



Moneyvista navigation and user flows

28 January 2016

Navigation and IA

The background of the slide is an abstract composition of overlapping, semi-transparent circles. The color palette transitions from a deep blue on the left side to a vibrant green on the right side. The circles vary in size and opacity, creating a layered, geometric effect that suggests movement and interconnectedness.

Navigation model and IA

The screenshot shows the MoneyVista website with a navigation menu at the top: HOME, WHAT IS MONEYVISTA?, GUIDES & TOOLS, NEWS, FORUM, Google Custom Search, and LOG IN. The main content area features a central white box with the heading "Take control of your finances now and into the future" and a sign-up form on the right. The sign-up form includes fields for "What is your first name?", "What is your gender?" (with radio buttons for male and female), and "When were you born?" (with dropdown menus for Month and Year). A "Build my plan" button is at the bottom of the form. A blue banner in the bottom left corner says "SAVINGS WATCH Click here".

moneyvista

What is MoneyVista? How can it help me? How does it work? Who's behind it?

Take control of your finances now and into the future

MoneyVista is the new way of managing your money.

With MoneyVista you can build a personal financial plan which shows you the shape of your finances today, tomorrow, next year and for the rest of your life.

Better still, you'll see ways you can improve them.

For a **limited period MoneyVista is completely free**, so you have nothing to lose.
To get started just complete the blue box on the right and click 'Build my plan'.

Or if you prefer, find out more by exploring the site or view a [short demo](#).

Free!
Get started now

What is your first name?

What is your gender?
male female

When were you born?
Month Year

Build my plan >

SAVINGS WATCH
Click here

Navigation model and IA (cont.)

Home | What is Moneyvista? | Guides & Tools | Forum | News | Search | Log in

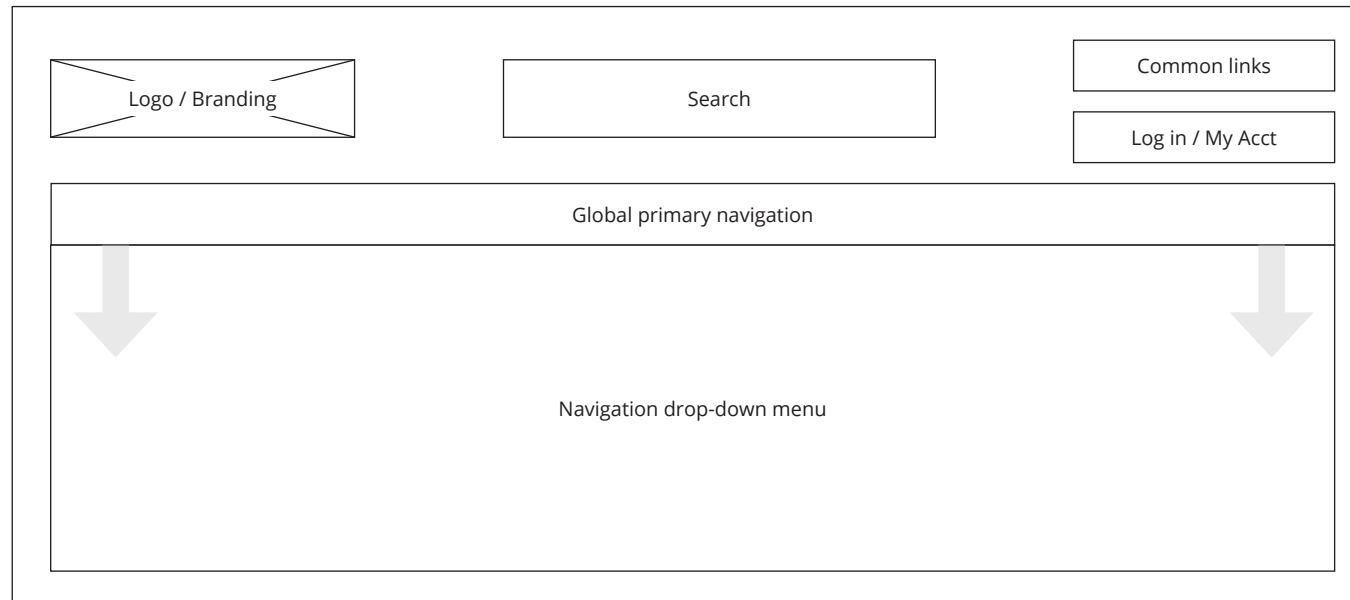
Home | My Data | Financial Planning | Forum | Guides & Tools | News | My Account

