



Scheduler Optimization

Improving Start Rate and Completion Rate



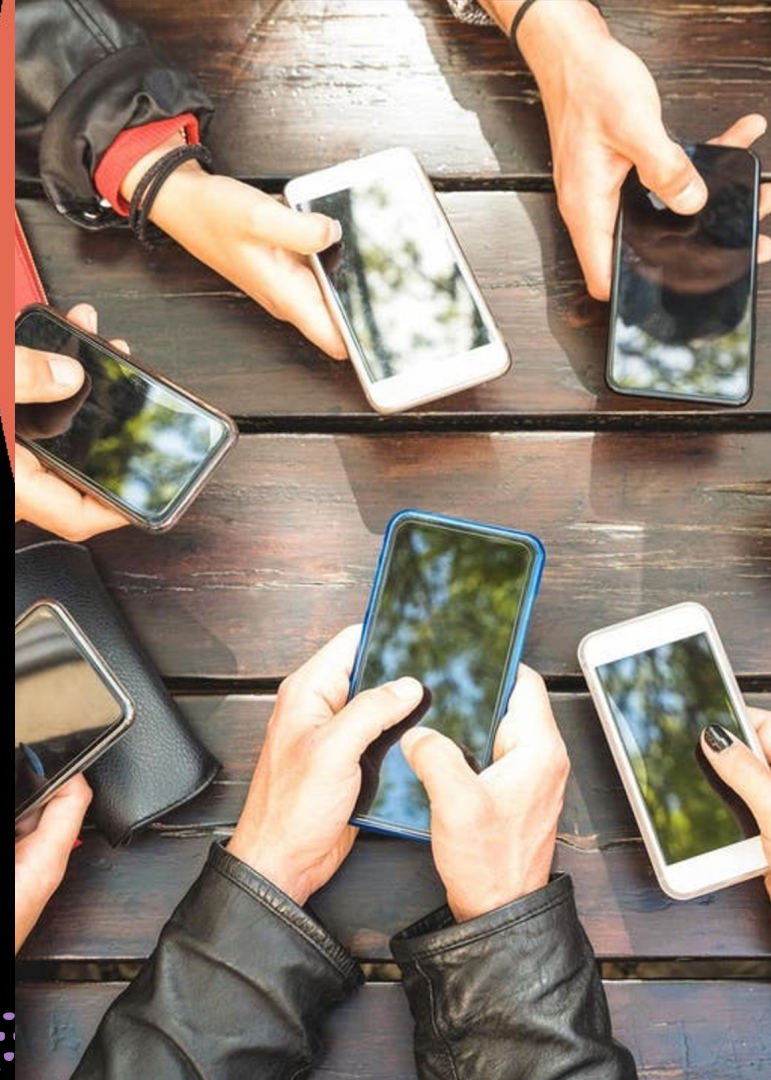


Purpose

- Understand where users are falling out of the scheduler funnel
- Understand biggest areas of opportunity & impact
- Identify UX/UI areas for improvement to increase start & completion rate

Methods

- Heuristic Evaluation
- Competitor Evaluation
- User session analysis using ContentSquare





Completion Rate

- % of scheduler starts that complete scheduler
- 2 step process – doesn't include locator step

12:40

AMERICA'S BEST
CONTACTS & EYEGLASSES

Schedule an Eye Exam

Taylor Station [Change](#)

Step 1 of 2: Exam Details

Exam

Has this patient had an exam at an America's Best store?

☐ Yes ☐ No

What type of exam does this patient need?

CONTINUE

AA americasbest.com

3:36

AMERICA'S BEST
CONTACTS & EYEGLASSES

Schedule an Eye Exam

Taylor Station [Change](#)

Exam [Edit](#)

Date & Time
12/14/2021 10:20 am
Exam Type
Eyeglasses Only

Step 2 of 2: Patient Information

BOOK NOW

AA americasbest.com

11:48

AMERICA'S BEST
CONTACTS & EYEGLASSES

You've successfully scheduled an exam!

Your eye exam has been scheduled. An email confirmation has been sent to your email address.

Need another exam for a family member?

