NetX 360 mobile nav - UX review

Yelena Dobric Nov. 16, 2017

Table of contents

Objective 3

Current state 4-14

- NetX360 current scrolling 5
- MOD hamburger menu mockups 6
- MOD hamburger menu - open questions 7
- Amazon 8
- New York Times 9
- Icons' role in hamburger menus 10
- MOD definition of "the mobile space" 11
- MOD hamburger references 12
- "Current state" section summary 13

Device holding stats 14-19

- Phone holding statistics 15
- Phone content placement best practices 16
- Tablet interaction vs. reading areas 17
- Section summary 18

Social media influence 20-22

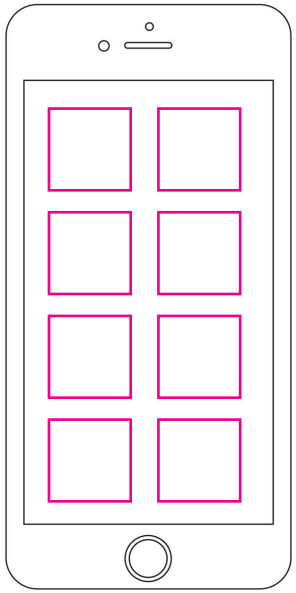
- 35-50 audience 21
- Under 35 audience 22

Competitive analysis 23-44

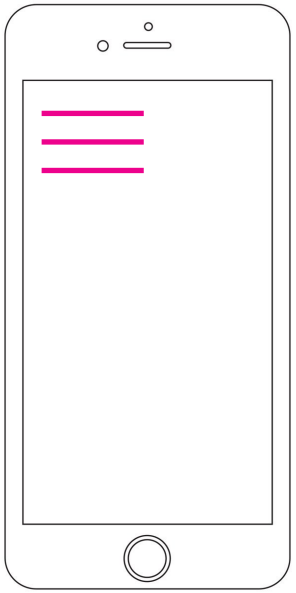
- MOD competitive analysis 24
- Pershing competitive analysis 25-41
- Pershing competitive analysis summary (Phone) 42
- Pershing competitive analysis summary (Tablet) 43
- NetX 360 feature analysis / Section summary 44

Evaluation summary 45

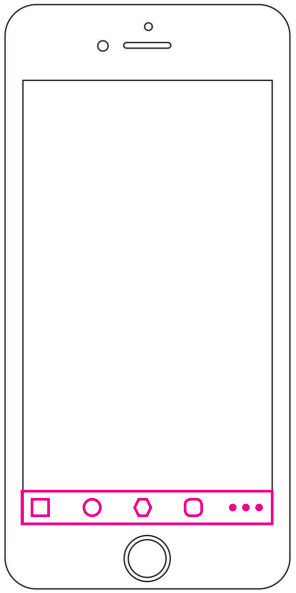
Objective **evaluate the 3 different mobile nav approaches**



Tiles
Current state of the NetX360 native mobile app.



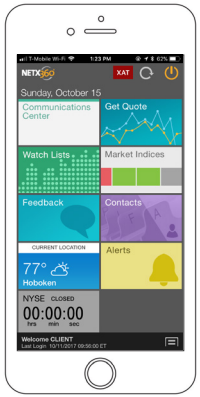
Hamburger
Direction proposed by Markit on Demand (MOD).

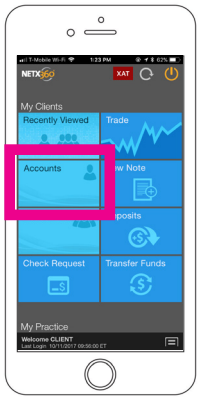


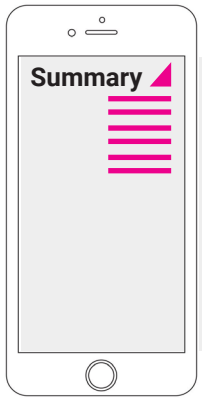
Tray
Predominant mobile navigation among our competitors' mobile apps.

Current state

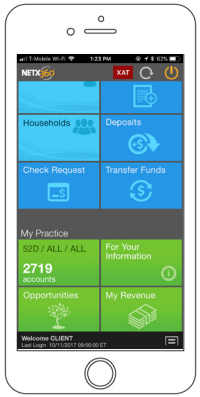
Current state **horizontal and vertical scrolling**





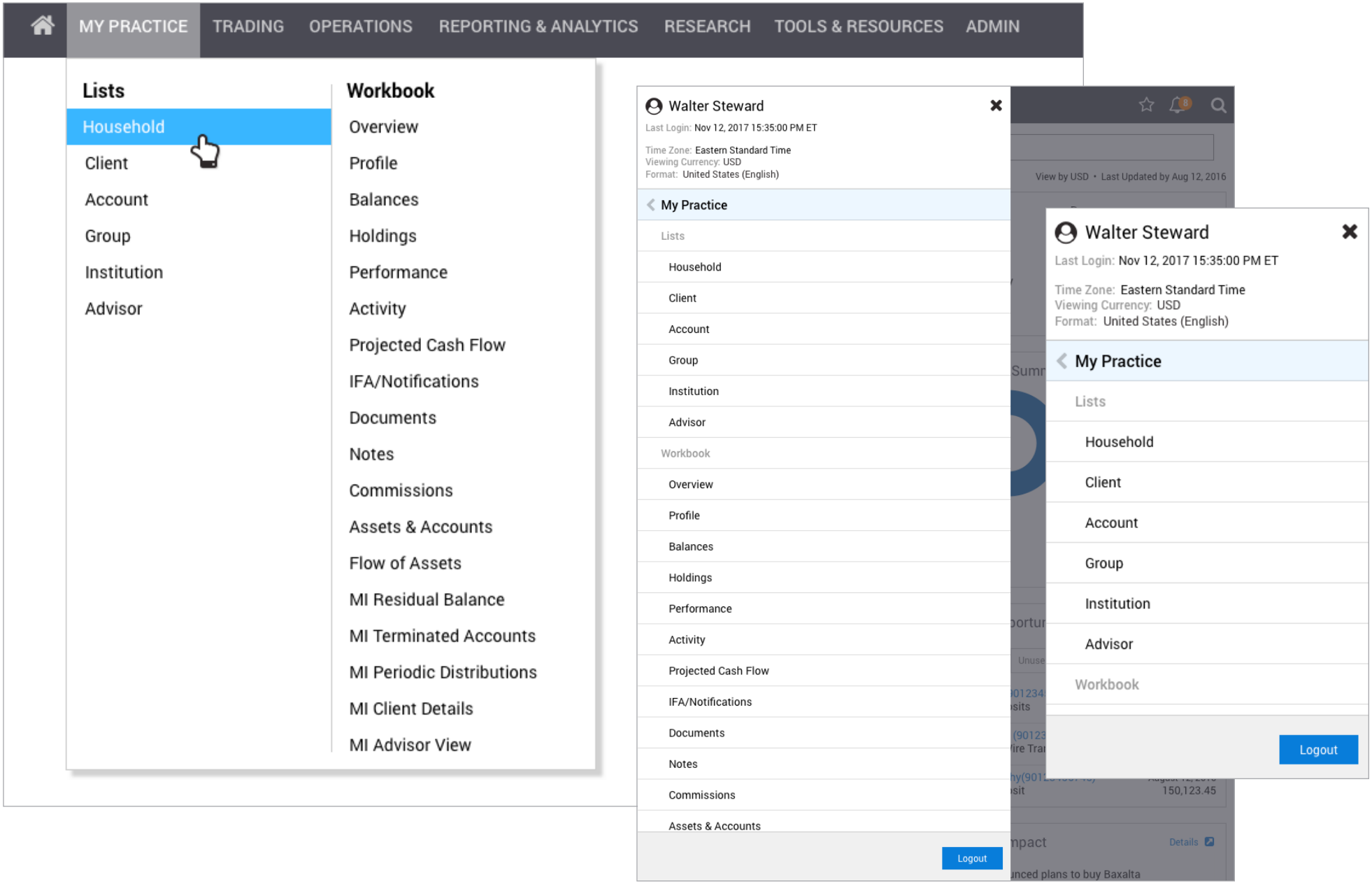


Balances | Holdings | Projected Task | Activity | Orders | Transaction Status | Documents | Notes | Work Status



In the current mobile app, there is both horizontal and vertyical scrolling (swipping), and an in-page hamburger-type dropdown, to get user to another section quickly.

MOD’s hamburger menu recommendation



MOD's hamburger menu review

1. Are we planning reduction of content, going from desktop to mobile?

2. As is, it's a bit overwhelming.

3. Having several levels of content in the hamburger is not uncommon. However, it is not an ideal UX because:
   a) Does not engage the user
   b) It appears laborious for the user

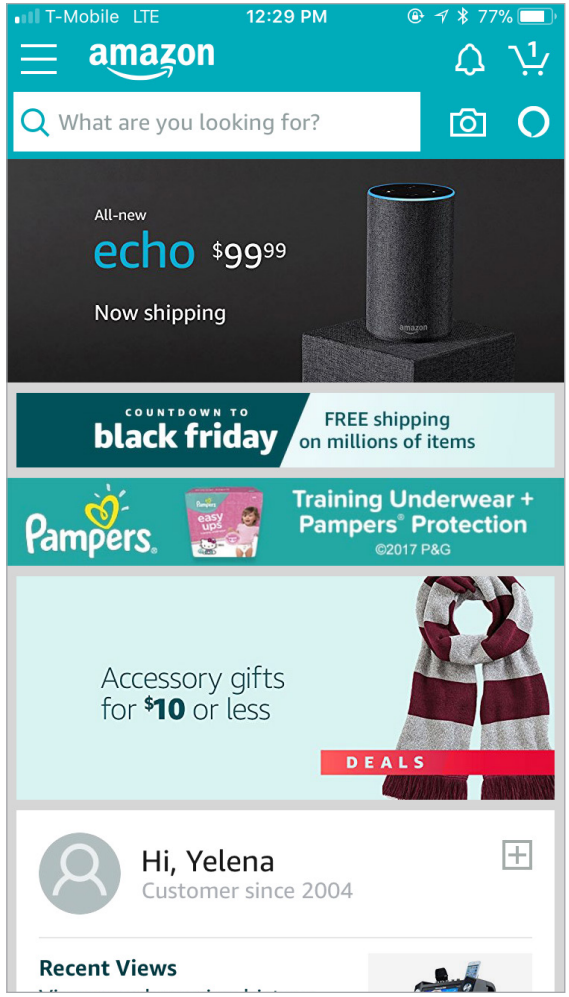
4. With massive content, hamburger navigation is usually breaken up with icons:
   a) Icons provide ample tap targets
   b) Icons are processed by a human brain 10 times faster than words
   c) Samples on next page **(see The New York Times screen recording)**

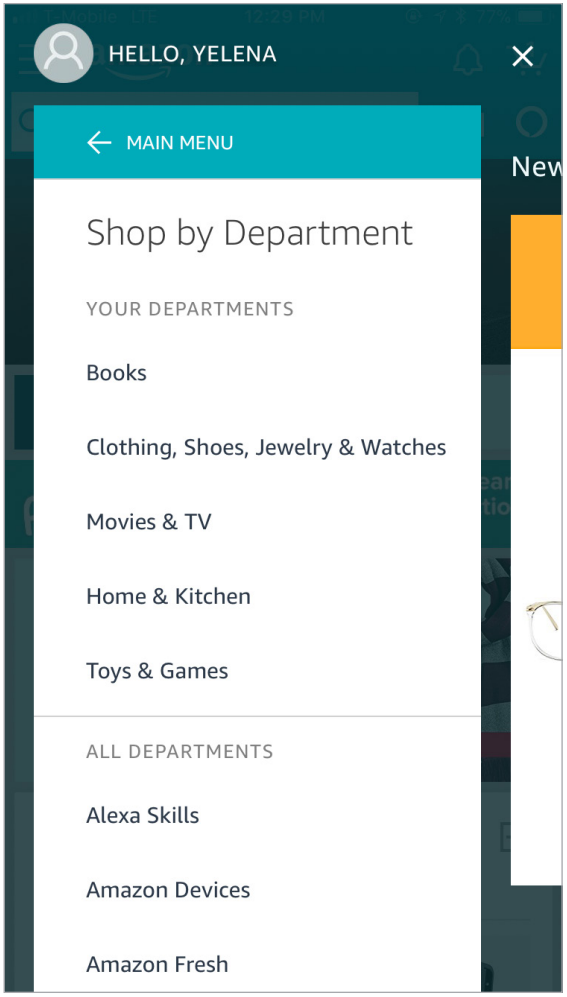
5. Is there wireframe that contains complete taxonomy for desktop, tablet and mobile?

6. Is there a prototype that contains complete taxonomy, so we can test and see complete interaction, and not just a sample of it?

