

Tree Testing Results

Jenny Rose John

June 2024

WHAT WE TESTED

2 Trees

Tree A: Different layout for Pension Benefits Section

Tree B: Different layout for Pension Benefits, included Forms and Resources category, changed positions for items in Health Benefits section

10 tasks

150 participants - Tree A

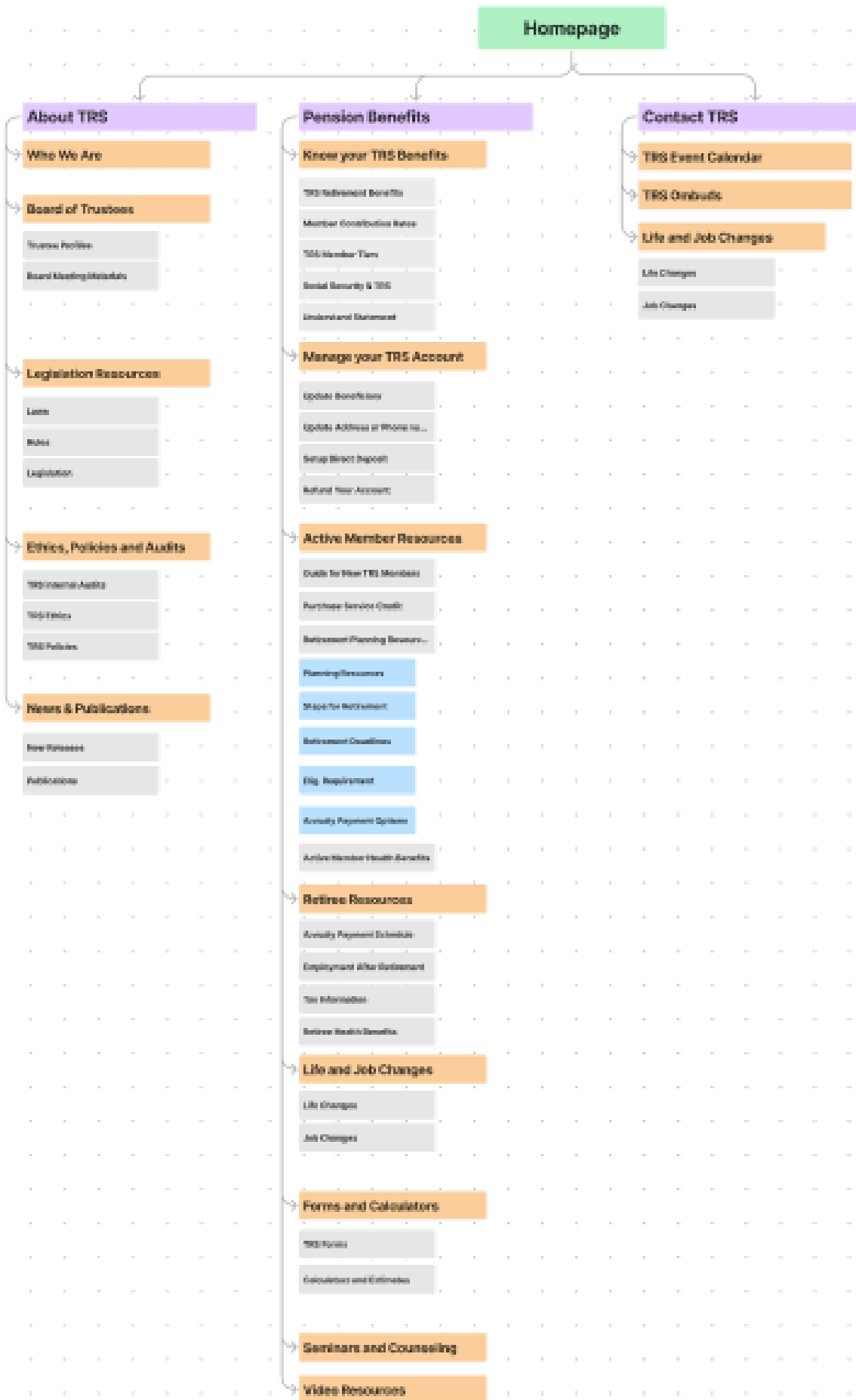