Logged out



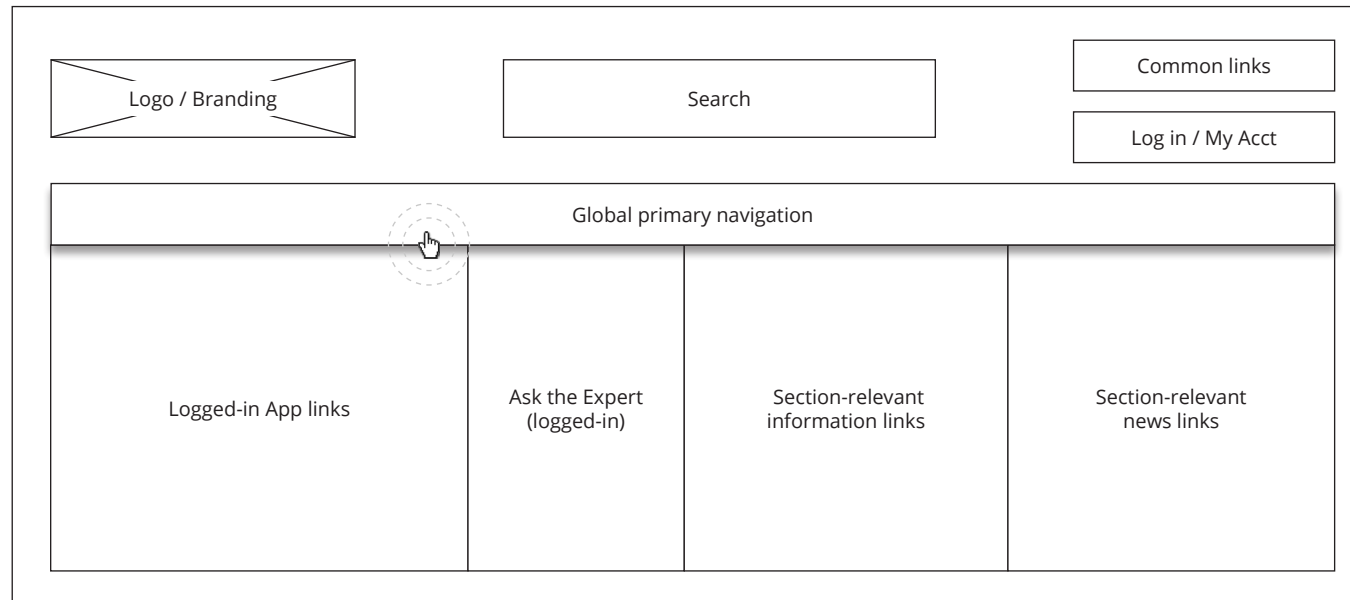
Logged in

Navigation model and IA (cont.)



Header content regions defined

Navigation model and IA (cont.)



