



# World's Most Successful Design

BY TOM MALLON

**H**ave you ever been lost on a Web site or had difficulty figuring out a Web-based application? If the answer is "yes," be assured you are not alone. The problem inherent with most user interface design is the failure to display relevant information, usually by not providing a proper path to obtain it. It's one thing to have a good-looking Web site or application and another to provide one that works. The Holy Grail is in achieving both.

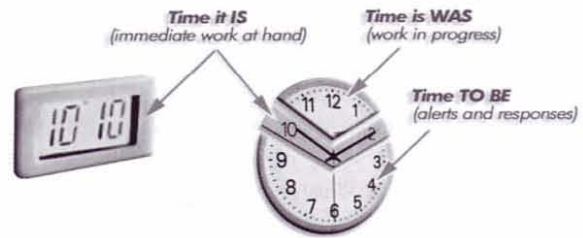
To measure the accuracy of the above statement, ask yourself the following questions: What do most interfaces have in common? How many look alike? How many have changed over the past few years? With regard to the Internet, it's downright scary. Some Web sites simply don't work and others seem to change almost daily. Often they change just around the time you get comfortable with them. As the Internet grows, change is inevitable. However, many popular and successful Web site and Web application interfaces change very little. What is their secret?

## Seeing What Isn't as Well as What Is

The most successful Web sites are built by individuals who have looked beyond the Web into other areas where things work well. Non-Web interfaces include dashboards in automobiles and other vehicles, radios, remote controls, monitoring devices, equipment controls, etc. However, one interface has seen the greatest success, the least change, and become so useful it has survived for centuries. The most successful interface of all time is the analog clock, and it continues to influence solid interface design today. What does an analog clock do that a more modern, clearly read digital clock does not? An analog face clock tells not only what time it is but what time it isn't! While on a deadline or just on the way to work, a quick glance at a conventional analog clock provides you with time passed, exact current time, and time remaining. With a digital clock that displays only the current time, an individual has to pause and calculate the options. With analog, there's nothing to figure out. Just the phrase "twenty past the hour" is far more descriptive and thought provoking than "01:20:17," even if the latter is more accurate (see figure 1).

Because of this, singular readout digital clocks and stop watches have pretty much passed from the scene,

**FIGURE 1** The Most Useable Interface



almost as a fad. The same is true of digital speedometers, gas gauges, and pressure valves. Why? Because designers and behavioral psychologists alike now understand that people need to focus on the task at hand and not the additional chore of calculation.

## Putting an Open Face on Design

So how can we make Web sites and Web applications more practical, logical, and easy-to-use? Employ this analog design lesson by applying the same principles of exposure and order. Here are some basic rules:

**Don't force users to click to view their options.** Have all relevant options available and clearly visible whenever possible. Avoid or sparingly use things such as drop-down/fly-out navigation and try to keep the most immediate steps or relevant links visible at all times.

**Consolidate and minimize navigation.** The best way to keep from hiding things is to offer choices. You can do this by consolidating subjects or like tasks. People easily can remember up to five things (like fingers), so if you keep navigation items to five, the user is bound to feel familiar with and not overwhelmed by choices. Too much eye movement creates confusion, resulting in lost attention.

**Maintain logical tasking order.** Once you've rounded up all the similar topics for functions, place them in the most logical or stepped order for reading (if prose) or action (if within an application).

**Group screen activities for relevance.** If you have things such as check boxes that need to be selected before a button is clicked, place the button close to where the actions occur, not centered or to the other side of the page. This is true for all actionable items, whether you have a little viewing icon, a delete button, more details, add-to-cart,

>> "SUCCESSFUL DESIGN" CONTINUED

etc. Keep them all together in an "action area" so they are self-explanatory. Action areas are best placed to the left of the page, as eye movement starts at the left. Placing them to the right always presents the possibility for critical actions to scroll off the screen.

### The Analog Display

Another reason the analog clock is so successful is its shape. Because time is continuous the clock's hands move in a perpetual circle. The eye follows time's circular path, naturally. A Web site also is required to provide the correct-shaped container for its content. The prose a client faces on a Web site should be easy-to-read. A prose container will flow from top to bottom with limited width, like a book or magazine. These vertical screens are referred to as "portrait" pages. Conversely, an online investment tool such as a portfolio or account statement is predominately data. This container must be able to support numerous columns in a line-item fashion. This horizontal approach of displaying data is referred to as a "landscape" display and resembles a spreadsheet. Examples of these vertical and horizontal pages are shown in figure 2.

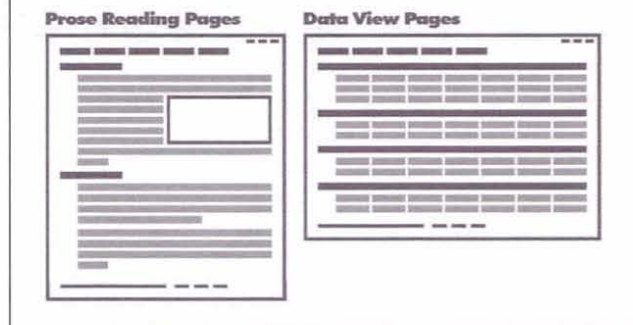
When placing prose on a Web page, never use pages that stretch horizontally. The eye gets lost on wide lines of copy. Comprehension is greatest when prose is read from top to bottom, not left to right on wide pages. Books and magazines continue to have columns for this very reason. So, if time is round, prose is vertical and data is horizontal. However, placing correct, client-specific data is the greatest challenge.