7. Hamburger menu in transactional financial applications is used if the benefits outweight the challenges

Amazon hamburger strategy = **discovery = conversion**

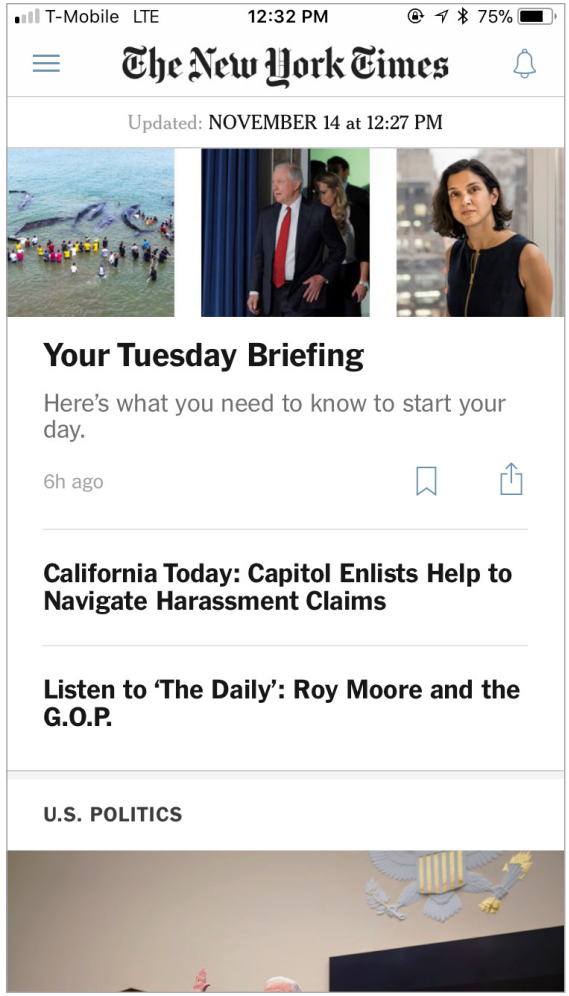


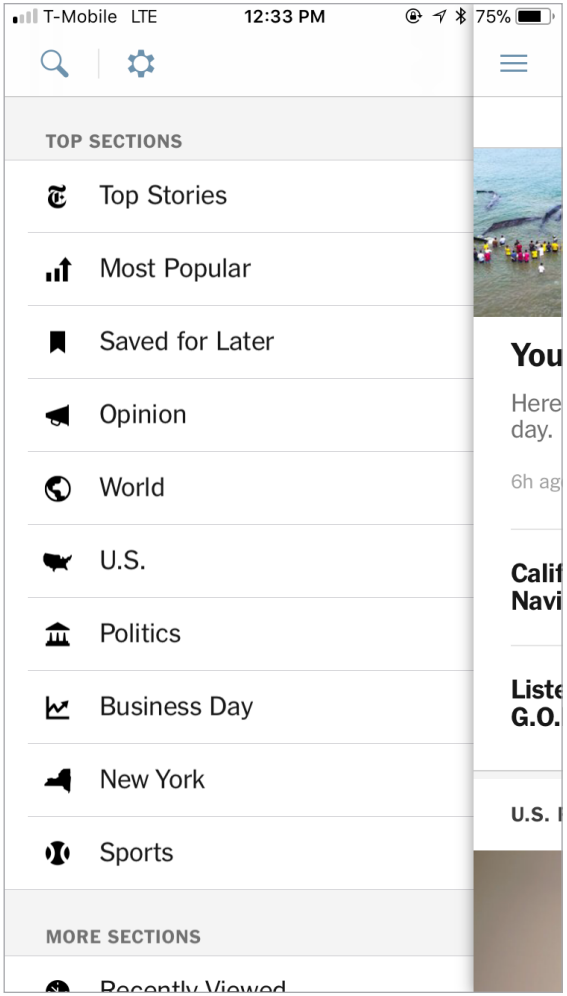


Hamburger is used:

1. When user scrolls vertically, so need maximum top-bottom space
2. On content rich sites
3. When the company wants user to “discover” content
4. **Discovery = conversion**, on e-commerce.
5. Akin to “impulse” purchases in a supermarket.
6. On Amazon, it can also be under “Related items”
7. Hidden by default; cannot be made persistent
8. Movie available

New York Times hamburger strategy **discovery = retention**



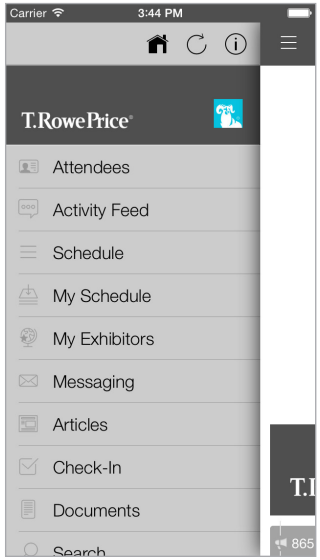


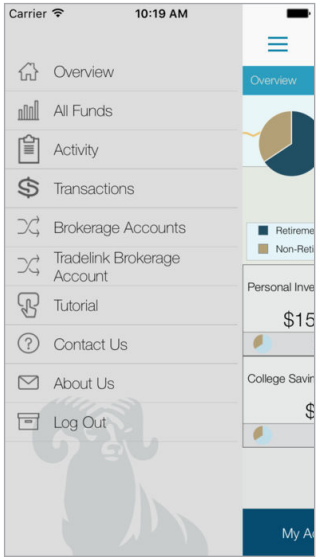
Hamburger is used:

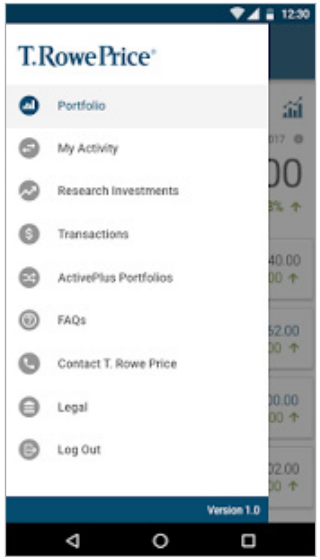
1. When user scrolls vertically, so need maximum top-bottom space
2. On content rich sites
3. When the company wants user to "discover" content
4. **Discover = retention**, on subscription based content sites
5. NYT editorial constantly adds sections, reshuffles things, to keep users engaged, interested and paying the subscription.
7. Hidden by default; cannot be made persistent
8. Movie available

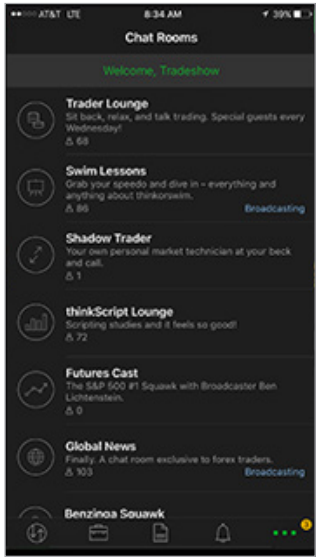
Hamburger with icons examples in IB

T.D. Ameritrade

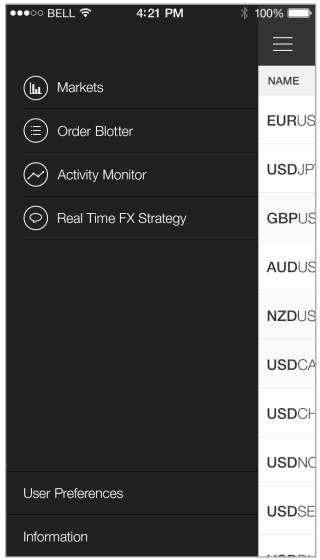


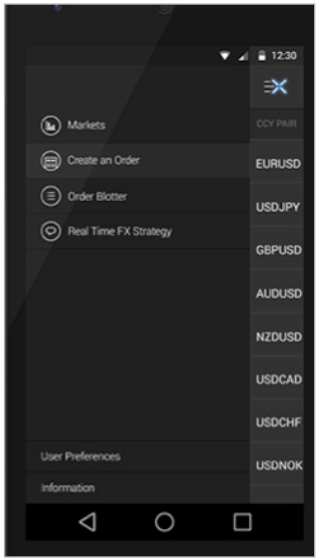


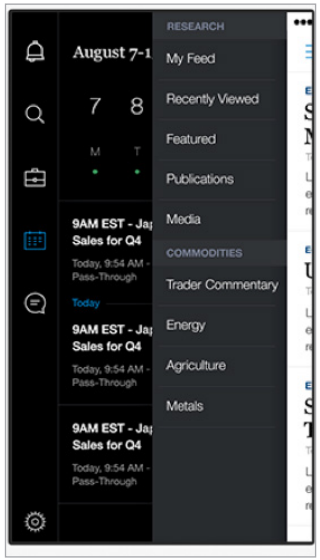




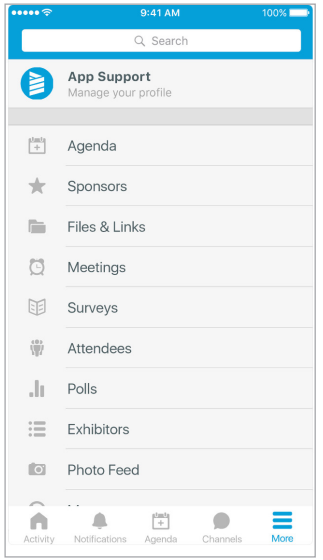
J.P. Morgan Markets







EnvestNet



MOD's hamburger menu recommendation - II

Navigation standards

A solid, well thought-out information architecture and navigation structure is an essential building block for a successful adaptive website. The mobile and desktop navigation should be considered at the same time and should be as consistent as possible.

Hamburger navigation

- Dominant style within the mobile space
- Intuitive and easy to access
- Hides navigation

Dashboard navigation

- Primary navigation is viewable from the start
- Requires smart drill-in navigation so that users can easily find their way back

In-page navigation

- A top or bottom bar always visible
- Dynamic navigation allowing users to quickly move throughout different sections with very few taps

General best practices

- Action oriented items such as trade shouldn't be hidden within a navigation structure
- Create a structure that is consistent with the desktop site
- Users easily get lost if the structure allows more than a few levels of drill-ins incorporating 'back to' links

What does MOD mean by "the mobile space"?

If we were to roughly define mobile spaces, those would be:

1. E-commerce

2. Content sites

3. Social media

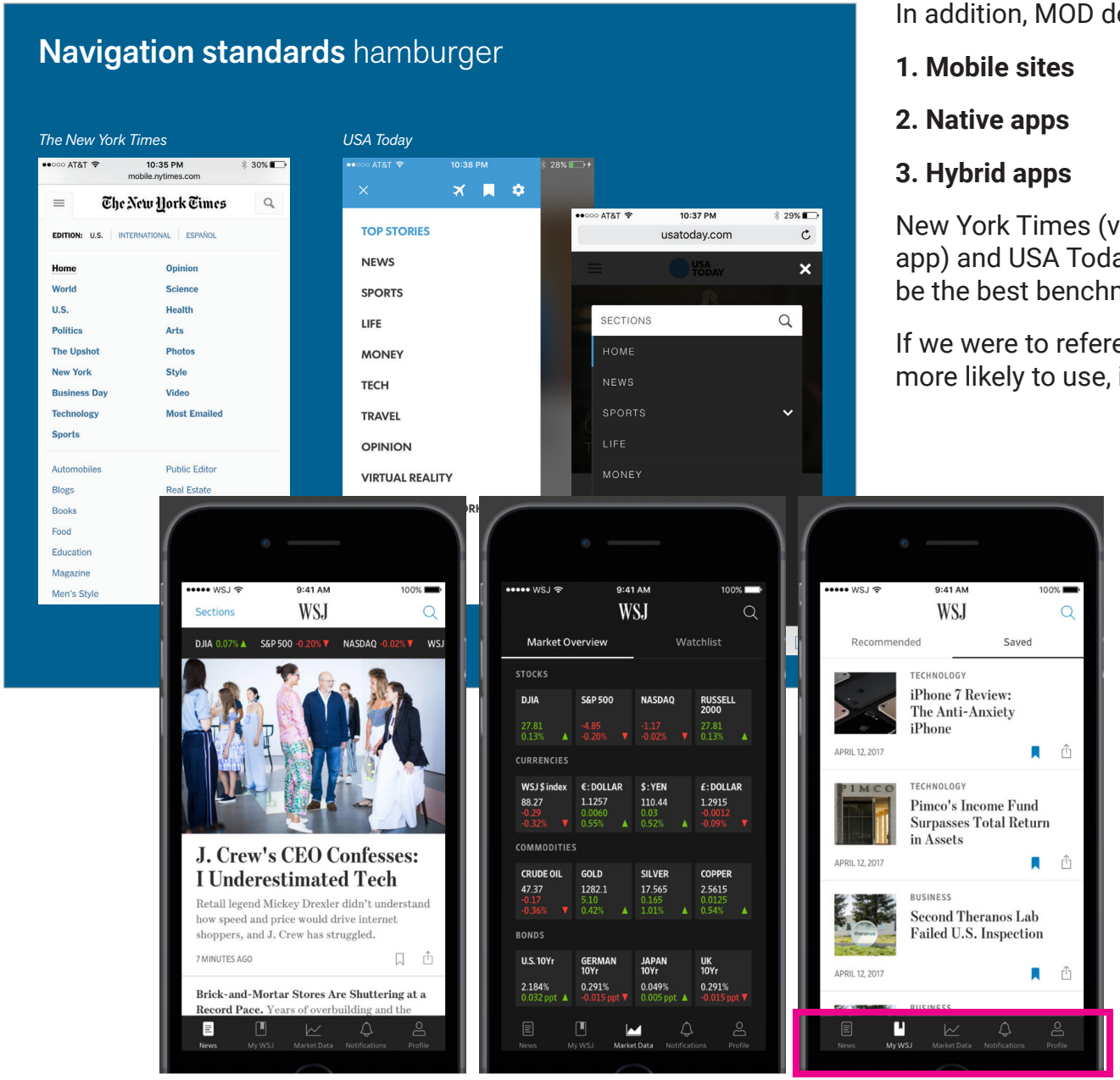
4. Tools and utility apps

5. A mix of any of the above two categories

All those are very different from each other.

Industry and market in which Pershing operates are rather particular and unique, with its own product and UX best practices. Same goes for our mobile apps and strategy.

MOD's hamburger menu recommendation - III



In addition, MOD does not clarify if they are talking about:

1. **Mobile sites**
2. **Native apps**
3. **Hybrid apps**

New York Times (visual is of the mobile site, not the native app) and USA Today are content sites, and as such, may not be the best benchmark for NetX360.

If we were to reference a newspaper app NetX360 users are more likely to use, it would be The Wall Street Journal.

This may be a good question to add to our user research questionairre: what newspaper do you read on your device?

WSJ does not utilize a hamburger, but a tray, because it is used as a tool.

