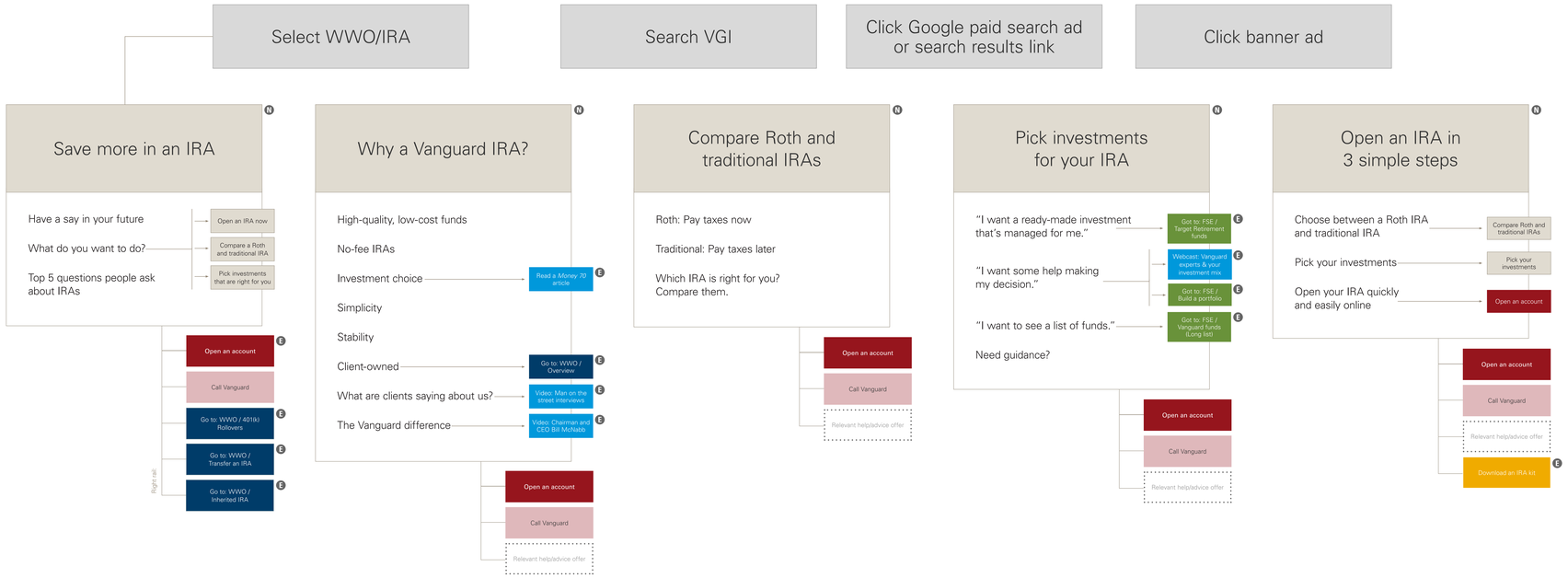
Public site redesign — workgroup 1

WWO / IRA user experience



Legend

- "Story" page
- Page "outside" this story
- FSE Section
- Call us (or other non-web action)
- Forms / PDF
- Article / Video / Insight
- Tool
- "Learn more"
- Open an account
- Future / TBD

N new page
E as-is / existing page
R refresh / existing page

Note: pages are noted on the map with an icon by first instance

PSR Workgroup 1 WWO / IRA UX Map
www.investor.vanguard.com/what-we-offer/iras/

Created / Revised
April 26, 2013
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Production Plan

New primary "story" pages	Linking to an existing page "outside this story"	Linking to an existing page in FSE	Linking to an existing pdf	Linking to to an existing article / video / Insight	Linking to Open an account
5 N	4 E	3 E	1 E	4 E	6 E

Deployed
March 14, 2013

Ensuring a meaningful and successful IRA experience required broad collaboration across multiple CXG disciplines. Our different backgrounds, experiences, perspectives, and talents generated powerful ideas — and lots of discussion — around identifying who is the user, what challenges do they face, and what is not working in the experience today. In the end, what we heard loud and clear was to make a process that to many users seemed intimidating, time-consuming, and confusing *simple*.

What we heard from our experts:

"Users don't understand an IRA is an account — not the investment."

"Trust is a big issue — on the phone, first-timers have to 'gather the courage' to call."

"Tools that are most helpful are hidden — the 'Which IRA is right for me' chart is like gold."

"The biggest challenges (for users) are fund choice and thinking about objectives, time horizon, and diversification."

"Make it simple!"

What users are thinking when approaching the IRA experience:

"I don't know if I should pick a Roth or traditional IRA."

"This might take a long time to do"

"All investment companies (all IRA offerings) are the same — does it really matter who I buy from?"

What goals users want to accomplish through the IRA experience:

"I want to reduce my taxes this year."

"I want to take the opportunity to save more for retirement. I want to ensure that I will have the best retirement possible."

How we want users to say they feel after visiting the IRA experience:

"I feel more knowledgeable about IRAs. I'm confident I've made a good/smart investment choice."

"Vanguard helped me understand, without making it overly complicated. They were really helpful; I felt guided through the experience."

"That did not take long at all to complete."

Post-launch results:

Since the new IRA pages elevated in early March, we've tracked a 29% increase in conversion rates.

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