138 participants - Tree B

May 2- 30th

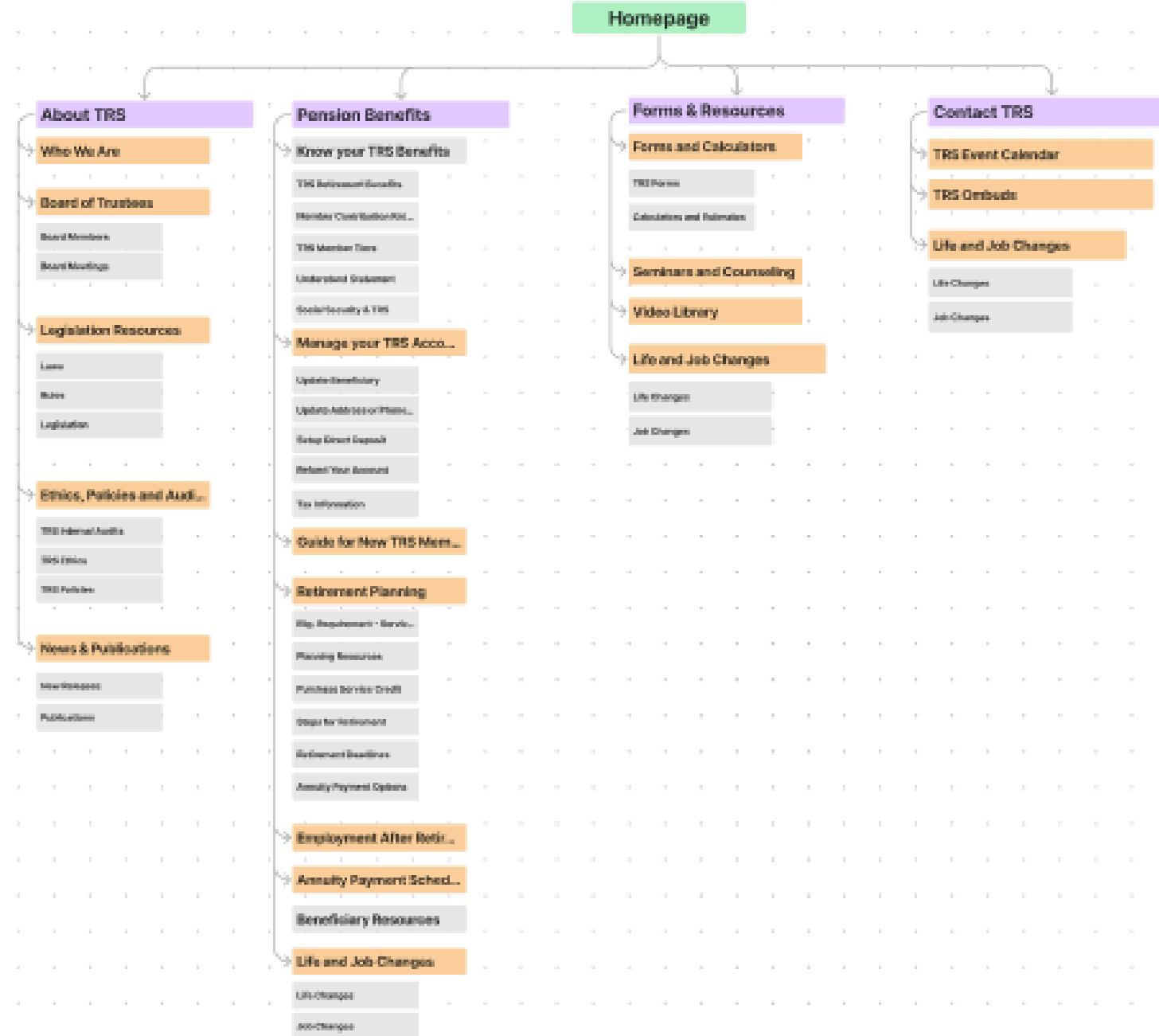
Pilot - 11 participants

WHAT WE TESTED

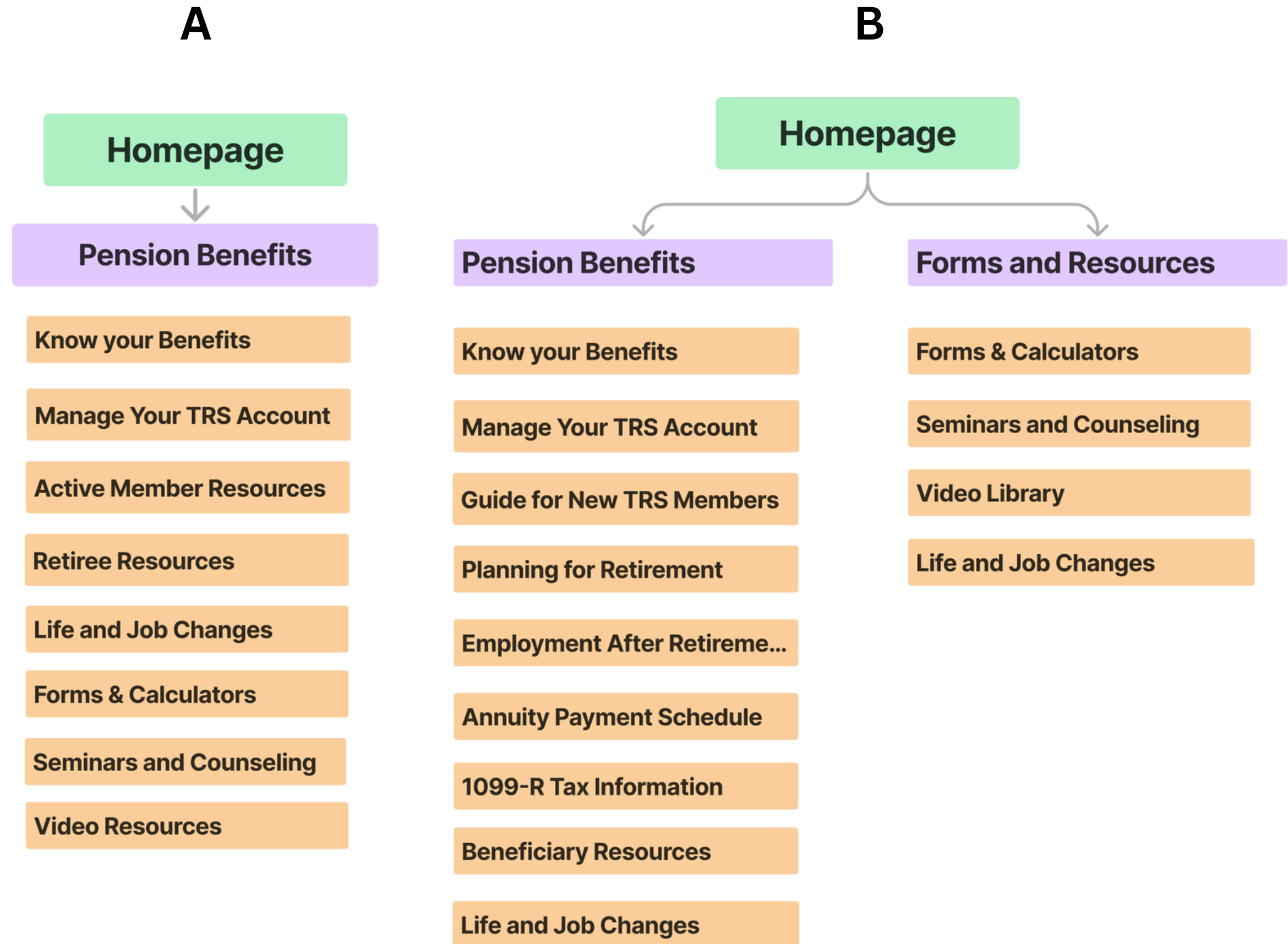
A



B



WHAT WE TESTED



HOW WE TESTED

Task 1 of 9

You have moved to a new home and need to change your address on file you check to find out how to do this?



