

marketingsherpa marketingexperiments

# optimization summit 2013

## Digital Optimization

How AARP Services increased referrals and  
membership renewals

# Session Speaker



[@gauravbhatia1](#)

**Gaurav Bhatia**  
**Vice President, Digital Strategy**  
**AARP Services Inc.**

Gaurav Bhatia, Vice President of Digital Strategy, ASI, has more than 15 years of online marketing and digital expertise. In his current role, Gaurav is responsible for digital strategy and execution of digital capabilities for products and services across Web, email, mobile and social media platforms.

Gaurav has extensive knowledge in both B2B and B2C digital marketing. He is a digital marketer with experience in building digital assets to drive business growth, and has led large scale digital transformation projects for large organizations.

Gaurav holds a Master's Degree in Information Systems, MBA in Strategy and a Bachelor's Degree in Mechanical Engineering.

# Session Speaker



@preeti\_nyu

**Preeti Sood**

**Digital Channel Manager**

**AARP Services Inc.**

Preeti Sood, Digital Channel Manager, ASI, has more than 12 years experience in online, site optimization and digital insights/analytics. In his current role, Preeti is responsible for digital strategy and execution of digital capabilities for financial and health products and services.

In addition, she is responsible for all digital metrics and insights for ASI. Her past experience includes creating personalization and relationship marketing strategy for Choice Hotels International.

Preeti holds a Master's Degree in Direct and Interactive Marketing from NYU.



