

Content strategy & UX writing: Sign-on redesign

CLIENT

Wells Fargo

PROJECT SUMMARY

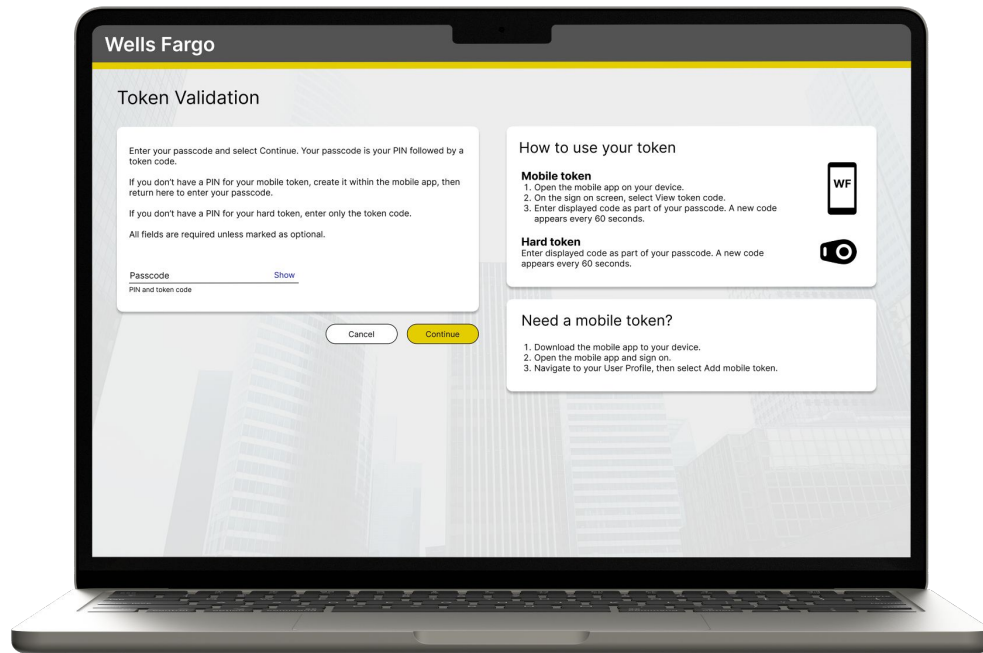
- Added hierarchy and clarity to 4 sign-on scenarios
- Updated copy for the Token Validation flow to new content and accessibility standards

TIMELINE & TEAM

- 2 weeks
- Me, product designer, accessibility specialist

RESULTS

Improved client experience and reduced support tickets for signing on using a token.



Problem

Wells Fargo was refreshing their commercial banking experience, which included updating copy in the Token Validation process to align with new content standards and WCAG accessibility requirements.

My goal was to introduce hierarchy and clarity to the flow, ultimately shaping a more intuitive client experience through a holistic design approach.



TL; DR

PROBLEM

Users had to call support for helping signing in with a token

SOLUTION

Reorganized and updated instructions to clarify the sign-on process

IMPACT

Fewer calls to support, increased confidence in the company

Do the original screens make sense?

The 4 screens seemed like they were part of 1 flow.

