

Fidelity.com • Accounts & Trade responsive redesign 1/3

With 2.5 million daily users, Fidelity is one of the most heavily used financial services websites. Rolling out a responsive redesign in beta helped test multiple iterations and learn from user feedback.

The brief

As part of the responsive redesign of Fidelity.com, the User Experience Design team tried numerous ways to address the massive Positions grid, a table of thirteen or more columns, and potentially thousands of rows. The business stakeholders had a long list of requirements and goals for the table. The team struggled with performance issues on mobile devices. They were blocked on the responsive data-dense Positions grid.

Hinderance

Teams were siloed back then, and the dev team wanted to continue with their JS idea.

Users

A wide range of Fidelity.com retail investors

My role

Design Lead, Information Architect, Prototyper

Skills used

- Accessibility
- Design Thinking
- Design System
- Information Architecture
- Interaction Design
- Front-end Web Development
- Rapid Prototyping
- Responsive Pattern Library
- Responsive Web App Design
- Style Guide
- User Research
- Visual Design

What I did

Brought in as a “unicorn” and responsive web design expert, the design director engaged me to share the latest techniques with his team. Collaborating with a team of information architects, visual designers, analysts, researchers, and developers, I reimagined existing layouts using rapid prototyping, and user-centered design. Leveraging a CSS-based solution to replace the JavaScript-centered approach, we designed the table to be as fast as possible.

Key tools and deliverables

- Wireframes (HTML/CSS/JS, Backbone templates)
- Branding and visual design (Adobe Illustrator, HTML/CSS)
- Responsive, interactive prototypes (HTML/CSS/JS)

Results

The redesign resulted in a 75% increase in mobile engagement. After launch, the Positions grid became the most viewed page on Fidelity.com.

Interview discussing the project on the Responsive Web Design podcast:

<https://responsivewebdesign.com/podcast/fidelity/>

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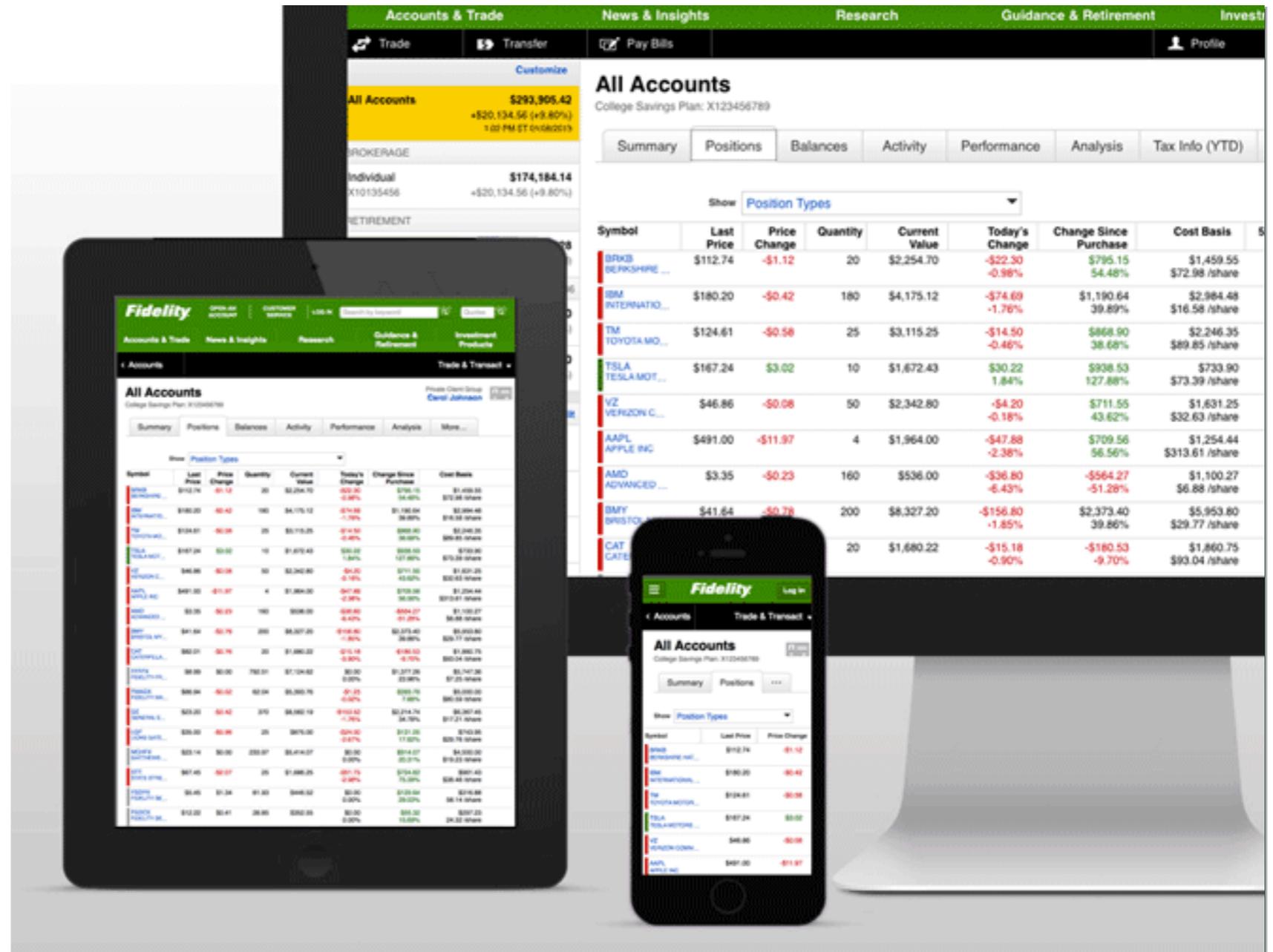
Change takes time, patience, and trust