**AARP is the largest member advocacy organization in the world.**

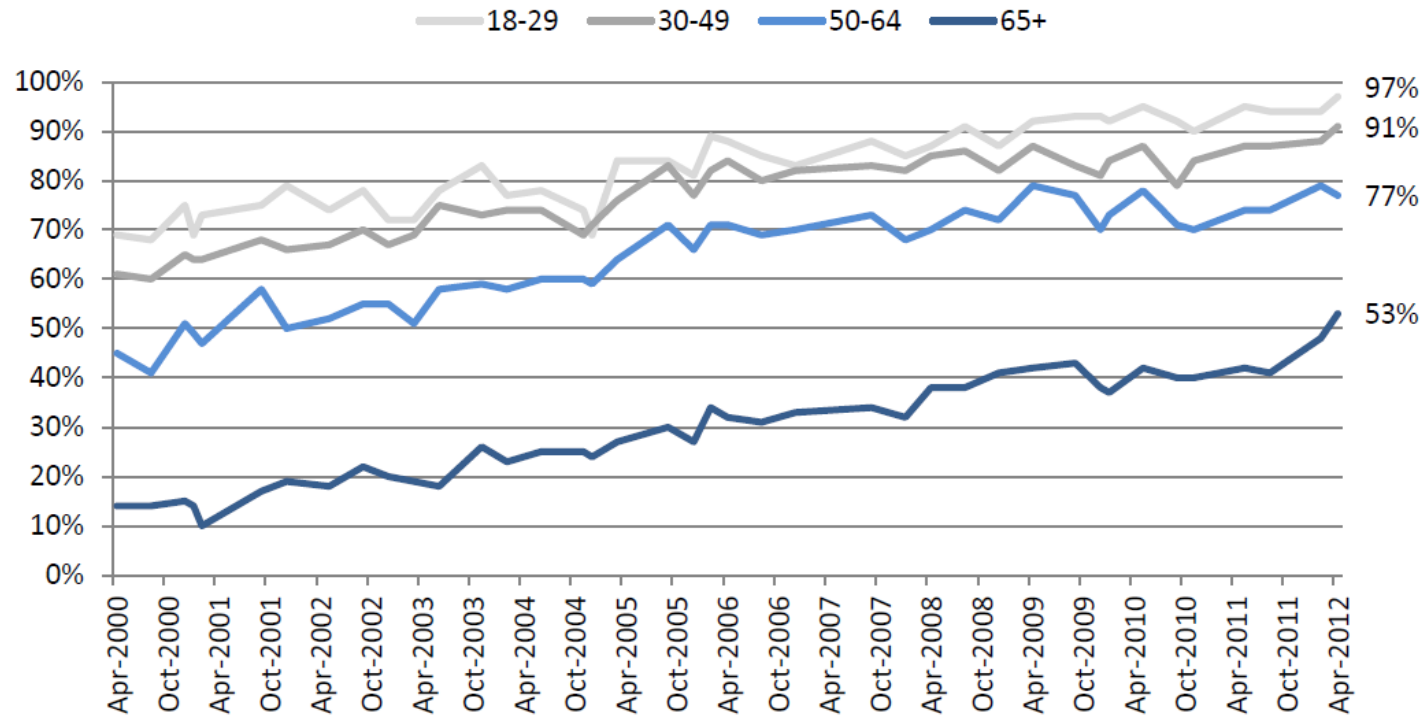
**37** Million  
Members

**22** Million  
Households

# The 50+ population is tech savvy

## Internet use by age group, 2000-2012

% of American adults age 18+ who use the internet



Source: Pew Internet & American Life Project Surveys, April 2000-April 2012.

- 53% of American adults age 65 and older use the internet or email
- 63% have researched a product or service online
- 50+ population is the fastest growing audience on Facebook

# What does this mean?



## Online seniors need digital to deliver three critical attributes:

- **Useful (delivering value).** Just like younger users, seniors will only take the time and effort to use a site that helps them accomplish goals. Sites targeting seniors must focus on a value proposition that is both clear and valued by older users.
- **Usable (providing easy access to value).** Web users who are in their golden years benefit most when designers apply their usability best practices — like creating clear menu categories and making text legible — to a tee.
- **Enjoyable (creating an emotional connection).** The attributes that make a site enjoyable for Gen Yers — flashiness, fun, and a certain cool factor — won't work for seniors. Instead, users from the older generations seek health, safety, connectivity, and contribution.

*Source: Designing for Seniors: Forrester Research 2009*



# OPTIMIZATION



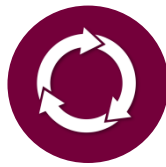
## EXPERIMENTATION



## TRANSFORMATION

- Test 1 – Make it Easy to Read and Share
- Test 2 – Make it Easy to Listen
- Test 3 – Make it Easy to Find
- Test 4 – Make it Easy to Understand
- Test 5 – Make it Easy to Access
- Test 6 – Make it Easy to Use

# Test 1 - Make it easy to read and share



## Research Notes:

### Background:

- Response from site survey and usability focus groups suggested, 50+ found 9 point font size on site challenging to read content
- Background color behind text confused and caused further legibility issues
- Site usability study – focus groups (conducted every year) showed members interest in ability to share content via social media on health insurance coverage and education as part of AARP membership

### Objective:

- Reduce site abandon and exit rates
- Drive higher awareness through incorporation of social media

### Primary Research Question:

- Members adoption and usage of the 'increase font size' and 'social media' sharing feature

### Test Design:

- Increased overall font size of text on site
- Ability to increase font size on all site pages