Tray nav

“Current state” section **summary**

1. NetX360 has both vertical scrolling and horizontal swipping

2. MOD hamburger implementation does not follow best practices for hamburger menu

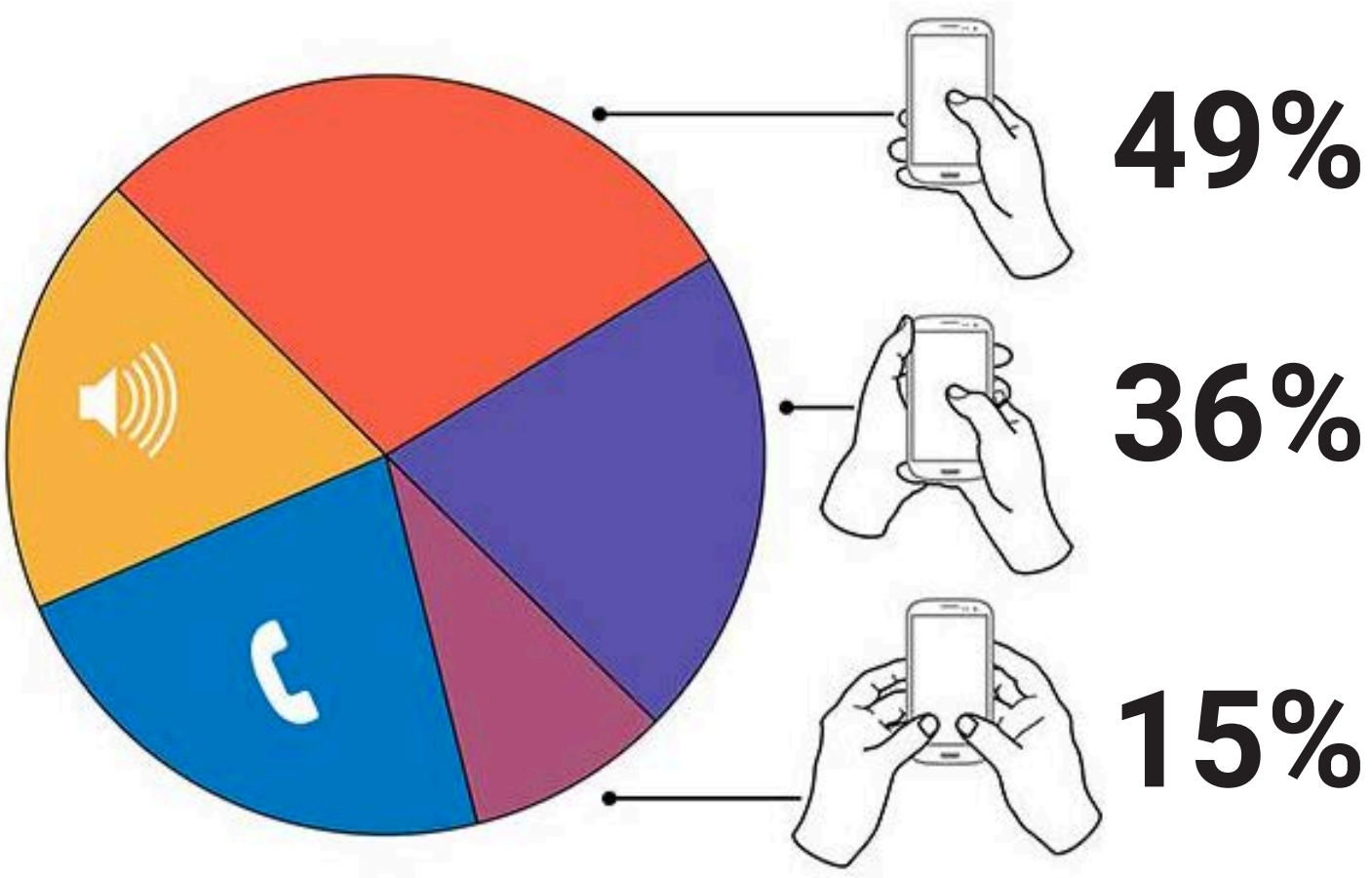
2. MOD hamburger recommendation is based on products seemingly unrelated to NetX360

3. MOD does not identify the mobile NetX360 persona

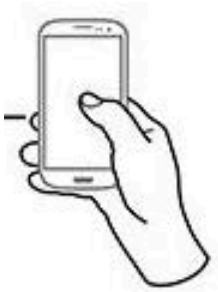
Device holding stats and best practices

Phone holding stats

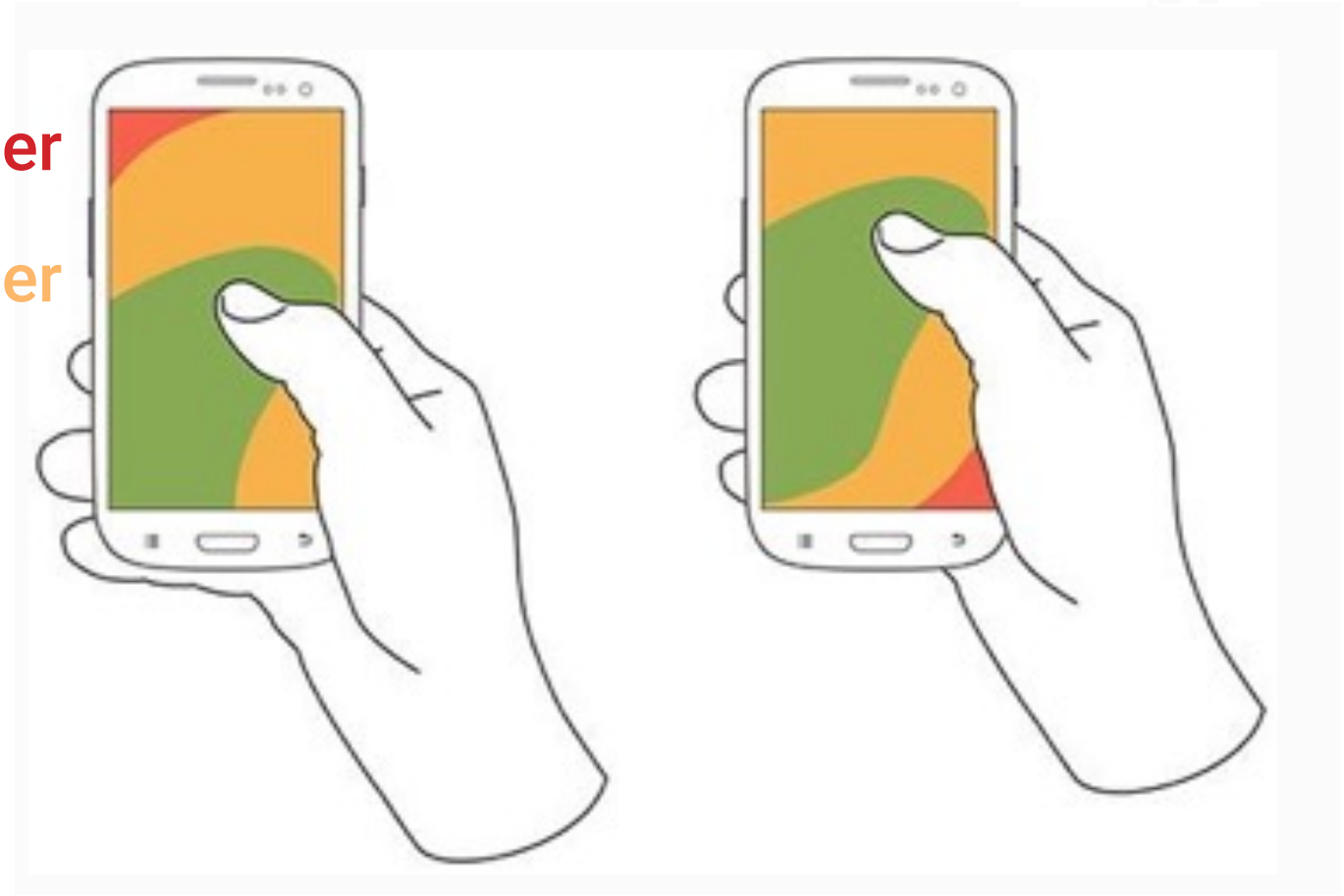
- Single hand: 49%
- One hand assist another: 36%
- Both: 15%



Phone **access areas for the most common position**



49%



Tablet **upper left is the worst touch position**

Most people are right-handed

- In general, elements placed on the right side are easier to touch
- Putting them on the right prevents occlusion of the main area



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Tablet **bottom is the best touch position**

Interaction vs. reading areas



Interaction areas: Because tablets are most often held along the side, the bottom corners
and sides are ideal locations for interactive elements.



Reading areas: Because tablets are most
often held along the side, the bottom corners and sides are ideal locations for interactive elements.

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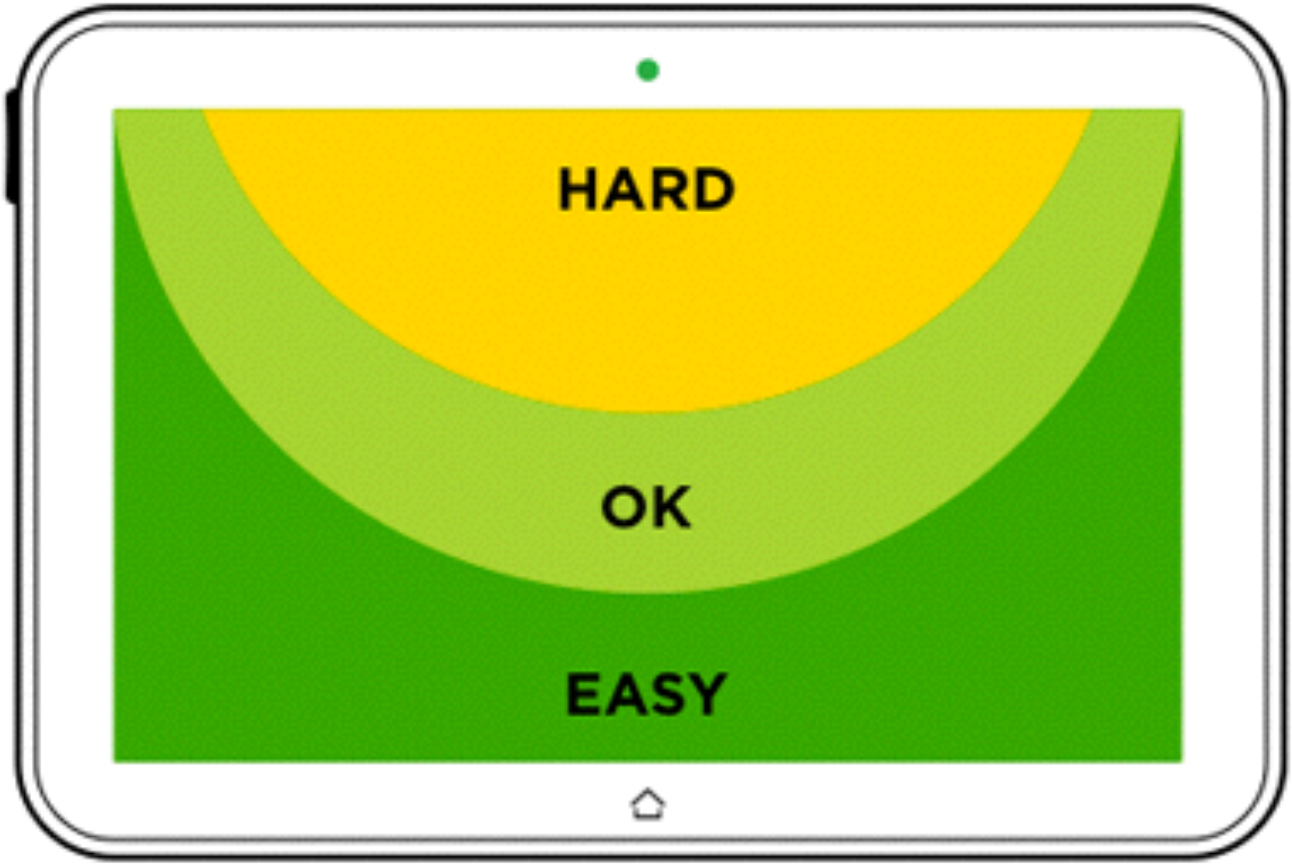
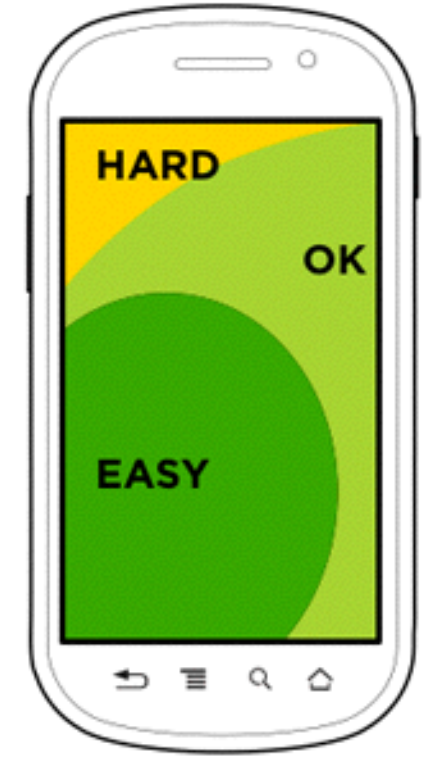
Device holding stats and best practices **summary**