SCHEDULE AN EYE EXAM

Exam

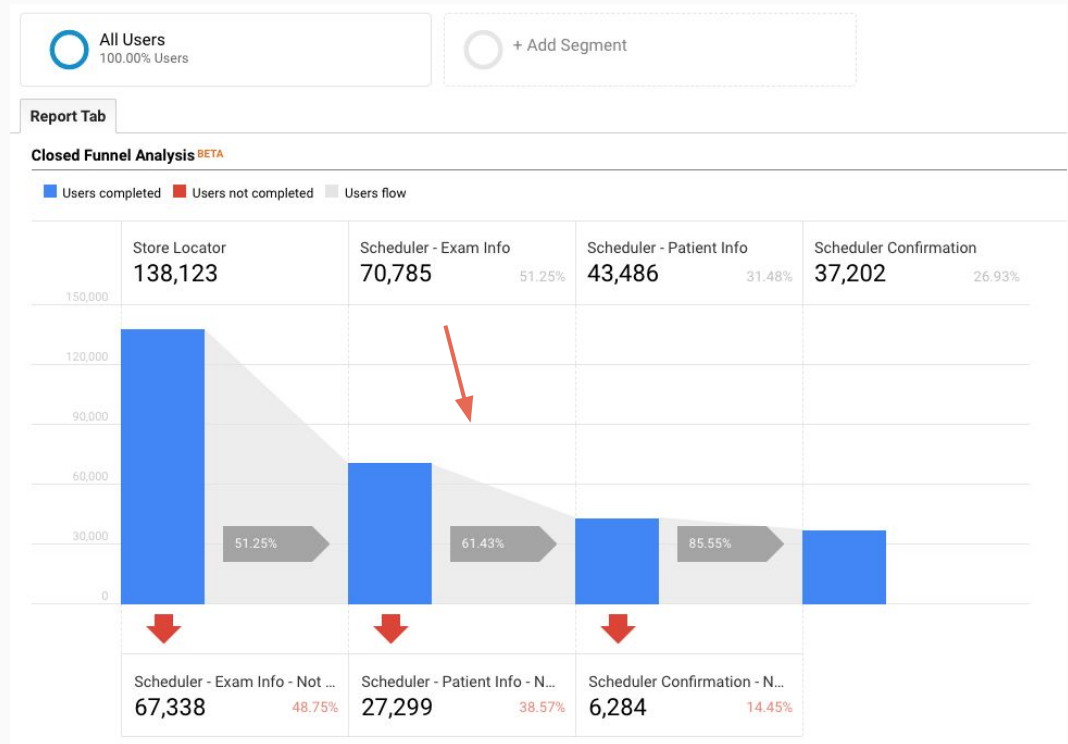
Date & Time:
January 21, 2022 at 11:30 AM

