

Thomas Proctor

Content Strategy and Design

Presentation of work samples from PayPal, PayPal Credit, Xoom, Symantec

The content and examples are real. They are either currently live on the web or used with permission for the purpose of work sample discussions.

Tom Proctor

10/2024



EARN REWARDS WHILE SHOPPING ON THE GO

Travel and pay with the ease of PayPal and keep earning your credit rewards, points and miles.



You can find us just about anywhere.

PayPal is available across the globe at millions of brands. No matter where you're traveling this fall, we'll be there to make spending more secure.

[Link a Card](#)

Credit rewards promotional

Goal: Motivate customers to link their card.

Audience: All PayPal Credit customers.

Message: PayPal offers credit rewards that you can build on while traveling and on the go.

Motivation: Travel and pay with ease while earning payback rewards.

Action: Link a card



PayPal kiva

Lend \$25, receive a \$25 Kiva credit to lend again.

Make a loan to an entrepreneur around the world by October 10th and receive a \$25 credit to create even more impact.

Lend Now

Check out our [campaign page](#) for terms and conditions

Celebrate 10 years of collaboration between PayPal & the microlending pioneer, Kiva.

For the past 10 years, PayPal has powered Kiva's platform and helped to ensure that 100% of every dollar lent goes to funding loans to entrepreneurs around the world. **Together we've helped more than 2M small businesses access over \$920M in loans from over 1.5M lenders.**

Help us kick off the next 10 years; make a loan to a Kiva entrepreneur by October 10th and receive a \$25 Kiva credit.

Offer limited to the first 10,000 people who make a loan through this campaign now through 10/10/2016. Kiva credits provided by PayPal Corporate Advised Fund.

KIVA promotional

Goal: Awareness of KIVA value proposition for customers and drive them to make a microloan and get a \$25 credit.

Audience: All PayPal customers.

Message: Explain KIVA business concept and what they do. Explain offer.

Motivation: Travel and pay with ease while earning payback rewards.

Action: Lend Now



PAYPAL MEMBER
SPECIAL OFFER



PAYPAL MEMBER SPECIAL OFFER:

TAKE \$15 OFF

your order of \$100 or more on Wayfair.com*

Use promo code: 4566684337944

Expires 10/30/2016. Exclusions apply. See offer terms below.

[Shop Now](#)



IF ORDERS ARRIVE DAMAGED, INCOMPLETE, OR NOT AT ALL –

WE CAN HELP.

[Learn More about Purchase Protection & See Eligibility](#)

Wayfair promotional

Goal: Awareness of Wayfair \$15 off offer using promo code.
Entice customers to shop Wayfair using PayPal.

Audience: All PayPal customers.

Message: Get \$15 off orders over \$100 when using PayPal on Wayfair's site.

Motivation: Get \$15 off and also get product assurance.

Action: Shop Now and save money.



← Back to PayPal Profile | Secure Messages (0) | Chat Log Out

PayPal CREDIT Overview Activity Payments Benefits Credit Services

Transactions

\$763.48
Current Balance
Notify when high

\$7,736.00
Available credit
Notify when low

Current balance may not include pending transactions.

Choose a statement period

Pending transactions

These transactions have not posted to your account and are not included in your current balance, but may affect your available credit. Transactions usually post within 48 hours.

You have no pending transactions at this time.

Completed transactions

Notify when large amount

Sort by: Date Amount

Apr 08		EBAY 800-456-3229 See all special financing purchases No interest if paid in full	\$220.99
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Load next statement period Export

Dispute a charge Report a missing payment

Save on today's top brands.

Check out the latest deals and use PayPal Credit.

Shop Now

Sign up to receive your free credit score from VantageScore.

Enroll Now

Contact Us Online Privacy Policy Privacy Policy Online Usage Agreement Fraud Protection

Credit Transactions Web UI

Goal: Present content and layout for simplified redesign incorporating new and existing features.

Simple transactions reporting and functional clarity is primary.

Multiple layouts, labels and touchpoints were user-tested extensively.

Developed information architecture of Navigation bar with design team.

Provide uncrowded and balanced layout with room for banner elements

Audience: All PayPal Credit customers, continuous online statement.