# Control- Make it easy to read and share



The screenshot shows the AARP Health website. At the top left is the AARP logo and the word "Health". To the right is a search bar with a "SEARCH" button. Below the search bar are navigation links: "AARP Health | My Account | Request Information | Contact Us". A horizontal menu contains three items: "UNDERSTANDING HEALTH PRODUCTS" (with a book icon), "NAVIGATING LIFE CHANGES" (with a sun icon), and "GETTING MY QUESTIONS ANSWERED" (with a question mark icon). The main content area has a breadcrumb trail: "AARP Health > Understanding Health Products > Valuable Discounts > Vision Discounts". On the left is a sidebar with categories: "AARP-BRANDED PRODUCTS" (Medicare Supplement, Medicare Advantage, Medicare Part D, Medical Supply Services), "INSURANCE" (Major Medical Health Insurance, Hospital Indemnity Insurance, Dental Insurance, Long Term Care Insurance), and "OTHER OFFERINGS" (Vision Discounts, Hearing Care Program, Prescription Discounts, Health Essentials Catalog, Fitness and Wellness Program, Care Provider Search). The main content features a large image of a woman wearing glasses. Below the image is the AARP logo and "Vision Discounts provided by EyeMed". A headline reads: "SEE THE DIFFERENCE WITH GREAT DISCOUNTS ON BRAND-NAME EYEWEAR, CONTACTS AND EXAMS". Below this is an "Overview" section with text: "Your path to deep discounts couldn't be clearer. Simply present your AARP membership card or your insurance card for a plan that carries the AARP name at any [LensCrafters](#), most participating [Pearle Vision](#), [Sears Optical](#), [Target Optical](#), [JCPenney](#) and thousands of private Doctors of Optometry and save today!". At the bottom of the main content are logos for "LENSCRAFTERS", "PEARLE VISION", and "Sears Optical". On the right side of the page are four blue buttons: "find a provider", "eye exam information", "eyewear information", and "calculate your savings". Below these buttons is a "Want to Get in Touch?" section with "AARP Vision Discounts Information" and contact details: "1-888-849-7289, 7 a.m. - 11 p.m. EST Mon-Friday and 9 a.m. - 5 p.m. EST Sat". At the bottom right is a "SEE MORE AARP® HEALTH DISCOUNTS" section with the text: "With health care and wellness discounts made available by AARP."

## Optimization Scenario

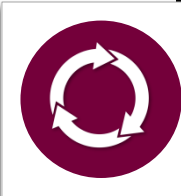
### Readability Issue

1. Background grey color
2. 9 point font size
3. No ability to increase text size
4. Placement testing of email icon

### Social Media Sharing

1. Members expressed interest in sharing content via feedback collected at focus groups and site surveys

# Test 1 - Make it easy to read and share



A screenshot of the AARP Member Advantages website. The header includes the AARP logo and the text "Member Advantages" with a sub-tagline "Your gateway to trusted financial products, services and discounts from top companies." Below the header is a navigation bar with categories: Life Insurance, Vehicle Insurance, Property Insurance, and Banking &amp; Financial Services. The main content area features a large image of a smiling woman. Below the image, there are sections for "Insurance Options" (Life Insurance Coverage, Lifetime Income) and "Understanding Insurance". The article title is "Life Insurance Coverage" and it includes a "Learn More" button. At the bottom, there are sections for "Term Life Insurance" and "Permanent Life Insurance".

-A | A | +A



**Optimization Results**

1. High adoption of increase text size option
2. Increased usage of Email capability
3. Growing Social media sharing usage

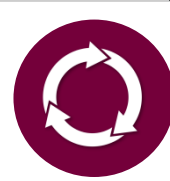
Print | Email | Share: f t



A close-up of the article's share icons. It shows the text "Print | Email | Share" with a blue arrow pointing upwards to the "Share" icon. Below this, there is a section titled "Health Insurance" with a "Print | Email | Share" bar and an upward-pointing blue arrow.

**Incorporated feedback from focus group members recommendation on adding icon**

# Test 1 – Make it Easy to Read: Results



**12% decrease in Page Bounce Rates**

*as members can read the content*

## Make it Easy to Read

Control – 9 point font size, grey background color

Treatment – 12 point font size, white background and text increase capability



**What You Need to Understand:** How users read and consume information.

# Test 1 – Make it Easy to Read: Results

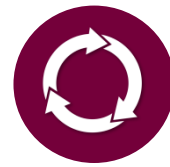


**7% increase in Email Sharing**

*Prominent display of Email Share capability on the Test page*

**Over 3% adoption of Social Sharing**

# Test 2 – Make it Easy to Listen



## Research Notes:

**Background:** AARP ASI digital properties serves as a gateway for our members to educate and learn about products, services and discounts. Usability studies conducted showed members interest in ability to listen to content on pages.