Exam Type:
Eyeglasses Only

americasbest.com

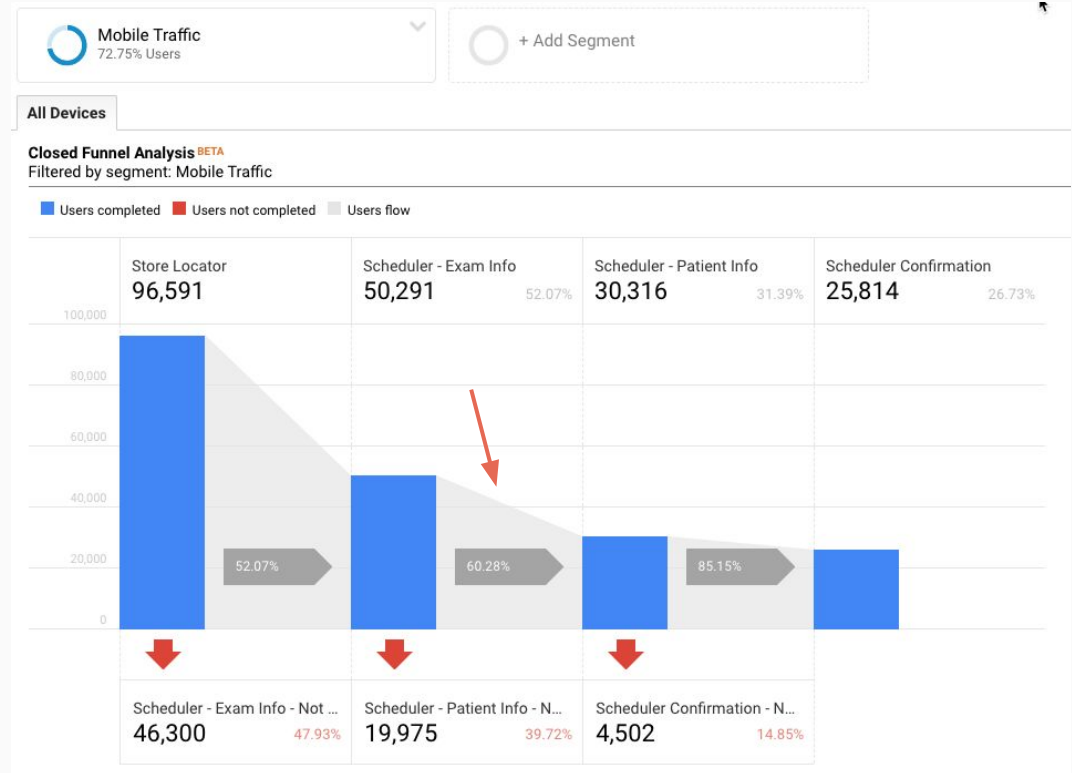
Scheduler Abandonment – All Sessions

- Completion rate of 53%
- 39% of sessions don't get past Exam Info (step 1)



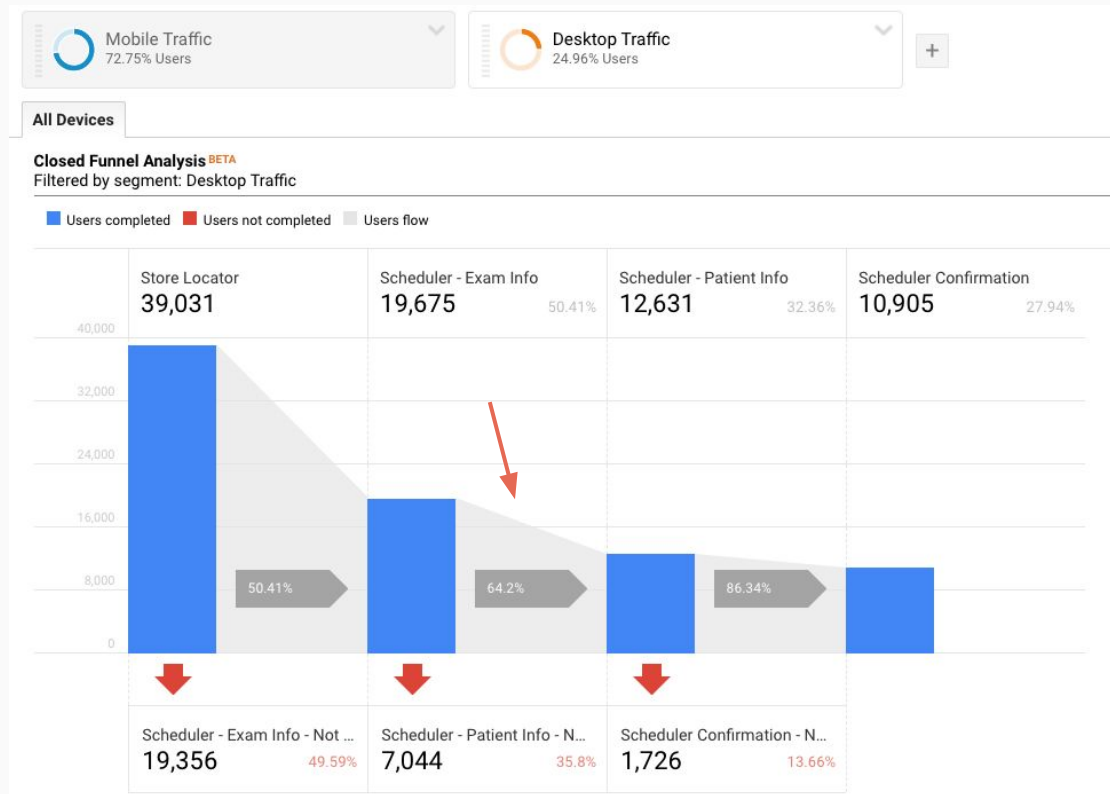
Scheduler Abandonment – Mobile

- Completion rate of 51%
- 40% of sessions don't get past Exam Info (step 1)



