**REC Podcast Transcript – 20th December 2023**

***Portal UX Project***

***Paul Rocke***

*Hello and welcome to the REC Podcast – the bite-sized show that brings the latest news from the Retail Energy Code straight to your ears. I’m your host Paul Rocke – the Head of Communications within the REC Code Manager.*

*In this episode I wanted to spend a little time focusing on a project that recently kicked off to review online user experience on two key REC services – the REC Portal and the Digital Navigator. I’d anticipate that most of our listeners will be at least semi-regular users of these tools, given their important functions hosting the various REC documents, providing a facility for the upload of reporting between REC Parties and Code Manager, providing a window into the Change and Committees processes, and much more.*

*The services have been live since the REC started up in September 2021, and while there have been iterative improvements made across their lifetimes, the Code Manager continues to receive feedback that users can find both Portal and Digital Navigator unfriendly to use, particularly with respect to navigation. To address these issues in a coordinated way, the Code Manager and RECCo recently launched a project to review User Experience across the services, employing the support of User Experience experts from within the Code Manager.*

*Today, I’m joined by one of those experts. A big welcome to you, Cassie Robinson.*

**Cassie Robinson**

Thanks Paul, it’s a pleasure to be invited onto the podcast as a long-time listener!

***PR***

*So Cassie, what does it mean to be an expert in User Experience?*

**CR**

In simplistic terms, user experience describes what a person experiences when interacting with a product or service. So as an UX expert, it’s my role to empathise and understand the user’s needs and pain points and translate them into actionable things organisations can implement. An expert in user experience must deliver more than just a checklist of functionality users want, they must approach an experience holistically, and consider things like the psychology of the user, where they enter and exit the service from, any technical restrictions or how pain points can help shape organisational strategy. You must draw from a multitude of disciplines to deliver a great user experience.

***PR***

*And how are you putting those skills into good use for this project?*

CR

I’m part of a larger project team that is coordinating to identify the strengths and weaknesses in the current design of the Portal and Digital Navigator. The project is sponsored by RECCo, and together we’ve put together a project plan which will enable us to thoroughly understand how users perceive our services, prioritise their requirements, and come up with ideas for a design that works much better for them.

***PR***

*You’ve been heavily involved in defining the methodology for gathering feedback from users, haven’t you?*

**CR**

That’s right, using lessons learned from previous projects I helped to document our process for how we get that detailed understanding of users’ requirements. That resulted in a busy two-week period of interviews with key service users where we explored how they work with the Portal and Digital Navigator, and some of the frustrations they come up against.

***PR***

*Those interviews concluded around a week ago, I think. Did you get a lot of valuable insight? And how do you intend to turn that insight into tangible benefits for our users?*

**CR**

The interviews gave us some fantastic information to help us build a comprehensive list of user requirements. There were definitely some common themes that came out of the interviews. As for the next steps – this stakeholder engagement is still a fairly early step in the process. The project team has now documented all of the feedback we received, and populated a backlog of requirements. We’ve worked together to prioritise those requirements, and we’re now entering a period where we get out creative hats on and think about what a solution that meets the requirements might look like. In the New Year, we plan to test some of our ideas with our users, and we’ll be reaching out first of all to those who conducted interviews with us during our feedback gathering stage. Subject to those usability tests going well, we’ll have a list of changes that we can begin to develop and implement.

***PR***

*You mentioned some common themes coming out of the interviews?*

**CR**

Yeah, there were absolutely some topics that cropped up in multiple interviews that seem to be particular areas of frustration for users. To draw out a couple of examples:

The first would be inefficient navigation. A lot of users felt like their journeys within the REC Services take too long and that it’s difficult to find their destination. From watching user’s behaviour on the site, they often missed out on navigation as it is hidden or poorly designed, so it’s difficult to see and intuitively know where to go. Many users use browser bookmarks or save links to navigate to their frequent pages as it’s quicker and easier that trying to find the location using the website navigation. We want to try and make navigation simple and easy to understand.

Second theme would be an overwhelming amount of content. Users felt like there are several sections where there are walls of text or pages of uncategorised links or documents. During the interviews we noticed examples where the site wasn’t clear about which content was the most relevant to the user’s task, and that some of the content was outdated or irrelevant. While this effects all users, we’ve noticed that this is really frustrating for users who are more specialist, and only have interest in certain information. These users tend to spend less time exploring the site and only have knowledge about their specialist area. This means that there is a lot of unnecessary content that bloats out their experience using the site. We try to be cognisant of the different use cases interacting with REC services.

***PR***

*Does the fact that these issues were raised multiple times have any impact on how the project team will prioritise them against the other feedback raised?*

**CR**

We’re using something called the RICE scoring model as a framework for prioritisation. RICE stands for Reach, Impact, Confidence and Effort. We use Reach to rate how many users are affected by the issue, Impact to rate how much this issue effects the user, Confidence to rate how confident we are in our understanding of the issue, and Effort to rate how complex it will be to resolve the issue. We combine these ratings in a formula to produce a total score out of 100, the score helps us see at a glance which issues would be best to prioritise first, the higher the score the more likely it is to improve the user experience.

***PR***

*Great thanks, that approach makes sense to me. Do you know when users could expect to see some changes to the Portal and Digital Navigator as an output of this project?*

**CR**

The project is due to run until February 2024, and at that point we will have a clear view on what an ideal solution might look like. Subject to RECCo agreeing to proceed with implementing the requirements, there will likely be a period of time required to work with developers to build and test the changes. And we’ll also need to make sure that we schedule the activity to avoid conflicts with other ongoing system changes. So at this stage, it’s tricky to put a precise date on when changes could be made. However, we’re also looking to identify any quick wins that we could bring forward much sooner, perhaps even being able to implement some impactful change by the end of the project.#

***PR***

*Amazing. Cassie, thank you so much for joining the podcast today and answering all of my questions. If our listeners have any questions, they can get in touch with Cassie and the project team by emailing* [*enquiries@recmanager.co.uk*](mailto:enquiries@recmanager.co.uk)*.*

*But for now, that’s all we have time for on this podcast. I hope you’ve enjoyed listening, and that it’s been useful to hear about the ongoing User Experience Project for the REC Portal and Digital Navigator. I’ll speak to you on the next one.*