

boxclever



Website Taxonomy Research Stage 1 findings

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IFIRMA

Cennik

Darmowy Magazyn i CRM w każdym pakiecie!

Program do faktur
Darmowy

Fakturowanie
CRM
Magazyn
Wsparcie techniczne

Wyślij pierwszą fakturę

875 PLN
miesięcznie

Księgowanie
Fakturowanie
CRM
Magazyn
Wsparcie księgowo

Przebieg 3 miesięcy!

Biurowo rachunkowe
80 PLN

Pełna obsługa księgowo
indywidualny księgowy
Reprezentacja przed ZUS i US
Narzędzia do prowadzenia firmy

Złóż księgowość

Today's Session (60 mins)

- ❖ Introduction and report on findings (40 mins)
- ❖ Discussion and questions (10 mins)
- ❖ Planning next steps (10 mins)



Report Contents

Background & Approach



Research questions & methodology used

Findings



Key findings from customer data and interviews

Implications for current taxonomy



Assessment of what this means for the current site

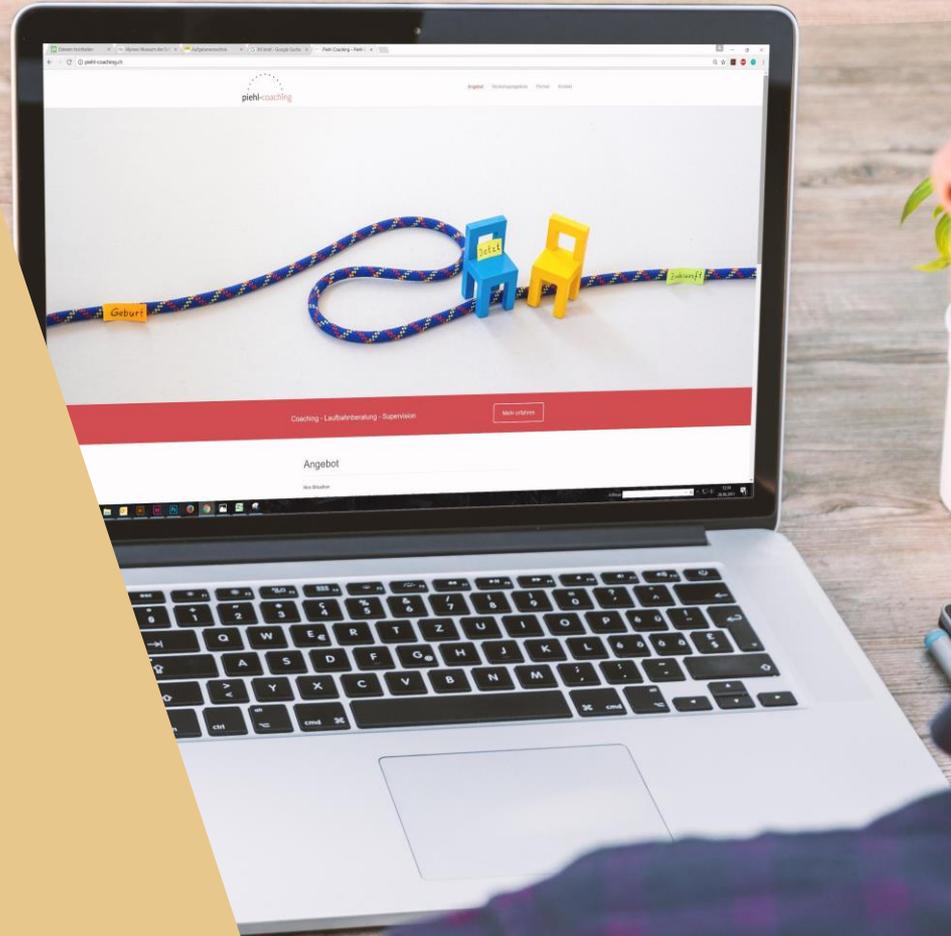
Recommendations



Suggested changes to taxonomy for testing



Background & Approach





YOU TOLD US.....

United Utilities' aim is to improve the user experience on the website homepage, specifically the menu bar, ensuring customers can locate and complete their desired tasks from the landing page easily through intuitive navigation and signposting.

There is a need to understand from a customer perspective what the most useful taxonomy of the menu bar is, and the most effective way to group and signpost key customer tasks. Language for headings needs to be explored to ensure navigation flows effectively.

In preparation for the website re-launch, this research will inform taxonomy through a clear customer-centric approach to test and ensure navigation is highly intuitive and the customer journey is reduced to a seamless and simple process.





Our approach in summary: A two stage qual approach, followed by a tree-test survey to build and test customer-centric website taxonomy

WE PROPOSED THIS METHOD.....