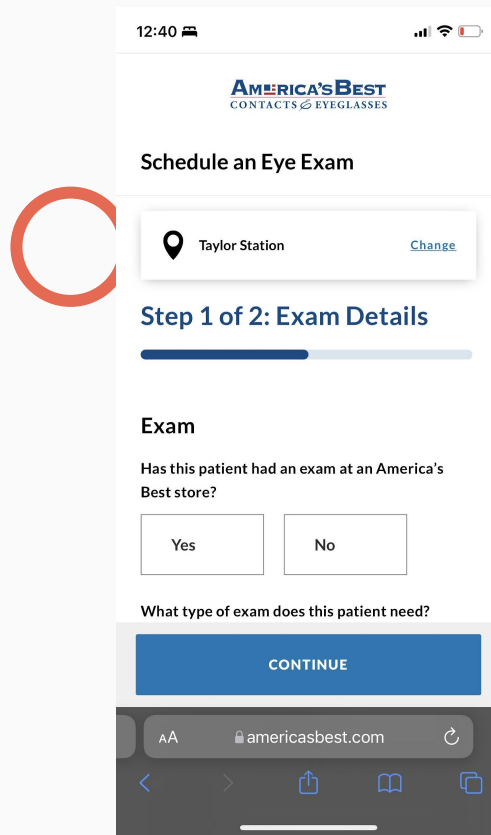
Scheduler Abandonment – Desktop

- Completion rate of 55%
- 36% of sessions don't get past Exam Info (step 1)



Competitor Review

1. Warby
2. LensCrafters
3. Cohen's
4. MyEyeDr.
5. Apple



12:40

AMERICA'S BEST
CONTACTS & EYEGLASSES

Schedule an Eye Exam

Taylor Station [Change](#)

Step 1 of 2: Exam Details

Exam

Has this patient had an exam at an America's Best store?

Yes No

What type of exam does this patient need?

CONTINUE

AA americasbest.com

8:27
Messages
AA myvisiondirectory.com

← ×

Select exam type

Comprehensive eye exam
for glasses

\$95 due at visit

This exam includes a refraction to measure eyesight and eyewear needs for a glasses prescription, a complete eye health check, and a dilation.

Select and continue

Comprehensive eye exam
for glasses and contacts

< > 📎 📖 📄

8:32
AA myvisiondirectory.com

← ×

Select an exam time

Close calendar

December 2021

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

< > 📎 📖 📄

8:32
AA myvisiondirectory.com

← ×

Select an exam time

View full calendar

Thu	Fri	Sat	Sun	Mon
12/02	12/03	12/04	12/05	12/06

11:40 a.m.

12:20 p.m.

1:00 p.m.

2:20 p.m.

< > 📎 📖 📄

8:33
AA myvisiondirectory.com

← ×

Last step! Enter the patient's information.

Patients under 18 must be accompanied by a parent or legal guardian.

Patient's first name

Patient's last name

Patient's email address

Phone number
(e.g. 9171234567)

< > 📎 📖 📄

8:34
myvisiondirectory.com

See you December 3,
2021 at 11:40 a.m.!