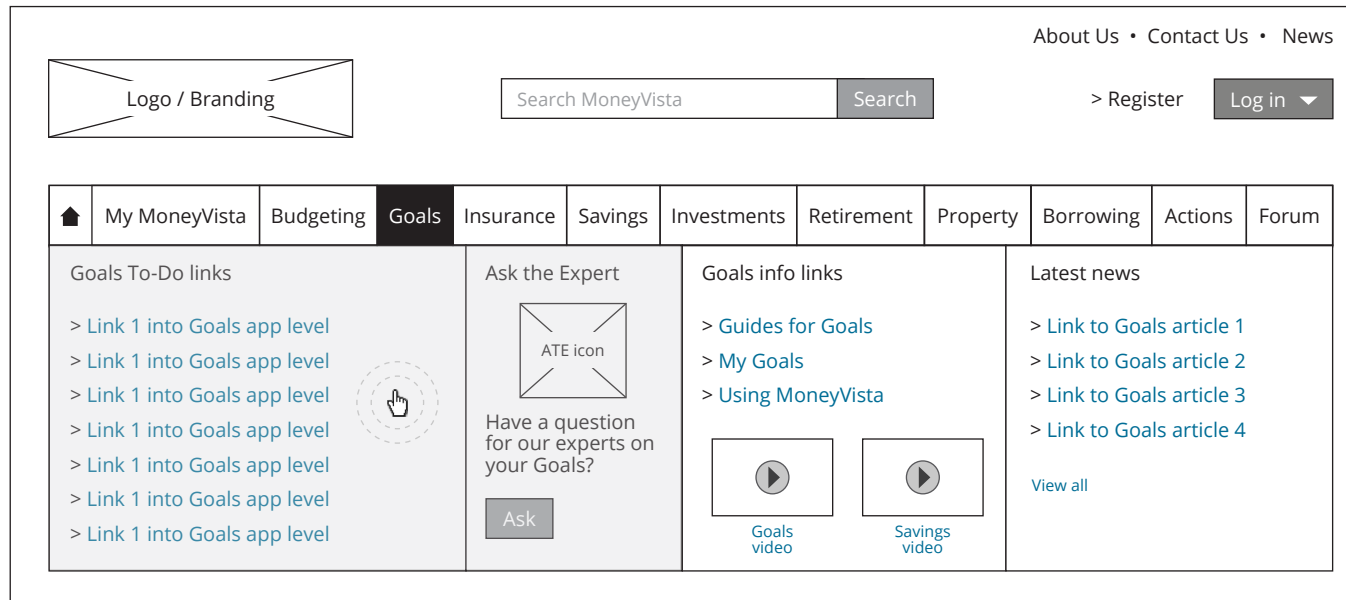
Global primary navigation regions defined

Navigation model and IA (cont.)

The screenshot shows a website navigation interface. At the top right, there are links for "About Us", "Contact Us", and "News". Below these is a search bar labeled "Search MoneyVista" with a "Search" button, and a registration/login area with "> Register" and a "Log in" button with a dropdown arrow. The main navigation menu consists of several items: a home icon, "My MoneyVista", "Budgeting", "Goals" (highlighted with a mouse cursor), "Insurance", "Savings", "Investments", "Retirement", "Property", "Borrowing", "Actions", and "Forum". Below the "Goals" menu item, the content is organized into four columns: "Goals To-Do links" (a list of seven links), "Ask the Expert" (featuring an "ATE icon", a text prompt, and an "Ask" button), "Goals info links" (a list of three links and two video thumbnails labeled "Goals video" and "Savings video"), and "Latest news" (a list of four article links and a "View all" link).

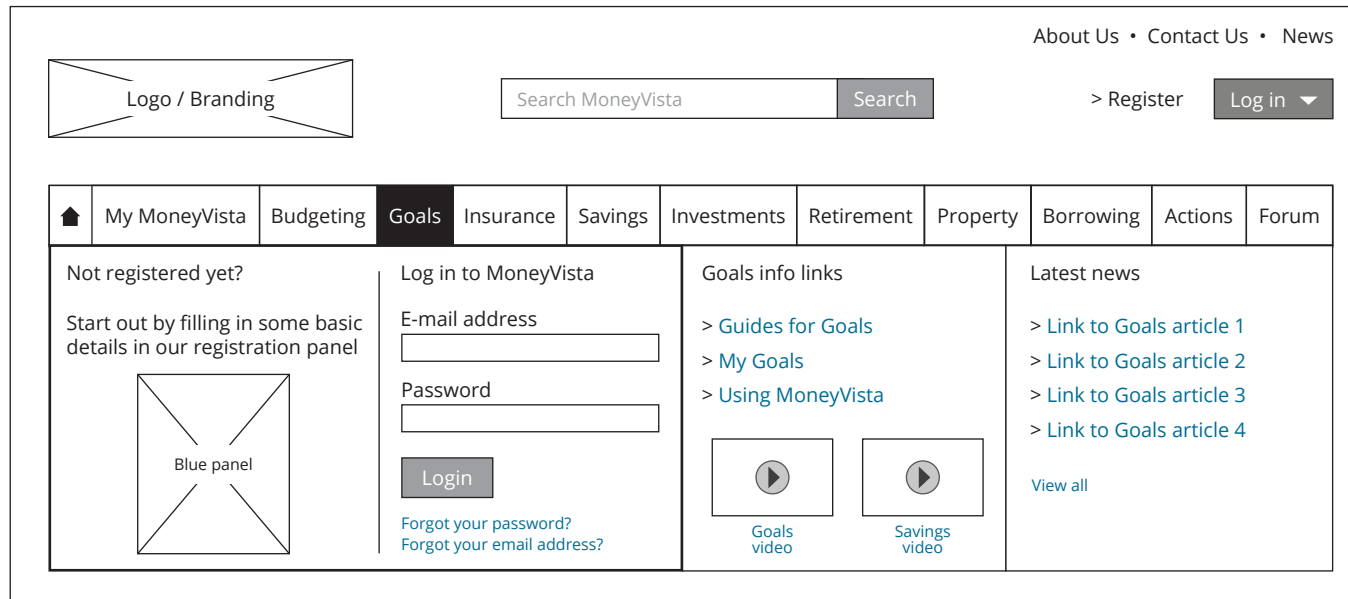
Drop down menu items and sub-items refined