1. Digital card-sorting task & online depths



Customers completed an online card-sorting task, followed by a 30-minute depth interview to explain the thought process behind their grouping choices and how it would help them navigate

2. Internal taxonomy review and test sites



Based on findings from the customer research, United Utilities will build in some recommended changes to the taxonomy to test whether these improve navigation for customers

3. Accompanied surfs via Screencast & Tree-test survey



A new set of customers to complete tasks with the customer centric taxonomy in place – we can observe how this impacts navigation and ask respondents to review the journey



300 customers will also complete tasks using tree testing, showing us where they would go to complete said task, allowing further observation of whether navigation works effectively.



List of tasks for card-sorting groups

42 website tasks given to customers

1. Contact United Utilities
2. Pay a bill
3. Find out about current incidents in my area
4. Moving home – I am a new customer
5. Report a problem
6. Find out about water quality
7. Struggling to pay my bill
8. Ways to pay my bill
9. Moving home - Existing customer
10. I am experiencing low water pressure
11. Find out about water meters
12. Find the right contact number
13. I need help finding my water meter
14. Report a blocked drain
15. Using the mobile App
16. I am experiencing no water
17. Moving home - no longer responsible for the bill
18. I want to apply for a water meter
19. Information on sewers and drains
20. My water bill is higher than expected
21. View my Account balance
22. I have discolored water
23. Information about reservoir levels
24. Report a leak
25. Make a complaint
26. Moving home - want to check if I am in your area
27. Information about planned works
28. Supporting customers with disabilities and ill health
29. I want to set up a direct debit
30. Find out about water saving devices
31. Tracking a leak
32. Understanding my bill
33. Find out about water quality in my area (postcode checker)
34. Add a name to the bill
35. Find my account number
36. I am experiencing sewerage issues
37. Remove a water meter
38. Change to paperless billing
39. Provide feedback on your service
40. I want to find out latest news from United Utilities
41. Find out about recreation on our land
42. Support with flooding



Card-sort task and zoom depths

Two stages to understand spontaneous grouping choices and post-rationalize impact on navigation

Group 1
2 items

- Find my account number
- I want to set up a direct debit

Group 2
1 item

- I want to find out latest news from United Utilities

Group 3
1 item

- Contact United Utilities

Group 4
Remove group

zoom

Help in the local area

- Find out about current incidents in my area
- Find out about recreation on our land
- I am experiencing low water pressure
- I am experiencing no water
- I am experiencing sewerage issues
- I have discoloured water
- I want to find out latest news from United Utilities
- Information about planned works
- Provide feedback on your service
- Support with flooding
- Tracking a leak

Dealing with own account

- Add a name to the bill
- Change to paperless billing
- Contact United Utilities
- Find my account number
- Find out about water meters
- Find the right contact number
- I need help finding my water meter
- I want to apply for a water meter
- I want to set up a direct debit
- Make a complaint
- Moving home - Existing customer
- Moving home - no longer responsible for the bill
- Moving home; I am a new customer
- My water bill is higher than expected
- Pay a bill
- Remove a water meter
- Report a blocked drain
- Report a leak
- Report a problem
- Struggling to pay my bill
- Supporting customers with disabilities and ill health

Find out about water meters

- Find out about water quality in my area (postcode checker)
- Find out about water saving ideas
- Information about reservoir levels
- Information for local area
- Information on sewers and drains
- Moving home - want to check if I am in your area

4/42

Report a leak

Tracking a leak

Using the mobile App

Support with flooding

Add a name to the bill

Find out about water meters

Digital card-sorting task sent to x10 customers and x10-20 colleagues

X10 Zoom depths conducted with customers, allowing them to review grouping choices



Findings





General findings from customer groupings task:

1.

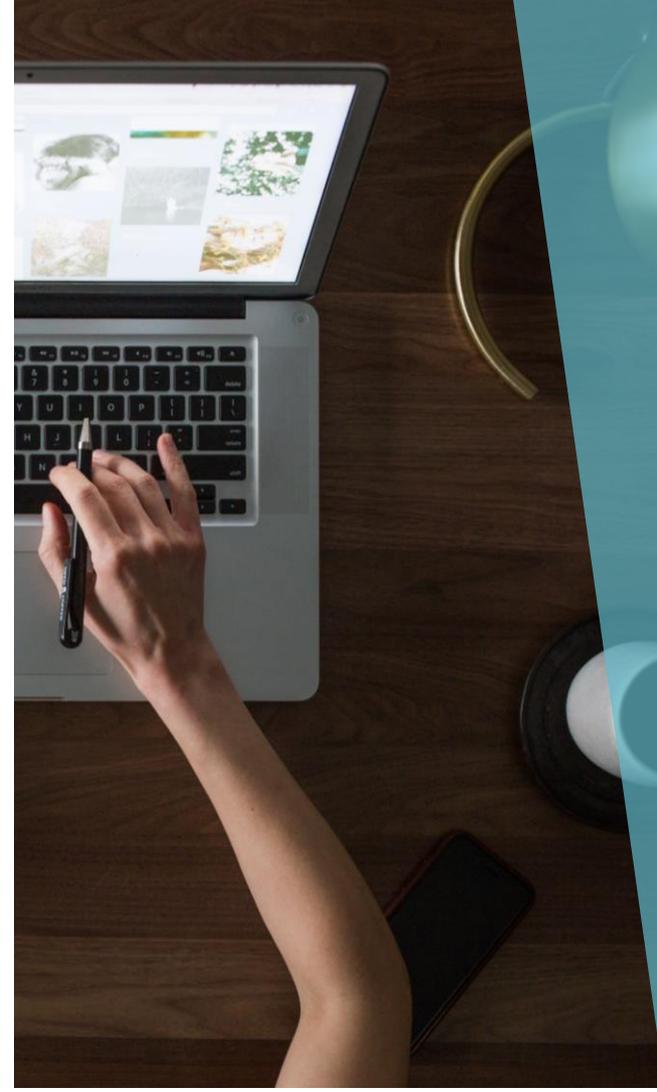
There are four very clear customer groupings – My Account, Customer Support, Problems & Issues and General Info - these were found consistently across our customer sample