**Objective:** Improve member experience on ASI digital properties and reduce site abandon rates

**Primary Research Question:** Evaluate need and adoption of ‘content listening’ module

**Test Design:** A/B Test – Incorporate content listening module on test page; control pages did not have any module

# Test 2 – Make it Easy to Listen



AARP.org | AARP Member Benefits | Join AARP | Renew AARP

**AARP** Health

AARP Health | My Account | Request Information

UNDERSTANDING HEALTH PRODUCTS | NAVIGATING LIFE CHANGES | GETTING MY QUESTIONS ANSWERED

**Listen**

**get a quote**

**apply**

**Want to Get in Touch?**

**AARP Medicare Supplement Information**  
1-866-524-7865 (TTY: 711)  
7 a.m. - 11 p.m. EST Mon-Fri  
and 9 a.m. - 5 p.m. EST Sa

**AARP** Medicare Supplement Plans  
insured by **UnitedHealthcare Insurance Company**

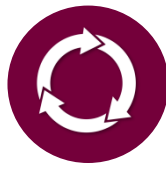
print email

A Medicare Supplement Insurance Plan, such as an AARP Medicare Supplement

**Optimization Results**

Tested providing content listening capability resulting in over 3% adoption

# Test 2 – Make it Easy to Listen: Results



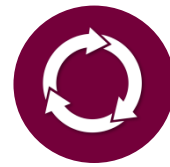
**5% click-through rate**

*On key product pages driving Web referrals; providers interested in integrating capabilities on their sites*



**What You Need to Understand:** Listen to your member feedback and industry trends.

# Test 3 – Make it Easy to Find



## Research Notes:

**Background:** AARP Members found it difficult to locate products/services/discounts on ASI digital properties assessed through site metrics, focus groups and site survey.

**Objective:**

- Improve site navigation for members
- Provide clear paths for members to find products and education section
- Improve Web referral rates

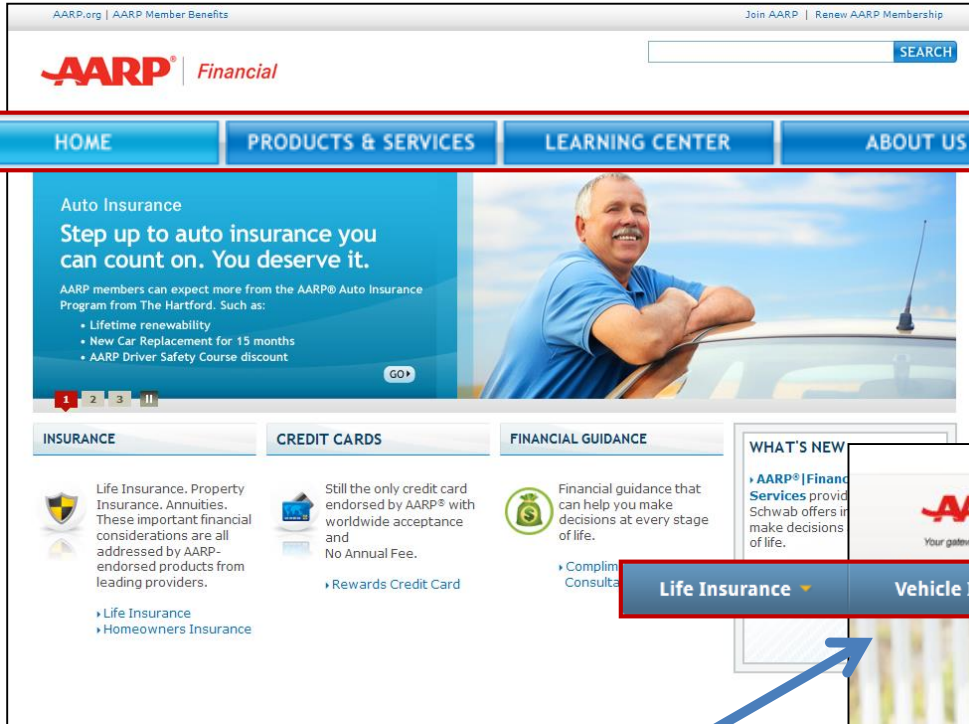
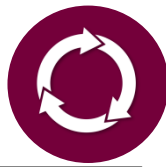
**Primary Research Question:** Did you find what you were looking for?