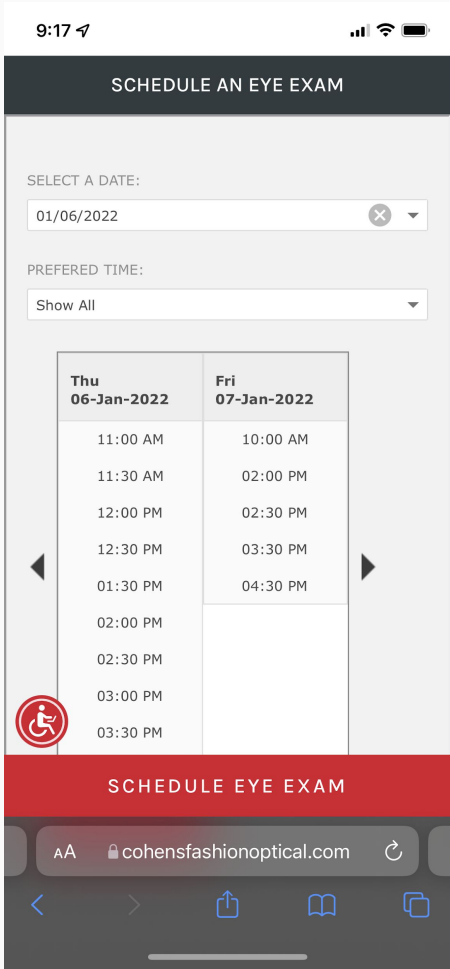
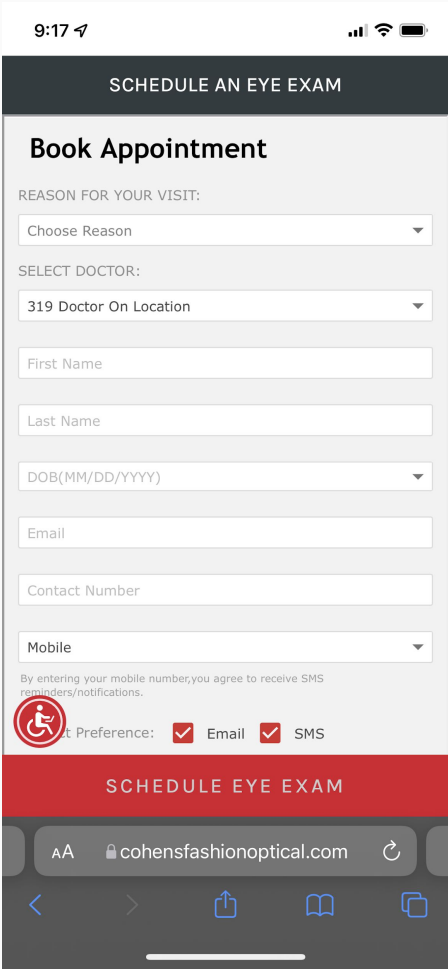
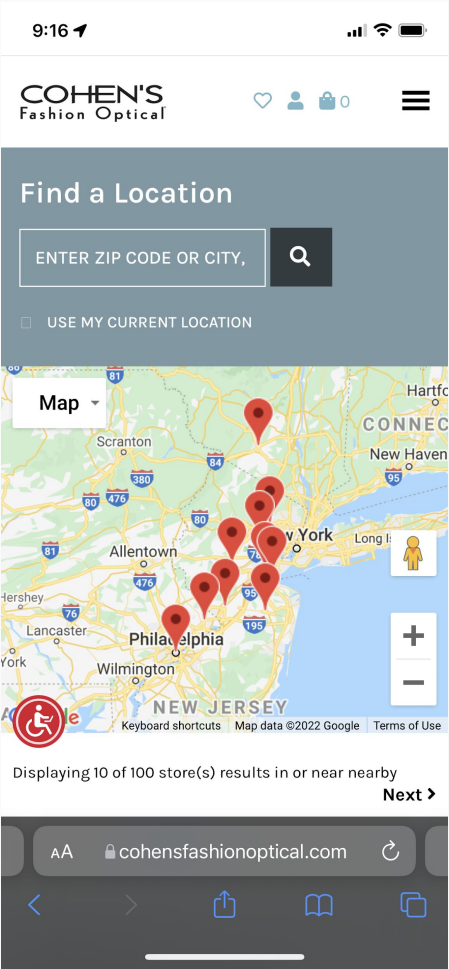
Your appointment is confirmed at 4049 The Strand E (Inside Warby Parker Easton Town Center store).
For your health, we'll be minimizing contact at your appointment, so please fill out our digital intake form before you arrive.

Begin intake form

Appointment details

Comprehensive eye exam for glasses
December 3, 2021
11:40 a.m.

Nick Perichak, OD
4049 The Strand E
(Inside Warby Parker Easton Town Center store)
Columbus, OH 43219
(614) 574-4640



LensCrafters

9:18

SCHEDULE AN EYE EXAM FOR YOU AND YOUR FAMILY

✓1Store info2Schedule exams3Contact info

← BACK

What's the purpose of your visit ?

Eye exam

Eye exam with contact lenses

Have you had an eye exam with us at this location ?

YesNo

Book exam overview

lenscrafters.com

9:18

sun mon tue wed thu fri sat

1

2345678

9101112131415

16171819202122

23242526272829

3031

Select an available appointment

Get to know your doctors

MORNING8:00 am - 12:00 pmAFTERNOON12:00 pm - 4:00 pmEVENING4:00 pm - 8:00 pm

No appointments available for the date and time selected.

Next availability for morning appointments: 01/12/2022

lenscrafters.com

9:19

16171819202122

23242526272829

3031

Select an available appointment

Get to know your doctors

MORNING8:00 am - 12:00 pmAFTERNOON12:00 pm - 4:00 pmEVENING4:00 pm - 8:00 pm

10:00 AMStephanie Haas

10:20 AMStephanie Haas

10:40 AMStephanie Haas

11:20 AMStephanie Haas

Book exam overview

lenscrafters.com

9:19

SCHEDULE AN EYE EXAM FOR YOU AND YOUR FAMILY

✓1Store info2Schedule exams3Contact info

← BACK

Who is this exam for ?