[Overview](#)[Activity](#) ▾[Payments](#) ▾[Benefits](#) ▾[Credit Services](#) ▾

Request Credit Increase

\$8,500.00

Current Credit Line

\$763.48

Current balance

\$7,736.00

Available Credit

Request an increase to your current credit line by providing your requested credit line amount and your annual income after taxes.

New Credit Line: \$

The total credit line amount you are requesting.

You may be asked to provide your annual income after taxes if we do not have your recent information on file. Income is used to determine eligibility for a credit line increase. Subject to credit approval.

Annual Income
after Taxes:

\$ 208,000

Your income from all sources, after tax deductions.

You don't need to include alimony, child support, or separate maintenance income unless relied upon for credit. You may include the amount that you have available each year to spend from your assets.

Married WI Residents only: If you are applying for an individual account and your spouse also is a WI resident, combine your and your spouse's financial information.

[Request Credit Line Increase](#)



Request Credit Increase Web UI

Goal: Present minimalist simplified redesign of credit increase request.

Provide instructional, user-tested and legal wording that customers can easily interpret.






Labels and information efficiency were user-tested extensively.

Audience: All PayPal Credit customers, continuous online statement.

Action: Request Credit Line Increase

[Overview](#)[Activity](#)[Payments](#)[Benefits](#)[Credit Services](#)

Special Financing Purchases

>	 EBAY 800-456-3229 No Interest if paid in full by May 02, 2022	\$0.00 Remaining balance	\$0.00 Current accrued interest ?	May 02, 2022 Expiration date PAID OFF
>	 EBAY 800-456-3229 No Interest if paid in full by May 02, 2022	\$0.00 Remaining balance	\$0.00 Current accrued interest ?	May 02, 2022 Expiration date PAID OFF
>	 EBAY 800-456-3229 No Interest if paid in full by June 02, 2022	\$105.42 Remaining balance	\$9.93 Current accrued interest ?	Jun 02, 2022 Expiration date Set reminder
>	 TICKETFULFI No Interest if paid in full by September 02, 2022	\$437.07 Remaining balance	\$12.46 Current accrued interest ?	Sep 02, 2022 Expiration date Set reminder
>	 EBAY 800-456-3229 No Interest if paid in full by November 02, 2022	\$220.99 Remaining balance	\$0.00 Current accrued interest ?	Nov 02, 2022 Expiration date Set reminder

[Glossary of terms](#)

Never miss a payment.

Manage automatic payments in one simple place.

[Update Now](#)

Set up reminders for your PayPal Credit account

Receive email and text alerts about your balance, due date and account activity.

[Set Up Alerts](#)

Special PurchasesWeb UI

Goal: Present minimalist simplified redesign of special purchases and the terms, expiration dates.

Provide clear information so customers understand when their offers expire and don't think we are playing a gotcha game or trying to deceive them.

Audience: All PayPal Credit customers, continuous online statement.

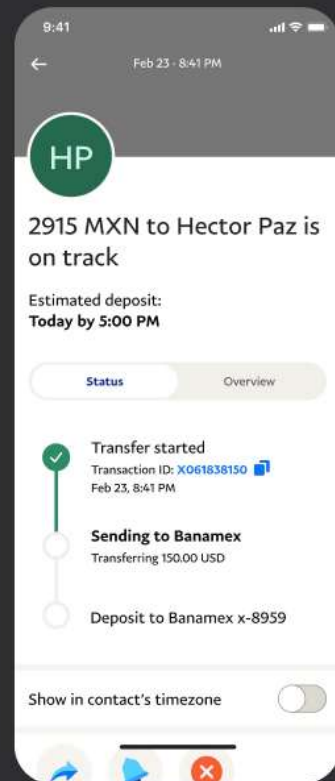
Action: Set reminders for expiration of offers to avoid paying extra interest and fees.