**Test Design:**

- Tested two product focused navigation menus via focus group
- Evaluate effectiveness of new site navigation

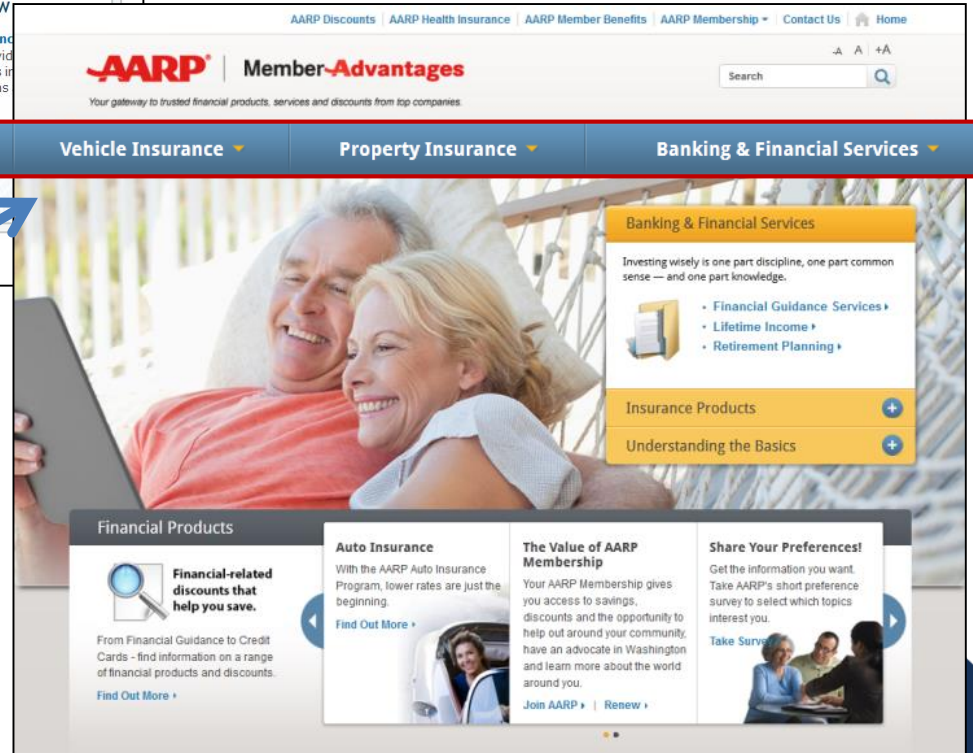


# Test 3 – Make it Easy to Find



**Situation – Control**

Site analytics and usability suggested visitors were not able to infer what content would be located in the main navigation sections



## Optimization Results – Test 1

Product- and category-focused navigation drew positive reaction. Users were able to infer what content would be located in the main navigation section (focus group was used to test effectiveness of new site navigation)

# Test 3 – Make it Easy to Find: Results



**15% increase in Web referral rate**

*Product-focused navigation menu allowed easy access*

Site navigation tested in focus group (Test 2 winner):

Member Feedback to control navigation: Grouping all products in a single category made it impossible to view product types at a glance



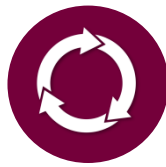
Member Feedback to Navigation Test 1: Separate category for Credit Cards and Services & Planning section nomenclature confused members



Member Feedback to Navigation Test 2: Participants were able to easily discern the range of products and services available under new categories



# Test 4 – Make it Easy to Understand



## Research Notes:

**Background:** Member confusion around site purpose through focus groups and site survey responses

**Objective:** Make it clear to understand the purpose of the site and what they get in a concise manner

**Primary Research Question:** Do you understand the purpose of the site?

**Test Design:** Conducted 2 focus groups (over 20 people – active Internet users, AARP and non members) to test various site value statements that expressed site purpose and placement on site