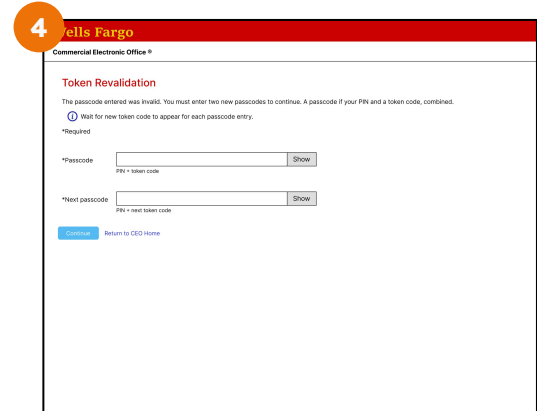
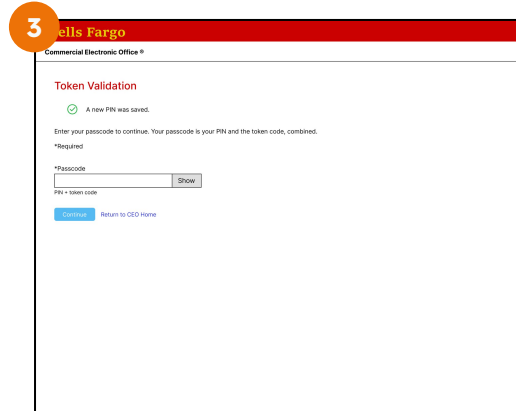
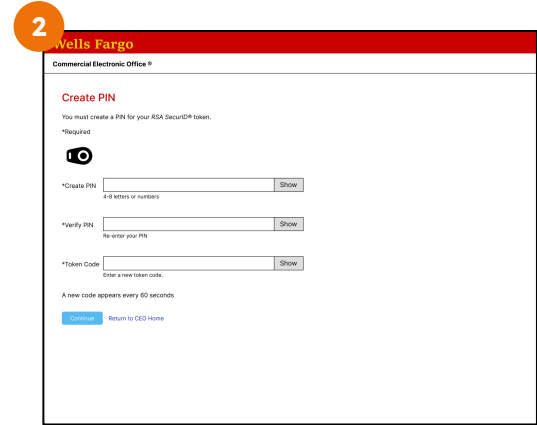
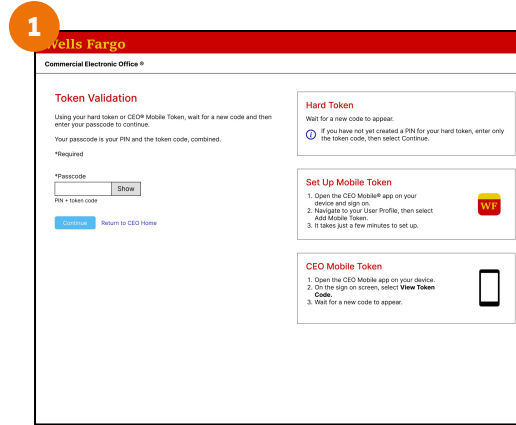
Step 1: Log in

Step 2: Create PIN

Step 3: Enter passcode

Step 4: ...Revalidate the token?

Step 5: Sign in?



The content hierarchy was disorganized and confusing.

To better see the existing content hierarchy, I created a priority guide/flow chart to summarize the content and place it roughly where it existed in the screens.

Screen 1

Instructions for proceeding through flow	How to use hard token
Definition of passcode	Instructions if user has hard token and no PIN
Passcode field	Instructions for setting up mobile token
	How to use mobile token