Tablet & phone bottom is the best touch position



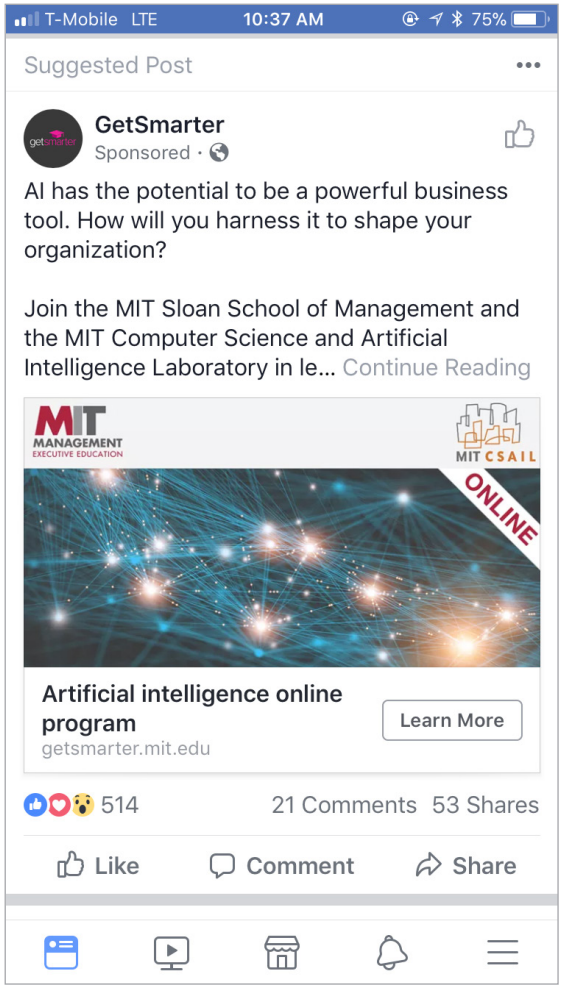


Social media influence

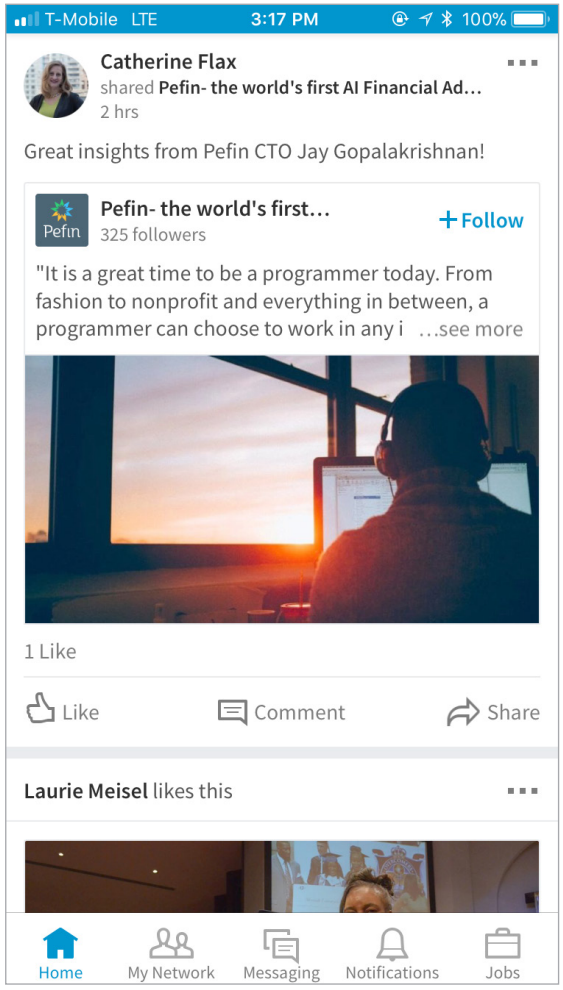
Social media influences for **35-50** age group

Mobile user research effort that starts in early December 2017, will provide statistics on NetX360 mobile app users social media patterns.

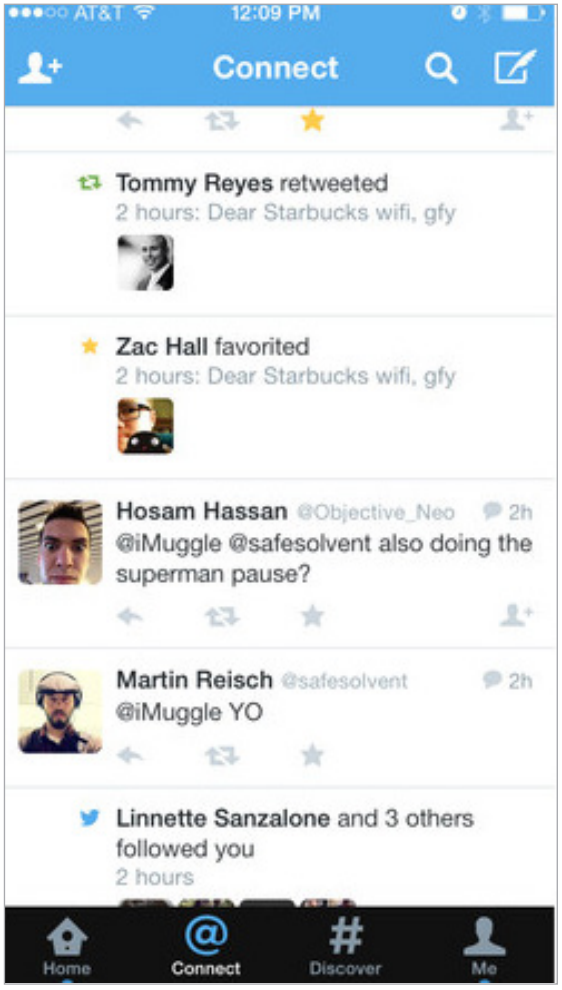
Facebook



LinkedIn



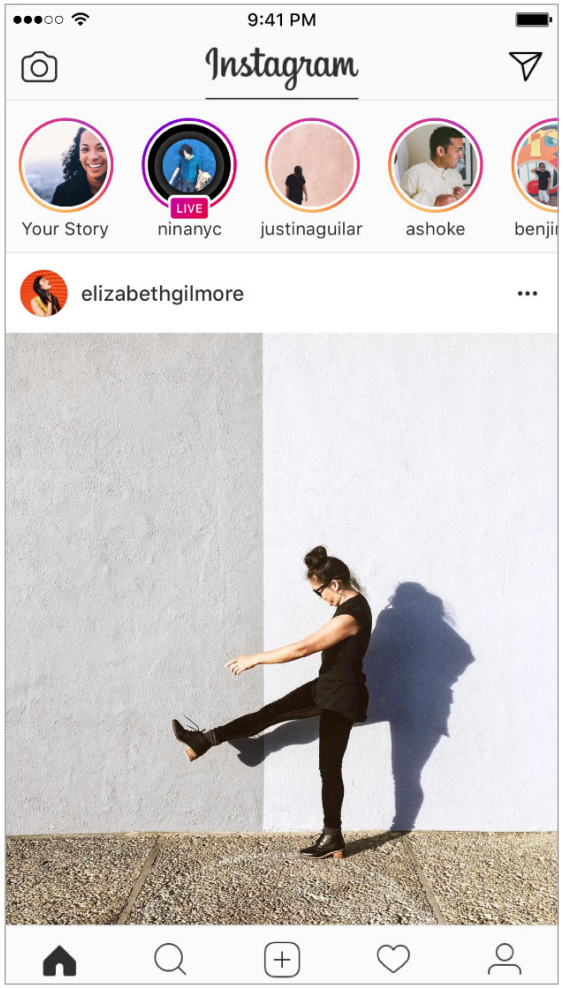
Twitter



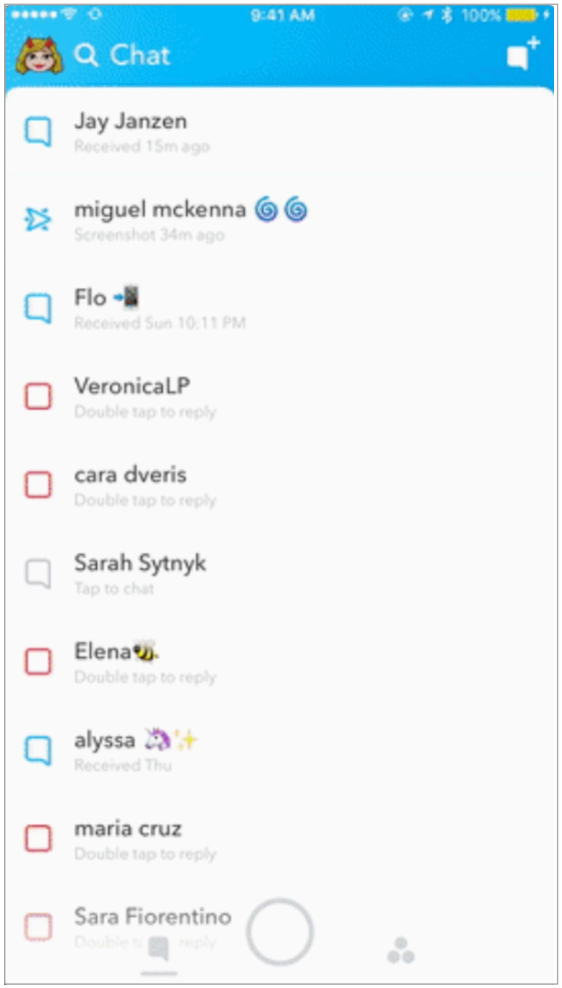
Social media influences for **under 35** age group

Mobile user research effort that starts in early December 2017, will provide statistics on NetX360 mobile app users social media patterns.

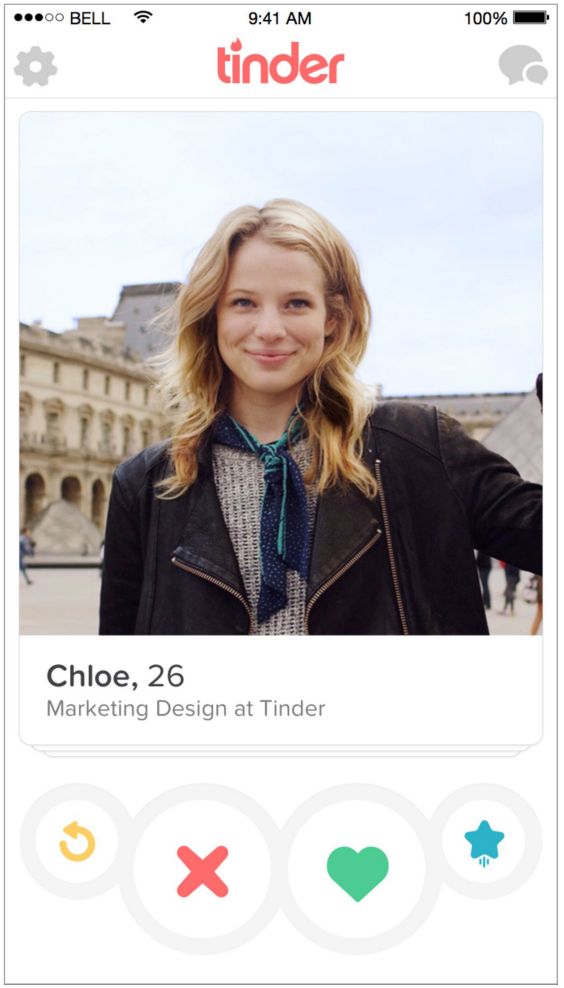
Instagram



SnapChat



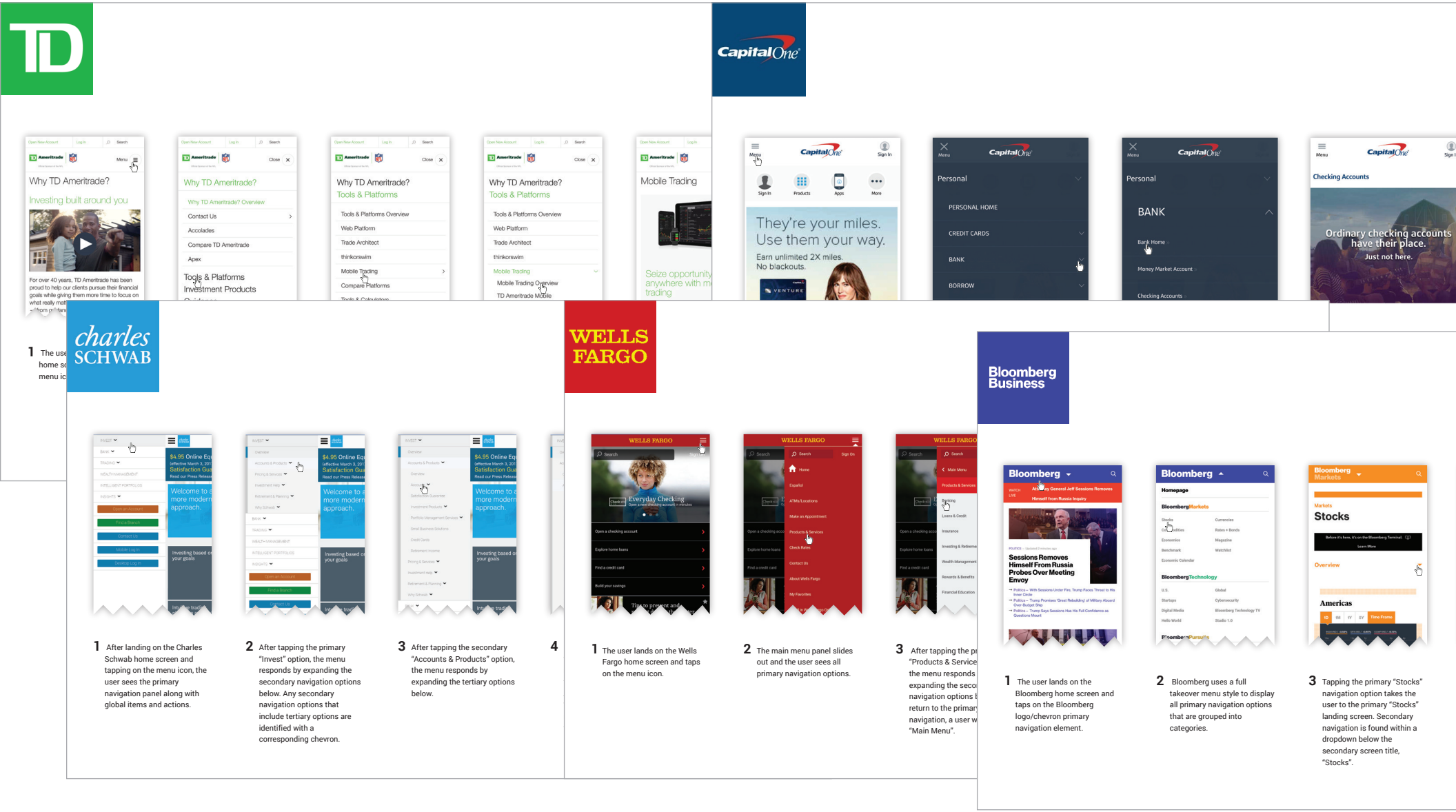
Tinder



Competitor analysis (20 pages)

MOD competitor analysis

1. MOD did not seem to show our direct competitors' mobile products.
2. They only listed the parent company; not the name of an actual app. So we can look it up on Appstore, or elsewhere.