I had an idea to help. In half an hour, I created a very rough HTML/CSS sketch of the initial idea using CSS inline-block display to have table cells reflow using min- and max-widths customized for the content.

Three months later the SVP halted that work and directed work on the CSS-based solution. Iterating on the idea, incorporating patterns into the early responsive pattern library, designed and built in tandem with this project. Collaborating with a design lead and UX researcher, we tested with users to determine their priorities, and iterated on prototypes in usability testing on a wide range of devices.



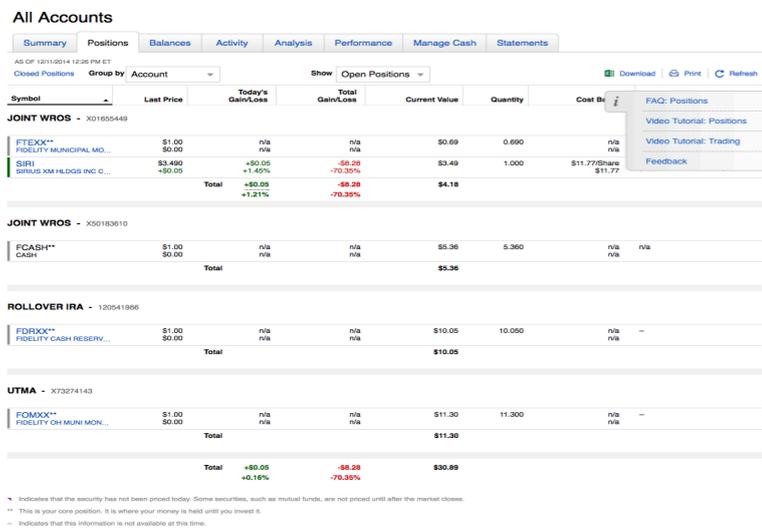
The low-fidelity Notepad sketch of the initial idea



The redesign captured customers' priorities at each viewport width.

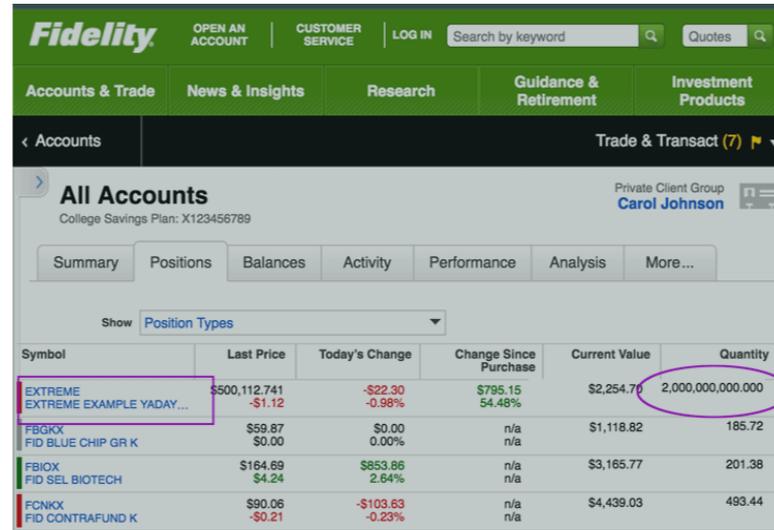
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Give the users what they show they need, not what they say they want