First name

Last name

Date of birth (MM/DD/YYYY)

Do you plan on using insurance for this patient? (Optional)

YesNo

CONTINUE

lenscrafters.com

9:20

LensCrafters

Sign in

SCHEDULE AN EYE EXAM FOR YOU AND YOUR FAMILY

✓1Store info2Schedule exams3Contact info

← BACK

Provide your booking contact information

First name

Last name

Email address

Phone number

MobileHome

Send me reminders via SMS (we will only send you info about your eye exam)

Sign me up to receive emails & offers from LensCrafters


lenscrafters.com

1:19📶🔋


myeyedr.

EYE HEALTH EXAM


TELL US ABOUT YOURSELF!
We'd like to know what you **currently use**. Your answers will help us prepare for your visit.



I ONLY WEAR GLASSES



I ONLY WEAR CONTACTS



I WEAR GLASSES AND CONTACTS

secure.myeyedr.com

1:19📶🔋

myeyedr.

☒ EYE HEALTH EXAM [EDIT](#)

PATIENT DETAILS

HAVE YOU PREVIOUSLY VISITED A MYEYEDR. LOCATION BEFORE?

YES

NO

NOT SURE

SCHEDULE WITH A DOCTOR

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1:19📶🔋

myeyedr.

☒ EYE HEALTH EXAM [EDIT](#)

☒ PATIENT DETAILS [EDIT](#)


SCHEDULE WITH A DOCTOR

 JAN 18TH, TUE.

▼

SELECTED OFFICE

MyEyeDr. in Ashville
3384 State Route 752
Ashville, OH 43103-9685



Dr. Julie Heidish

No Availability Today

Available Tomorrow

8:20 AM

10:00 AM

1:20 PM


[VIEW NEXT AVAILABLE](#)

secure.myeyedr.com

1:20📶🔋

myeyedr.

← Optometrists in MyEyeDr. in Ashville



Dr. Julie Heidish
3384 State Route 752
Ashville, OH 43103-9685

<

JAN. 18 - JAN. 22

>

Choose a time from Dr. Heidish's schedule.

TUESDAY, JAN. 18TH

NO AVAILABLE TIMES

WEDNESDAY, JAN. 19TH

8:20 AM

10:00 AM

1:20 PM

THURSDAY, JAN. 20TH

NO AVAILABLE TIMES

FRIDAY, JAN. 21ST

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1:20📶🔋

myeyedr.

PATIENT DETAILS

First Name

Last Name

Phone Number (mobile preferred)

() - -

Date of Birth

mm/dd/yyyy

Email

☐

I'd like to receive text reminders about my appointment and when my glasses or contacts are ready.

Message frequency varies. Message and data rates may apply. At any time you can text HELP for help or text STOP to stop notifications. [SMS Terms of Service](#)

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Usability Heuristics

1. Visibility of System Status
2. Match between System and the Real World
3. User Control and Freedom
4. Consistency and Standards
5. Error Prevention
6. Recognition Rather Than Recall
7. Flexibility and Efficiency of Use
8. Aesthetic and Minimalist Design
9. Recognize, Diagnose, and Recover from Errors
10. Help and Documentation



More info in appendix or here: <https://www.nngroup.com/articles/ten-usability-heuristics/>

Usability Heuristics Summary

- We do a good job of showing the user the system status (#1) and allowing the user to go back and edit (#3)
- We need to improve user control (#3), error prevention (#5), minimalist design (#8) and efficiency (#7)



Global - Docking Continue Button

- The continue button is enabled even if the user has not completed the form
- The Continue button is also docked at the bottom of the viewport on mobile which takes up valuable screen space
- *This leads to unnecessary errors (#5)*
- **Recommendation:**
 - Test “undocking” the Continue button
 - Move the legal copy below the CTA button

12:40

AMERICA'S BEST
CONTACTS & EYEGLASSES

Schedule an Eye Exam

Taylor Station [Change](#)

Step 1 of 2: Exam Details

Exam

Has this patient had an exam at an America's Best store?

Yes No

What type of exam does this patient need?

CONTINUE

3:34

Phone Type

Mobile Home

☐ I certify that I am 18 years or older.*

*You must be 18 years or older to schedule an eye exam for yourself, your spouse, or any under age child or dependent.

† We use America's Best Notifications, which consists of text and/or phone notifications to confirm appointments, reschedule appointments, including making earlier appointment times available, and inform you of order status. Message frequency may vary. Text message and data rates may apply. You can reply STOP to cancel text messaging for each program. Call [800-999-4758](tel:800-999-4758) for support.