1 The user lands on the home screen and taps on the menu icon.

2 After tapping the primary "Invest" option, the menu responds by expanding the secondary navigation options below. Any secondary navigation options that include tertiary options are identified with a corresponding chevron.

3 After tapping the secondary "Accounts & Products" option, the menu responds by expanding the tertiary options below.

4

1 After landing on the Charles Schwab home screen and tapping on the menu icon, the user sees the primary navigation panel along with global items and actions.

1 The user lands on the Wells Fargo home screen and taps on the menu icon.

2 The main menu panel slides out and the user sees all primary navigation options.

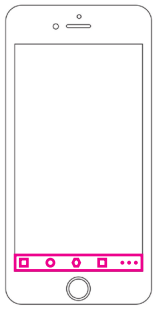
3 After tapping the pr "Products & Service the menu responds expanding the seco navigation options return to the primar navigation, a user w "Main Menu".

1 The user lands on the Bloomberg home screen and taps on the Bloomberg logo/chevron primary navigation element.

2 Bloomberg uses a full takeover menu style to display all primary navigation options that are grouped into categories.

3 Tapping the primary "Stocks" navigation option takes the user to the primary "Stocks" landing screen. Secondary navigation is found within a dropdown below the secondary screen title, "Stocks".

Pershing competitor analysis - **iPhone**



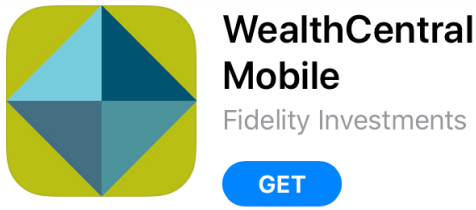
Tray

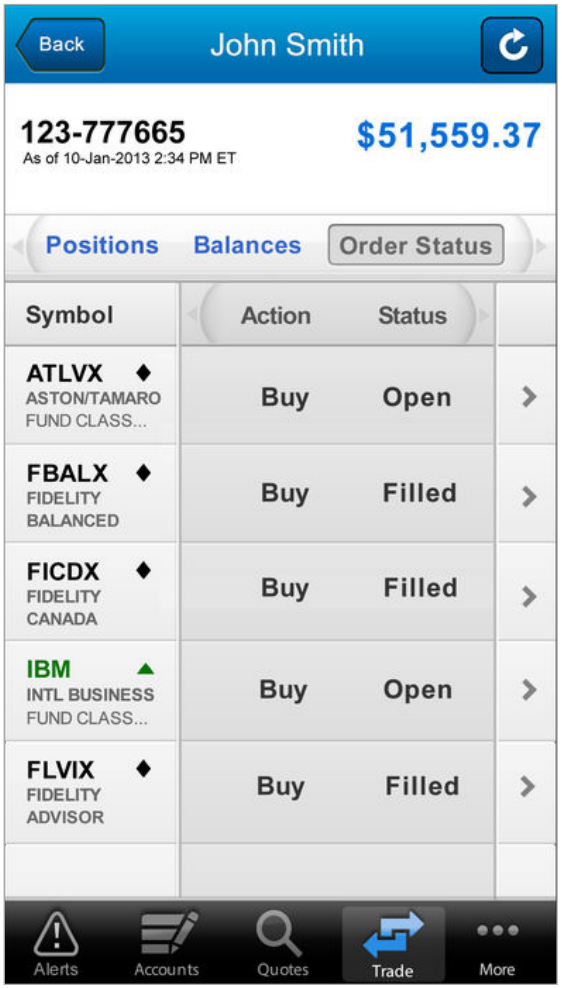
NETX360 COMPETITORS

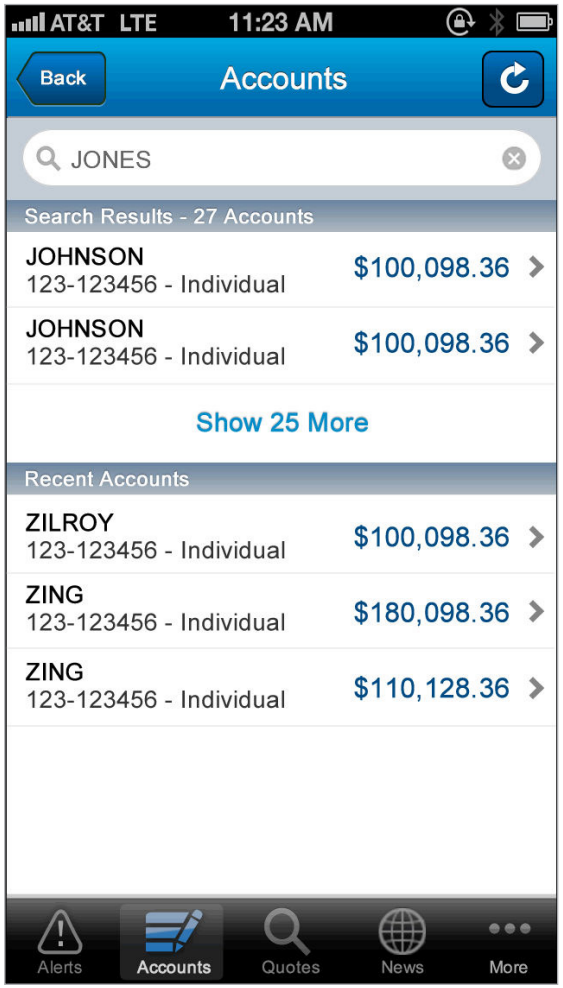
1. Fidelity - WealthCentral
2. Charles Schwab - Advisor Center
3. TD Ameritrade - AdvisorClient

NETX INVESTOR COMPETITORS

4. Fidelity - Investments
5. Charles Schwab - Intelligent Portfolios
6. TD Ameritrade - Mobile (trading app)







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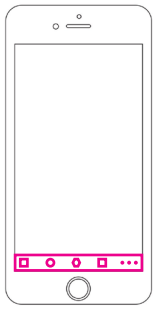

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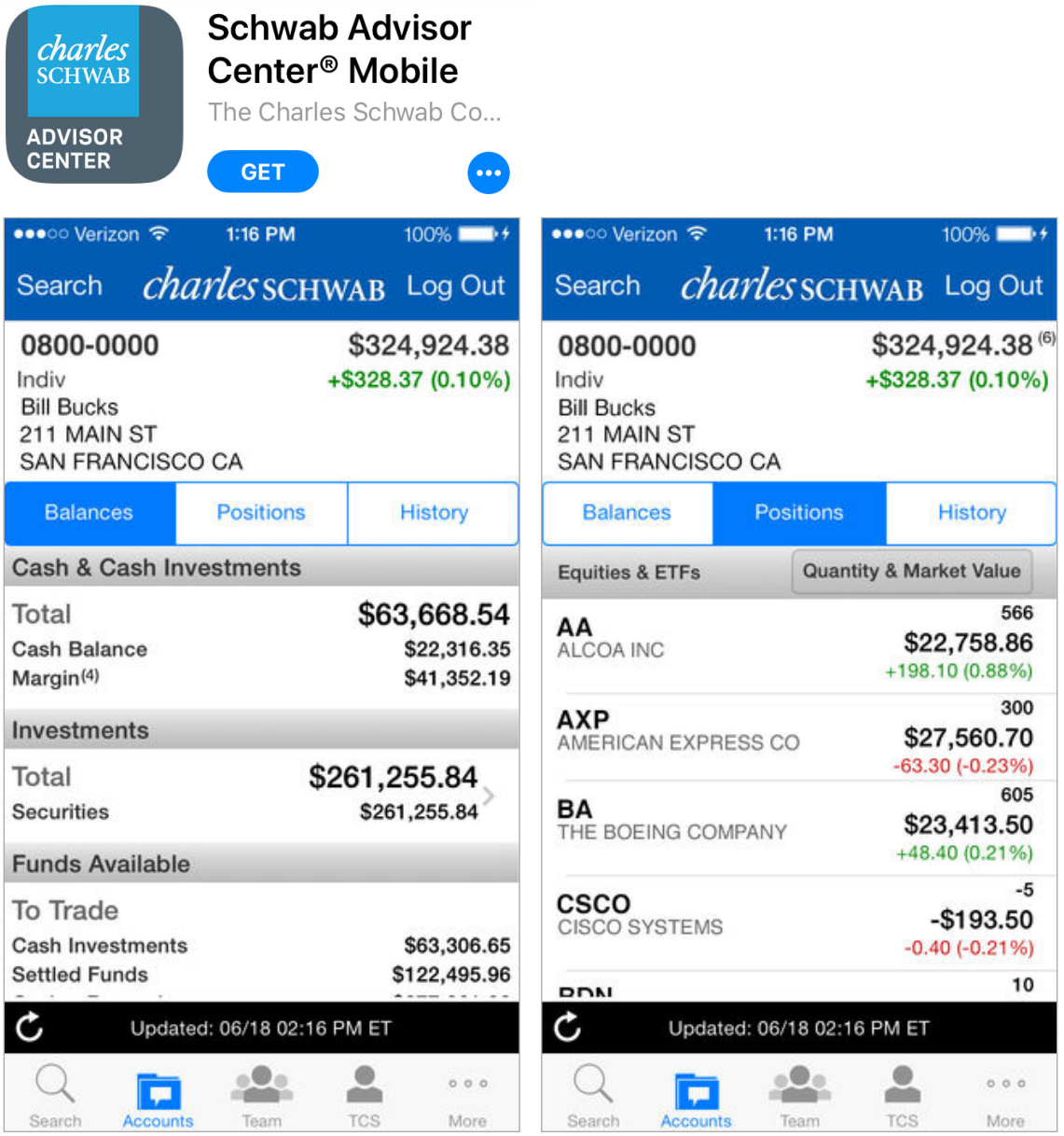
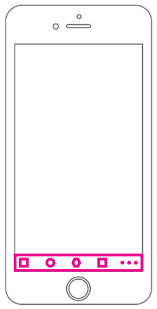


Pershing competitor analysis - **iPhone**



Tray

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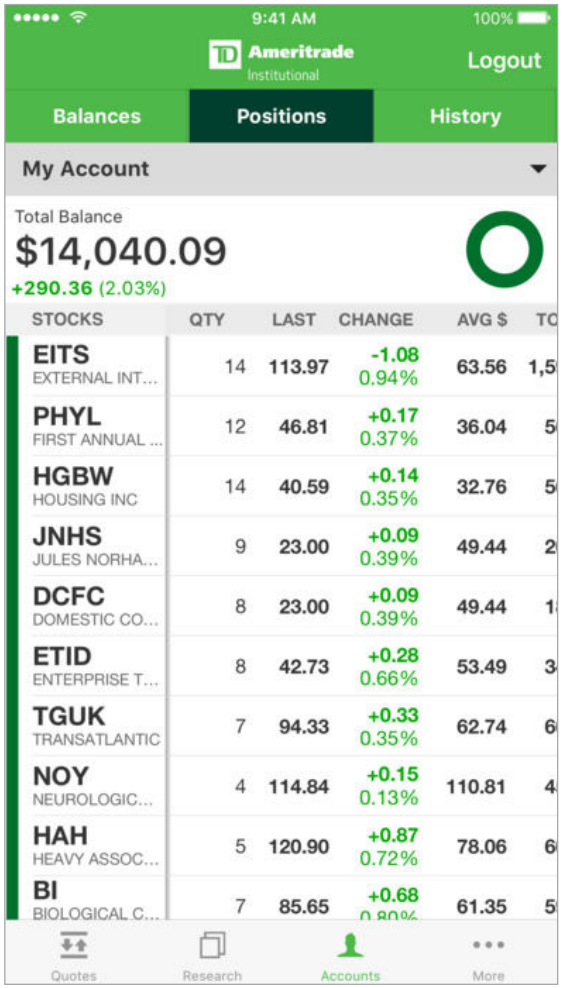
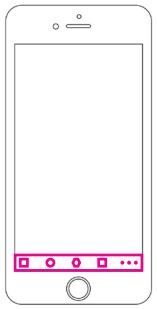


Pershing competitor analysis - **iPhone**



Tray

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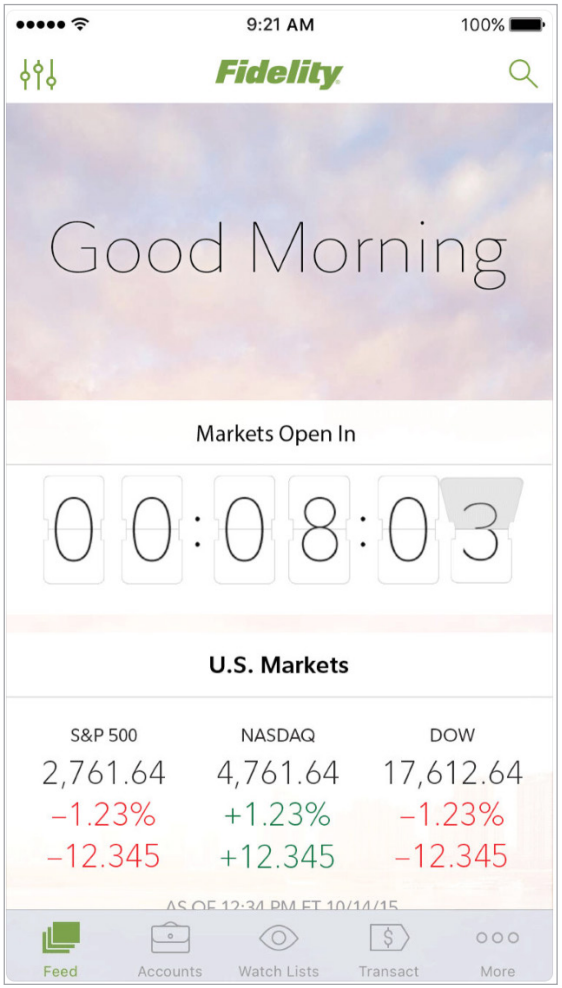
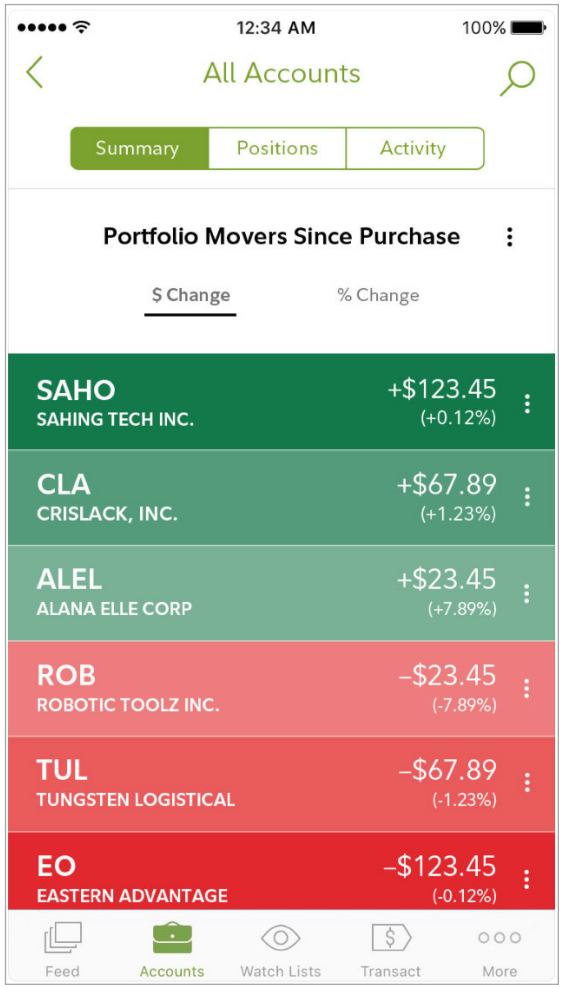
NETX INVESTOR COMPETITORS

