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

PayPal CREDIT

PayPal

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

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 CREDIT

PayPal

PAYPAL MEMBER
SPECIAL OFFER

wayfair

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

Account   Help   Fees   Privacy/Cookies   Apps   Shop

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

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.
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.

P PayPal CREDIT

Overview   Activity ⌄   Payments ⌄   Benefits ⌄   Credit Services ⌄

Request Credit Increase

$8,500.00 $763.48 $7,736.00
Current Credit Line   Current balance   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

P PayPal CREDIT

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

PP PayPal CREDIT

Overview   Activity ⌄   Payments ⌄   Benefits ⌄   Credit Services ⌄

Special Financing Purchases

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

Glossary of terms

Never miss a payment. **PayPal CREDIT**
Manage automatic payments in one simple place.   **Update Now**

Set up reminders for your PayPal Credit account **PayPal CREDIT**
Receive email and text alerts about your balance, due date and account activity.   **Set Up Alerts**

PP PayPal CREDIT

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.
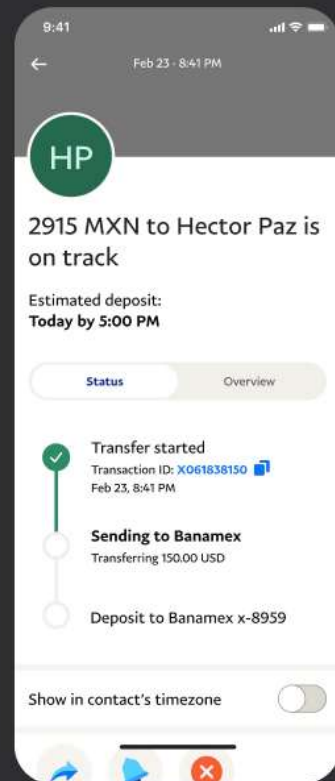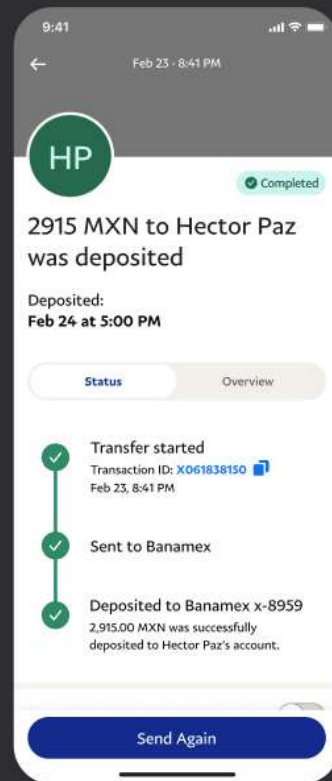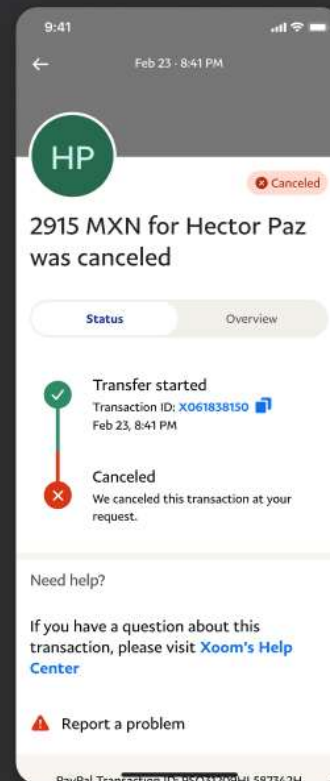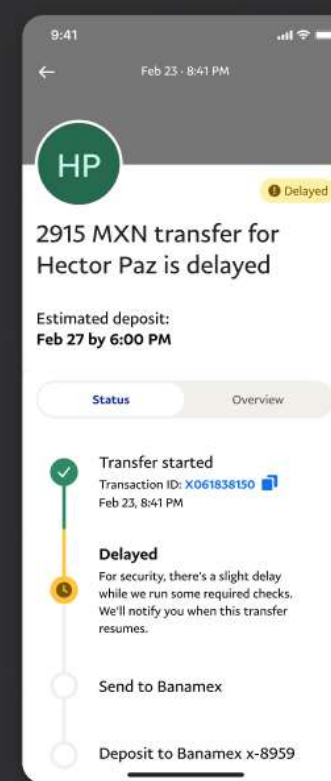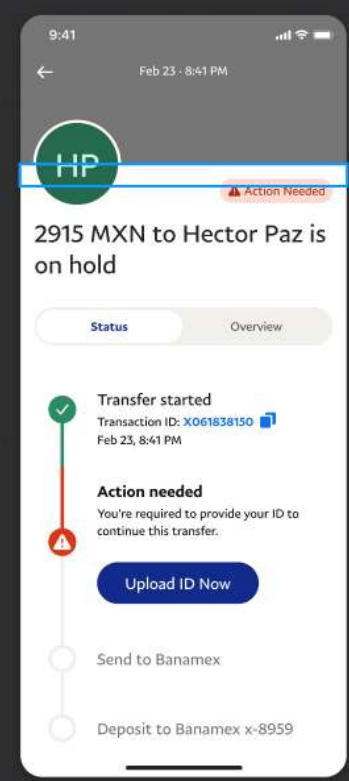
Delayed Transaction
Delayed - Manual Screening