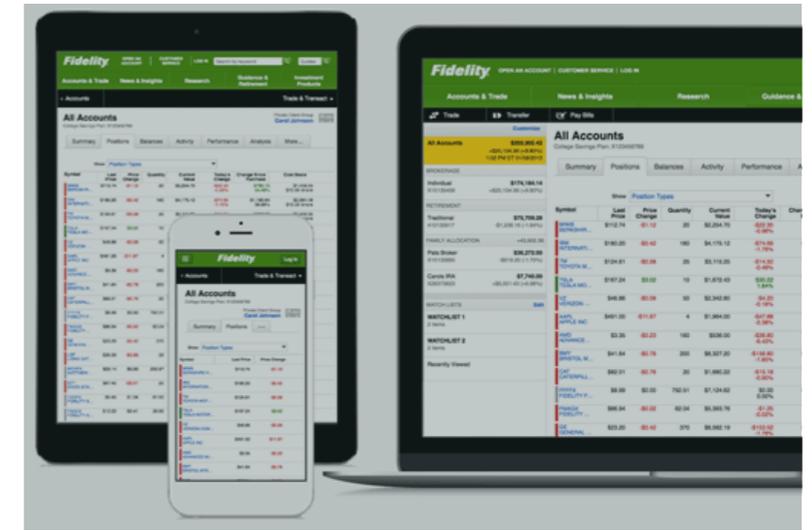
Symbol	Last Price	Today's Gain/Loss	Total Gain/Loss	Current Value	Quantity	Cost Bt
JOINT WROS - X01605449						
FTEXXX*	\$1.00	n/a	n/a	\$0.69	0.690	n/a
FIDELITY MUNICIPAL MO...	\$0.00	n/a	n/a	n/a	n/a	n/a
SIRI	\$3.49	+\$0.05	-\$8.28	\$3.49	1,000	\$11.77/share
SIRIUS XM HLDGS INC C...	+\$0.05	+1.45%	-70.35%			\$11.77
Total	+\$0.05	+1.21%	-\$8.28	\$4.18		
JOINT WROS - X00183610						
FCASH**	\$1.00	n/a	n/a	\$5.36	5,360	n/a
CASH	\$0.00	n/a	n/a	n/a	n/a	n/a
Total				\$5.36		
ROLLOVER IRA - 120541896						
FDRXXX*	\$1.00	n/a	n/a	\$10.05	10,050	n/a
FIDELITY CASH RESERV...	\$0.00	n/a	n/a	n/a	n/a	n/a
Total				\$10.05		
UTMA - XT3274143						
FOMXXX*	\$1.00	n/a	n/a	\$11.30	11,300	n/a
FIDELITY OH MUNI MON...	\$0.00	n/a	n/a	n/a	n/a	n/a
Total				\$11.30		
Total	+\$0.05	+0.16%	-\$8.28	\$30.89		

The existing Accounts & Trade experience was optimized for a fixed-width desktop experience, providing limited functionality. It wasn't usable on mobile devices, at all. The redesign was an opportunity for investigation of what was/wasn't working. Were people sorting and filtering as expected? Was it easy to use from the first time, and if they needed help could they find it? Realistic prototypes on actual devices with real customers allowed them to both tell us what they want and show us what they need.



Symbol	Last Price	Today's Change	Change Since Purchase	Current Value	Quantity	
EXTREME EXAMPLE YADAY...	\$500,112.741	-\$1.12	-\$22.30 -0.98%	\$795.15 54.48%	\$2,254.70	2,000,000,000.000
FBGKX	\$59.87	\$0.00	0.00%	\$1,118.82	185.72	
FID BLUE CHIP GR K	\$0.00	\$0.00	n/a	n/a	n/a	
FBIOX	\$164.69	\$853.86	2.64%	\$3,165.77	201.38	
FID SEL BIOTECH	\$4.24	\$0.00	0.00%	n/a	n/a	
FCNKX	\$90.06	-\$103.63	-0.23%	\$4,439.03	493.44	
FID CONTRAFUND K	-\$0.21	-\$0.21	0.00%	n/a	n/a	

The Positions grid is an exceptionally large, data-dense table serving a broad range of users. One customer might have only one row, whereas another could have thousands. High-value customers might have very large units of a stock or billions of dollars. Coordinating with business analysts to research the smallest and largest possible values, we tested our prototypes to ensure they were flexible enough for all customers.



Direct user observation uncovered unique needs and tasks in different scenarios. For mobile, we were able to hide the All Accounts sidebar to slide out of sight unless needed, and slide in with a tap. Through user testing we streamlined options provided to only those the users needed.