Adoption Metrics

6/6/21

Overview

UX has over 600 unique live pages on the .com site. That number doesn't include the 8000+ redirect URLs nor the over 30,000 instances of 1x pattern/code usage in our online channel. And it takes the commitment of all 300+ DE UXDs, Devs, UXAs, copy strategists and team managers to maintain the 1x combinations that keep the design/development of the channel on Brand, in code compliance, and on budget.

To measure successes, 1x has created a process for collecting compliance data. Now that we have the means to extract that data, we need an info delivery model our product teams can understand and react to.

How do we make 1x data interesting, relevant and immediate to each product team?

Challenges:

1. *"It's just one more report I have to read and react to…"*
   Each month, we produce hundreds of documents, emails, and reports that DE teams need to digest. Our delivery solution needs to be a format that will interest our teams in a way that feels modern, actionable, and builds a sense of "pride of ownership" – even competition – among the teams.
2. *"I never see other groups' reports, how do I even know we're among the worst offenders?"*
   Even when they see the available data, teams fail to acknowledge and make corrections based on it. Often the data is extensive, unfiltered or presented in a format that lacks a sense of gravity to the team. We need a format that a team will see, learn from and react to on a daily basis.
3. *"What's in it for me / my team?"*
   The solution needs to instill a *desire* for improvement. Currently, the UX team maintaining **the best** 1x adoption is scoring <80% compliance among its overall pattern uses. At page level, this translates to < 30% of their communications being at an acceptable range of compliance. We need to make these numbers mean something to product teams and the people who can directly correct these numbers – if only as an incremental, positive-history trend.
4. *"Who wants responsibility of crunching and sharing 'yet more' data on a regular basis?"*
   We need to automate as much of the reporting model as possible using the up-to-date data mining and data manipulation process that are already available to us.

Goals and Objectives

- Real-Time Dashboard Allows immediate access to 1x adoption data
  - Data automatically extracted from 1x adoption metrics system
  - Available via web dashboard designed with assistance from DE Analytics team
  - Self-crunchable by product team mgr using excel spreadsheet
- Visual "Scorecard" for each UX product team
  - Based on Restaurant Scores, the 1x Scorecard would prominently for all to see
  - Creates a visual sense of awareness and friendly competition

- o Color, graphics and charts illustrate the team's 1x progress toward perfect score (100%)
- o Updated regularly to illustrate improvements/setbacks on a team's compliance progress

Benefits

- Improved 1x Compliance
- Better awareness of 1x guidelines and standards
- Better awareness among various group usage of 1x
- Cost benefits of re-usable code

Stakeholders

Core Team	DE Leadership Stakeholders	Stakeholders
Myles Singleton – Developer James Gray – UXA,1x analytics Chevon Little – DE Analytics	Vijay Yarraguntla – DE Executive - Sponsor Todd Steineman –- Sponsor Jay Matthews – Sponsor Ticia Reed - Sponsor Josh Goodwin – Sr CD Thomas Schafer – 1x Sponsor ET Managers Matt Cuttell Sarah	DE Departmental Devs, UXAs, Designers, Copy Strategists

Timeframe/ Approach

- Determine Areas using 1x
  - Developers using 1x
  - Part of a product team
  - Areas of interest in piloting AMD
  - Step 1: DEVELOPS -- Possible pilot teams? (how many in pilot)
    - o West
    - o My Accounts
    - o Internal Apps? Yes!
      1. "1x owned internal apps"
      2. SFX to 1x migration
      3. Question: what mechs do we have in place to assure that pilot teams are self-supporting?
         a. Documentation (Myles doing actual set up)
         b. Getting started instructions
         c. Live support
         d. Team Liaison
         e. Communications
      4. 1 or 2 used from standard platform
         a. Agent microsites
         b. Agent locator application
      5. Tech platform (applications housed on other servers "cloud")
         a. My account
         b. Insurance pages on sf.com
         c. Env1, 2, 7, .com,. org. – perf or prep
    - o Need to demonstrate "Value" to:

1. Tech improvements
2. Fail rates are going down
3. Knowledge Value

- Step 2: "Opt In" to a "global" dashboard.

- Communications ?
- Assign Prod Team liaison
  - Help that team get "set up" to use AMD
- Communications ?

- Phase 1: Complete Adoption Metrics Automation
- Phase 2: Work with Analytics on Dashboard Design
- Phase 3: Design Scorecard and Data Mining Process
- Phase 4: Scorecard Roll Out
- Phase 5: Scorecard Monthly Reporting and "team" presentations (UXA Roundtable, 1xDev Retrospective, UXD group meeting, etc)

Next Steps/Action Items

Completion of Application for Adoption Metrics

Review with Leadership (names)