4. Fidelity - Investments
5. Charles Schwab - Intelligent Portfolios
6. TD Ameritrade - Mobile (trading app)

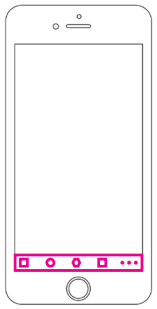


Movie available





Pershing competitor analysis - **iPhone**



Tray

NETX360 COMPETITORS

1. Fidelity - WealthCentral
2. Charles Schwab - Advisor Center
3. TD Ameritrade - AdvisorClient

NETX INVESTOR COMPETITORS

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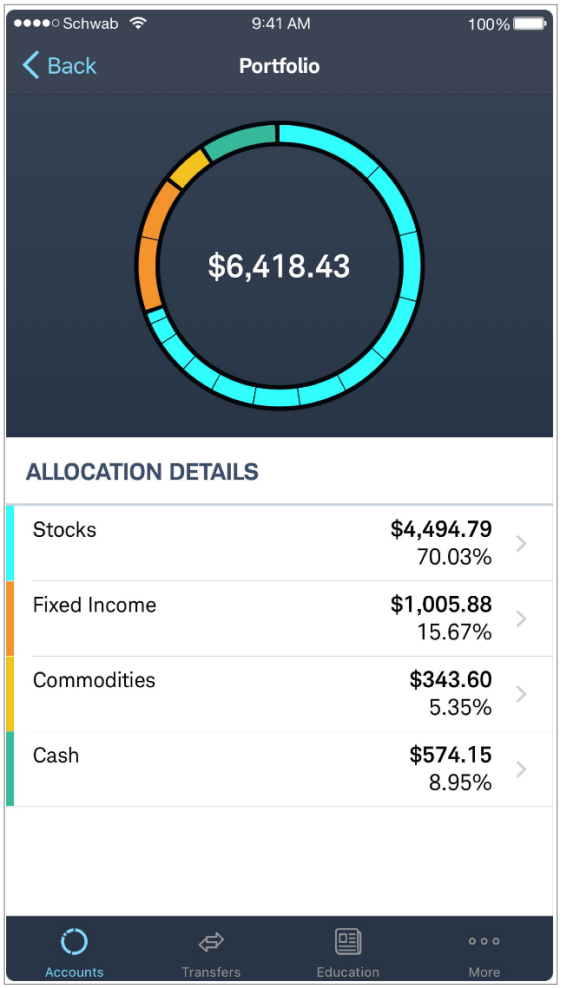

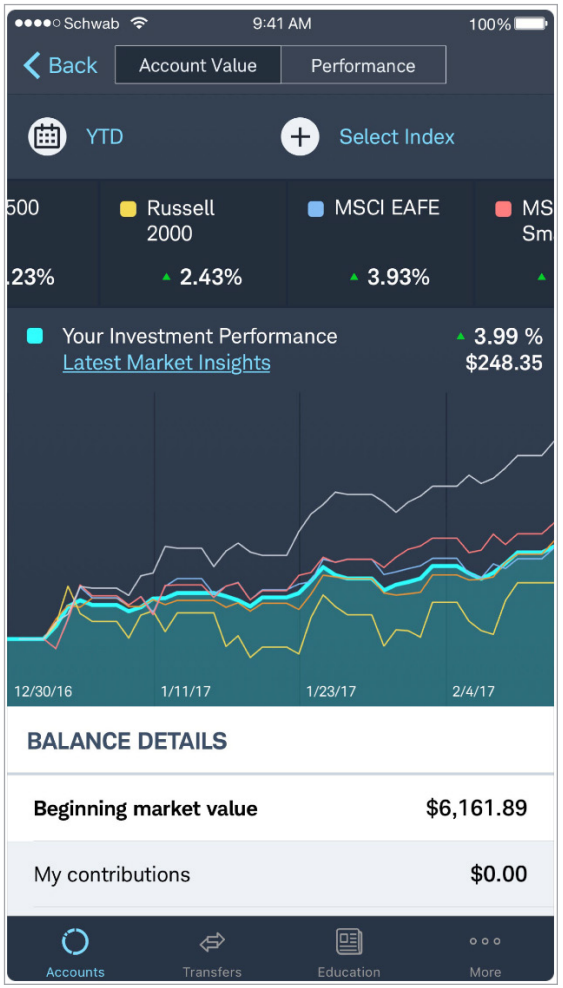

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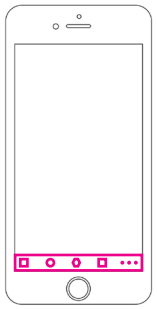

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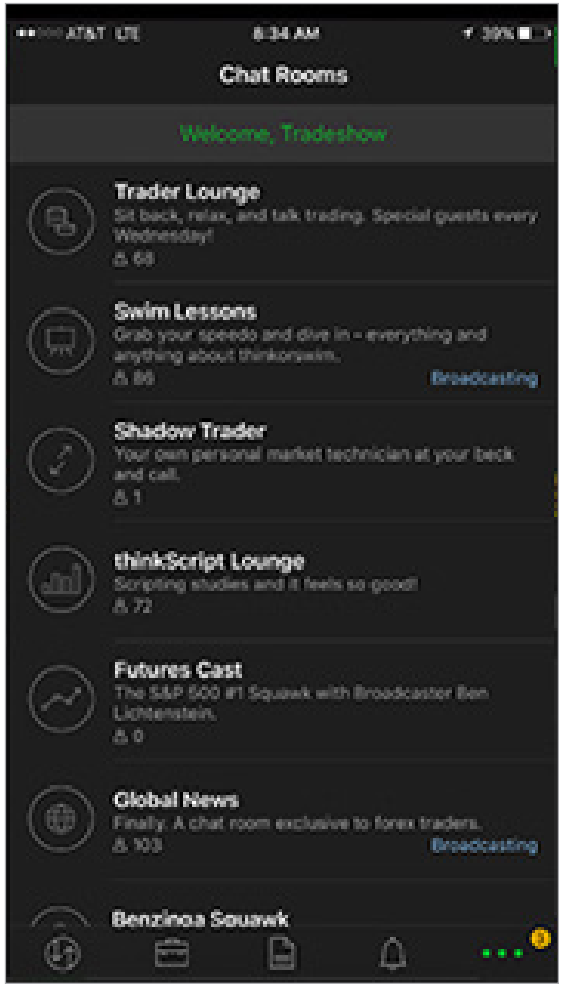

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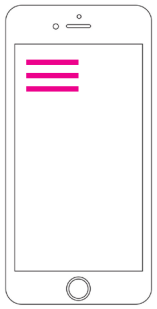

Hamburger

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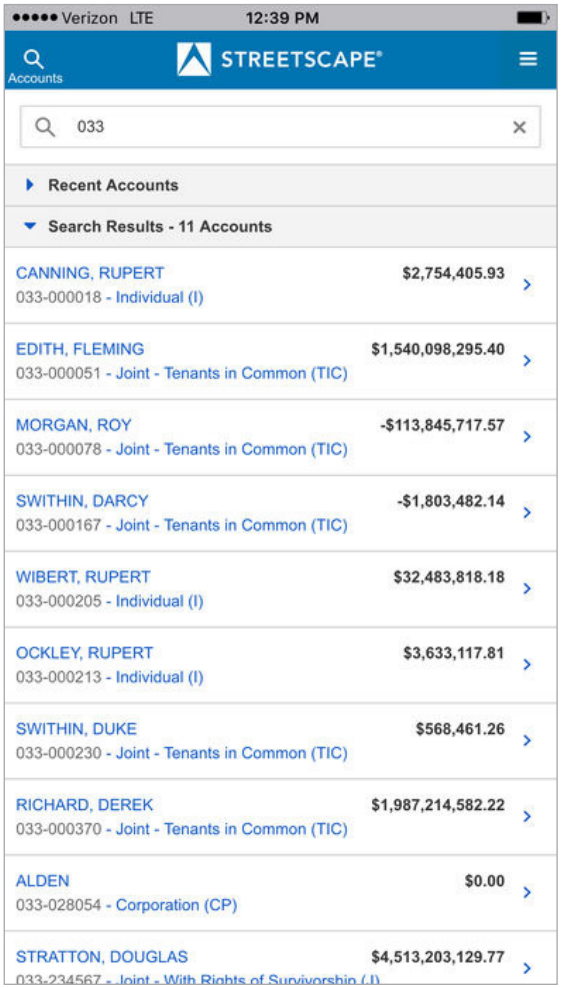
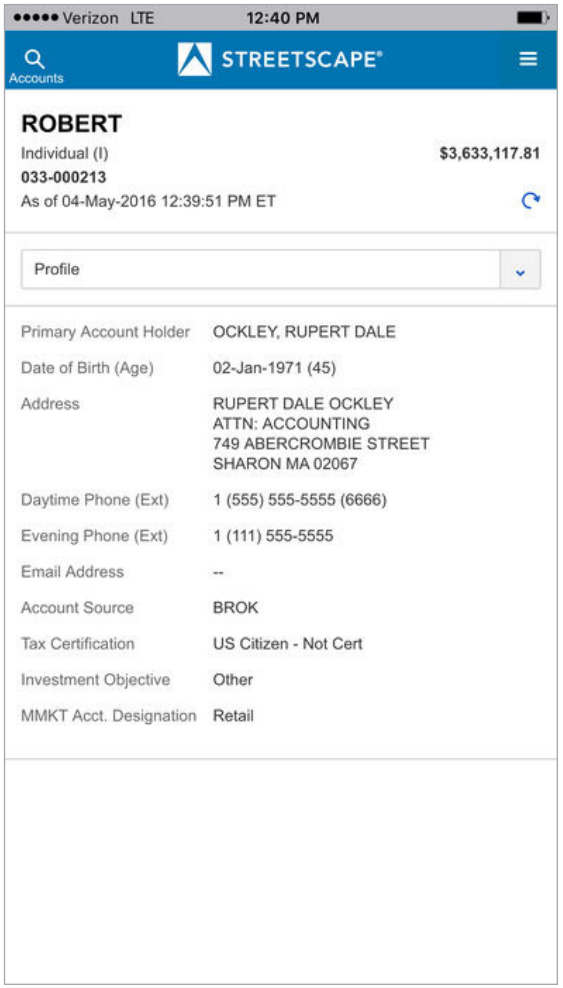
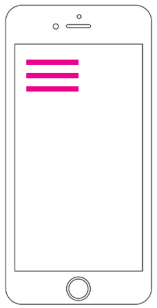
NETX INVESTOR COMPETITORS

3. T Rowe Price - Personal





Pershing competitor analysis - **Phone - Android**



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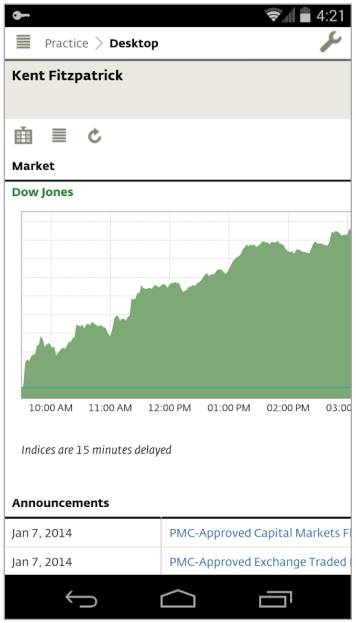