# Test 4 – Make it Easy to Understand

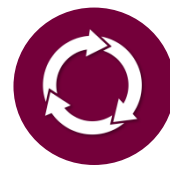


The screenshot shows the AARP Member Advantages website. At the top, there is a navigation bar with links for 'AARP Member Benefits', 'AARP Membership', 'Request Information', 'Contact Us', and 'Home'. Below this is the AARP logo and the text 'Member Advantages' with a red underline. A search bar is located to the right of the logo. A red box highlights the tagline: 'Your gateway to trusted health products, services and discounts from top companies.' Below the tagline is a horizontal menu with categories: Medicare, Insurance, Long Term Care, Caregiving, Health Discounts, and Tools & Resources. The main content area features a large image of an elderly couple smiling. Below the image is a sidebar with 'Medicare Plans' and a main content area with the heading 'Medicare Advantage' and a sub-heading 'AARP MedicareComplete Insured through UnitedHealthcare'. The main content area includes a paragraph about choosing health care coverage and a 'View Plans and Pricing' button.

**Optimization Opportunity**

Site value Statement:  
Explains clearly the value and purpose to site visitor (utilized on mobile and social as well)

# Test 4 – Make it Easy to Understand: Results



## **70% responded positively to Statement #1**

Responding favorably to the idea of the site as a “gateway” and characterization of the products as “trusted”

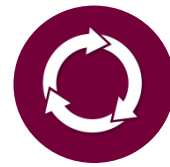
### Site Value Statements Tested:

1. Your gateway to trusted health products, services and discounts
2. Your connection to quality health products, services and discounts
3. Over 37 million AARP members