On Hold Transaction
On Hold - Doc Upload
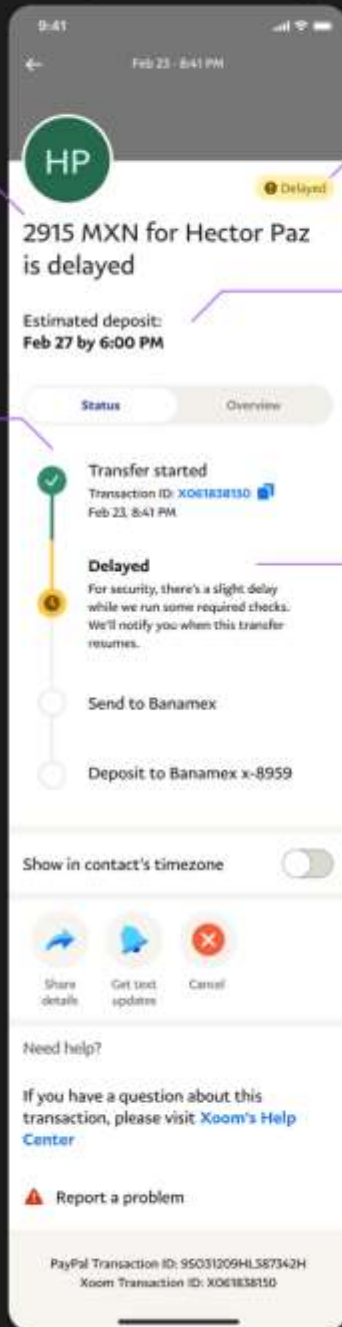
Status Header
At-a-glance status

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.
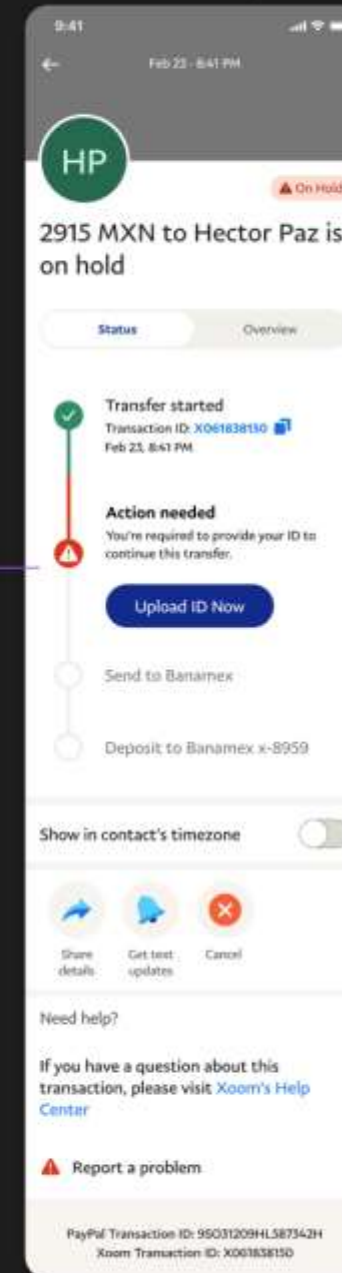
Transaction Tracking Mobile