Navigation model and IA (cont.)



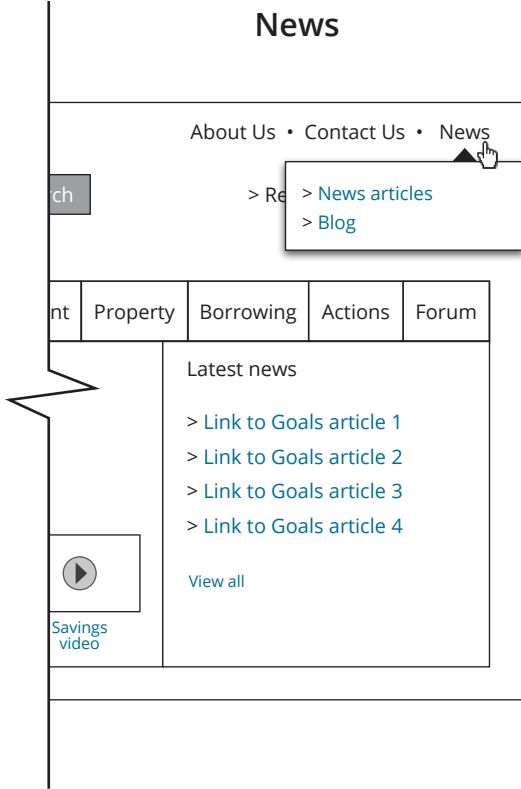
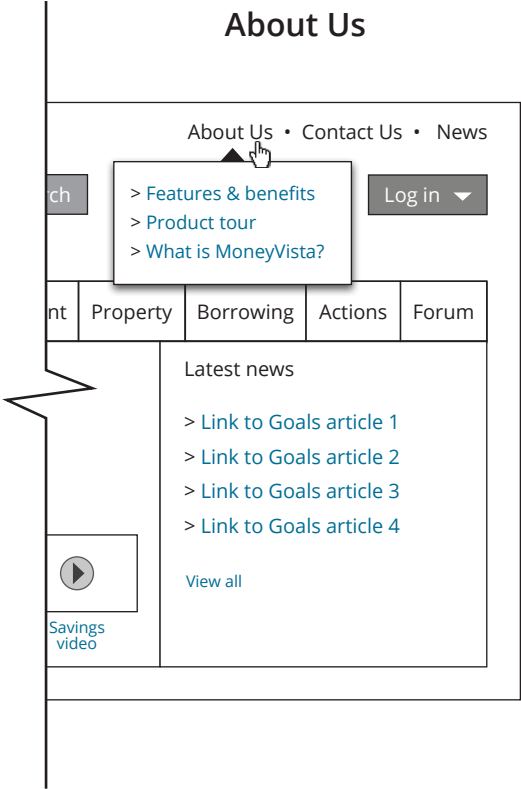
Left-hand dropdown content configured for logged-in users only

Navigation model and IA (cont.)

