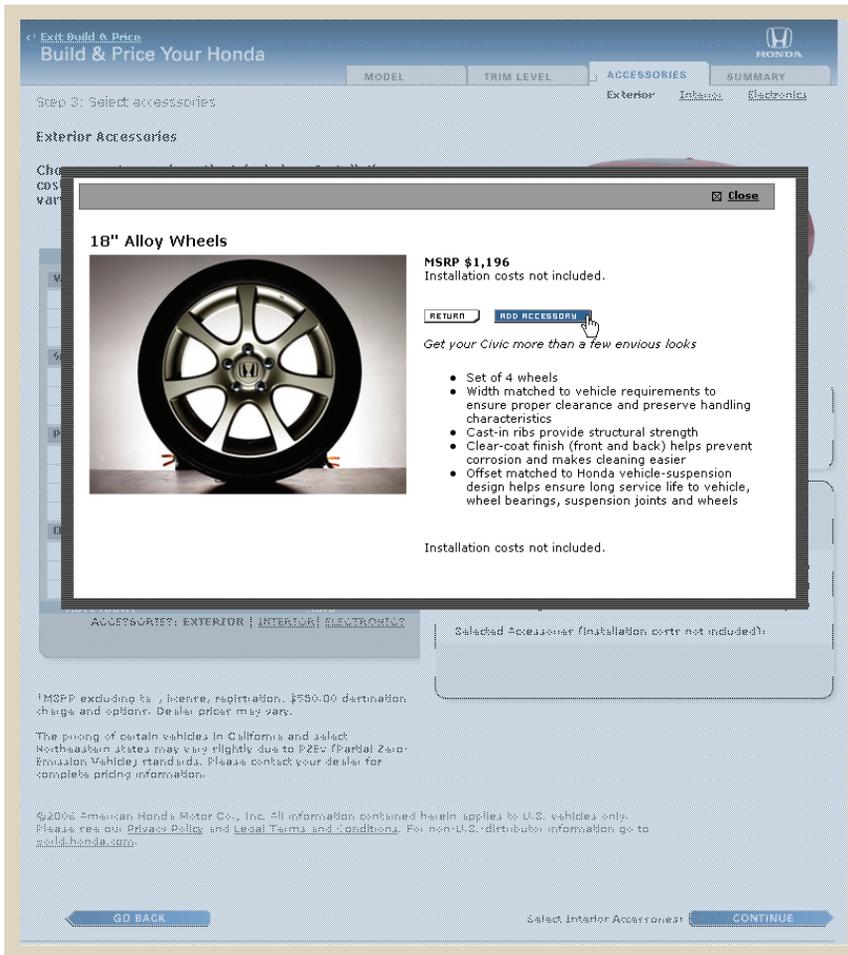


# H1 PROCESS FUNNEL



**Figure H1.1**

Honda uses a process funnel consisting of several logical steps that guide customers to quickly configure a car with the desired options. Information in floating windows shows additional details but keeps customers in the funnel so that they can continue to completion.

H1.1

(www.automobiles.honda.com, April 27, 2006)

## \* BACKGROUND

All Web sites that lead visitors through stepped tasks—PERSONAL E-COMMERCE (A1), SELF-SERVICE GOVERNMENT (A4), WEB APPS THAT WORK (A10), and ENABLING INTRANETS (A11)—need ways to help people succeed at completing the tasks.



## \* PROBLEM

**Customers often need to complete highly specific tasks on Web sites, but pages with tangential links and many questions can prevent them from carrying out these tasks successfully.**

People enjoy completing the tasks they start. Yet all kinds of distractions—including links that lead off the critical path, extra steps, and extra content—can inadvertently lead them away from accomplishing their goals. These diversions can have legitimate purposes, however, such as providing continuity, giving visitors opportunities to explore, providing instructions, or providing extra details. Striking a balance between these various forces and the actual task can be challenging.

**Minimize the Number of Steps Required to Complete a Task** • Customers find tasks daunting if there are too many steps. A process funnel might have anywhere from two to six discrete steps. Anything less than two steps is not a process, and a process of more than six steps can be unmanageable. If there are more than six steps, try to split the process into two or more separate process funnels, or try combining multiple steps on one page. You don't want to intimidate customers with too many steps. However, these are not always viable solutions, because one choice may precede another, and not every page can hold all the information that customers might need at certain points.