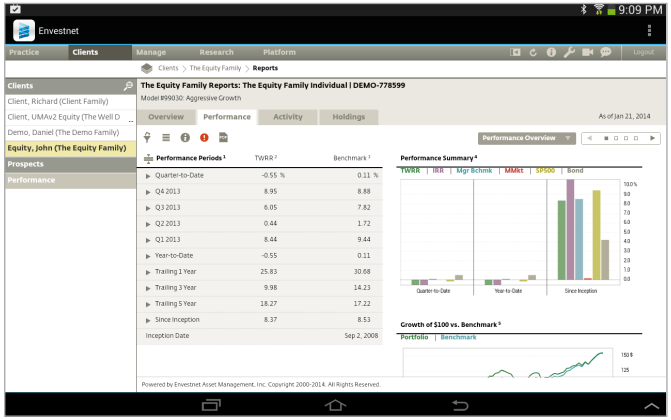

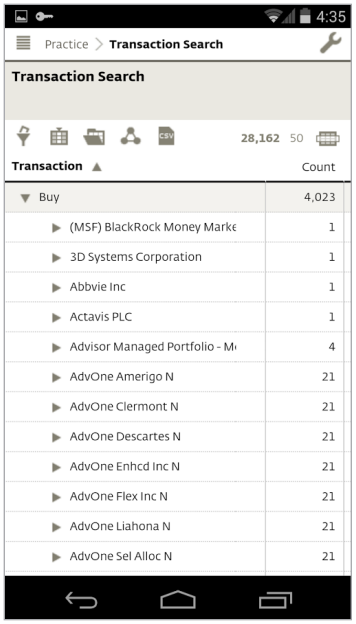

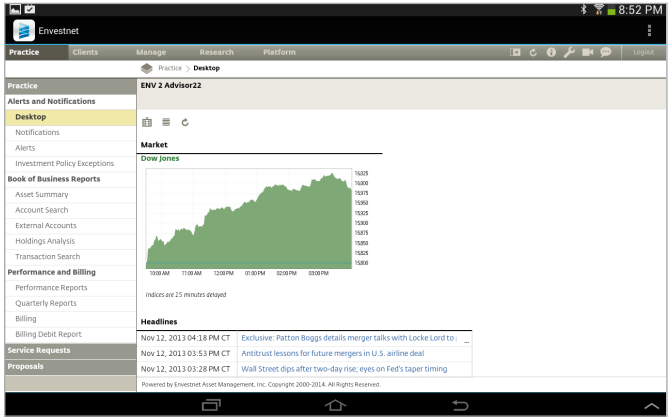

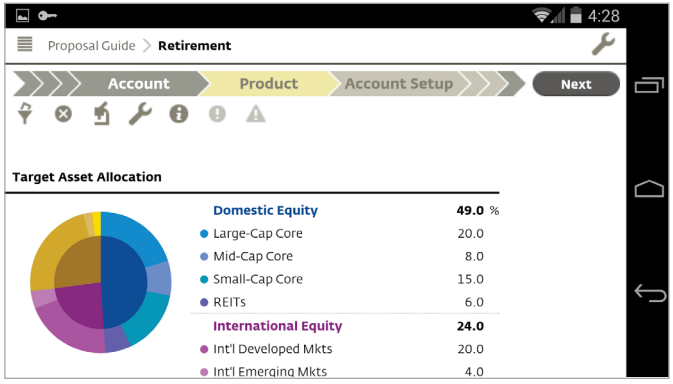

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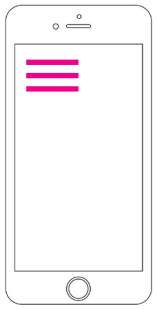

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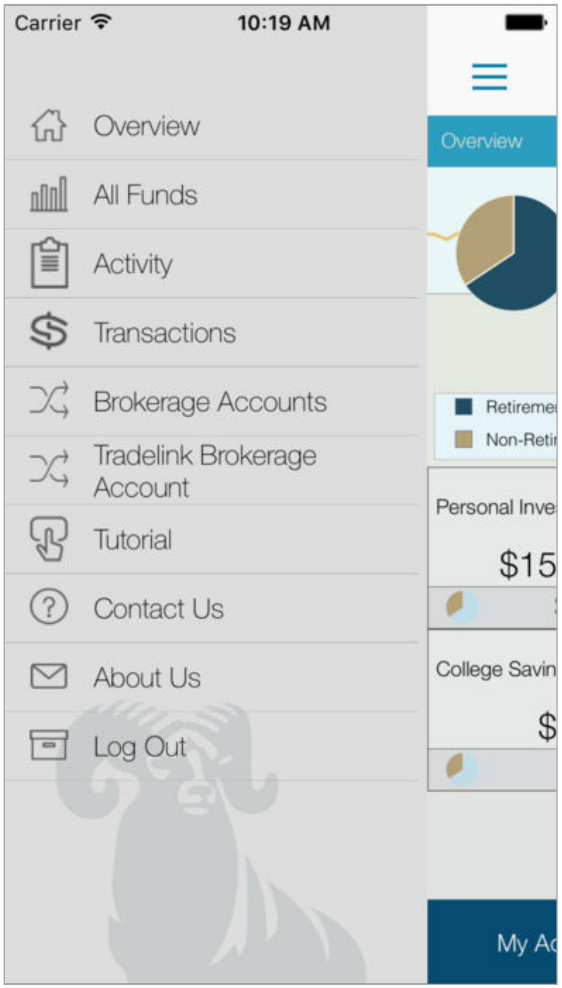

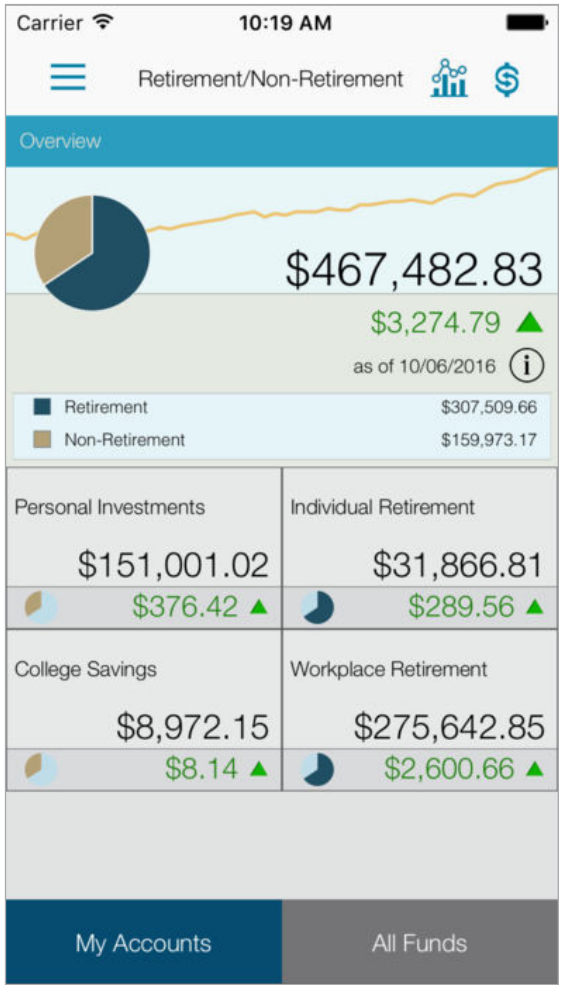

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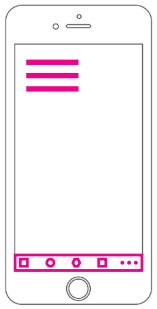
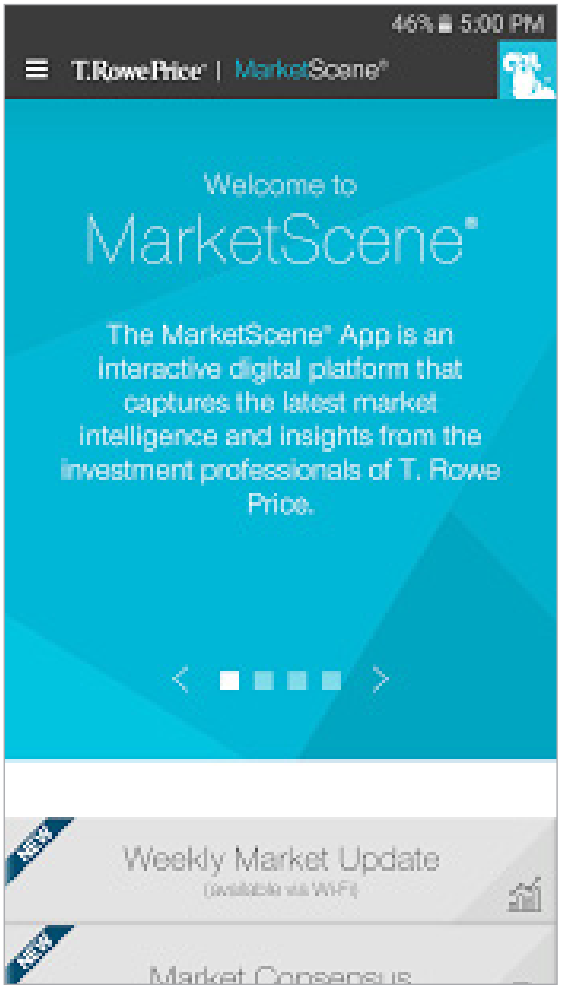


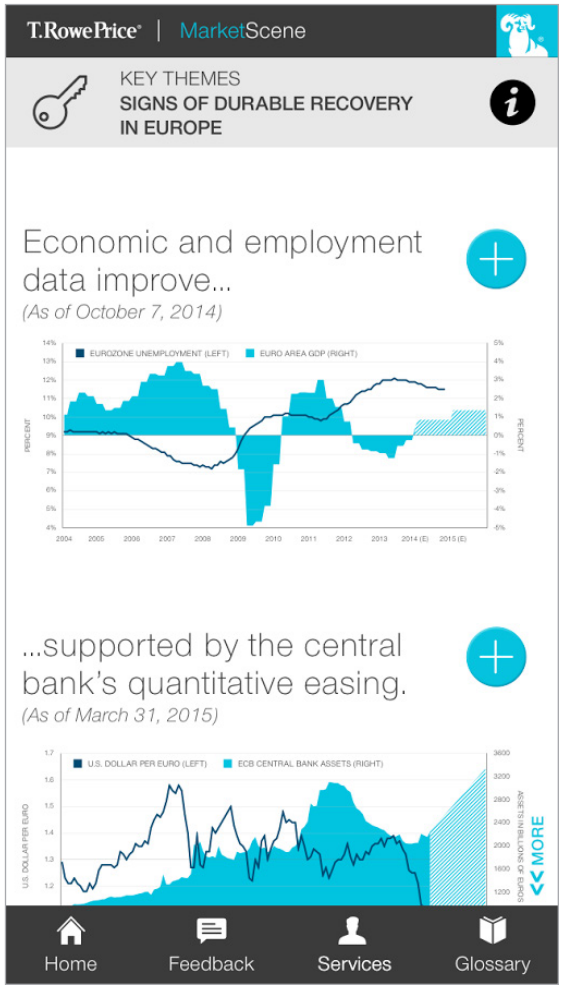
Tray + Hamburger

NETX360 COMPETITORS

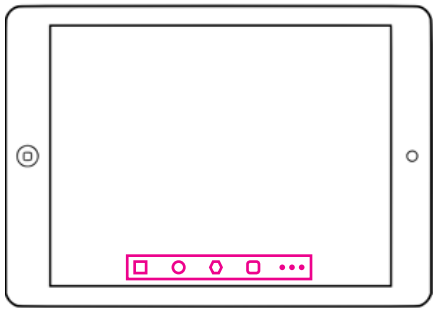
1. T. Rowe Price - MarketScene







Pershing competitor analysis - **Tablet**



Tray

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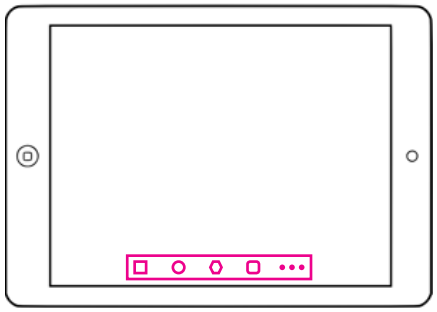
NETX INVESTOR COMPETITORS

4. Fidelity - Investments
5. Charles Schwab - Intelligent Portfolios
6. TD Ameritrade - Mobile (trading app)

WealthCentral Mobile
Fidelity Investments
GET



Pershing competitor analysis - **Tablet**



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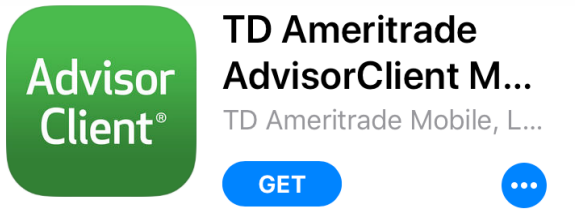

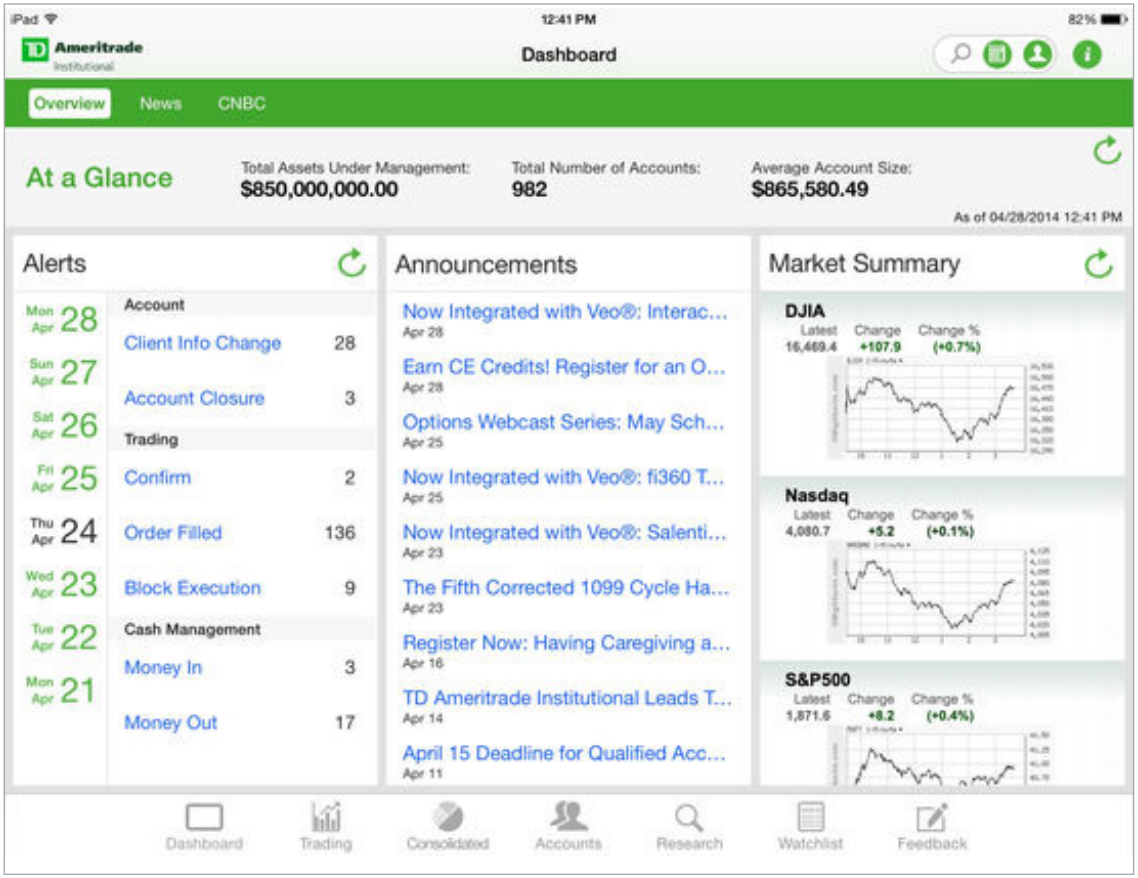

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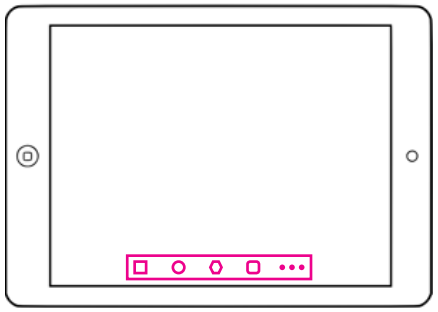