Transaction Tracking Mobile

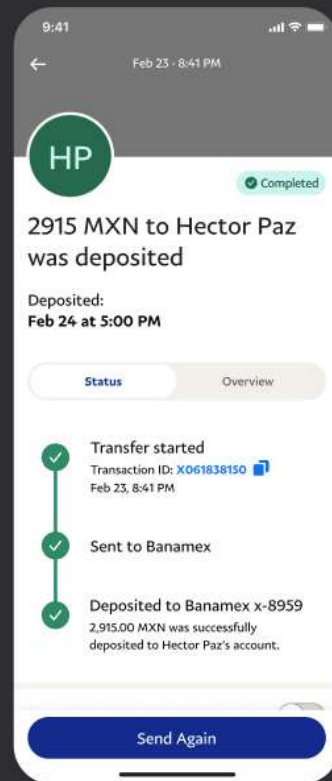
The ability to track transaction progress in real-time was an important milestone for Xoom and its customers.

The new interface allows customers to see where their money is in the transfer process. Customers can find out if their money is sent, delayed, canceled or on hold. In some cases, customers can fix the issue quickly and avoid a support call. I designed this framework with two interaction designers.

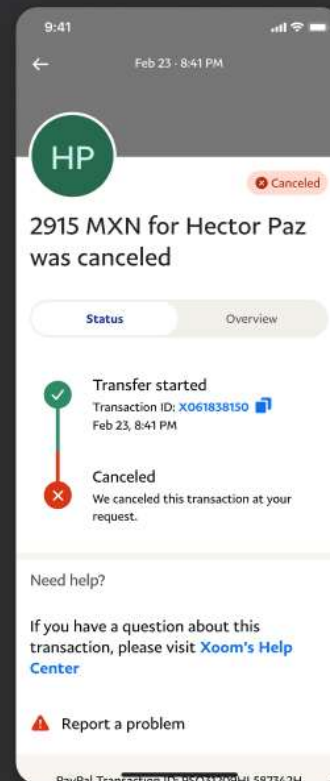
On Track



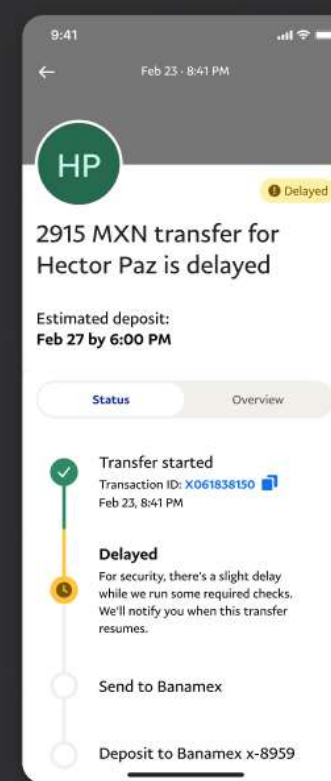
Completed



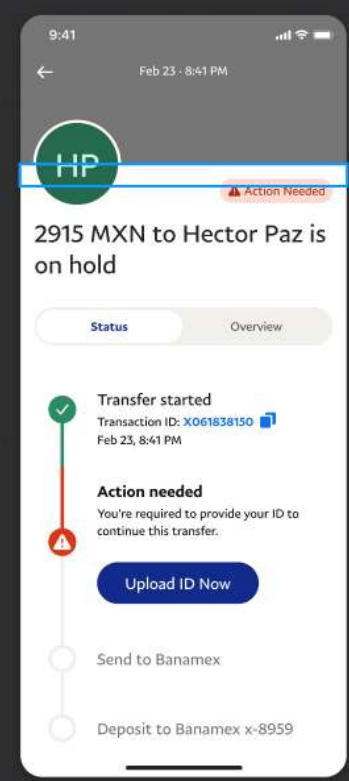
Canceled



Delayed

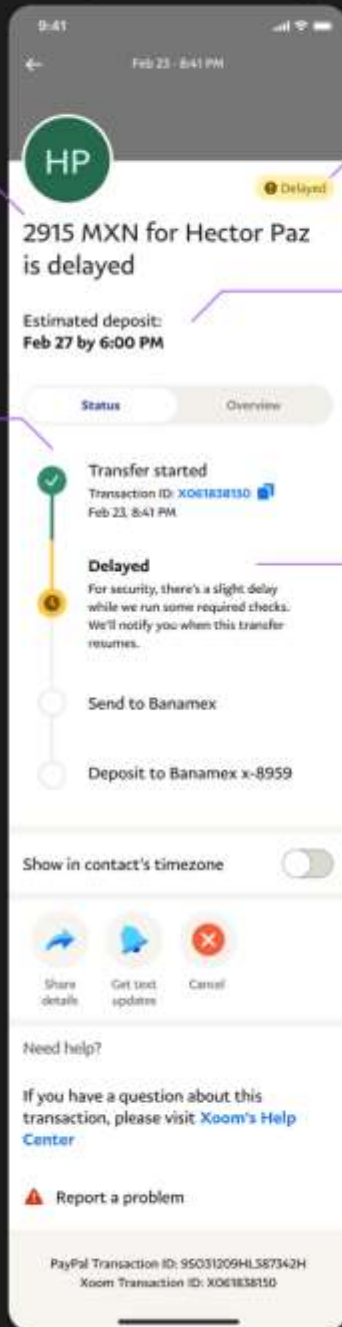


On Hold



Delayed Transaction

Delayed - Manual Screening



Status Header
At-a-glance status

Status Badge
Strong visual reference using badge

ETA
Prominent, easy to parse

Milestones
Key steps in the process. Shown in past, present and future states in a timeline

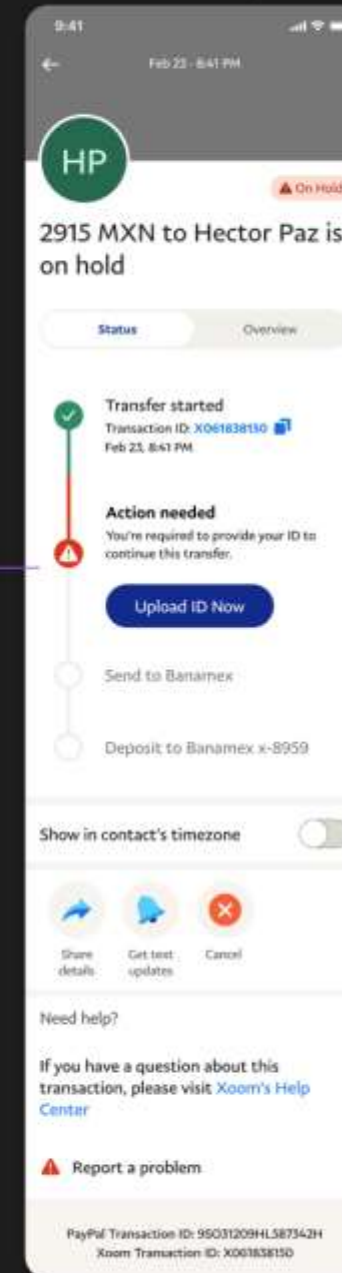
Milestone content

- Visual cues
- Remediation action if possible
- What went wrong
- Set expectation or next step

CTA or link if needed.

On Hold Transaction

On Hold - Doc Upload



Transaction Tracking Mobile

Goal: Develop framework, content, and visual design for all transaction tracking events in happy path and error scenarios.

Provide self remediation for over 100 scenarios where customer is delayed and can fix related issues.

Audience: All Xoom customers.

Action: Multiple actions possible based on error or event.



RCM and Legal Compliance

- Managed content and legal approval process for Paypal RCM (Regulatory Change Management) content changes driven by changing legal requirements for all PayPal products globally.
- I worked closely with legal partners to get agreement, signoff and completion of content changes on tight deadlines.
- As the customer advocate for accessibility, user-friendliness, and brand voice of content, I worked with legal partners to simplify legalese, UX, and messaging.

Example of how I approached fixing the TOP support issue for Symantec Trust Services

- Certificate and intermediate certificate installation was the #1 support issue.
- 40% of support calls with customers were related to problems with certificate delivery and installation.





SSL - Upgrading the tools and user experience

UX and product management researched the user experience to see how to make it easier to use Symantec SSL certificates. Fixing the issues became a top priority.