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In certain states, eye exams provided by independent medical

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Step 1: Exam Info

- Slot selection is the biggest area for optimization in the scheduler
 - 40% of sessions abandon
 - Step 1 is *long* and the entire slot selection is below the fold (#7) – combined with the enabled Continue button, it is easy to think that you can hit continue – **causing errors** (#5)
- Recommendation
 - Make slot selection the next step or at least jump page down (scroll) when user completes the special needs question.

12:40

AMERICA'S BEST
CONTACTS & EYEGLASSES

Schedule an Eye Exam

 Taylor Station [Change](#)

Step 1 of 2: Exam Details

Exam

Has this patient had an exam at an America's Best store?

Yes No

What type of exam does this patient need?

CONTINUE

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4:57

Choose your Exam Date and Time

Month View

Fri	Sat	Sun
12/10	12/11	Not available

Morning 9:00 am – 11:50 am	Afternoon 12:00 pm – 3:50 pm	Late Afternoon 4:00 pm – 6:00 pm
9:40 am	9:50 am	10:10 am
10:20 am	11:00 am	11:20 am
11:30 am		

Later Times ▶

CONTINUE

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Step 1: Exam Info

- Recommendations
- Another test would be to split the slot selection into another step
 - It adds a step, but makes it clearer what we are asking the user to do on the page
- Additionally, when there are no slots for a day part, we just give an "All Booked" message
 - Check to see if there are any stores in proximity with slots available at that date/time

4:57

Choose your Exam Date and Time

Month View

Fri	Sat	Sun
12/10	12/11	Not available

Morning 9:00 am – 11:50 am	Afternoon 12:00 pm – 3:50 pm	Late Afternoon 4:00 pm – 6:00 pm
9:40 am	9:50 am	10:10 am
10:20 am	11:00 am	11:20 am
11:30 am		

Later Times ▶

CONTINUE

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5:18

Fri	Sat	Sun
12/10	Not available	Not available

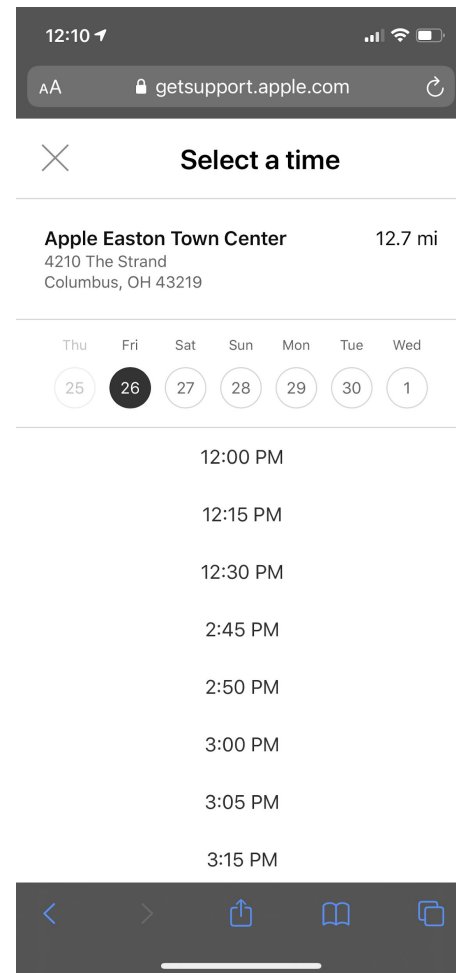
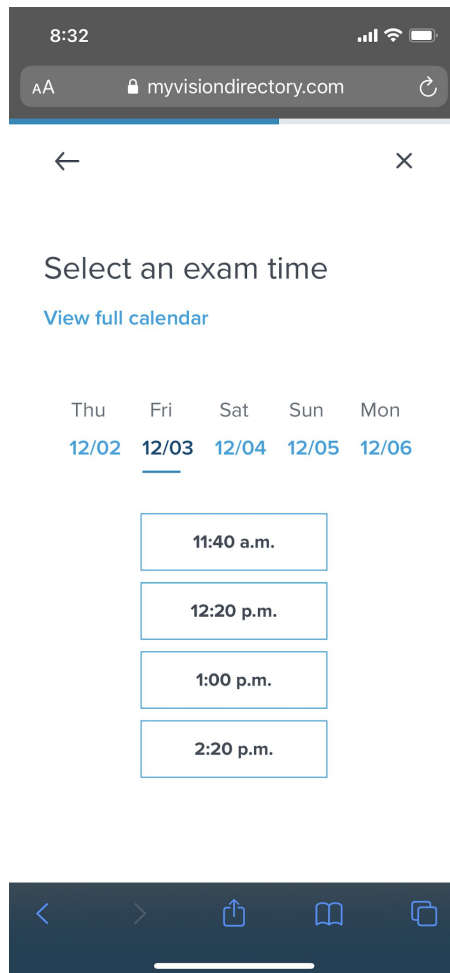
Morning 9:00 am – 11:50 am	Afternoon 12:00 pm – 3:50 pm	Late Afternoon 4:00 pm – 6:00 pm
◀ Earlier Times		
We're all booked! Please find another time or day.		
Exam: Friday, December 10th, 2021		
*You must be 18 years or older to schedule an eye exam for yourself, your spouse, or any under age child or dependent.		
+ We use America's Best Notifications, which consists of text		