2.

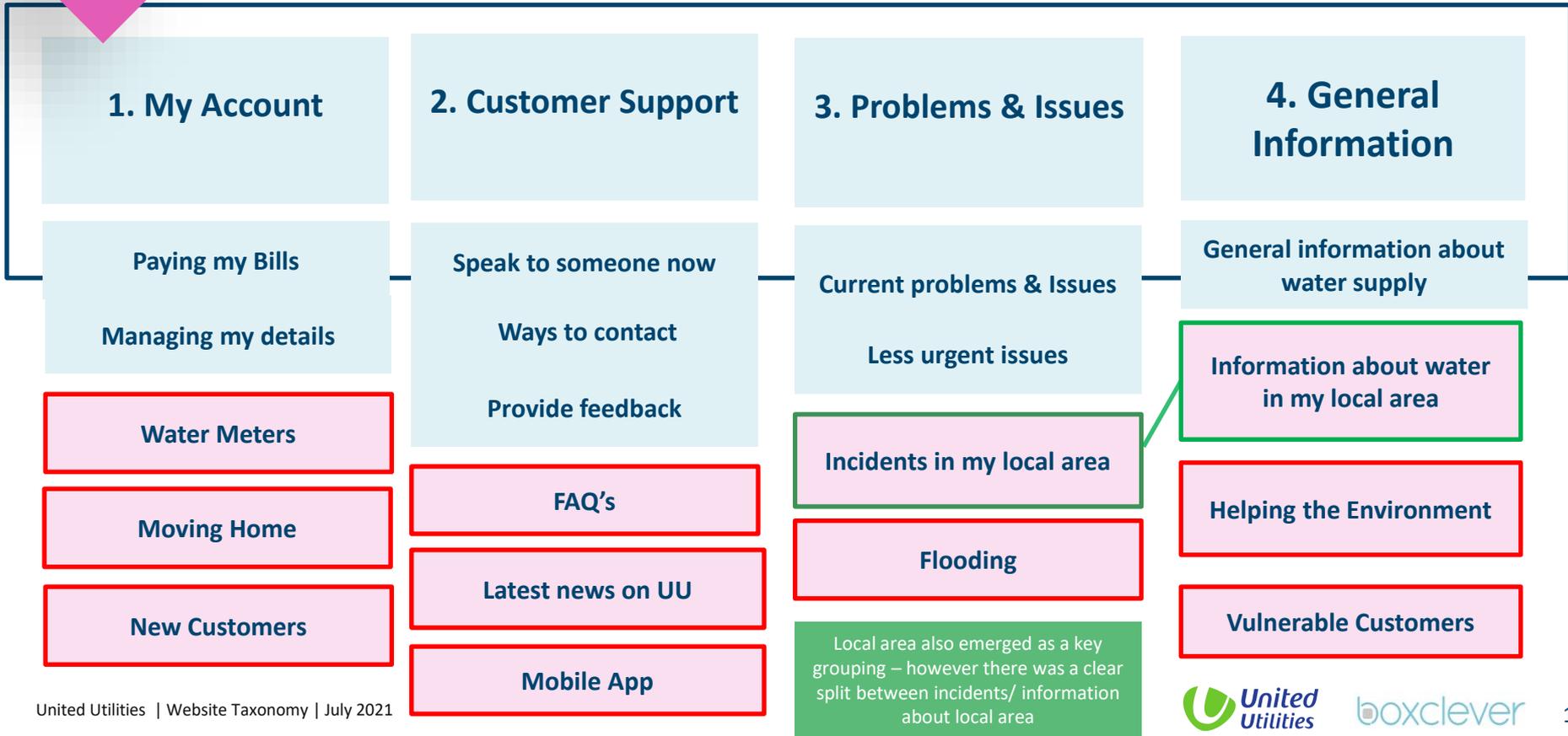
There are also some clearly defined smaller groups, however these were less defined in terms of where they sit as a sub-group and less consistently grouped within the top four groups

3.

