

## Designing for clients, with clients: Our collaborative process creates major wins for portal users

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Product success is rarely determined by innovation alone. It is determined by relevance, usability, trust, and adoption. No matter how technically advanced, features that are not aligned with real-world workflows and user audiences can lead to slow adoption and declining customer satisfaction.

This paper highlights the advantages of a client-centered product design process, using the extensive redesign of the VitalPoint® portal as a case study in how sustained client engagement, structured feedback loops, and cross-functional interactions transformed our flagship product.

Through surveys, focus groups, iterative mockups, usability testing, and post-launch measurement, the VitalPoint redesign demonstrates how designing *with* clients — rather than just for them — drives better outcomes in usability, efficiency, satisfaction, and long-term product scalability. The results include dramatic improvement in our Net Promoter Score (NPS), smoother adoption, reduced training burden, and a stronger foundation for future innovation.

*Our product design process gathers interactive input from clients throughout development.*

*It then moves it directly and rapidly to our client experience, product innovation, IT, and UX design teams to create powerful innovative solutions.*

# The case for client-centered design

The catalyst for change began with a pattern that was impossible to ignore. Through our annual Customer Experience survey, clients repeatedly delivered the same message: the portal needed to be more intuitive and user-friendly. This feedback surfaced year after year, consistently ranking among the top themes in survey results.

We initially responded in a measured way. Each release included incremental enhancements intended to address specific pain points. While these were well received by clients, the changes did not meaningfully shift client perception. The same feedback continued to appear in subsequent surveys, signaling that these improvements were not enough.

At that point, Our client experience team recognized that, to effectively address client issues, more information was required. Clients were clearly telling us what they needed at a high-level — an easier, more intuitive portal — but our design and development teams did not yet fully understand in what ways the user experience was challenging.

Rather than continuing to iterate in small increments, we made the decision to step back and pursue a larger, more transformative change — one that would be informed directly by clients themselves.

# Building the foundation for feedback: How we gathered client input

## Insight through surveys

The first step in our approach was to move beyond high-level survey feedback and gather more detailed, actionable insights. The foundation of the effort began with structured surveys, which served two critical purposes:

- 1 Identifying recurring pain points across the client base
- 2 Establishing prioritization based on frequency and severity

Clients who agreed to participate were invited to complete a survey that focused specifically on their experience with the existing portal.

This quantitative data helped us to understand where effort would deliver the greatest impact.

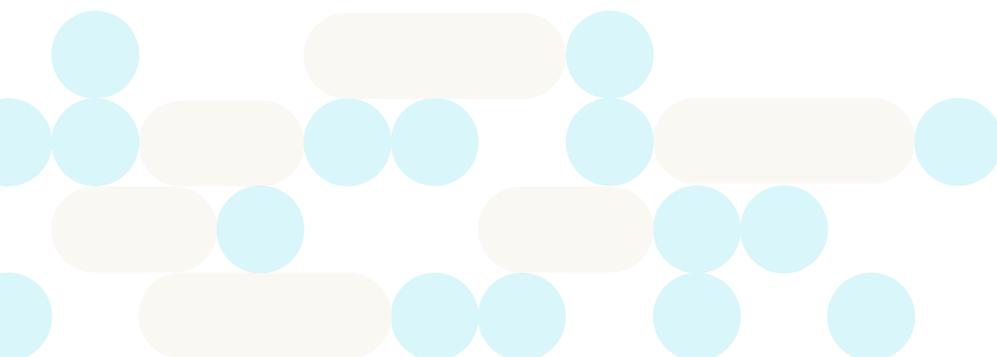
*What do you think of this feature?*

*How would you prioritize this feature in your workflow?*

*Is this information “need-to-see” or “nice-to-have”?*

## Insight through focus groups

While the surveys showed what needed attention, our next step was to create focus groups to identify why.



These groups brought together a mix of end users, decision-makers, and stakeholders to discuss workflows, challenges, and expectations. The interactive working sessions were designed to uncover:

- Daily usage patterns
- Decision-making triggers
- Workarounds users had developed
- Information gaps that slowed productivity

We found that one of the most valuable techniques was to have users show us how they completed their daily tasks while interacting with the portal. This uncovered discrepancies between intended functionality and actual use, allowing us to make small changes that would provide major usability benefits.

## Turning insight into action: Designing through iteration

### The power of design mockups

Clients often struggle to articulate future-state needs in the abstract. To bridge this gap, the design team created multiple interface mockups, each representing a different interpretation of the feedback received.

Instead of simply asking clients what they wanted, the team transformed clients into full design collaborators. The design and development teams effectively combined the best elements of each mockup into a unified solution that reflected collective client input.

*What works here?*

*What doesn't?*

*What's missing?*

*What would slow you down?*

### Designing for the majority without ignoring the minority

One of the core challenges in enterprise design is balancing consistency with flexibility. Not every user works the same way, and not every preference can be accommodated. Our intent was to create product designs that would satisfy the majority of clients but would not take away functionality from the minority of users who had different requests.

Our design methodology focused on creating configurable options to tailor the user experience wherever possible. In the few instances where we could not accommodate conflicting requests, we grounded our decisions in objective data and project priorities:

- Usage data
- Workflow criticality
- Impact on training and adoption
- Risk of delaying release

By anchoring decisions in data and dialogue rather than opinion, the team was able to maintain client trust even when individual requests could not be implemented immediately.