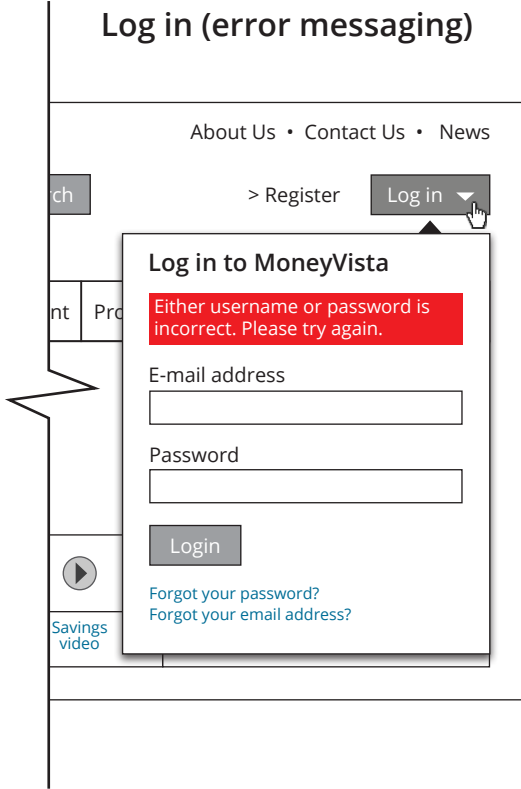
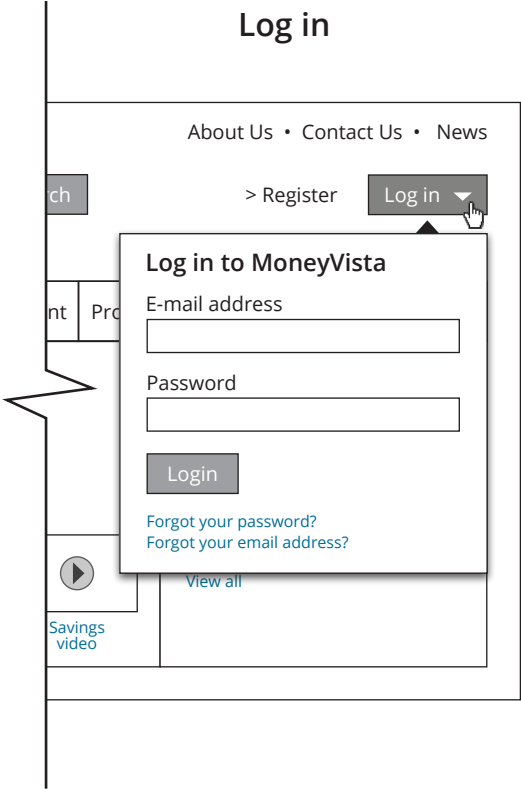


Register/log-in prompt appears for clicks from logged-out users

Navigation model and IA (cont.)



Navigation model and IA (cont.)



Navigation model and IA (cont.)

The screenshot shows the MoneyVista website interface. At the top, there is a search bar with the text "Search MoneyVista" and a "Search" button. To the right of the search bar are links for "About Us", "Contact us", and "News". Below the search bar is a navigation menu with the following items: Home, My MoneyVista, Budgeting, Goals (highlighted), Insurance, Savings, Investments, Retirement, Property, Borrowing, Actions, and Forum. Below the navigation menu is a content area with four columns:

- App links**
 - Add a new goal
 - Change how much I spend on goals
 - Change when I want to achieve my goals
 - Edit my goals
 - Turn goals on/off
 - Save more for my goals
 - Borrow to fund goals
- Ask the Expert**
 - Have a question for one of our experts on your Goals?
 - [Ask](#)
- Goals info links**
 - Guides for Goals
 - My Goals
 - Using MoneyVista

Below the links are two video thumbnails:

 - [Goals video](#)
 - [Savings video](#)
- Latest news**
 - Cheapest day to fly is Tuesday
 - Winners and losers in the Premier League housing boom
 - Consumers hit with £120 on energy bills in latest rise
 - ISAs maintain popularity despite economic pressure

[View all](#)

Navigation model and IA (cont.)

The screenshot displays the MoneyVista website interface. At the top, the MoneyVista logo is on the left, a search bar with the text "Search MoneyVista" and a "Search" button is in the center, and links for "About Us", "Contact us", and "News" are on the right. Below the search bar is a navigation menu with tabs for "Home", "My MoneyVista", "Budgeting", "Goals", "Insurance", "Savings", "Investments", "Retirement", "Property", "Borrowing", "Actions", and "Forum". The "Goals" tab is currently selected.