Designing Dashboard

In Scope (flesh out
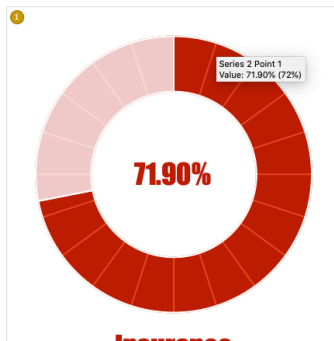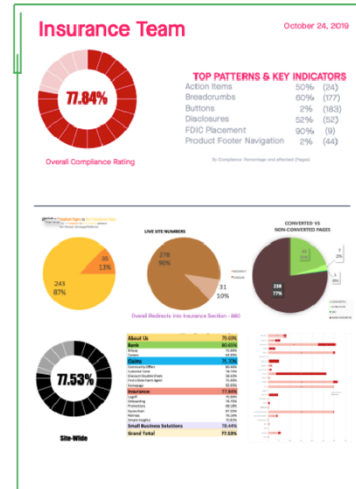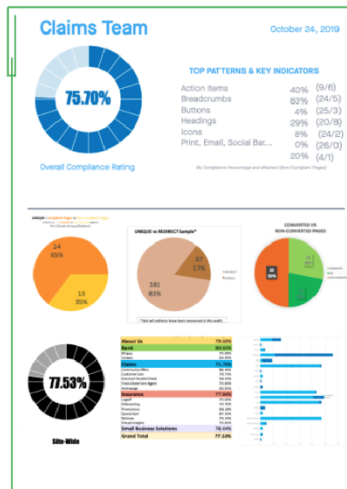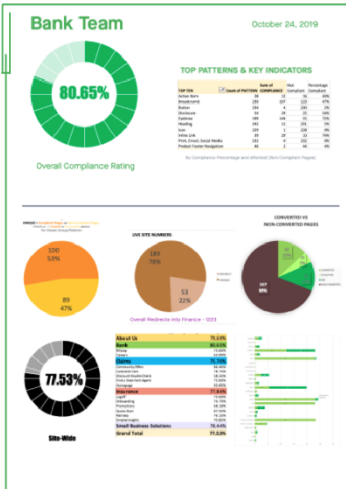
Out of Scope (Flash out

Outcomes

1. Monthly 1x Scorecard reporting and acceptance
2. Monthly 1x issues log updates
3. Ongoing Pattern Usage Reviews and alignment

Risk/Concerns

- Lack of follow through addressing found issues
- LOE may need to be addressed and weighted into the reporting model
- Doesn't currently allow for A/B testing considerations (but these could be filtered out)
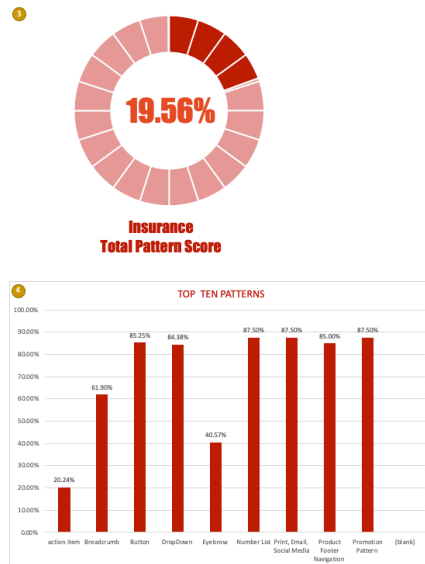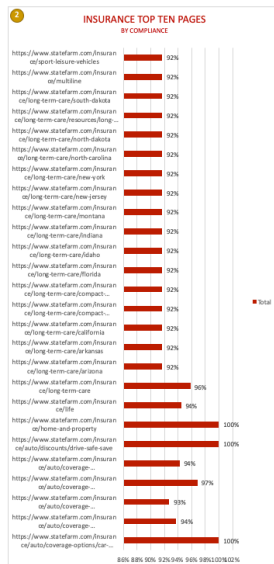
& StateFarm®

Bank Team — October 24, 2019 — **80.65%** Overall Compliance Rating

Claims Team — October 24, 2019 — **75.70%** Overall Compliance Rating

Insurance Team — October 24, 2019 — **77.84%** Overall Compliance Rating

71.90%
Insurance
Total Page Score

Series 2 Point 1
Value: 71.90% (72%)

INSURANCE TOP TEN PAGES
BY COMPLIANCE

19.56%
Insurance
Total Pattern Score

TOP TEN PATTERNS

CONVERTED?
CONVERTED / ctd / e / Evolution / L / L&S / n / na-redirect / NON-CONVERTED / (blank)

GROUP
About Us / bank / Careers / Community Offers / Customer Care / Home Page / Insurance

GROUP
Careers / Claims / Community Offers / Customer Care / Home Page

GROUP
Community Offers / Customer Care / Discount Double... / Find a State Farm... / Homepage

Confirm your GROUP filter for each chart is set to "Insurance" only.

Total Page Score reflects the percentage of page compliance throughout the Insurance section(s) of the Web site.

This number is achieved by averaging the page-level scores from URLs belonging to the "Insurance" Group as listed in Column T of the master data list (DESKTOP_ALL_MASTER).

Total Pattern Score reflects the percentage of pattern compliance throughout the Insurance section(s) of the Web site.

This number is achieved by averaging by pattern totals within the "Insurance" Group as listed in Column S of the master data (DESKTOP_ALL_MASTER).

Top Pages - These are the Insurance pages that have achieved the highest marks for compliance.

Bottom Patterns - These are the patterns that (if corrected) will afford the group the most lift in overall Page score.

68.89% About Us
72.93% bank
72.14% Customer Care
71.00% Claims
80.44% Insurance
77.17% Small Business Solutions