# Client-centered design in practice: Key enhancements

One of the most dramatic changes to the redesigned portal was the new home page. Intuitive, uncluttered, and inviting, it provides an icon-based launchpad that is as easy to use and visually appealing as a smartphone. Shortcuts are aligned with role-specific workflows and provide immediate visibility of items that need attention and action.

*With less clicks needed, users can move quickly through their work queue without compromising the quality of their decision-making.*

## Fewer clicks, faster decisions

Another major change involved eliminating the need for users to drill down through multiple screens of supporting information to close a work task. Client survey feedback revealed that for many tasks, users knew enough to make a decision without the additional information. We redesigned queues so that key information about the claim is provided at the top level, allowing users to resolve routine cases quickly and reserve deeper investigation for more complex scenarios. By eliminating unnecessary navigation and reducing the number of clicks, we were able to create workflows that let users make decisions more quickly and focus their time and attention where it matters most.

## Clear language and visible functionality

The client surveys revealed user confusion that could be traced to vague labels, nested menus, and hidden features. To address this, the redesign uses intuitive language and provides direct navigation to frequently used actions.

As a result, many users discovered functionality they had not known existed — simply because it was much easier to find.

## A tailored, personalized user experience

The new design includes extensive configurability, allowing users to customize views, features, and workflows to meet their needs. This adaptability reduces frustration, often removes unnecessary steps, and makes daily work easier and more efficient.



# From design to development: Collaboration at scale

## Embedded UX and agile execution

Our large planning sessions aligned teams around the long-term design vision, short-term delivery goals, and incremental milestones. Daily stand-ups and weekly stakeholder reviews ensured continuous alignment, while iterative delivery allowed course correction without derailing timelines.

So they could work directly alongside developers and product owners, we embedded user experience (UX) designers within the technology teams. This eliminated handoff delays and reduced misinterpretation of requirements.

## Managing scope without losing momentum

One of the greatest risks in client-centered design is uncontrolled scope expansion. To guard against this, our disciplined approach emphasized the completion of identified core and critical functionality, while also recording additional enhancements for future prioritization and development. This effectively preserved flexibility while protecting delivery timelines.



# Validating success: How was the product received?

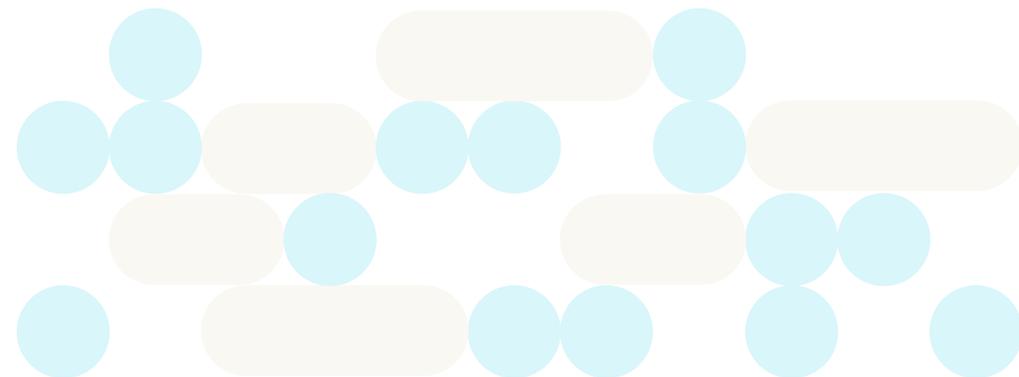
To confirm that we had correctly interpreted our clients' feedback, we repeatedly engaged clients to review our designs. In some cases, our assumptions had to be revisited, which reinforced the value of this iterative validation.

Optum leaders who had engaged directly with clients participated in user acceptance testing (UAT). This ensured that final validation reflected real-world expectations, not just technical correctness. We also measured the success of the redesigned portal after implementation through client feedback, additional focus groups, built-in tools within the portal, and our ongoing review of enhancement requests submitted post-launch.

The results were clear:

- Adoption was faster and smoother than anticipated
- Training requirements dropped sharply
- NPS and satisfaction scores increased significantly

There were no negative surprises during the rollout. Just the opposite: clients remarked that the product was intuitive, and they felt confident when using it. Perhaps most importantly, clients felt a sense of ownership.



## Unexpected benefits of client-centered design

The process of engaging clients throughout the design process yielded positive results that exceeded our initial expectations. And we found it produced intangible benefits that have strengthened not only our relationships with clients but the synergy of our internal teams.

The results of our redesign initiative also demonstrated that meaningful transformation requires both financial and cultural investment.

### *Our client collaboration created:*

- *Strengthened trust and transparency*
- *Organizational alignment around a shared client narrative*
- *Improved internal morale, as positive feedback was shared*
- *A repeatable design framework for future innovation*

## Moving into the future, powered by client-centered design

In our experience, client-centered design reduces risk, improves adoption, and accelerates value realization. Through our recent innovation success — made possible through our partnership with clients — we have built a strong foundation for powerful future innovation. Our collaborative efforts resulted in a streamlined, repeatable process that harnesses the intelligence of our clients with the expertise and numbers of our client experience, product design, product development, IT, and UX design teams.

By embedding client experience into every stage of product development, we are delivering better tools and fostering stronger, more resilient relationships with our client partners. We are confident that the shared trust and excitement we experienced during this collaboration will only continue to compound over time.

*Our process combines insight from workers' comp and auto no-fault industry leaders with the expertise of our CX, design, development, IT, and UX teams.*

*As we draft the blueprints for future development, our clients are now full partners in this process. Designing not only for, but with, our clients is the future of our product innovation.*