The main content area is divided into four columns:

- Not registered yet?**: A section encouraging new users to register. It includes a sub-section titled "Get Instant Free Access" with a form for "What is your first name?", "What is your gender?" (with radio buttons for Male and Female), and "When were you born?" (with dropdown menus for Month and Year). A "Build my plan" button is at the bottom.
- Log in to MoneyVista**: A section for existing users. It includes fields for "E-mail address:" and "Password:", a "Login" button, and links for "Forgot your password?" and "Forgot your email address?".
- Goals info links**: A section with three links: "Guides for Goals", "My Goals", and "Using MoneyVista". Below these links are two video thumbnails, one labeled "Goals video" and one labeled "Savings video".
- Latest news**: A section with three news items, each with a green arrow icon: "Cheapest day to fly is Tuesday", "Winners and losers in the Premier League housing boom", and "Consumers hit with £120 on energy bills in latest rise". A fourth item, "ISAs maintain popularity despite economic pressure", is partially visible. A "View all" link is at the bottom.

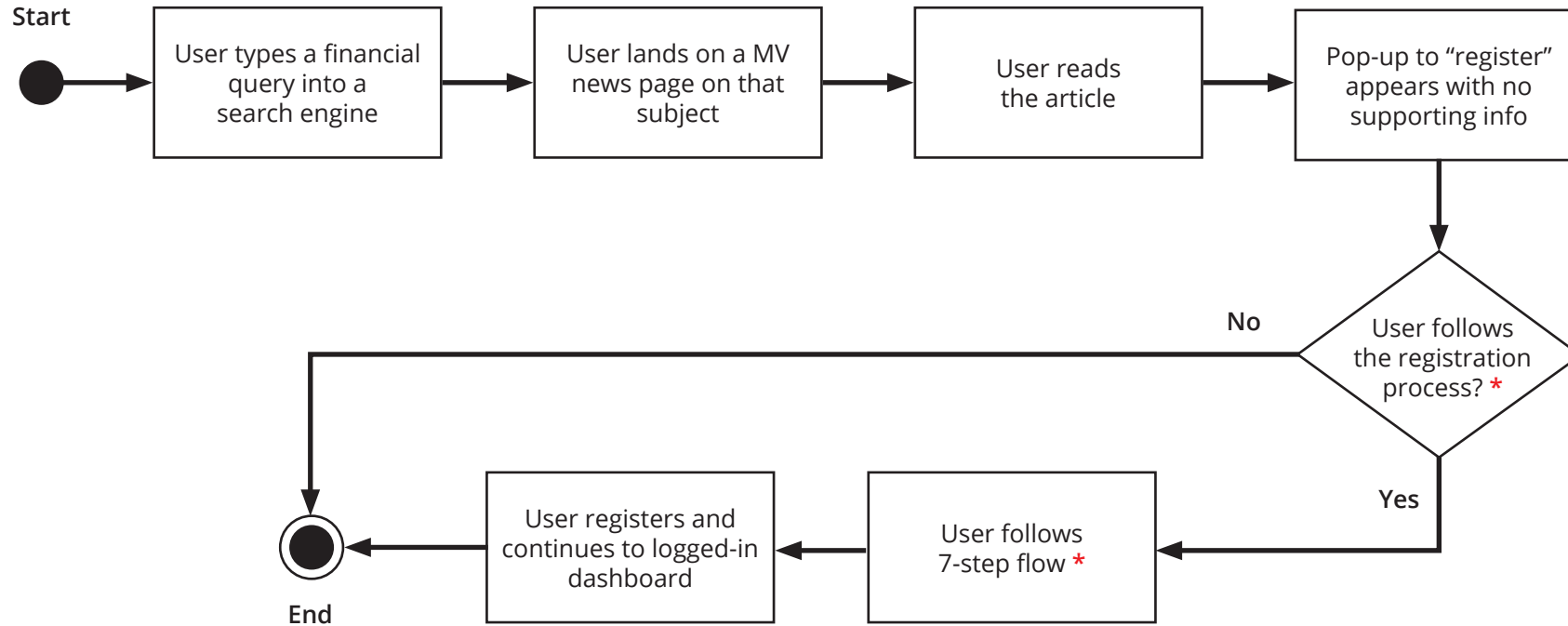
Navigation model and IA (cont.)

Gamification user flow

A gamified user flow - **the high** vs **the low** drop offs

- 80% of traffic came from natural search
- Very strong editorial and well-tuned SEO
- Existing **“first time visitor”** user flows were **“dead ends”**
- There had to be a way to **“get users in and keep them engaged”**
- Treat them like **“users”** instead of **“customers”**

A “pre-gamified” user flow - **the high**



* Very high drop-off rate

A "gamified" user flow - the low