Screen 2

Instructions
PIN and token fields
Frequency of new code

Screen 3

"New PIN was saved" message
Instructions
Definition of passcode
Passcode field

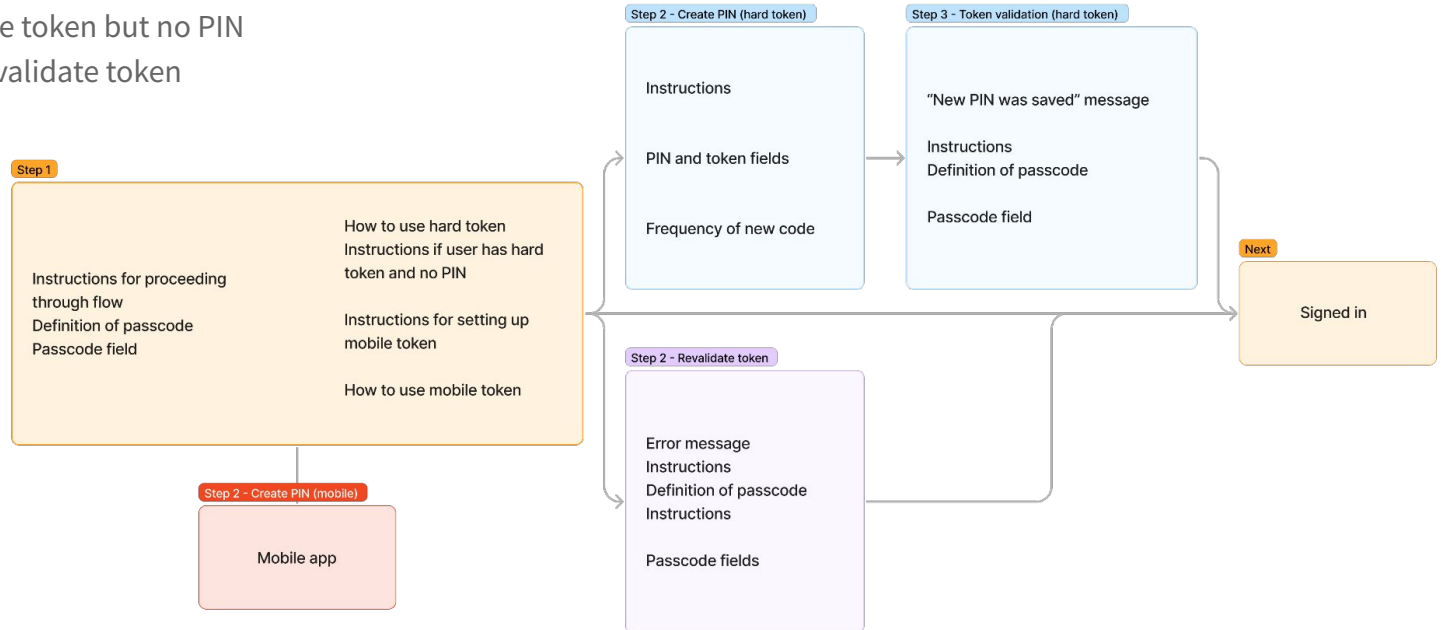
Screen 4

Error message
Instructions
Definition of passcode
Instructions
Passcode fields

4 distinct scenarios were actually possible

Further analysis of these screens and several discussions with the product owner showed that there were actually **4 distinct scenarios**:

1. User has a PIN and token code
2. User has a hard token but no PIN
3. User has a mobile token but no PIN
4. User needs to revalidate token

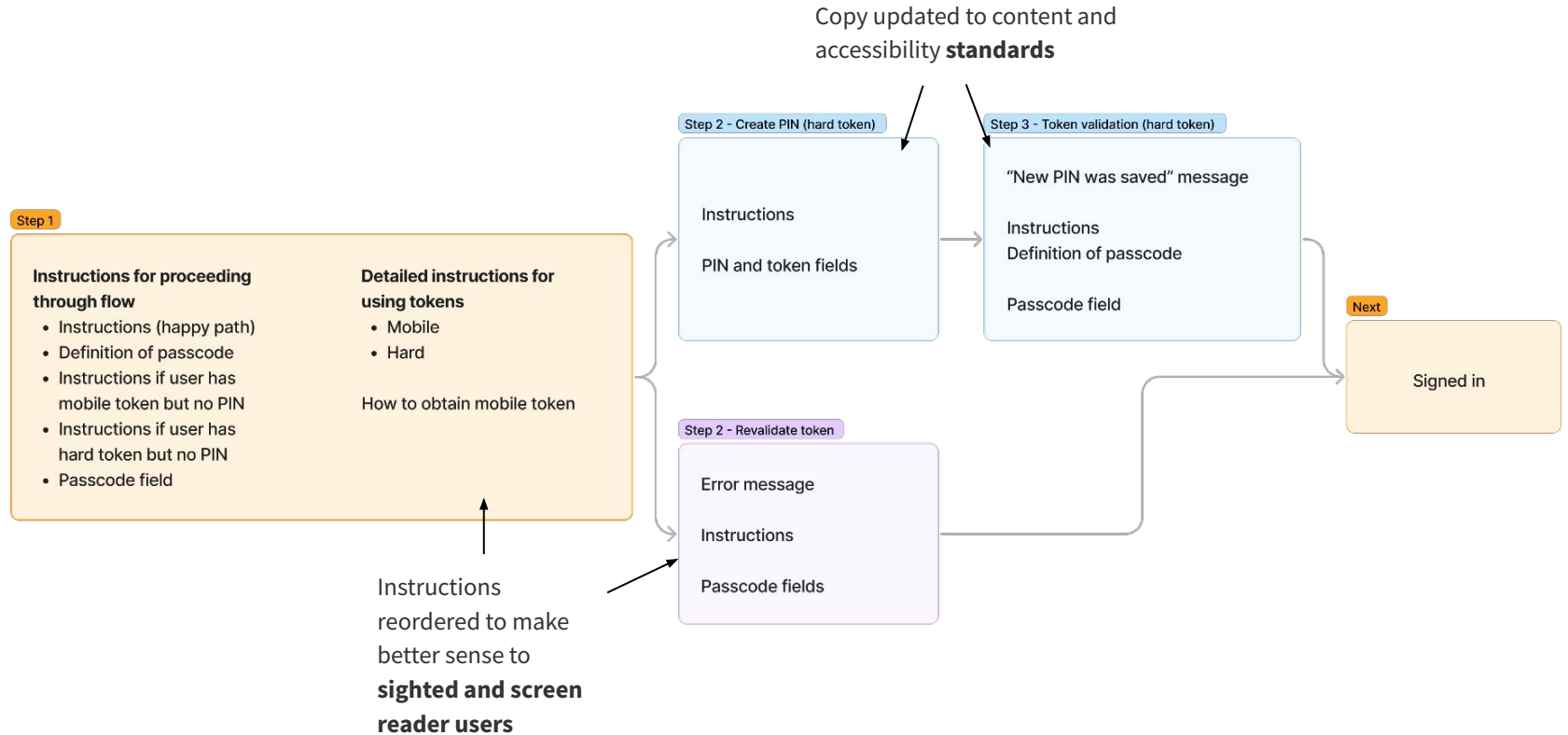


2 scenarios needed clearer instructions

Because mobile tokens were handled within the company's app, I wouldn't need to create any new screens for this scenario. I would need to find a better way to present the information for scenarios 2 and 4.