Customers expect that some actions/tasks should be found via multiple navigation routes – these need to be linked across areas of the website



Customer card-sort task overview: four main groups emerged, each with several sub-groups



Grouping 1: 'My Account'

This was primarily customers first, most unanimous and straight forward grouping. It is all about managing your home water supply – both financially and practically.

MY ACCOUNT

'Paying my Bills'

- Pay a Bill
- I want to set up a direct debit
- My water bill is higher than expected
- View my account balance

'Help with Bills'

- Struggling to pay my bill
- Understanding my bill

'My preferences'

- Ways to pay my bill
- Change to paperless billing

'Managing my details'

- Add a name to the bill
- Find my account number
- Reporting Bereavement

Water Meters 'In my home'

- Need help finding water meter
- Apply for a water meter
- Remove Water Meter

Find out about water saving devices? *

*Customers were less decided whether this fits in this group

'Moving Home'

- Moving home - Existing customer
- Moving home - no longer responsible for the bill

'New Customers'

- Moving Home: check if I am in a UU area

Mobile App?

Considerations for testing

- Should moving home be its own section?
- Should Water Meter info all come in here?
...It's about 'my meter' – general info about water meters could be elsewhere
- Does Mobile App

Customer Language

Customers spontaneously called this.....

- 'My Account'
- 'Billing'
- 'Paying a Bill'
- 'Account Information'
- 'Managing my account'
- 'Account changes'
- 'My UU' (Like mobile 'My EE')
- ✓ 'My Account/My UU' is the right language

Customers tell us about this group: 'My Account'



“This is my section of the website –it’s all about me and my home and my money”

“It’s very straight forward really – these are all around paying for my water”

“Moving home is in there as that’s the key time you really think about your water”

“Sorting the water meter is also about what’s going on my house so I have included it – it’s still something I need to manage”

Grouping 2: Customer Support

This was a vital and instinctive group, many customers felt this was most important to locate quickly and easily

Customer Support

'Speak to someone now'

- Contact UU

'Ways to contact customer service'

- Find the right contact number
- Phone numbers & opening times
- Email address
- Online chat

'Give Feedback'

- Provide feedback on your service
- Make a complaint

Mobile App?

*We also asked respondents to tell us what they would want to see in the groups, outside of the 42-task list

'Company News and Updates'

- I want to find out latest news from United Utilities

FAQ'S

- General Q&A to aid navigation to other groupings

For many, 'contact us' is just a functional way of reaching 'a real-life person'. However, others felt it was an area of the site they should also be able to use to keep up to date with the company, any news and receive navigation support through FAQs

Considerations for testing

- Customers would like it to be more visible on the website
- However, do we want to drive more phone enquiries? An FAQ section with links across the site could help navigate and trouble shoot
- This group has links across other groups
- Does Mobile app go here?

Customer Language

Customers spontaneously called this.....

- 'Contact Us' - universally understood as a straightforward heading
- 'Customer support'
- 'We love to help'
- 'Here to help'
- ✓ 'Contact Us' or 'Customer Support' is the right language – but language around 'here to help' also resonates

Customers tell us about this group: 'Customer Support'



Stim 1: Group 4

GROUP 4 - United utilities info

- Find out about current incidents in my area
- Find out about recreation on our land
- Find out about water meters
- Find out about water quality
- Find out about water quality in my area (postcode checker)
 - Find out about water saving devices
- I want to find out latest news from United Utilities
- Information about planned works
- Information about reservoir levels
- Information on sewers and drains
 - Support with flooding
- Supporting customers with disabilities and ill health

"This group is all about UU supporting us – getting that information quickly"

"This is the customer service element – it's all about how UU can support us"

"I think it's potentially the most important thing to be able to find – many people will want to get straight to those phone numbers or online chat support"

"This is simple and straight forward – I want to find a way of speaking to someone"

"News and updates could be here – especially if it's something lots of people are likely to be contacting about"

Grouping 3: 'Problems/Issues'

This group was all about things going wrong with my water – resolving and reporting problems - most importantly those impacting me now, but also other problems that I might need to be aware of

PROBLEMS/ISSUES

Urgent problems

- Report a problem
- I am experiencing no water
- I am experiencing sewerage issues
- Reporting a leak
- Tracking a leak
- Reporting a blocked drain

vs Less urgent issues

- I am experiencing low water pressure

Find out about water quality

Incidents in my area

"External issues not affecting me yet but might in future"

- Information about planned works
- Incidents in the area

Support with Flooding

- Is general info? Preventative?
- Help when you have been flooded?