- **Key Issue #1 - Certificate delivery to the customer**

The existing method of delivering certificates to customers was inadequate and problematic for many users, mostly due to using attachments in the delivery email – an outdated method for file delivery.

- **Key Issue #2 – Generating a CSR for the certificate**

The requirement for customers to generate a CSR on their server is a big technical hurdle. The existing workflow had a lot of “gotchas” and show-stoppers that users found difficult to remedy, short of calling support.





SSL - Upgrading the tools and user experience

UX Goals

- Fully understand user tasks and workflows, and where and why users get stuck.
- Improve designs and flows while minimizing impact on development and engineering teams.
- Visibly improve the user experience for customers.
- Provide clear paths for the various levels of user preparedness.
- Provide a design that works equally well for the full range of users.
- The interface must allow for educating users that need information and help, while not impeding users that know what to do and don't need explanation.
- Reduce support call volume. Enlist support team feedback to fine-tune designs to cover all use-cases.



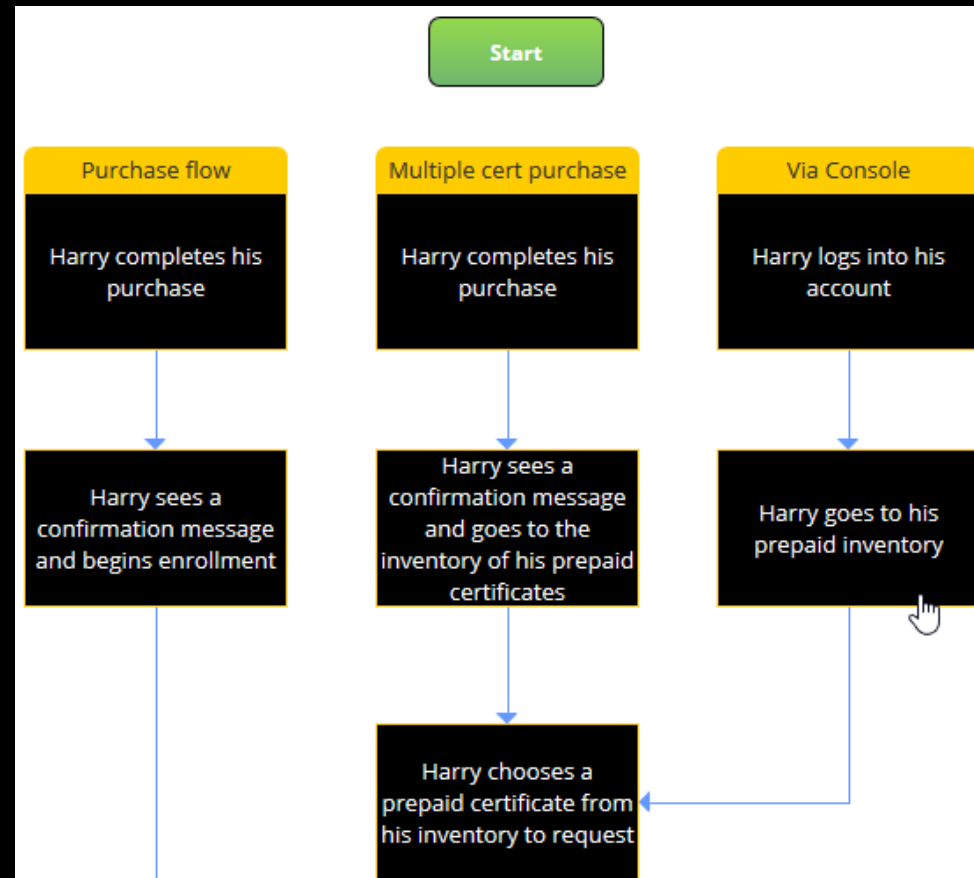
SSL - Upgrading the tools and user experience

Discovery and User Story

Task flow diagrams

UX created detailed steps of the user's task flows.

Research is done on the user persona, finding out everything we know about a typical user.