**What You Need to Understand:** Listen to members and their feedback.

# Test 5 – Make it Easy to Access



## Research Notes:

**Background:** No easy access from home page to find products and information users were coming to site to find

# Test 5 – Make it Easy to Access



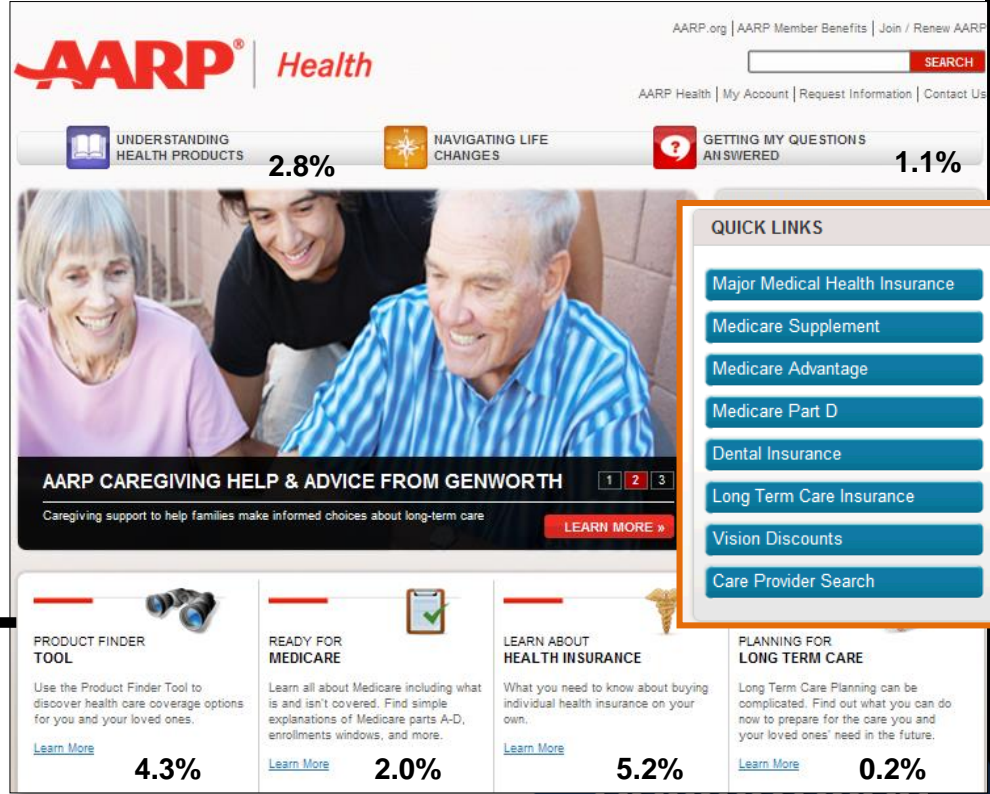
## Pre-design Home Page Activity



**Situation**

1. No direct path to Product Pages
2. High usage of 800 #, Getting My Questions Answered (GMQA)

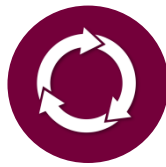
## Post-design Home Page Activity



**Optimization Opportunity**

1. Quick links on home page driving over 50% clicks to product page
2. Reduced 800 # calls and visits to GMQA section

# Test 5 – Make it Easy to Access: Results



## 25% increase in Web Referrals

*As members found their path to product and services on site*

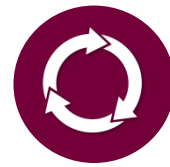
Variables
Control – No change
Treatment – <ul style="list-style-type: none"><li>• Added Quick Links for products</li><li>• Reduced billboard size</li><li>• Optimized page content</li><li>• Moved left navigation to top of page to be consistent with other pages</li></ul>



**What You Need to Understand:** Make it intuitive for members.



# Test 6 – Make it Easy to Use



## Research Notes:

**Background:** Site includes product finder tool to help members find products and services based on their age and state. Tool's conversion metrics showed fall off at the last step in the process of starting search.

**Objective:** Improve conversion rate for product finder tool

**Primary Research Question:** Understand usage metrics for tools, fall off at every step.

**Test Design:** Simplify user experience and ascertain conversion rate

# Test 6 – Make it Easy to Use



## Old Version

member, these plans are not your only option. You are strongly encouraged to evaluate your needs before choosing a health plan.

1. Who are you looking for?

For me       For two

2. Select a location.

Arizona

3. Select a person (or two) to evaluate.

**Person One**

Myself       50-64  
 My Parent       Under 65 but eligible for Medicare  
 My Spouse       65+  
 My Child (18 or under)

Lost 11% of customers when they needed to enter age as they didn't realize they needed to fill two fields

Prior to optimization, 83% of customers complete the Product Finder Tool session

## New Version

UNDERSTANDING HEALTH PRODUCTS      NAVIGATING LIFE CHANGES      GETTING MY QUESTIONS ANSWERED

AARP Health > Tools > Product Finder

### Product Finder

If you're looking for health-related insurance plans, services & discounts that carry the AARP name, this tool can help. AARP licenses its name to top companies that make these health-related plans and discounts available to you. We don't recommend any of these or any other health plan over another, however, if you would like to learn about these plans, we do make information available to you from the providers who offer them. We hope this information will help you choose confidently and feel better about the road ahead.

Below you'll find the full list of all the health products, services & discounts that carry the AARP name. To see which ones are available in your area and for your age group, answer the questions below.

Remember, these plans are not your only option. You are strongly encouraged to evaluate your needs before choosing a health plan.