If serious issue – needs urgent update on homepage

ie. Flooding threat, water supply down

'Getting Help' - Contact Us

Considerations for testing

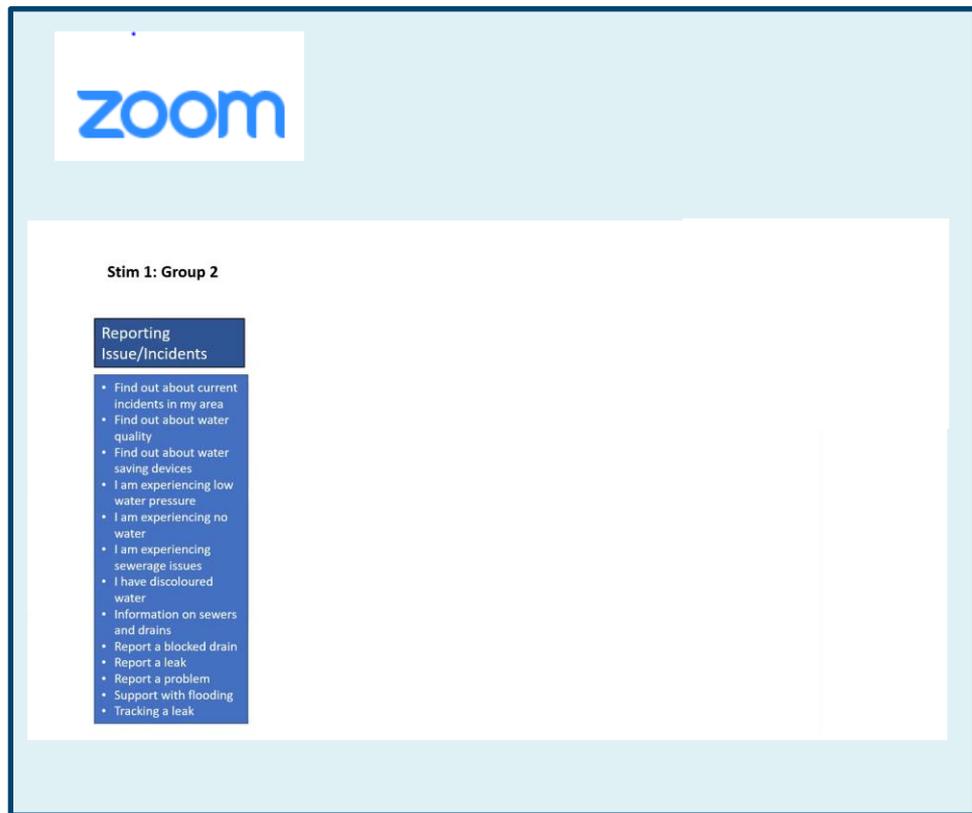
- This area needs to directly link to contact us/phone numbers
- Clear divide between urgent/less urgent
- Customers talk about problems in 'my area' or 'wider problems'

Customer Language

Customers spontaneously called this.....

- 'Problems with my water'
- 'Issues & Incidents'
- 'Experiencing problems'
- 'Current problems'
- 'Problem Solver'
- ❖ **'Emergencies is the wrong language** (for this customers refer straight to contact us)
- ✓ **'issue & problems' or 'resolving issues' is the right language**

Customers tell us about this group: 'Problems/Issues'



zoom

Stim 1: Group 2

Reporting Issue/Incidents

- Find out about current incidents in my area
- Find out about water quality
- Find out about water saving devices
- I am experiencing low water pressure
- I am experiencing no water
- I am experiencing sewerage issues
- I have discoloured water
- Information on sewers and drains
- Report a blocked drain
- Report a leak
- Report a problem
- Support with flooding
- Tracking a leak

“These are all things that are currently happening with my water that need solving”

“I’ve split them between things that are happening to me vs things happening in the area – potential issues but not affecting me ”

“This group is all the things that could go wrong and how to sort them”

“If there's a leak in your house – you want to know what to do – you need the info but then the contact number if you can't fix it yourself ”

Grouping 4: 'General Information'

This group was an area for education and learning about water and how it works - as well as water in the local area, for many it was also a catch all group for a range of different subjects

General Information

Understanding/information about

- Information about sewers and drains
- Water quality
- Water meters?
- Water saving devices?

Information in my local area

- Information for local area
- Find out about water quality in my area (postcode checker)
- Information about reservoir levels
- Find out about recreation on our land

Incidents in my area

About United Utilities

Environmental

- Water saving devices
- More info about water and how to be environmentally friendly

Vulnerable Customers

- Supporting customers with disabilities and ill health
- Info about different ways UU can support – older, more water dependent, financially struggling

Non-vulnerable customers preferred 'vulnerable' as a term rather than 'priority' (not widely understood) while 'customers with additional needs' preferred by vulnerable customers