Generating a CSR - a list of UX problems

- The installation process and steps were not clear
- A lack of examples, help, or supporting media
- Incomplete information provided
- Not enough information collected from the user to tailor the experience
- Content not focused on the user's tasks
- Use of unsupported or unfamiliar jargon and terminology
- A complex email full of content not applicable to most users.

```
keytool -genkey -alias star_domain_com_2015Nov2 -keyalg RSA  
-keysize 2048 -keystore star_domain_com_2015Nov2.jks -dname  
"CN=*.domain.com, OU=OUName, O=OrgName, L=Santa Clara,  
ST=California, C=US" && keytool -certreq -alias  
star_domain_com_2015Nov2 -file star_domain_com_2015Nov2.csr  
-keystore star_domain_com_2015Nov2.jks
```

United States | English | 144QATESTFIRST 144QATESTLAST | Help & Support | Feedback | Sign Out

Symantec. Trust Center

You must submit your CSR to continue.
Before we can issue your certificate, you must generate and submit a certificate signing request (CSR). You can submit your CSR now or come back later by signing in to your account.

1 Select your server

☒ Apache
☐ Microsoft IIS server
☐ Other server / I don't know

2 Generate your CSR

Automated CSR generation
Run the SSL Assistant tool on your server to generate your CSR.
[Apache on Red Hat](#)
[Instructions for Red Hat](#)

Manual CSR generation
Use the manual instructions to generate your CSR.
[Manual instructions](#)

3 Submit your CSR

- RSA: Use a 2048-bit key to generate your CSR.
- DSA: Use a 2048-bit key and SHA-256 to generate your CSR.
- Do not include passwords or challenge phrases.
- We issue your certificate using the domain and organization submitted with your order; not your CSR.

Paste CSR here

How will I know when my certificate is ready?
Before we can issue the certificate, your organization contact needs to approve your order. We will email or call them for approval.
Meanwhile, we will verify your organization information.
When complete, you will receive an email with instructions to download and install your certificate.

[Go to the Trust Center](#)

CHAT WITH US
A representative is standing by

NEED ASSISTANCE?

CALL US
1-866-893-4565 or 1-520-477-3111

ORDER DETAILS

ORDER NUMBER
822049488

WEBSITE
gatestout162-11.gatestout1.com

YOUR RECEIPT
We will send you an email when your order is approved. You can also use the printer icon to print your receipt.



Generating a CSR Original Page Analysis

A reference to a tool most users have never seen or do not know how to get

Complex criteria is a jargon filled mess

Most references to "we" are not user focused and the information is more relevant to the company, not the user.

United States | English | 144QATE5T1RST 144QATE5T1LAST | [Help & Support](#) | [Feedback](#) | [Sign Out](#)

Symantec. Trust Center

You must submit your CSR to continue.
Before we can issue your certificate, you must generate and submit a certificate signing request (CSR). You can submit your CSR now or come back later by logging in to your account.

1 Select your server

☒ Apache
☐ Microsoft IIS server
☐ Other server (I don't know)

2 Generate your CSR

Automated CSR generation
Run the CSR Assistant tool on your server to generate your CSR.

Manual CSR generation
Use the manual instructions to generate your CSR.

OR

Apache on Red Hat
[Instructions for Red Hat](#)

Manual Instructions

3 Submit your CSR

- RSA: Use a 2048-bit key to generate your CSR.
- DSA: Use a 2048-bit key and SHA-256 to generate your CSR.
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Paste CSR here

How will I know when my certificate is ready?
Before we can issue the certificate, your organization contact needs to approve your order. We will email or call them for approval.
Meanwhile, we will verify your organization information.
When complete, you will receive an email with instructions to download and install your certificate.

[Go to the Trust Center](#)

Many users were stuck here - didn't know what a CSR is or how to submit one. No help was available.

Redundant text. Not clear how to "come back later"

Inadequate options for server definition

Complex instructions, very generalized

With no examples or help. Users would call support.

The user's expectation and goal is the last thing mentioned in tiny print

ORDER DETAILS:

ORDER NUMBER
622049468

WEBSITE
qatestout162-1 | testout1.com

YOUR RECEIPT
We will send you a receipt when your order is approved. You can also use the printer icon to print the receipt.

Need Assistance?