**Provide a Progress Bar to Let Customers Know Where They Are in the Process Funnel** • Showing a PROGRESS BAR (H13) at each step lets your customers know how much farther they need to go to complete the task (see Figure H1.2). Note that it's often not worth your effort to make the individual steps on the progress bar clickable because doing so adds more

**Figure H1.2**

Many Web sites use a progress bar like this one at Half.com to let customers know where they are in the process funnel and how much farther they have to go.



**H1.2**

([www.half.com](http://www.half.com), October 24, 2001)

## H1 PROCESS FUNNEL

complexity but little benefit for customers. See the **PROGRESS BAR (H13)** pattern for situations where it makes sense to allow this.

### **Remove Unnecessary Links and Content While Reinforcing the Brand •**

Removing links and content that are unrelated to the task at hand will reduce the number of distractions, making it more likely that your customers will successfully complete their tasks. Remove extraneous **NAVIGATION BARS (K2)**, **TAB ROWS (K3)**, **LOCATION BREAD CRUMBS (K6)**, and **EMBEDDED LINKS (K7)**, leaving only the links and **ACTION BUTTONS (K4)** that help visitors reach their goals, as well as an obvious exit that cancels the process funnel. Take out any content that is superfluous to the task.

Reinforce the Web **SITE BRANDING (E1)** to minimize any disorientation that customers might feel from sudden changes in navigation options. Use the same fonts, images, colors, layout, and logo throughout the Web site so that, no matter where they are, people know they're still on the same site.

### **Use Floating Windows to Provide Extra Information, without Leading Visitors Out of the Process Funnel •**

Sometimes customers need additional information that you have not provided on a page, such as extra help or product details. Provide a link to a **FLOATING WINDOW (H6)** containing **CLEAN PRODUCT DETAILS (F2)** (see Figure H1.1), **CONTEXT-SENSITIVE HELP (H8)**, or information from the **FREQUENTLY ASKED QUESTIONS (H7)** page, to make the extra information less intrusive. Your challenge is to implement this extra content without detracting from the main purpose.

**Make Sure the Back Button Always Works •** Customers often use the **Back** button on browsers to modify answers that they've typed in on previous pages. If the Web site is not implemented correctly, however, the information that they've already entered may be lost when they hit the **Back** button, forcing them to type everything again. In the worst case, people get a cryptic error message saying that the posted information was lost. You can address this annoying problem by temporarily storing the information entered on each page, redisplaying this information if customers hit the **Back** button, and then overriding the temporarily stored information on the page if it is changed.

**Always Make It Clear How to Proceed to the Next Step** • Some Web pages are longer than can be displayed on a customer's Web browser, and people sometimes get lost if the critical ACTION BUTTON (K4), the one that takes them to the next step, is hidden below the fold. Place HIGH-VISIBILITY ACTION BUTTONS (K5) both high *and* low on the page, ensuring that at least one of the critical action buttons will always be visible without scrolling.

**Allow Customers to Skip Unnecessary Steps** • Customers sometimes need to be able to skip unnecessary steps in a process. For example, customers do not always choose the gift-wrap option on Amazon.com during the check-out process. Some steps might automatically be skipped if the required information is automatically supplied, as when name and address information comes from a customer database, such as in SIGN-IN/NEW ACCOUNT (H2), rather than being supplied manually by a customer logging on with a GUEST ACCOUNT (H3). A step also can be skipped, for example, when customers supply a billing address and then check the **Shipping Address Same as Billing Address** box so that they don't have to type the whole address again.