Considerations for testing

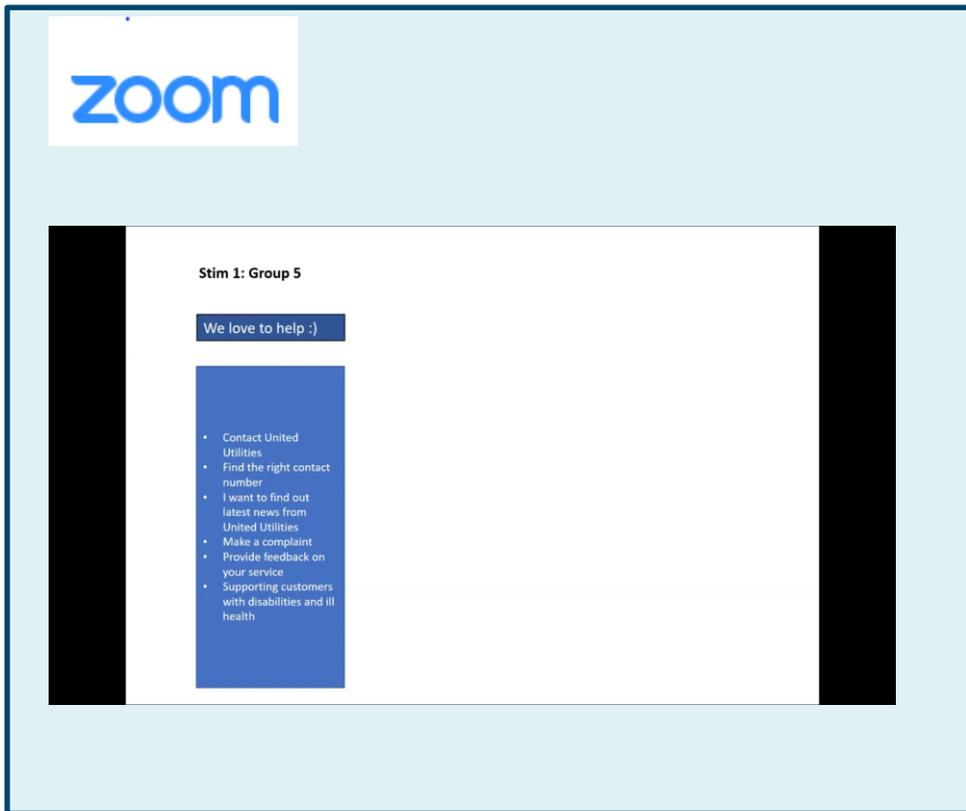
- Should these all fall under general info or be headings in their own right?
- Should local area also info include problems and be its own area?
- Some thought supporting customers with disabilities should be alongside new customers

Language

Customers spontaneously called this.....

- 'General information regarding Unites Utilities'
- 'Useful information'
- 'Water information'
- 'Help in the local area'
- 'Learn about your water'
- ✓ 'General Information' is immediately recognized as catch all - 'Learn' and 'Educate' also resonates'

Customers tell us about this group: 'General Information'



"This section is about learning and education"

"I like there being a section for the area – the water quality in this part of the country is great, I'd like to know more so I can tell people!"

"I put a lot of these tasks under general info as I don't know where else they would go"

Findings from colleagues' groupings

UU colleagues also completed the task to see how their task groupings compared

1.

Account & Billing was the most similar grouping to customers with similar language for headings 'account management' 'billing information'

2.

Colleagues split out groups by type of water – 'clean water' 'wastewater' (customers see it all as one thing)

3.

Group headings such as 'corporate', 'digital optimization' not customer language and what customers would probably fit into 'About UU' or 'general information'

Account

- Add a name to the bill
- Change to paperless billing
- Find my account number
- I want to set up a direct debit
- Moving home - want to check if I am in your area
- Pay a bill
- View my Account balance
- Ways to pay my bill

Corporate

- Find out about recreation on our land
- Find out about water saving devices
- I want to find out latest news from United Utilities
- Information about reservoir levels
- Provide feedback on your service

Waste Water

- I am experiencing sewerage issues
- Information on sewers and drains
- Report a blocked drain
- Support with flooding



Implications for current website taxonomy





Customer card-sort task overview: four main groups emerged, each with several sub-groups



How does this fit with United Utilities' current menu bar

- ✓ My Account is right
- ✓ Having three headings in menu bar feels like not enough to cover all key customer groupings
- ❖ Help & support feels a bit muddled - mix of customer support, problems and general information
- ❖ Missing 'information' section



The 'My Account' area fits well with customer groupings

Corporate [↗](#) About us [↗](#) Building and developing [↗](#) Business [↗](#)

My Account [^](#) Help & Support [v](#) Emergencies [v](#) Search [🔍](#) [LOG IN / REGISTER](#)

My Account

- Your bill**
 - Ways to pay
 - Is your water bill higher than expected?
 - Our household charges 2021/2022
 - Difficulty paying your bill?
 - Understanding your bill
- Moving home**
 - Existing customer
 - New customer?
 - Moving out of your home
 - Landlords
 - Student moving home?
- All about water meters**
 - Apply for a water meter
 - You can save with a water meter
 - How to find & read meters
 - Water usage calculator
 - Automated Meter Readers
- Manage your account online**
 - [👤 Login](#)
 - [+ Register](#)