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.
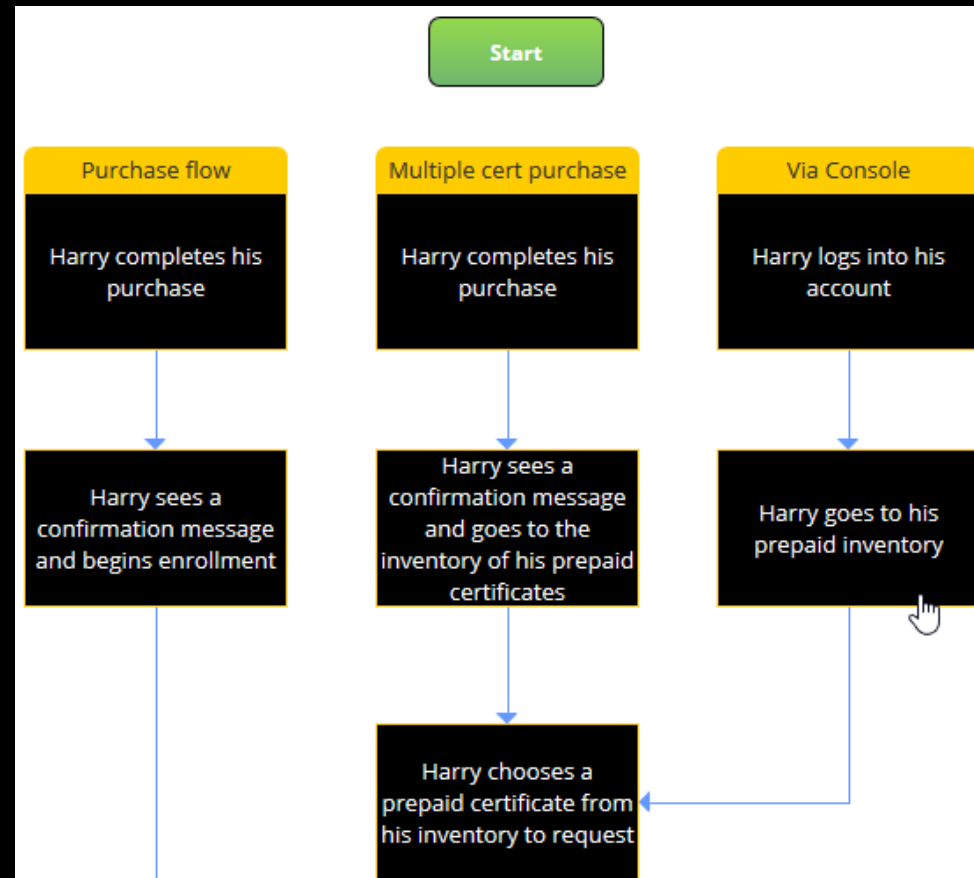
Generating a CSR - a list of UX problems