CALL US
1-866-893-8565 or 1-828-477-3111

[Legal Notices](#) | [Privacy](#) | [Repository](#) | [Feedback](#)

Help: 1-828-477-3111 | 1-888-883-8888 | **Support:** 1-828-477-3112 | 1-877-438-6796

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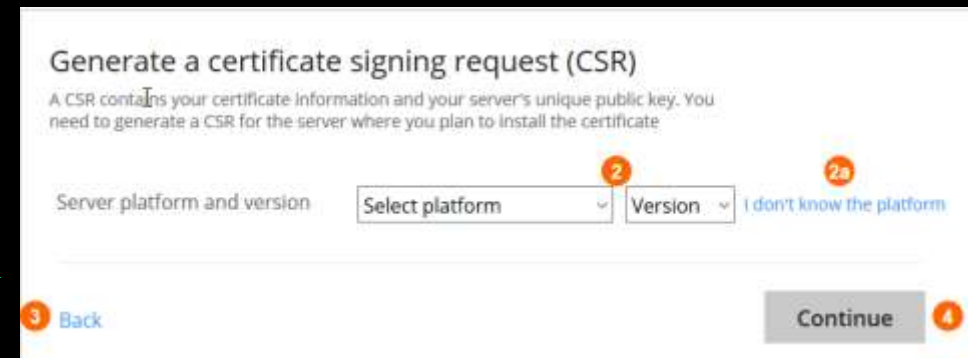
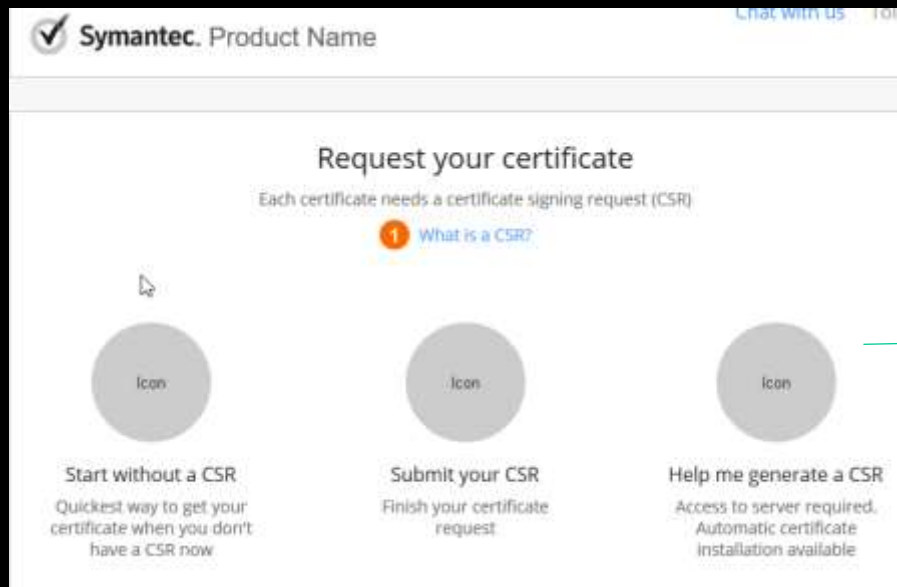
VeriSign
VeriSign

Solution 1

- **Change the order of information** collected to better focus the user down one of three different paths at the outset.

Result

- User expectations are better understood at the outset.
- Users follow a path most appropriate to their needs and situation.





Solution 2

- **Refocus content and messages** onto user tasks and education. Vet content rigorously through testing and review.

Result

- Users get only the info they need and feel more comfortable when messaging is directed to their tasks, and when they can quickly find the info they need.