❖ Missing a 'managing your details' section

❖ More customer language could be used – Your Bill, Your Home, Your Water Meter

While customers felt there was a clear divide between customer service, problems and educational info – help & support blurs these groups

United Utilities
Water for the North West

Corporate | About us | Building and developing | Business

My Account | Help & Support | Emergencies | Search | LOG IN / REGISTER

Help & Support

- Contact us
 - Other ways to contact us
 - Popular leaflets
 - Frequently asked questions
- Your water supply
 - Your Water
 - Your Pipes
 - Your Reservoirs
- Your wastewater services
 - Stop the Block
 - Monster found in liverpool sewer
 - Our wonderful coastline
 - Sewers and drains explained
 - Down the drain
- Priority Services
 - Help with your water supply
 - Translation services
 - Bogus callers
 - Password scheme
 - Register for Priority Services
- Cold weather advice
 - Burst pipes
 - Frozen pipes
- Save water
 - Water saving tips
 - Save water in the garden
 - Save water, save money
 - Leaky Loos
 - Water saving devices
- Building & Developing
 - Application forms & guidance
 - Maps of our assets
 - New self-lay providers
 - Building over a public sewer
 - Replace your lead pipes

❖ This feels more educational than help & support

'Emergencies' isn't the right language - 'urgent problems' is better and should fit under support section

The screenshot shows the United Utilities website header and a main content area. The header includes the United Utilities logo (Water for the North West), navigation links for Corporate, About us, Building and developing, and Business, and a search bar with a 'LOG IN / REGISTER' button. The 'Emergencies' menu is open, showing a list of links: 'Got a problem?' (with sub-links for 'Got no water?', 'Low pressure?', 'Flooding', 'Burst water pipe?', and 'Need a plumber?'), and 'Report a leak' (with sub-link 'Leak tracking process'). A green callout box is overlaid on the 'Report a leak' link, containing the text: '❖ This feels like it should be in 'problems & issues' as for emergencies customers defer to contact us'.

United Utilities
Water for the North West

Corporate [About us](#) [Building and developing](#) [Business](#)

My Account [Help & Support](#) **Emergencies** [Search](#) [LOG IN / REGISTER](#)

Emergencies

- Got a problem?
 - Got no water?
 - Low pressure?
 - Flooding
 - Burst water pipe?
 - Need a plumber?
- Report a leak
 - Leak tracking process

❖ This feels like it should be in 'problems & issues' as for emergencies customers defer to contact us



Recommendations for testing



Recommendations for a customer-centric taxonomy

Customers showed us there are more than three main groups across the menu bar

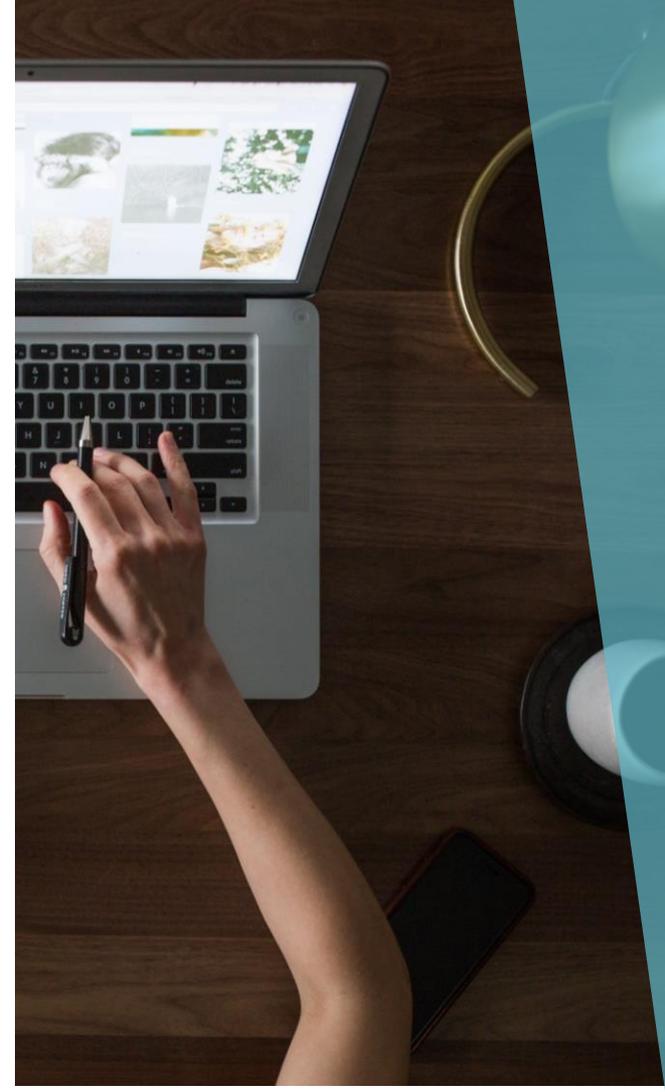
- **Increase menu options to specific customer groups +1 for 'My local area' to trial**