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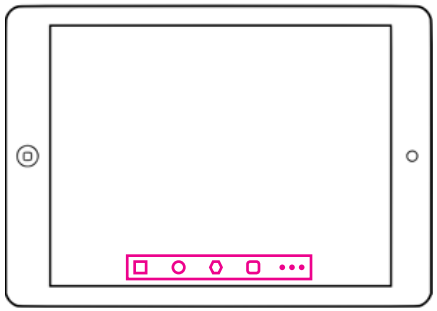

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charles SCHWAB INTELLIGENT PORTFOLIOS



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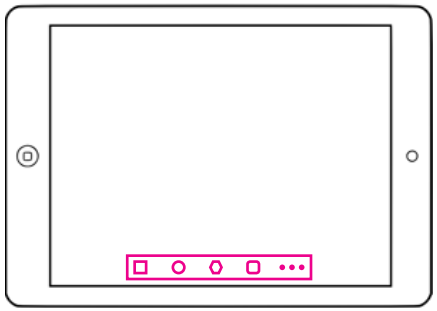

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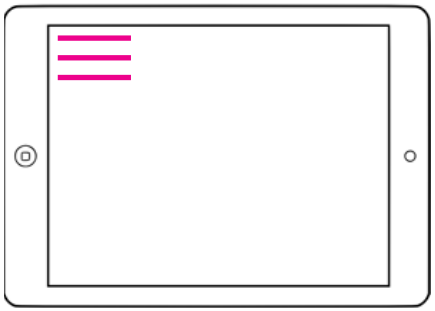
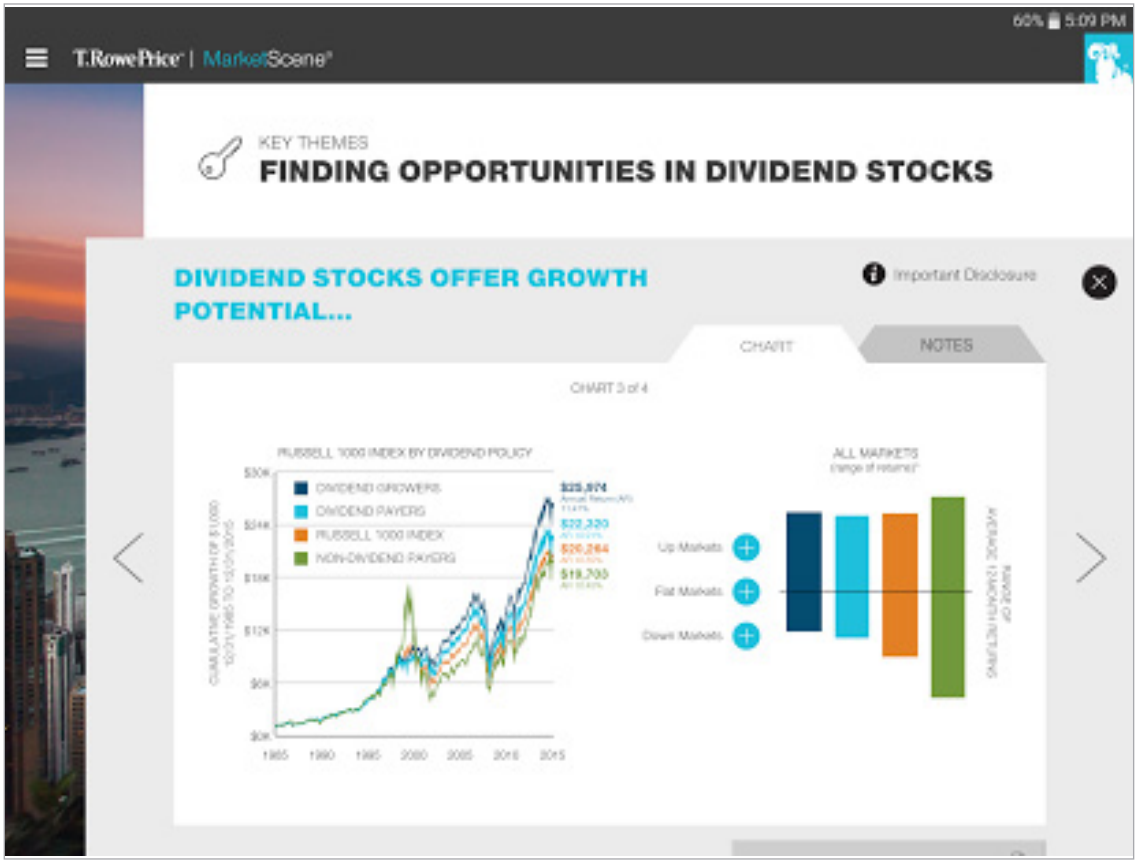


Hamburger

NETX360 COMPETITORS

T. Rowe Price - MarketScene



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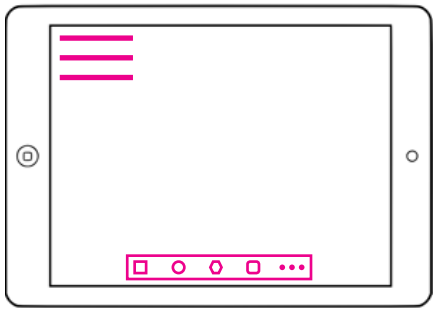

Tray + Hamburger

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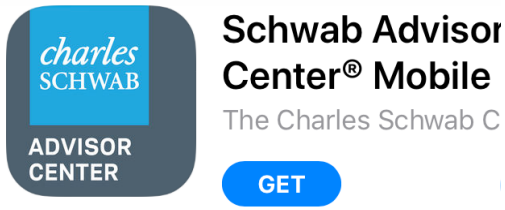
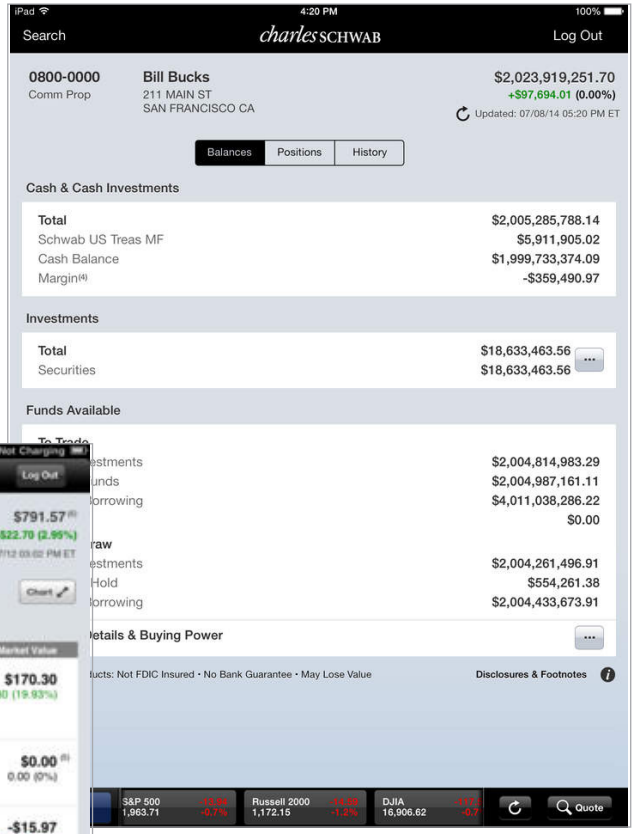
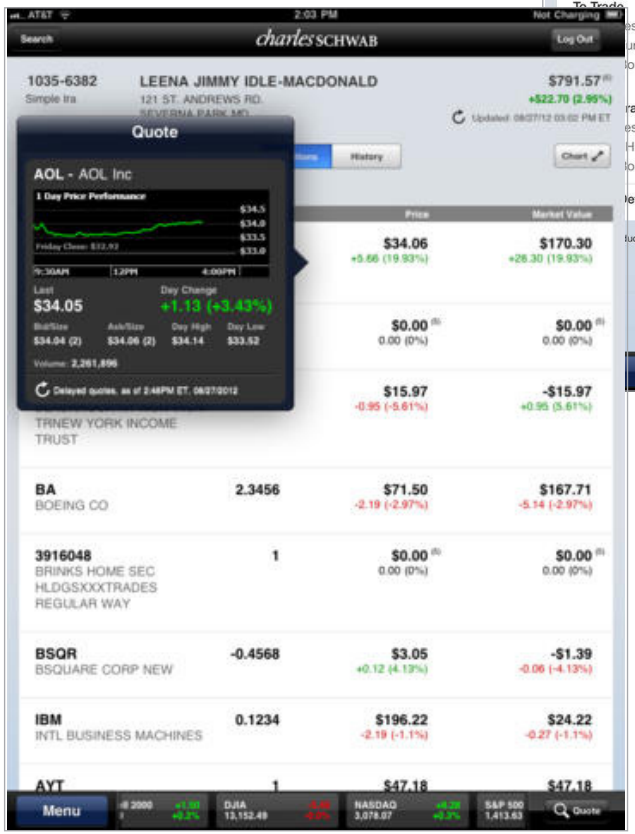
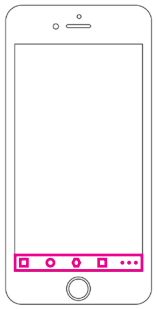






Pershing competitor analysis - **Phone**



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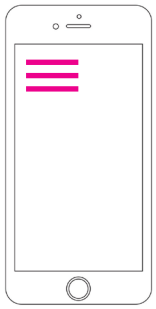

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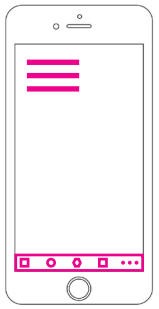


Tray + Hamburger

NETX360 COMPETITORS

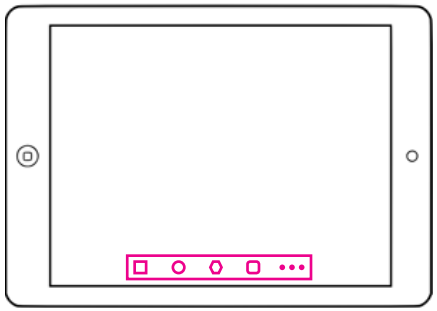
1. T. Rowe Price - MarketScene

Tiles

OUR DIRECT COMPETITORS

None

Pershing competitor analysis - **Tablet**



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Hamburger

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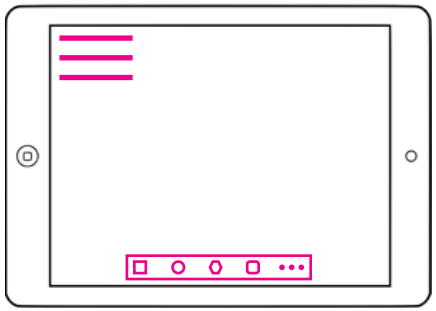

Tray + Hamburger

NETX360 COMPETITORS

Charles Schwab - Advisor Center

Tiles

OUR DIRECT COMPETITORS

None

NetX 360 feature evaluation

	HAMBURGER	TRAY
Best for	Content-based sites	Tools
	E-commerce	
Scrolling	Vertical	Horizontal (swiping)
Content strategy	Discovery = conversion. Akin to “impulse” purchases in a supermarket. Or “Related items” on Amazon.	Upfront and available
	Discovery = retention. For example, in the New York Times app, editorial constantly adds sections, reshuffles things, to keep users engaged, interested and paying the subscription.	
User engagement and objective	Tends to be longer. Reading, shopping, leisure.	Tends to be short; get the job done and leave.
Switching between sections	Medium priority	Highest priority
Number of features	Very many important features	3-5 main features
Section and feature names length	Long	Short
In line with mobile device hand positions statistics	No	Yes
Flexibility (hiding)	Hidden by default; cannot be made persistent	Persistent by default; can and usually is hidden (by drag or click) on deeper level pages (enter “Back” button). Should be persistent on all pages that can be accessed directly from the tray.
Compatible with status indicators	No	Yes
User always knows where they are	Deepends on implementation	Yes

Evaluation summary - tray is the recommended mobile nav

1. MOD recommendation appears vague and incomplete.

2. We seem to be following the Amazon IxD, however our use-case seems different

3. We need a UX artifact with complete taxonomy. So we, and users, and stakeholders, can have the full UX, with the complete data, relevant amount of scrolling, etc.

4. Phone holding stats work towards the tray.

5. Social media influences train audiences towards trays.

6. Competitive analysis is predominantly leaning towards the tray. Phone is 6:3, tablet 6:1.

7. Comparison between hamburger, and tray use cases, through the NetX360 lense, also leans predominantly towards the tray. Stats are 10:1.

8. Tray can be implemented in both native, and a hybrid app.