▼ Home

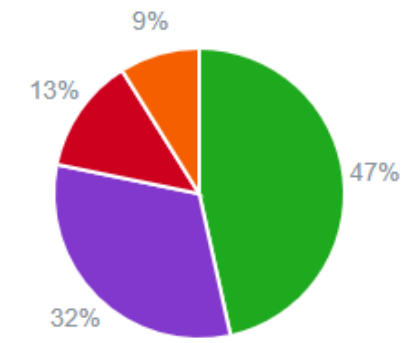
About TRS

Pension Benefits

Health Care Benefits

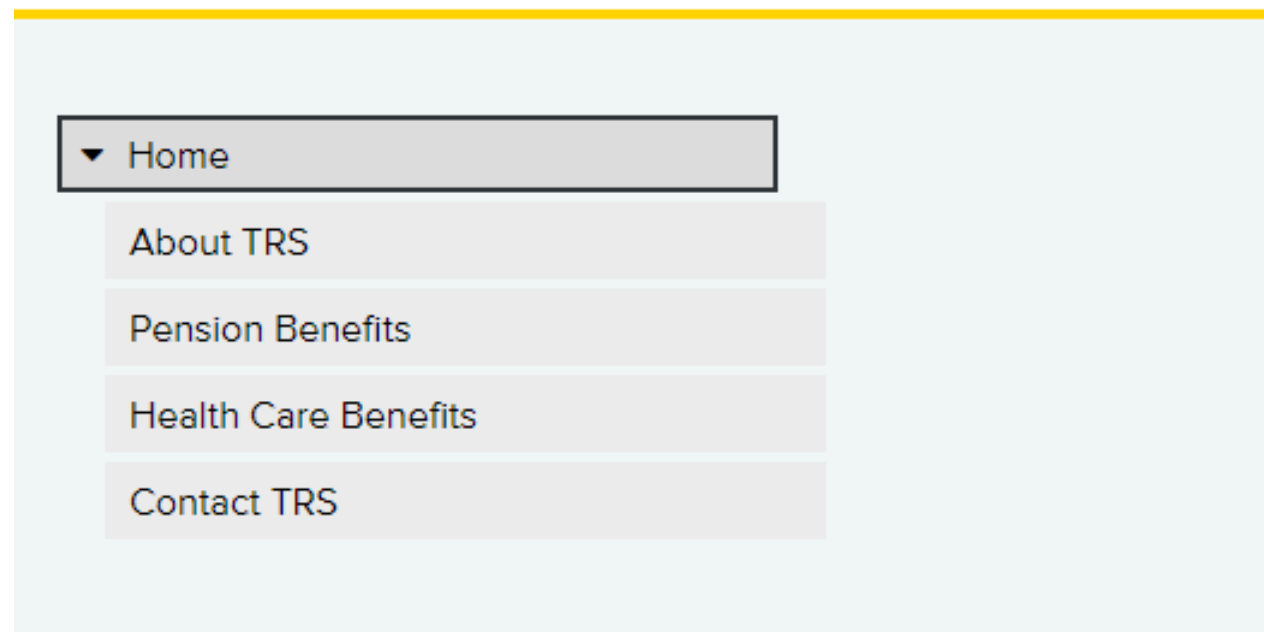
Contact TRS

WHAT WE ANALYZED



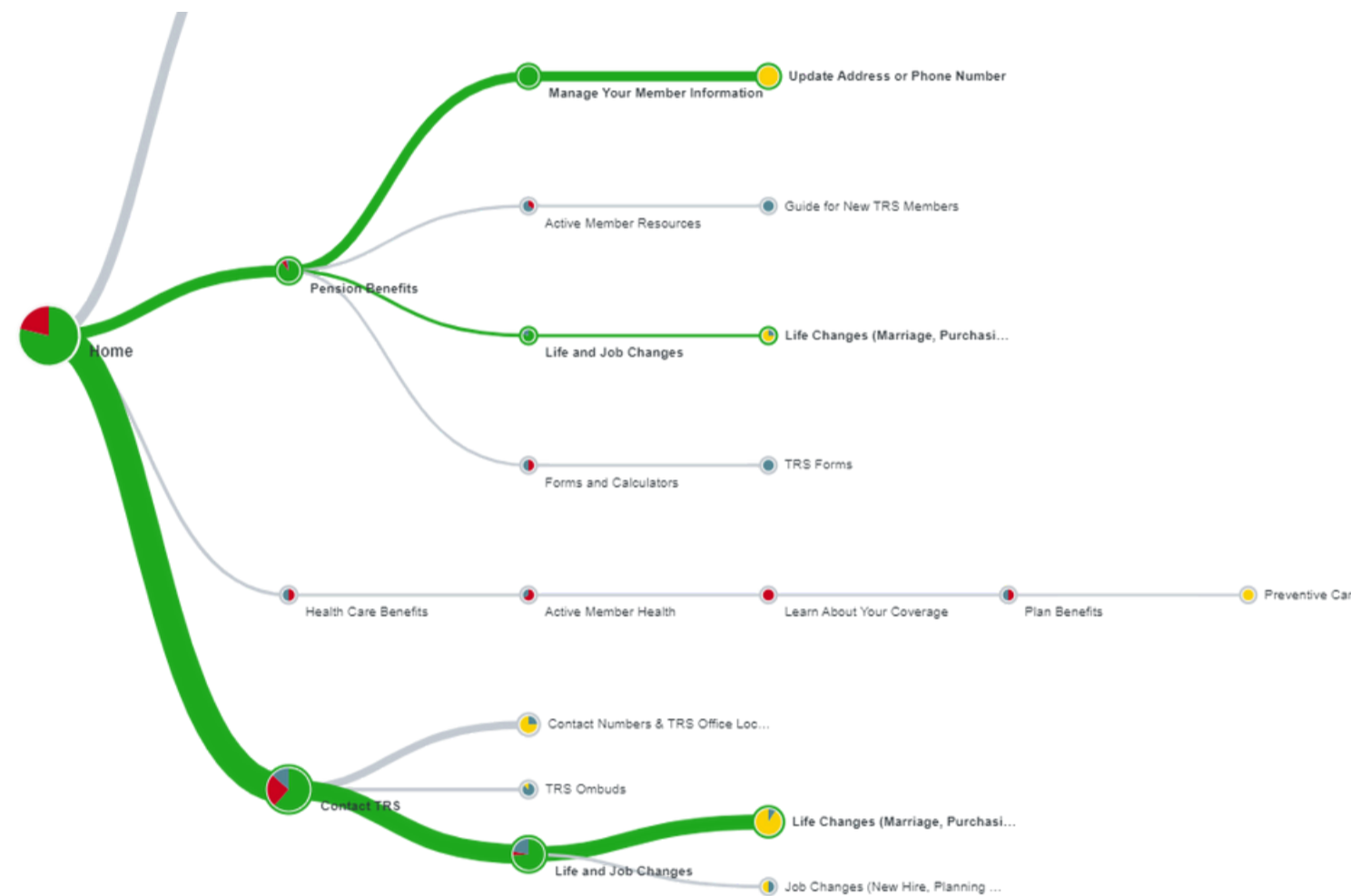
Task 1 of 9

You have moved to a new home and need to change your address on file you check to find out how to do this?



	Success		Total	Fail		Total
	Direct	Indirect		Direct	Indirect	
Success	70	48	118	19	13	32
Fail	0	0	0	0	0	0
Skip	0	0	0	0	0	0

* percentages may not total 100 due to rounding



- Pies**
- Went down the correct path
 - Went down the incorrect path
- Lines**
- Went back
 - Nominated as the correct destination
 - Skipped task
 - Correct path
 - Incorrect path

WHAT WE ANALYZED

- Section first clicked

First click ?

Select task

1. You have moved to a new home and nee... ▼

📝 Add a note

1. You have moved to a new home and need to change your address on file with TRS. Where would you check to find out how to do this?

Path ◇	Correct first click ◇	Clicked first ◇	Clicked during task ◇
Home > About TRS	No	4%	10%
Home > Pension Benefits	Yes	4%	11%

WHAT WE ANALYZED

- All paths to reach a destination - direct or indirect, success or failure

Participant paths ?

Select task

1. You have moved to a new home and need...

Result filters ^

Show all participant paths

1. You have moved to a new home and need to change...

3. Where would you check to find out how to do this?

Home > Pension Benefits > Manage Your Member Information

Home > Pension Benefits > Life and Job Changes > Life Changes (Marriage, Purchasing a Home, Reporting a Death...)