Customers told us contact us/customer support is a key area of the menu bar

- **Make contact us prominent and have customer support as key defined group ('help & support' currently not feeling defined)**

Customers also divided information into 'me', 'my area' and 'general information'

- **Although this can be split within problems/general info we should trial 5th menu option 'My local area'**



Customer taxonomy for testing

We recommend:

Trial 4 key customer groups in menu bar based around - My Account, Customer support, Problems & Issues and General Information

1. My Account

Paying my Bills

Managing my details

Water Meters

Moving Home

New Customers

2. Customer Support

Speak to someone now

Ways to contact

Provide feedback

FAQ's

Latest news on UU

Mobile App

3. Problems/Issues

Current problems & Issues

Less urgent issues

Incidents in my local area

Flooding

4. General Information

General information about water supply

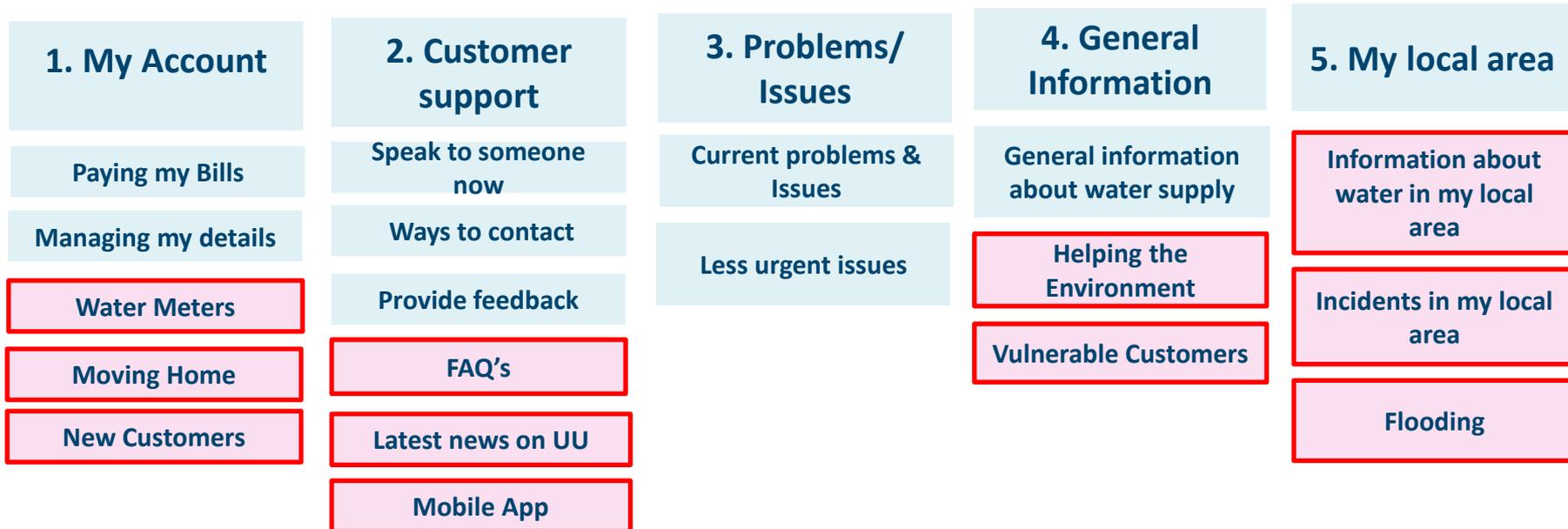
Information about water in my local area

Helping the Environment

Vulnerable Customers

Customer taxonomy for testing

We recommend:
Also testing a 5th group 'my local area'



QUESTIONS?



Our approach in summary: A two stage qual approach, followed by a tree-test survey to build and test customer-centric website taxonomy

1. Digital card-sorting task & online depths



Customers completed an online card-sorting task, followed by a 30-minute depth interview to explain the thought process behind their grouping choices and how it would help them navigate



2. Internal taxonomy review and test sites



Based on findings from the customer research, United Utilities will build in some recommended changes to the taxonomy to test whether these improve navigation for customers

3. Accompanied surfs via Screencast & Tree-test survey



A new set of customers to complete tasks with the customer centric taxonomy in place – we can observe how this impacts navigation and ask respondents to review the journey



300 customers will also complete a tasks using tree testing, showing us where they would go to complete said task, allowing further observation of whether navigation works effectively.

Stage 2&3

A nighttime photograph of the Leeds cityscape. The Cathedral of St. Asaph is the central focus, illuminated with warm lights. The sky is a deep blue with some clouds. The city lights are visible in the background, and the foreground shows the rooftops and streets of the city.

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