CONTINUE

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Step 1: Exam Info

- Recommendations
- We should also consider a simpler slot presentation without the parts of the day (#8)
- Users on ContentSquare were frustrated by the day part selection, especially when changing days (#4)
 - Test sticky day parts prior to removing
 - LensCrafters does this
- Warby and Apple use a similar layout with days horizontal and slots vertical



Step 2: Patient Info

- The form is below the fold on load with the user only able to see the summary (#6)
 - **Recommendation:** Test minimizing these content blocks with the ability to open for more detail – this will bring the main form into the viewport

3:36

AMERICA'S BEST
CONTACTS & EYEGLASSES

Schedule an Eye Exam

Taylor Station [Change](#)

Exam [Edit](#)

Date & Time
12/14/2021 10:20 am

Exam Type
Eyeglasses Only

Step 2 of 2: Patient Information

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- The “Sign In Now” CTA is very easy to miss (#7)
- For users that have an account, we will be able to prefill info with a login
- **Recommendation:** Test adding prominence to the Sign In link
 - *Not many users login so this is low impact*

3:37

Step 2 of 2: Patient Information

Exam

Already have an account? [Sign In Now](#)

First Name

This field is required

Last Name

This field is required

Date of Birth

Month Day Year

BOOK NOW

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Step 2: Patient Info

- We have confirmed that we do not need to collect the “Phone Type” (#8)
- All users should be added to the database as Mobile by default because we message them either way.
- **Recommendation:** Removing this question should increase completion slightly

3:34

Phone Type

Mobile Home

☐ I certify that I am 18 years or older.*

*You must be 18 years or older to schedule an eye exam for yourself, your spouse, or any under age child or dependent.

† We use America's Best Notifications, which consists of text and/or phone notifications to confirm appointments, reschedule appointments, including making earlier appointment times available, and inform you of order status. Message frequency may vary. Text message and data rates may apply. You can reply STOP to cancel text messaging for each program. Call 800-999-4758 for support.

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- The DOB validation and inputs are sub-optimal (#5)
- **Recommendation:** We should conduct a test to make these more intuitive

3:37

Date of Birth

Month Day Year

01 31 1981

Contact Information

Email

Phone

Phone Type

Mobile Home

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Confirmation

- This image is incorrectly proportioned on mobile
- The green “the appointment was successfully booked” copy is redundant and can be removed
- These changes won’t improve completion rate, but will bring the relevant information higher up the page
- **Recommendation:** study the user behavior from this page & determine what *we want* them to do next

3:38

- Copy of your insurance card if you have vision benefits



Need to change your appointment?

Please make any schedule changes 24 hours in advance of your scheduled appointment.

RESCHEDULE

CANCEL

To schedule a follow-up appointment or if you have an eye-related issue (e.g. red eye, eye injury, etc.) please call your America's Best store at: [\(614\) 986-1234](tel:614.986.1234).

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3:38

Eyeglasses Only

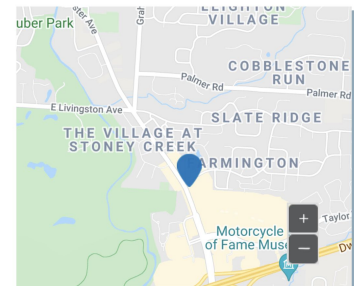
Patient Information:

Brian Frank
January 31, 1981

Contact Information:

brianfrank22@me.com
Mobile: 614-204-5382

The appointment was successfully booked



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Low Hanging Fruit

- We have confirmed that we do not need to collect the “Phone Type”
- All users should be added to the database as Mobile by default because we message them either way.
- Removing this question should increase completion
- We will also permanently remove the SMS opt in checkbox

3:34

Phone Type

Mobile Home

☐ I certify that I am 18 years or older.*

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