Home > Forms and Resources > Life and Job Changes > Life Changes (Marriage, Purchasing a Home, Reporting a Death...)

Home > Contact TRS > Life and Job Changes > Life Changes (Marriage, Purchasing a Home, Reporting a Death...)

- Direct success
- Indirect success
- Direct failure
- Indirect failure
- Direct skip
- Indirect skip

Showing 45 of 45 unique paths

Result ^	# of Participants ^	Path ^
● Direct success	51 (37%)	Home > Forms and Resources > Life and Job Changes > Life Changes (Marriage, Purchasing a Home, Reporting a Death...)
● Direct success	16 (12%)	Home > Contact TRS > Life and Job Changes > Life Changes (Marriage, Purchasing a Home, Reporting a Death...)
● Direct success	3 (2%)	Home > Pension Benefits > Manage Your Member Information > Update Address or Phone Number
● Indirect success	2 (1%)	Home > Forms and Resources > Life and Job Changes < Home > Pension Benefits > Manage Your Member Information > Update Address or Phone Number

WHAT WE ANALYZED

- All destinations selected

Destinations ?

Select task

1. You have moved to a new home and need... ▼

📝 Add a note

1. You have moved to a new home and need to change your address on file with TRS. Where would you check to find out how to do this?

Correct destinations

97 of 138 participants

Destination ⌵

of participants ⌵

Home > Forms and Resources > Life and Job Changes > Life Changes (Marriage, Purchasing a Home, Reporting a Death...)

57 (41%)

Home > Contact TRS > Life and Job Changes > Life Changes (Marriage, Purchasing a Home, Reporting a Death...)