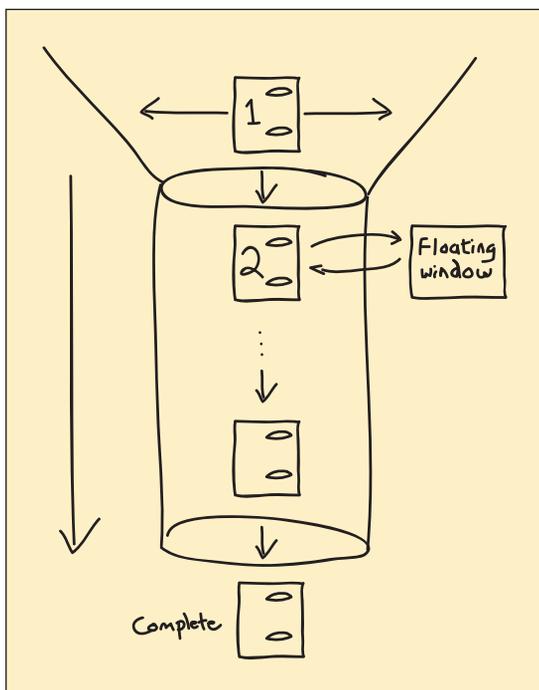
If a choice that the customer makes early in the process eliminates the need for one or more subsequent steps, then simply skip the subsequent steps in the PROGRESS BAR (H13) and treat them as if they were completed. Don't remove steps from the progress bar in the course of the process (or add them, for that matter) because this might confuse the customer.

**Prevent Errors and Provide Error Messages Whenever Errors Do Occur** • People will always make mistakes, even with the best of designs. You can help PREVENT ERRORS (K12) if you use CLEAR FORMS (H10) with structured fields, sample input, and PREDICTIVE INPUT (H11). At the same time, provide MEANINGFUL ERROR MESSAGES (K13) whenever errors do occur.

## H1 PROCESS FUNNEL

### \* SOLUTION

Minimize the number of steps required to complete a task, keeping them between two and six. Remove unnecessary and potentially confusing links and content from each page, while reinforcing the brand to maintain a sense of place. Use floating windows to provide extra information without leading people out of the process funnel. Make sure the Back button always works so that customers can correct errors. Use high-visibility action buttons to make it clear how to proceed to the next step. Let customers skip steps that may be unnecessary. Prevent errors where possible, and provide error messages whenever errors do occur.



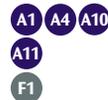
H1.3

Figure H1.3

A process funnel lets people complete their goals by breaking down complicated tasks into a small number of steps, using floating windows for detailed information, and including only critical links, so that people are not distracted.

### \* OTHER PATTERNS TO CONSIDER

Many kinds of Web sites use process funnels, including sites for PERSONAL E-COMMERCE (A1), SELF-SERVICE GOVERNMENT (A4), WEB APPS THAT WORK (A10), and ENABLING INTRANETS (A11). Customers use process funnels when they finalize purchases through QUICK-FLOW CHECKOUT (F1), when they



**H2** create new accounts through SIGN-IN/NEW ACCOUNT (H2), and when  
**G4** they post new messages to a RECOMMENDATION COMMUNITY (G4), to name  
some examples.

**K2** **K3** Remove NAVIGATION BARS (K2), TAB ROWS (K3), irrelevant ACTION  
**K4** **K6** **K7** BUTTONS (K4), LOCATION BREAD CRUMBS (K6), and EMBEDDED LINKS (K7)  
to ensure that customers stay on their paths. However, keep strong SITE  
**E1** BRANDING (E1) so that customers still know where they are.

**K12** Design process funnels to PREVENT ERRORS (K12) by using CLEAR  
**H10** FORMS (H10) for each step of the process funnel and provide MEANINGFUL  
**K13** ERROR MESSAGES (K13) when errors do occur. Consider also adding a  
**H13** PROGRESS BAR (H13) that tells people where they are in the process and  
how much farther they have to go.

**H5** Track your customers through PERSISTENT CUSTOMER SESSIONS (H5) to  
avoid problems with the **Back** button, and to save customer-entered  
information.

**H8** Move extra content, such as CONTEXT-SENSITIVE HELP (H8) and FREQUENTLY  
**H7** **H6** ASKED QUESTIONS (H7), to FLOATING WINDOWS (H6) to keep the main task  
page on the screen. Make the next action visible by keeping it ABOVE THE

**I2** **K5** FOLD (I2) and by using HIGH-VISIBILITY ACTION BUTTONS (K5).