- 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
```

Generating a CSR
Original Page Analysis
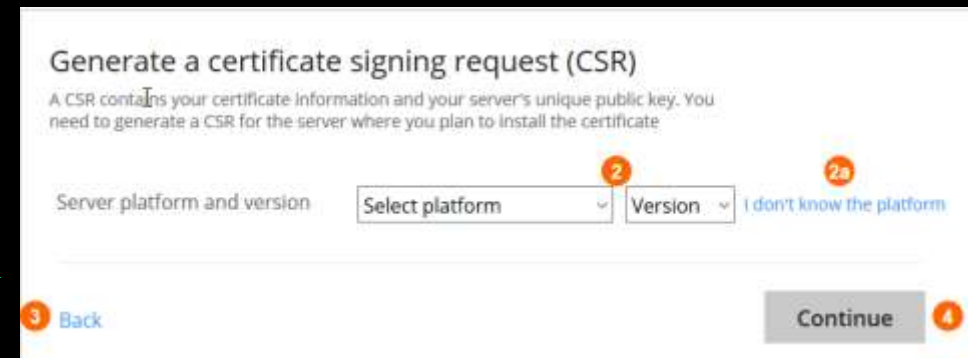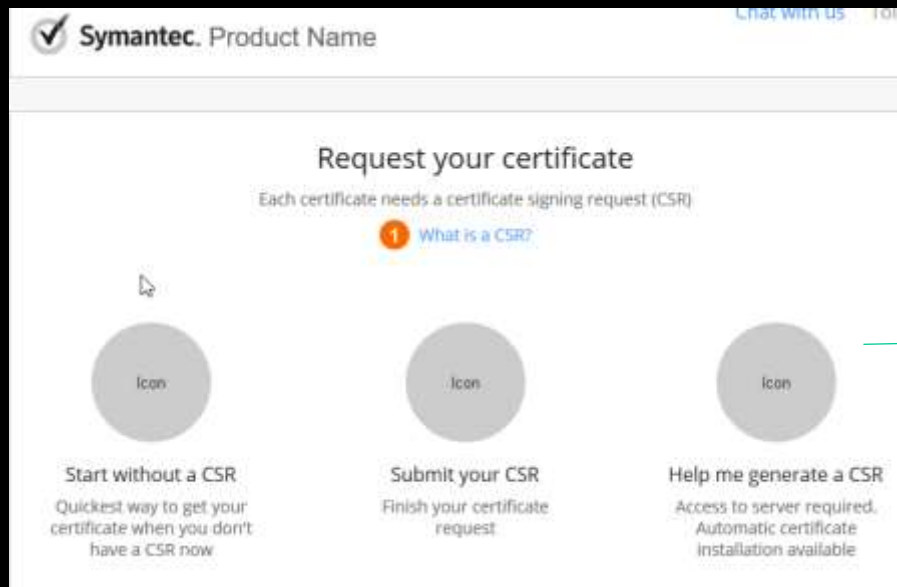
Solution 1

- **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.

Symantec.

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.
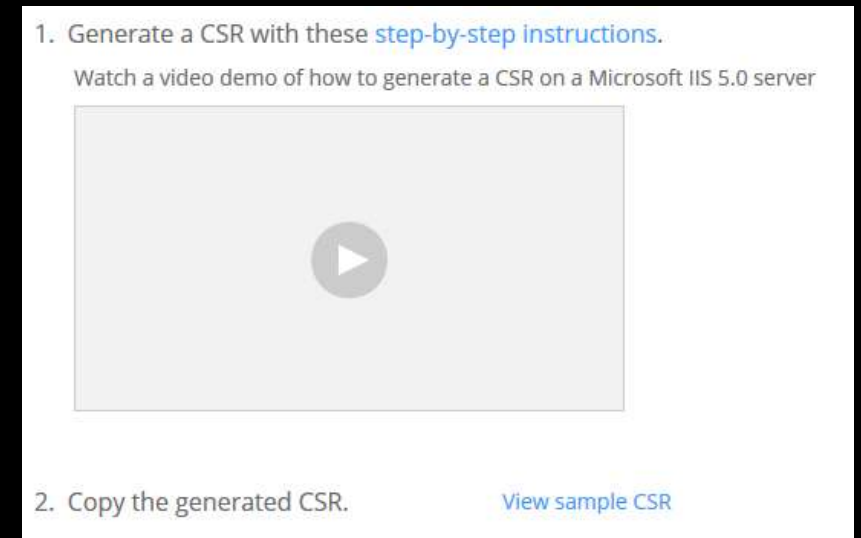
Solution 3

- **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).

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,

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   Apache   2.4.x   I don't know the platform

Organization   Ruth's Boutique, Inc   Change organization
A CSR requires information about the   Headquarters
organization that requests the certificate   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.