28 (20%)

Home > Pension Benefits > Manage Your Member Information > Update Address or Phone Number

12 (9%)

Home > Pension Benefits > Life and Job Changes > Life Changes (Marriage, Purchasing a Home, Reporting a Death...)

0 (0%)

Incorrect destinations

41 of 138 participants

Destination ⌵

of participants ⌵

Home > Contact TRS > Contact Numbers & TRS Office Locations

19 (14%)

WHAT WE WANTED TO FIND OUT

VALIDATE AND
INFORM
CURRENT IA

TEST NEW
CATEGORIES

REFINE
EXISTING
CATEGORIES

TEST LABELS
FOR MENU
ITEMS

AUDIENCE
BASED VS
TOPIC BASED

RESULTS

TREE A

TREE B

**OVERALL
SUCCESS***

58%

60%

**OVERALL
DIRECTNESS**

65%

72%

RESULTS (task-wise)

TREE A

	1	2	3	4	5	6	7	8	9	10
OVERALL SUCCESS*	79%	47%	62%	51%	67%	72%	61%	18%	63%	63%
OVERALL DIRECTNESS	59%	47%	51%	65%	81%	75%	78%	65%	69%	57%

Health Benefits focused

RESULTS (task-wise)

TREE B

	1	2	3	4	5	6	7	8	9	10
OVERALL SUCCESS*	70%	46%	50%	54%	65%	66%	56%	56%	59%	76%
OVERALL DIRECTNESS	70%	59%	42%	69%	85%	74%	77%	74%	86%	84%

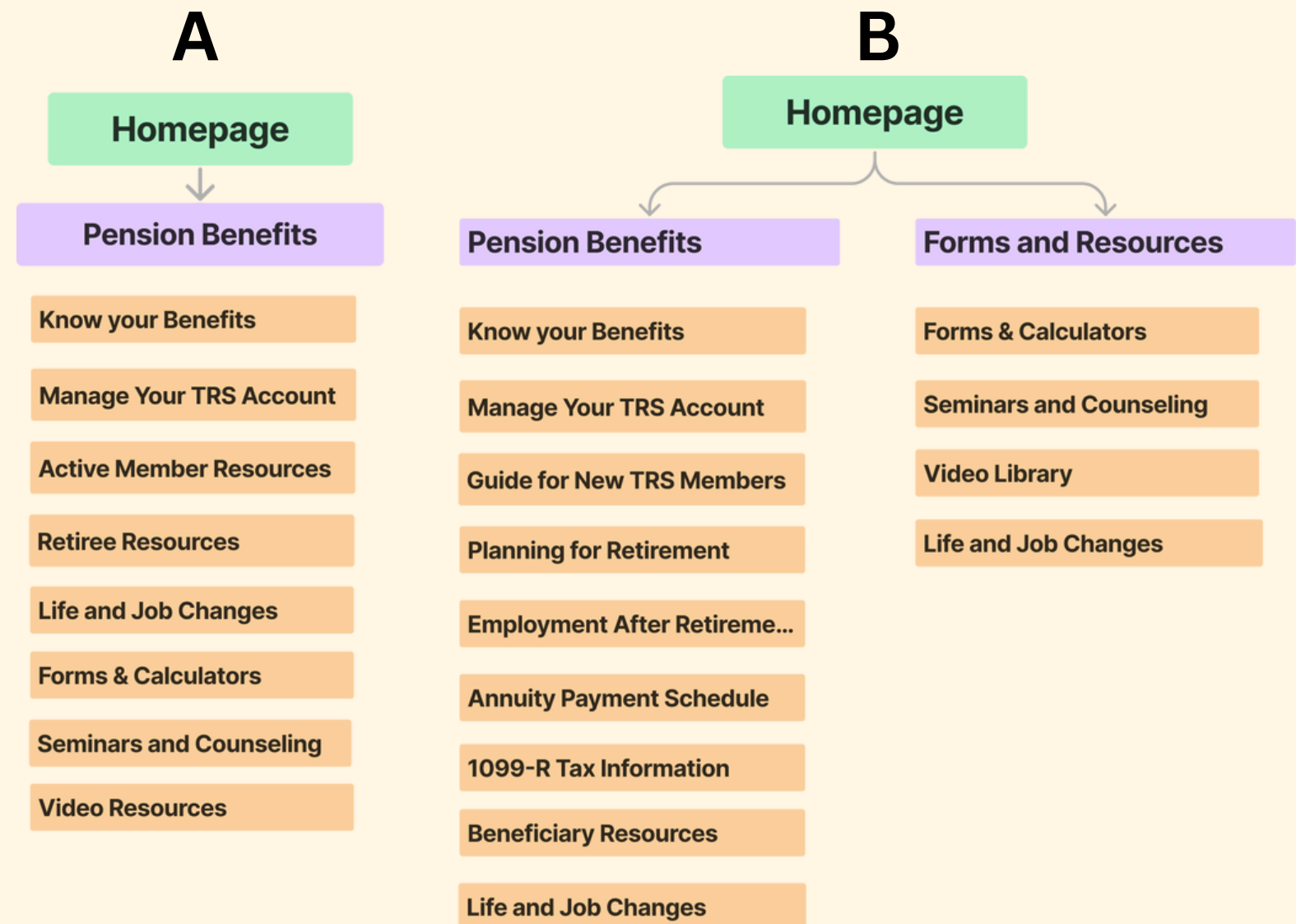
Health Benefits focused

FINDINGS & RECOMMENDATIONS

- Audience based grouping or topic based grouping for the Pension Benefits section:

Topic based grouping better - Planning resources, Guide for New TRS Members and Resources for Beneficiaries more discoverable.