Solution 3

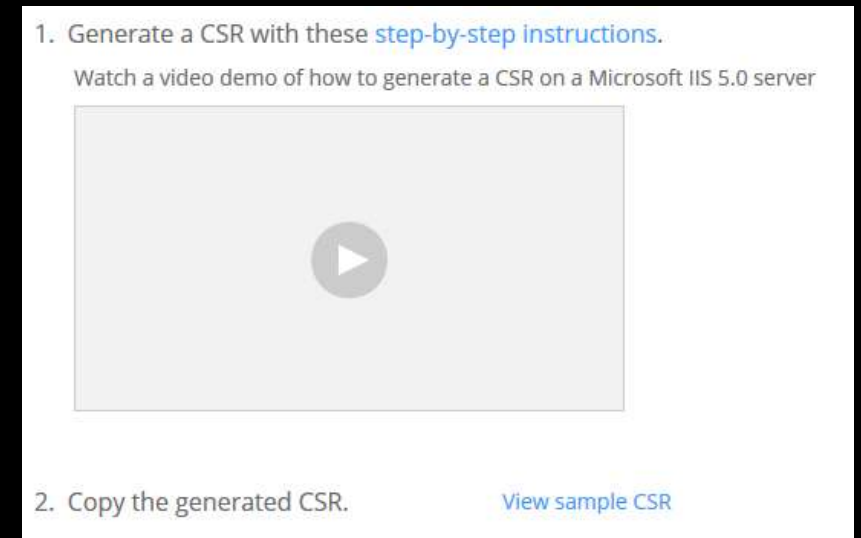
- **Provide user education** at appropriate places using tool tips, code samples, CSR samples, videos, and help links.

Result

- Users can easily get more details about concepts or terms they don't understand without calling support or needing other guidance.

Examples

- “What is CSR?” help topic
- “I don’t know the platform” help topic
- “View sample CSR” example text of a real CSR
- Video tutorial links





Solution 4

- **Create the server selection wizard** to simplify server criteria selection. Users can also now select server type and version. The wizard achieves the following:

Result

- Enables use of smart defaults based on their selections.
- Allows delivery of better, more specific information about the user's installation (rather than making users have to dig for it).

A screenshot of a web-based wizard titled "Generate a certificate signing request (CSR)". Below the title is a descriptive paragraph: "A CSR contains your certificate information and your server's unique public key. You need to generate a CSR for the server where you plan to install the certificate." The main form area is labeled "Server platform and version" and contains two dropdown menus: "Select platform" and "Version". To the right of these dropdowns is a link that says "I don't know the platform". At the bottom left of the form is a "Back" button, and at the bottom right is a "Continue" button. There are four numbered orange circles overlaid on the image: "2" is above the "Select platform" dropdown, "2a" is above the "I don't know the platform" link, "3" is above the "Back" button, and "4" is above the "Continue" button.



Solution 5

- **Provided additional UI** for special use-cases (server type).

Result

- The user experience is now complete for many variable setups and environments that previously required the help of the support team. This accommodates a much wider array of users and simplifies the process for all users.

Figure A-1.2: Supported server type (for KLEE), Select org, Common name, SANs,

The screenshot shows a web form titled "Generate a certificate signing request (CSR)". Below the title is a descriptive paragraph: "A CSR contains your certificate information and your server's unique public key. You need to generate a CSR for the server where you plan to install the certificate". The form has two main sections. The first section, "Server platform and version", contains two dropdown menus: the first is set to "Apache" and the second is set to "2.4.x". To the right of these dropdowns is a link that says "I don't know the platform". The second section, "Organization", has a label "Organization" and a sub-label "A CSR requires information about the organization that requests the certificate". To the right of this is a text input field containing "Ruth's Boutique, Inc" and a link "Change organization". Below the text input field, the address "Headquarters", "Mountain view, California", and "United States" is displayed.

Generate a certificate signing request (CSR)
A CSR contains your certificate information and your server's unique public key. You need to generate a CSR for the server where you plan to install the certificate

Server platform and version: [I don't know the platform](#)

Organization: [Change organization](#)
A CSR requires information about the organization that requests the certificate: Headquarters
Mountain view, California
United States



Solution 6

- UX worked with support team members for direct feedback during design and content iteration.

Result

- The support team's in depth knowledge of user issues helped UX fine tune our designs to cover all the bases for users, further reducing future support calls and pleasing customers!



Summary

Successful implementation of the CDC project yielded immediate feedback from our support team and some of our customers.

We were delighted to hear about how the upgrades directly helped reduce calls and make customers that were used to the old process much happier.

Real-world evidence validates many of the assumptions we made.

More work needs to be done on this process, but this project was a huge win and an important incremental step.