this field) and, above all, with claimants at every opportunity.

Now, since 2012/13 almost all housing benefit claims are made online. Briefing 3 will provide further information of the benefits achieved from this case study.

7. ONE FINAL IMPORTANT POINT

WEBSITE ACCESSIBILITY (WCAG 2.0)

Any methodology for developing the user journey must cover web accessibility. The standards for web accessibility have not changed for seven years since the W3C launch of Version 2 of the Web Content Accessibility Guidelines (WCAG 2.0). However, one very recent development concerning a new [Accessible Information Standard](#) to be implemented in 2016 prompts some questions about exactly what now constitutes an accessible website and the role of websites in supporting accessibility and inclusion.

Before considering this new standard, we should recap the case for web accessibility. Websites must be as accessible as possible for all users, including people with disabilities using assistive technologies such as text-to-speech screenreaders.

The prime reason for ensuring accessibility is that badly designed and implemented websites can make it difficult or impossible for disabled people to go online. Secondary factors include the legal requirement, pressure from government policy and the framework of good practice that influences the commissioning and supply of websites.

Accessibility should not be seen as an extra layer of usability to build into a site for a minority of users, however significant. Accessible websites are also easier for everyone to use.

Web pages which follow accessibility principles (including being properly structured and tagged) are easier to convert into other formats, often by automated means. When considering web accessibility, organisations are advised to ensure that they involve users at every stage, follow approaches to design and testing widely known to work in the accessibility field and communicate with users via an accessibility policy.

Organisations should also refer to [accessibility guidance](#) set out in the [Government Service Design Manual](#) and be aware that the minimum standard for the public sector is Level AA of [WCAG 2.0](#).

ACCESSIBLE INFORMATION STANDARD

The aim of this new standard is to make sure that people who have a disability, impairment or sensory loss get information that they can access and understand, and any communication support that they need. It tells organisations how to ensure that patients, service users and carers can access and understand the information they are given. If need be, people should be able to get information in different formats, eg in large print, braille or easy read, or via email.

Approved in June 2015, this standard must by law now be applied by all organisations that provide NHS or adult social care. The date for full implementation is 31 July 2016. The statutory guidance for the Care Act 2014 explicitly states that such information standards apply.

The accessibility of health and social care websites is out of scope of the Accessible Information Standard. However, it remains relevant in circumstances where a health or social care professional would usually refer a patient, service user or carer to a website for information. In these instances, it will be the duty of the professional – or their employing organisation – to verify that the website is accessible to the individual and, if it is not, to provide or make the information available in another way. For example, if a social worker would usually refer a client to information on the council's website about personal budgets or how to access particular services or support, then he, or she, would need to check that the client is able to use the website for this purpose. If not, the social worker will need to provide the information in an alternative format, eg as a paper copy, via email or on audio CD.

Organisations are therefore advised to review and, if necessary, take steps to improve the accessibility of their website(s) as part of preparation to implement the standard, because increasing web accessibility will reduce the need to produce information in alternative formats.

The [specification](#) for the standard notes that a new information standard covering web accessibility may be developed in the future.

6. CONCLUSIONS

DOS WHEN PLANNING A NEW DESIGN

- **DO** focus on information architecture, labelling, landing pages and content, not just the shiny new home page design.
- **DO** think about how your content will look on a mobile screen; think about reducing the words wherever possible.
- **DO** test with users early and often – from paper prototypes to wireframes and pre- and post-launch testing.
- **DO** adopt the principles developed by GDS and aim for ‘simpler, clearer and faster’.
- **DO** use early calls to action for each customer journey.
- **DO** think about user journeys from start to finish.

DON'TS WHEN PLANNING A NEW DESIGN

- **DON'T** import content from the old design to the new one without reviewing, revising and reducing it.
- **DON'T** underestimate the resources needed to review and rewrite content to new standards – it is a much more time-consuming task than producing a new design.
- **DON'T** allow design by committee and competing interests to derail the project and end in a compromised design.
- **DON'T** think that the new design is about implementing a new piece of technology such as a new content management system, or forms system – these are just incidental tools to help you.
- **DON'T** lose focus on the site objectives, or stray from the evidence that your data has shown you.
- **DON'T** be tempted to think the work ends with the site launch – it is just the beginning!

The basic premise of this briefing is that generally the current online experience is not good enough. We have set out a new direction to take it to a new level of digital maturity.

The first step is to recognise the problem. A few have, but most have not yet. The second step is to embrace the new direction which involves a new way of managing the online service. We have set out a number of changes that should take place, identified three specific areas that require attention and given a reminder about one important topic.

We have provided two case studies of councils that have recognised the need to change and made the improvements. We have also provided a third case study, covering a different service which shows how integration with third party sites can be achieved by overcoming initial barriers.

Over to you!

NEXT STEPS FOR YOU

- Carry out a major review of the current online experience, ideally using remote user testing as the prime mechanism.
- Do a major root cause analysis of any problems that this highlights.
- Be prepared to investigate all of the following web management practices:
 - The way in which user needs are examined, including involvement of users of services and their carers in the design process as well as at the testing stage
 - The adoption of the top tasks concept
 - The completion of any content pruning exercise
 - The use of professional jargon
 - The commitment to user testing
 - The way in which web performance is measured
 - The commitment to continuous improvement.
- Produce an improvement plan for the online user experience based on this investigation.
- Make sure that this plan contains the measurements that demonstrate the improvement.

FURTHER INFORMATION

- *Government Service Design Manual*
www.gov.uk/service-manual
- *Designing Web Usability: The Practice of Simplicity* by Jakob Nielsen
www.useit.com
- *Don't Make Me Think: Common Sense Approach to Web Usability* by Steve Krug
www.sensible.com
- *The Stranger's Long Neck: How to deliver what your customers really want online* by Gerry McGovern
- Subscribe to *New Thinking*, a free weekly newsletter from www.gerrymcgovern.com/
- BS 8878:2010 *Web accessibility code of practice* (BSI, November 2010)
- *Accessible Information Standard* at www.england.nhs.uk/accessibleinfo

Socitm Insight www.socitm.net

- *Do you do digital?* (April 2014)
- *Health and social care reforms: the ICT and digital implications: Report 1 The online user experience in 2014* (September 2014)
- *The design of the online user experience: more to this than meets the eye?*, (Briefing 70 October 2014)
- *Better connected 2015* (February 2015)
- *Towards the digital council?* (April 2015)

Engaging Citizens Online

List of briefings: topics

-  **01** *Identity and authentication*
December 2015
-  **02** *Methodology for developing the online user journey*
-  **03** *Business case for digital investment*
-  **04** *Planning online transactional facilities*
-  **05** *Supplier offerings of social care self-assessments*
-  **06** *Supplier offerings of social care financial assessments*
-  **07** *Examples of effective use of national information sources*
-  **08** *Examples of good practice of e-marketplaces in operation*
-  **09** *Promotion of online services*
-  **10** *Role of third sector and care providers*