The layouts perform similarly for other topics such as update member information or Service Credit.



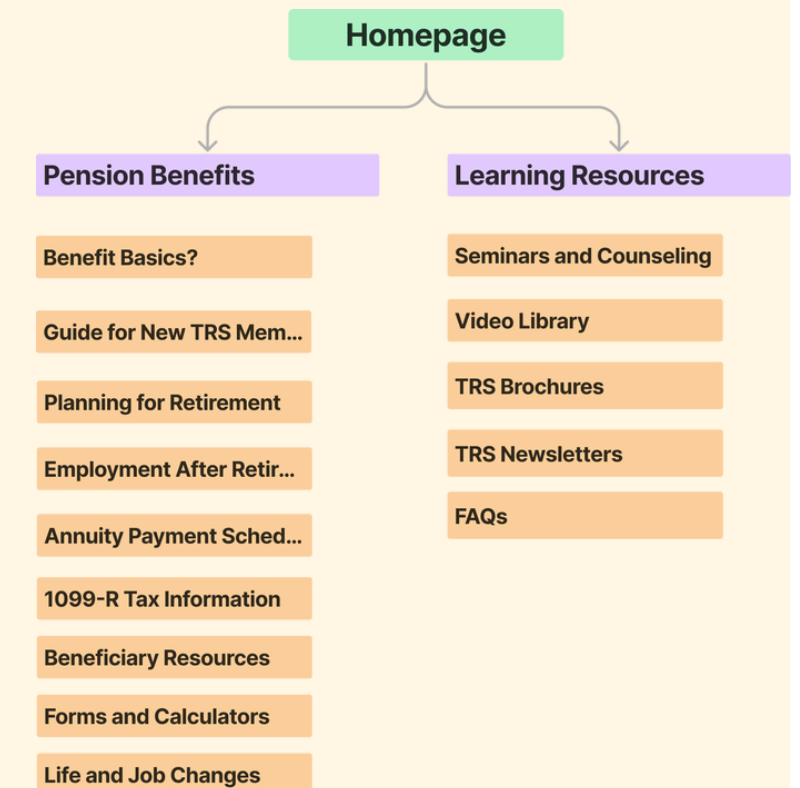
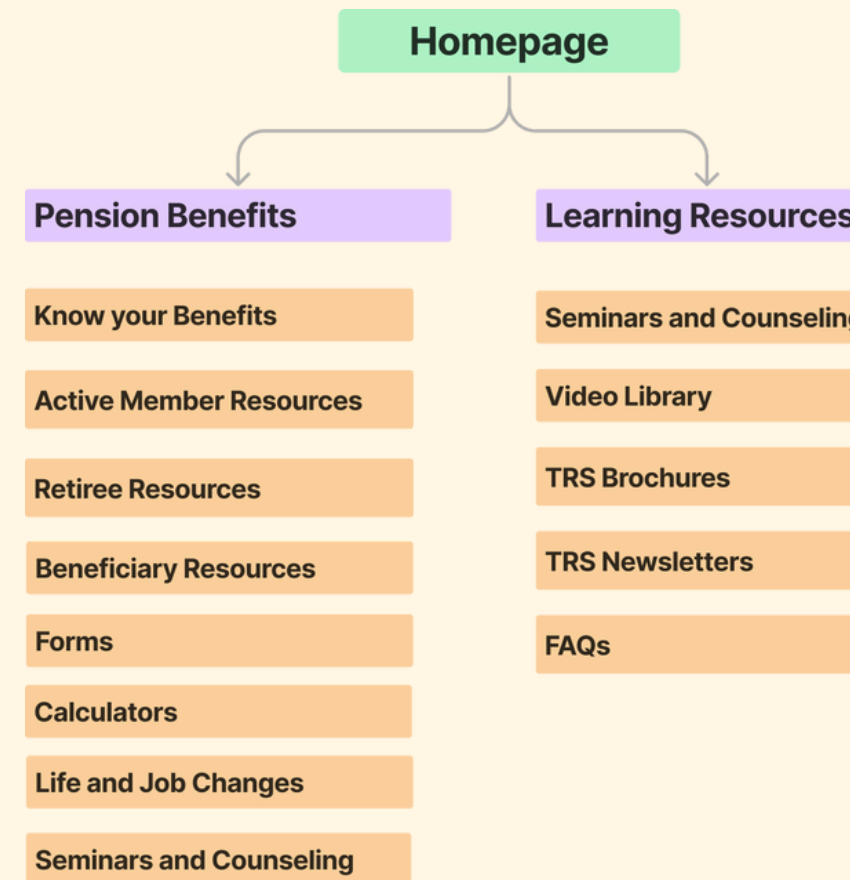
FINDINGS & RECOMMENDATIONS

- Test a new “Forms and Resources” category.

Helpful in some tasks such as “Update your address” or “Borrowing from TRS” - It seems make Life and Job Changes more discoverable.

Reason to include this section was to shorten the Pension Benefits sections which becomes larger in topic based grouping.

- Keep Forms section but rename label for clarity. or Edit Pension Benefits section further.



FINDINGS & RECOMMENDATIONS

- **Test a new “Forms and Resources” category.**

Helpful in some tasks such as “Update your address” or “Borrowing from TRS” - It seems make Life and Job Changes more discoverable.

Reason to include this section was to shorten the Pension Benefits sections which becomes larger in topic based grouping.

- Keep Forms section but rename label for clarity. or Edit Pension Benefits section further.