1. User has a PIN and token code
2. **User has a hard token but no PIN**
3. User has a mobile token but no PIN
4. **User needs to revalidate token**

Instructions in the new flow were organized to started with general instructions, and more detail following if needed.



I **reorganized** instructions based on business interests, **clarified** each sign-on process, removed marketing copy, and **updated** content to reflect new standards and accessibility requirements.

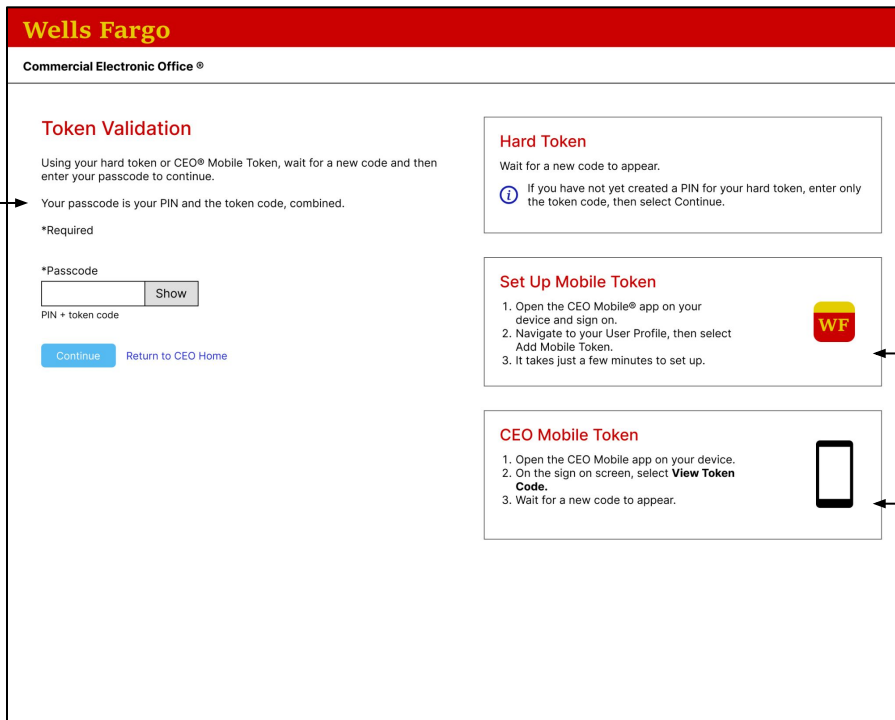
Writing guide

Concepts	Clear Useful Accessible Mobile-friendly
Vocabulary	Avoid “banklish” Use plain language Use words with fewer syllables Eliminate articles where appropriate
Verbosity	Less is more
Grammar	Active voice
Capitalization	Sentence case (with a few exceptions for title case)

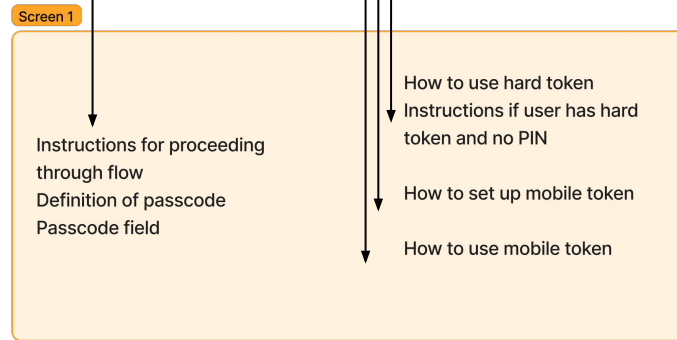
Wells Fargo’s guiding content principle is KISS: Keep it Simple and Straightforward.

Step 1 of the original screen had disorganized instructions and unnecessary copy.

Definition of passcode could be clearer



Instructions for logging in are mixed with token setup instructions



#3 isn't an instruction

No instructions for if mobile user doesn't have a PIN

The updated step 1 added hierarchy to instructions and was grouped more logically.