**FOR ME**

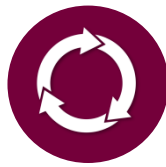
**1** Select a Location  
Alabama

**2** Select an age group  
 65+       Under 65 but eligible for Medicare  
 50-64

+ ADD ANOTHER PERSON      **SUBMIT**

95% of customers complete the Product Finder Tool session

# Test 6 – Make it Easy to Use



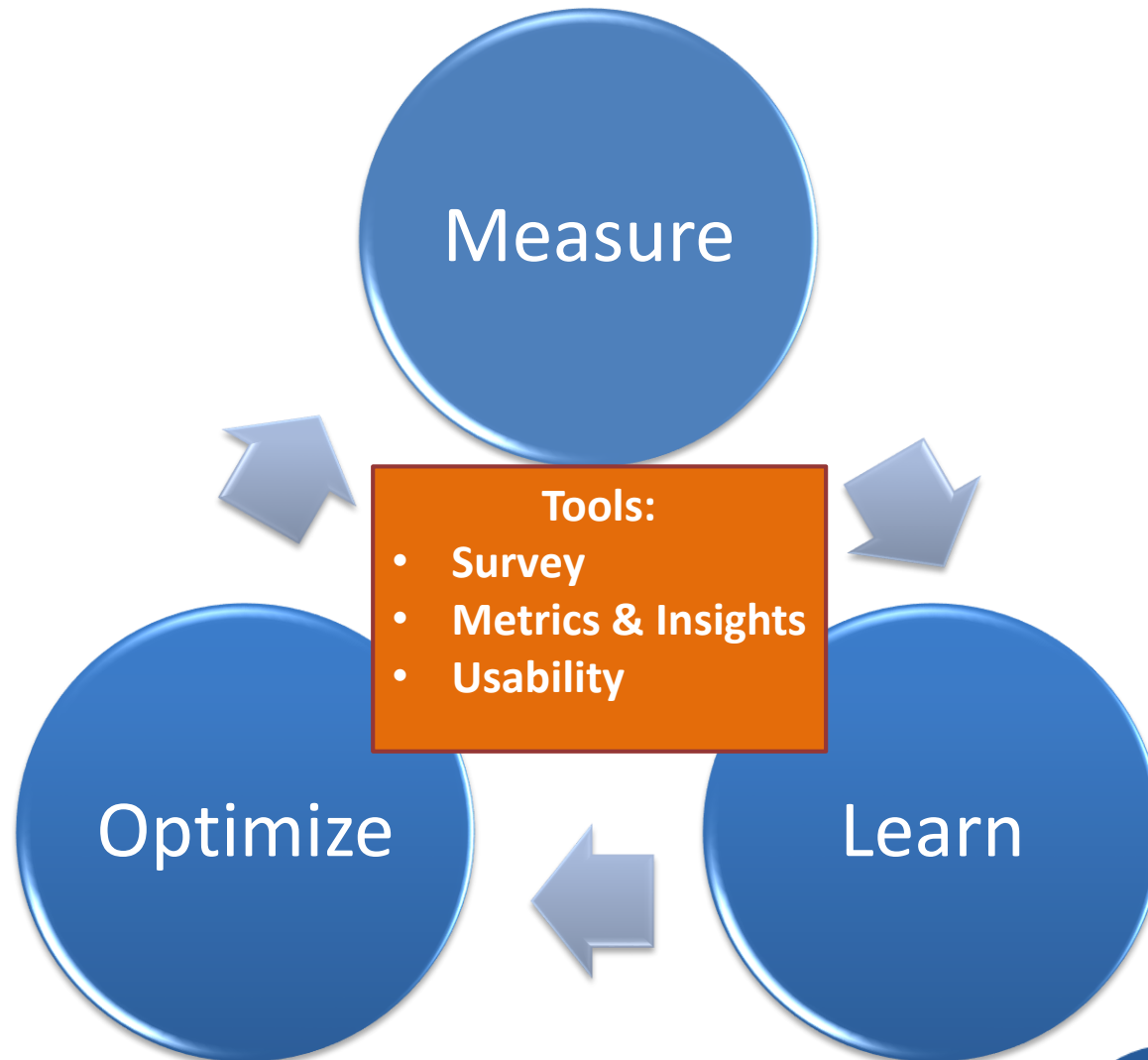
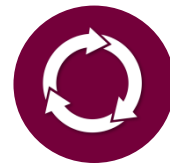
**12% increase in conversion**

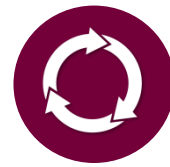
Variables
Control – No change
Treatment – Provided choice to select for one or two. In addition, separated age selection criteria.



**What You Need to Understand:** Don't ignore data and develop data insights review practice.

# Make it easy to learn





# Questions?