VENDORS

Pension Benefits Health Benefits Learning Resources Investments

Know your TRS Benefits

Active Member Resources

Retiree Resources

Beneficiary Resources

Forms

Calculators

Life and Job Changes

Seminars and Counseling

Learn about TRS Benefits

Detail is one of the required report components.
Detail is used to report data.

Managing your

Detail is one of the required report components.
Detail is used to report data.

Learn about TRS Benefits

Detail is one of the required report components.
Detail is used to report data.

FINDINGS & RECOMMENDATIONS

- **Test labels for menu and sub-menu items for clarity.**

-> About TRS vs About your TRS Account vs Know Your TRS Benefits.

Participants were frequently observed to incorrectly click on About TRS presumably looking for information related to their TRS Account (such as update address, member ship tiers, etc).

Labels need to be reworked for clarity

3. You heard in a webinar that TRS has different membership categories called "tiers" and you want to know which tier you belong to. Where will you look for this information?	
Correct destinations	93 of 150 participants
Destination ▾	# of participants ▾
Home > Pension Benefits > Know Your TRS Benefits > TRS Member Tiers	93 (62%)
Incorrect destinations	57 of 150 participants
Destination ▾	# of participants ▾
Home > About TRS > Who We Are	14 (9%)

FINDINGS & RECOMMENDATIONS

- **New menu item - Resources for Beneficiaries.**
-Significant improvement in accessing beneficiary specific resources.
- **Health Benefits section performing well despite being nested.**

TREE A

5

6

7

OVERALL
SUCCESS*

67%

72%

61%

OVERALL
DIRECTNESS

81%

75%

78%

TREE B

5

6

7

OVERALL
SUCCESS*

65%

66%

56%

OVERALL
DIRECTNESS

85%

74%

77%

FINDINGS & RECOMMENDATIONS

- **Contact Us - Life and Job Changes**

Several tasks indicate that people find Life and Job Changes section more easily from Contact Us than Pension Benefits.

But in many cases, people do not select Life and Job Changes even after expanding Contact Us - instead opting to Contact TRS directly.

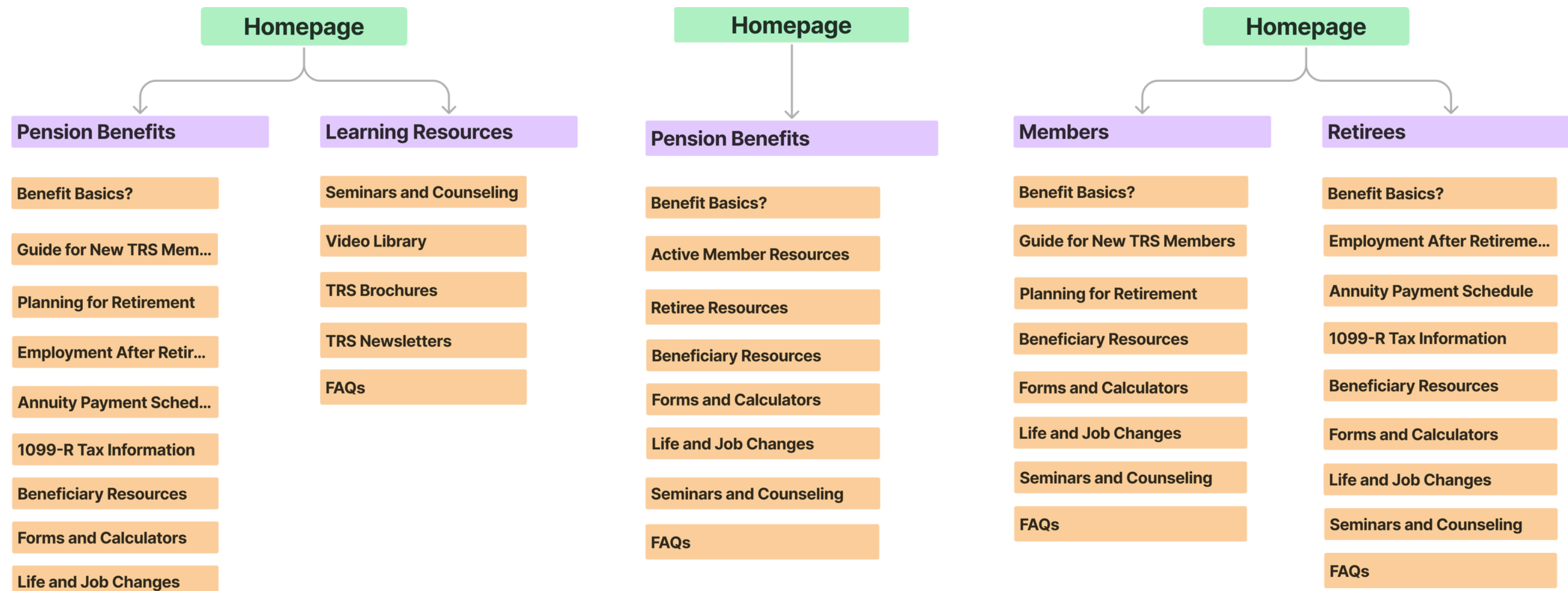
Label to be reworked AND/OR Feature Life and Job Changes prominently on the Contacts Landing Page.

- **Seminars and Counseling is a frequently selected option**

Label needs to be reworked. Ideas for more seminars.