The screenshot shows the Wells Fargo 'Token Validation' screen. It features a dark header with the Wells Fargo logo. The main content is divided into three sections: 'Token Validation', 'How to use your token', and 'Need a mobile token?'. The 'Token Validation' section contains instructions for entering a passcode and token code, with a 'Show' link for the passcode field. The 'How to use your token' section includes instructions for mobile and hard tokens, accompanied by icons for a mobile phone and a hard token. The 'Need a mobile token?' section provides steps for downloading and setting up the mobile app. Annotations on the left side point to the 'Happy path instructions', 'Mobile token instructions', and 'Hard token instructions' in the 'Token Validation' section. Annotations on the right side point to the 'Detailed instructions' in the 'How to use your token' section and the 'Hard tokens phasing out, so they're listed second' in the 'Need a mobile token?' section. At the bottom, there are 'Cancel' and 'Continue' buttons.

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Token Validation

Happy path instructions

Mobile token instructions

Hard token instructions

Enter your passcode and select Continue. Your passcode is your PIN followed by a token code.

If you don't have a PIN for your mobile token, create it within the mobile app, then return here to enter your passcode.

If you don't have a PIN for your hard token, enter only the token code.

All fields are required unless marked as optional.

Passcode [Show](#)

PIN and token code


Cancel Continue

How to use your token

Detailed instructions

Mobile token


1. Open the mobile app on your device.
2. On the sign on screen, select View token code.
3. Enter displayed code as part of your passcode. A new code appears every 60 seconds.



Hard token

Hard tokens phasing out, so they're listed second

Enter displayed code as part of your passcode. A new code appears every 60 seconds.



Need a mobile token?

1. Download the mobile app to your device.
2. Open the mobile app and sign on.
3. Navigate to your User Profile, then select Add mobile token.

Token revalidation didn't fit in the flow and content treatment was off.

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Token Revalidation

The passcode entered was invalid. You must enter two new passcodes to continue. A passcode is your PIN and a token code, combined.

ⓘ Wait for new token code to appear for each passcode entry.

*Required

*Passcode Show
PIN + token code

*Next passcode Show
PIN + next token code

[Continue](#) [Return to CEO Home](#)

Error message not in error format

Instructions in warning format

Screen 4

Error message
Instructions
Definition of passcode
Instructions

Passcode fields

All the info seems disorganized

Why would a user revalidate after creating a PIN?

Token revalidation was updated for clarity.

Error message clearly defined

Simplified instructions

Passcode definition added to hint text

The screenshot shows the Wells Fargo mobile app interface for token revalidation. At the top is a dark grey header with the Wells Fargo logo. Below it is a white card titled "Token Revalidation". Inside the card, there is a red error message box with a red exclamation mark icon and the text: "The passcode entered was invalid. Enter two new passcodes to continue." Below the error message, there are two lines of simplified instructions: "Wait for a new token code to appear before entering each passcode. A new code appears every 60 seconds." and "All fields are required unless marked as optional." At the bottom of the card, there are two input fields. The first is labeled "Passcode" with a "Show" link and a hint "PIN and token code" below it. The second is labeled "Next passcode" with a "Show" link and a hint "PIN and second token code" below it. At the bottom right of the card, there are two buttons: a white "Cancel" button and a yellow "Continue" button. The background of the app is a blurred image of a city skyline.

Instructions for steps 2 and 3 were simplified and edited to meet accessibility standards.

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Create PIN

Create a PIN to use with an RSA SecurID® token.
All fields are required unless marked as optional.


Create PIN Show 4 to 8 letters or numbers	Verify PIN Show Re-enter your PIN.	Token code Show Enter new token code.
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[Cancel](#) [Continue](#)

Step 2

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Token Validation

 A new PIN was saved.

Enter your passcode to continue. Your passcode is your PIN followed by a token code.
All fields are required unless marked as optional.

Passcode Show PIN and token code

[Cancel](#) [Continue](#)

Step 3

OUTCOMES & LESSONS

The success of this project surpassed expectations. I met the initial ask of **updating copy to new standards** and was able to **make the content clearer** for all users.

Because support ticket metrics hadn't been tracked well, it's unclear if the new design decreased work for the support team.

Given that this was my first project with the company, taking the stance for an improved user experience was risky.

Because I completed my work within the 2-week sprint (which involved meeting with developers, product designers, and the product owner outside of scheduled meetings), I was able to successfully advocate and make the needed changes.



Next steps

- Remove language and screens for hard token
- Add in the name of the mobile app (this hadn't been released when I was making these designs)
- Move the all fields required language to the top of the page

Takeaways

- I was able to make an impression as a thorough designer that would look at context, not just content
- This project presented a strong case for content-first design, which is now being worked into the team's design process
- Content needs to be involved in the user story refinement process so that there is a better understanding of the project from Day 1. I successfully made a case for content designers to be included earlier in the process moving forward