Time is read in a natural numeric flow and prose uses language to tell a story, but itemized data differs and requires rows and columns to be viewed and compared. It's easy enough to develop navigation that takes the user from one page to another to locate specific reports, view them, and return as needed. However, for more dynamic investment data or information that may change regularly, this presents a different set of problems. How can your Web site direct users to precise points of pertinent, personal interest if you don't know what data or information trends they are seeking? How do you return them to those points when the points are updated? What if it's difficult for them to remember the path they took initially?

### Personal Triggers

Each and every user has needs and criteria that dictate how that user will follow a unique discovery path. This is where "site personalization" or "my pages" come into play. Personalization settings can be compared with another tireless, time-related invention: the alarm clock. Everyone needs unique control over the time he or she rises in the morning. That same type of triggering mechanism can be applied to the personalizing of data.

**FIGURE 2** Sample Web Display Pages—Prose and Data



There are two types of personalization: proactive and passive. Proactive personalization is when users mark specific data points they wish to be updated on. Passive personalization is when server-side software records clicks and then guesses what else the user may be interested in. This latter approach is often seen on shopping sites presenting additional product purchase options (impulse items) at check-out, which has little to no use for financial institutions. Financial institutions should focus on proactive personalization that is precise and user-driven. Proactive personalization is little more than customizable user settings with server-side data-harvesting scripts. These are essential for the creation, customization, and updating of personal online portfolios. Usually once a portfolio or personal data folder is created, the server notifies the user with updates based on price or condition limits set by the user. But a slew of E-mails may become a burden because they interrupt the user and require logging onto the online tool. This most likely will cause the user to shy away from asking for E-mail notifications and instead look for an updating mechanism within the tool itself.

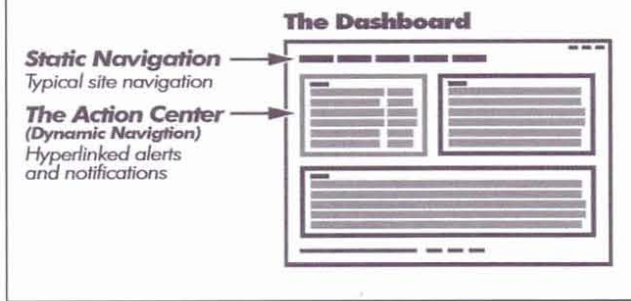
### Instant Data Gratification

Individual data needs differ as much as tastes in music. So how do you make lists of personalized data requests available without all the E-mails? The answer is to place all the items as personalized hyperlinks on a page that presents itself to the user immediately upon logging into an account or portfolio. This type of page is called a "dashboard" (another analog interface), because it places the data-driving controls directly in front of the user.

### The Dashboard and Dynamic Data Links

The dashboard appears to the user immediately after logging in. The content of the page is hyperlinked and referred to as "dynamic navigation" because, unlike the static navigation found at the top or to the side of each page, these links are populated and updated on-the-fly based on changing market conditions data. The user chooses the hyperlinked information displayed and the param-

**FIGURE 3** The Dashboard



eter limits determining its appearance. Alert status and levels of importance also can be applied. Alerts requiring response then can be segregated into a separate area such as the “action center” portlet shown in figure 3.

The dashboard is a dynamic display of navigation in the purest sense of analog interfaces because displaying the information is just as immediate as playing a track of music from a vinyl (analog) recording.

If you are old enough to have purchased and played vinyl recordings, you can remember how you would spot an album on a shelf, pull the record from its sleeve, place it on a phonograph, and visually—almost instantly—

locate the track you wanted. Then, placing the needle down, you would arrive exactly upon the musical phrase or lyric you wanted to hear. You would do all of this in a matter of seconds. The dashboard works the same way because when you click on the dynamic link in the “action center” or elsewhere, you bypass the multiple-click step through of the site’s static navigation and instead go directly to that point of interest. Using slower, static navigation could be compared with finding a particular musical phrase on a CD or MP3 device. The user has to fumble around and guess. Greeted with a dashboard immediately after login, the user is provided with dynamic links that are both accurate and immediate.

### Sticking with What Works

Building highly compelling, easily adopted Web sites or online financial tools is a cinch if you just follow existing, proven paradigms. Users will find your online solution as easy-to-use as a wall clock. All you have to do is wind it up with competitive, client-centric information. **M**

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## Call for Nominations to the 2008 IMCA<sup>®</sup> Board of Directors

**T**he Nominating Committee of the IMCA Board of Directors is seeking candidates for the 2008 IMCA Board of Directors. Any IMCA member may nominate a candidate. The IMCA Board of Directors consists of four officers, the immediate past president, and eight directors at large. IMCA Past President Norman E. Nabhan, CIMA<sup>®</sup>, is chair of this year’s Nominating Committee.

Candidates nominated by IMCA members will be evaluated along with others identified by the Nominating Committee. There is no predetermined form or format for a nomination. Each nomination should be accompanied by a summary of the nominated member’s background, professional experience, and qualifications to serve as a board member.

### Membership Guidelines for the Board

Aside from IMCA membership, there are no mandatory criteria for an individual to be nominated to serve on the

IMCA board. The following, however, is a list of general criteria used by the Nominating Committee in making its recommendations:

- **Membership.** IMCA membership is required, and preference will be given to nominees who have attained the CIMA and/or CIMC designations.
- **Prior board service.** Beginning in 2008 board members will serve two-year terms. Board members who express a desire to continue to serve on the board often are invited to continue because of their knowledge of IMCA and its operations.
- **Participation.** Ongoing, regular participation in the organization is preferred, either as a committee member, a committee chair, a current board member, an instructor, or in some other regular and continuous way.
- **Practicing consultants.** Money managers, vendors, academic members, and members who are in management roles may be board members, but the majority of the board,

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