NEXT STEPS

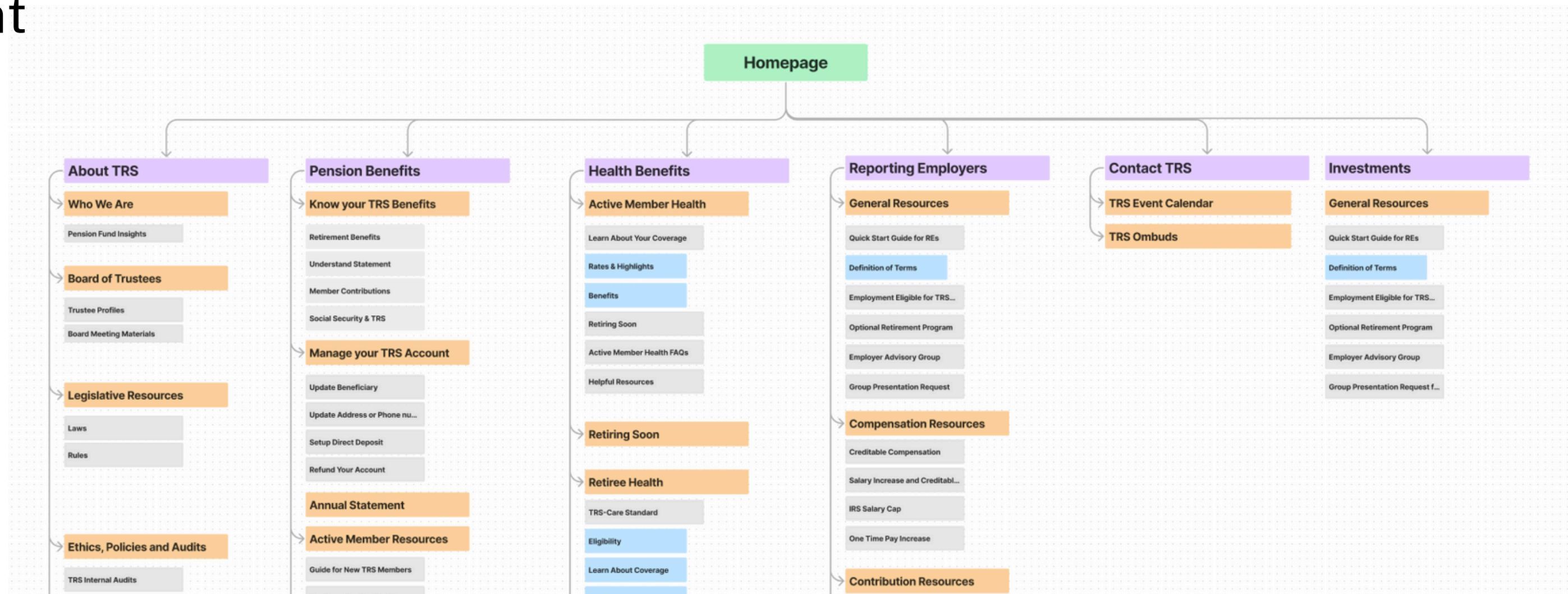
- Finalize IA based on findings
 - Set up meetings with Pension Benefits team.



NEXT STEPS

- Update Information Architecture spreadsheets.












Information architecture diagram > Content spreadsheets > Edited Page content



NEXT STEPS

- Update Information Architecture spreadsheets.














Information architecture diagram > **Content spreadsheets** > Edited Page content

 Name ▾	Modified ▾	Modified By ▾	+ Add column
 About TRS General NEW PLAN.xlsx	May 7	John, Jenny	
 Audit NEW PLAN.xlsx	February 26	Romberger, Kale	
 Board of Trustees NEW PLAN.xlsx	May 28	Romberger, Kale	
 Contact Us NEW PLAN.xlsx	February 27	Romberger, Kale	
 Doing Business with TRS NEW PLAN.xlsx	June 5	Romberger, Kale	
 Health Care NEW PLAN.xlsx	May 29	Yansak, Carly	
 Laws Rules Legislation NEW PLAN.xlsx	June 3	Romberger, Kale	
 Media Center NEW PLAN.xlsx	February 21	Romberger, Kale	
 Pension Benefits NEW PLAN.xlsx	4 days ago	John, Jenny	
 Reporting Employers NEW PLAN.xlsx	4 days ago	John, Jenny	

NEXT STEPS

- Update Information Architecture spreadsheets.

Information architecture diagram > Content spreadsheets > **Edited Page content**

 1 Level - Active Members	6/3/2024 1:08 PM	Microsoft Word Doc...	20 KB
 1 Level - Benefit Basics	4/29/2024 3:37 PM	Microsoft Word Doc...	17 KB
 1 Level - Calculators	4/25/2024 11:32 AM	Microsoft Word Doc...	18 KB
 1 Level - TRS Forms	4/25/2024 9:22 AM	Microsoft Word Doc...	18 KB
 2 Level - Annual Statement	5/6/2024 10:32 AM	Microsoft Word Doc...	190 KB
 2 Level - Employment After Retirement	5/6/2024 11:08 AM	Microsoft Word Doc...	20 KB
 2 Level - Get Retirement Ready	5/6/2024 10:37 AM	Microsoft Word Doc...	18 KB
 2 Level - Manage Your Member Account	5/6/2024 10:12 AM	Microsoft Word Doc...	19 KB
 2 Level - Plan for Retirement	5/6/2024 10:46 AM	Microsoft Word Doc...	18 KB
 2 Level - Service Credit	5/6/2024 10:52 AM	Microsoft Word Doc...	18 KB
 2 Level - Understand Your TRS Benefits	5/6/2024 10:39 AM	Microsoft Word Doc...	214 KB
 3 Level - Annuity Payment Options	5/6/2024 10:47 AM	Microsoft Word Doc...	20 KB
 3 Level - Five Years Membership Service Credit	5/6/2024 11:00 AM	Microsoft Word Doc...	14 KB

THANK YOU!