

# UX Brief - Centralized Opt In

We also have a version of this template with explanations for the sections [here](#).

## Goal of the Project

*The goal of this project is centralize the opt in and opt out for communications. This will reduce the amount of opt outs globally, and keep us legally compliant.*

### Additional UX Brief

This effort is part of a larger effort of opting in and out of subscriptions. The UX Brief for this can be found [here](#).

## Frame the problem

- **What**
  - *The problem is we have multiple opt in and opt out systems that don't talk to each other*
  - *Legally need to allow people to opt in and out of communication*
  - *The problem is almost every country has their own terms and conditions*
  - *Opt in and Out doesn't follow the user*
  - *The problem is there isn't a place for users to manage these opt in and opt out preferences*
- **Why**
  - *It is a problem because if systems can't talk to each other, users have to opt out multiple times in multiple systems. This creates compliance issues.*
  - *It is a problem because if we don't provide this, there can be legal implications*
  - *It is a problem because it complicates the opt in process*
  - *It is a problem because it puts unnecessary burden on the user to opt out multiple times*
  - *It is a problem because users don't have a place to re-opt in, so we are leaving potential revenue off the table*
- **Who**
  - *Distributors, Preferred Members, Customers, Leads, Unidentified Users*
- **Where**
  - *The problem arises where a user has access to more than one system with opt in and opt out*
  - *The problem arises where the effort to build a custom solution is costly*
  - *The problem arises when a user wants to re-opt in but can't*

## Predispositions

Here are some questions to ask at the kickoff meeting.

What do we know?

- ~~Currently, there is a lawsuit going where you can't send emails if the email was collected through a purchase transaction.~~
  - Consent is required by legal in connection with certain purchase transaction data.
- We are looking at vendors as a possible solution. Currently the vendor we are evaluating is [PossibleNOW](#)
  - Pros
    - They can act as an aggregator, systems can still be separate and they will combine. Less work for us
    - Less work. We don't have to build a UI or database. They handle it
    - We would provide requirements and UX guidance only
    - They have reporting built in
    - Easily gain insights in to opt in and opt out trends over time
    - They manage privacy policy
    - They are in many countries already - they have a global footprint
  - Cons
    - We don't have control over the system
    - Not flexible when it comes to changes. Outside our system means changes are difficult
    - If their system is down, so is out opt in and opt out systems. Is there a legal implication to this?
- It will save us money if we use a third party vendor
- Ideal solution would be configurable
  - Dynamic content based on locale
  - different terms and conditions based on country/region
  - most likely going to need 97 different solutions for content

### What do we not know?

- Estimates for custom build
- Pricing for the tool
- Other vendors we need to evaluate
- How much will we save farming out to a third party vendor?
- What rules govern each country specifically?
- Do we know all the ways we are capturing opt in? Where can we find this list?

### What are your assumptions about the project?

- Add assumptions on the project here

### Who are the users?

- Add users here. Will most likely be the "Who" from above.

### What are your assumptions about the users?

- Add assumptions about users here

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UX Team generally fills the rest out.

## Research

1. **observations**
  - a. *Add observations links here*
2. **literature review**
  - a. *Add literature links here*
3. **collections**
  - a. *Add collections links here*

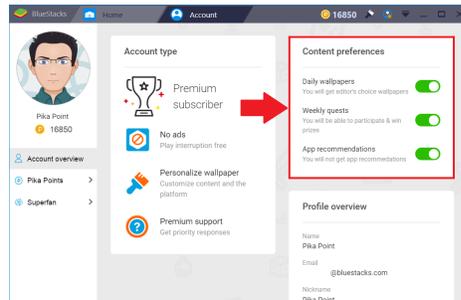
## Inspiration

**Communication**

**Contact**  
Name: Arnold Menezes

**Preferences**  
Email Address:

Topic	Email	Direct Mail	Phone Call	Text Message
Atrino General Communications	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Used for physicians to express interest in the ProxalanD family of products.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing Communications topic for Atrino Zoltrax products and services.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Diabetes Management Communications for HCP website www.ProxalanD.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Marketing Communications topic for Atrino Solitrax products and services.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Marketing Communications topic for Atrino Zenulin products and services.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>



## Insights

Here are some questions to ask once research is synthesized.

### What did we learn?

- Add what we learned here

### Does more research need to happen?

- Add additional research we need here

### Is this still a viable project?

- Generally, a yes or no will suffice.

### What is potentially challenging?

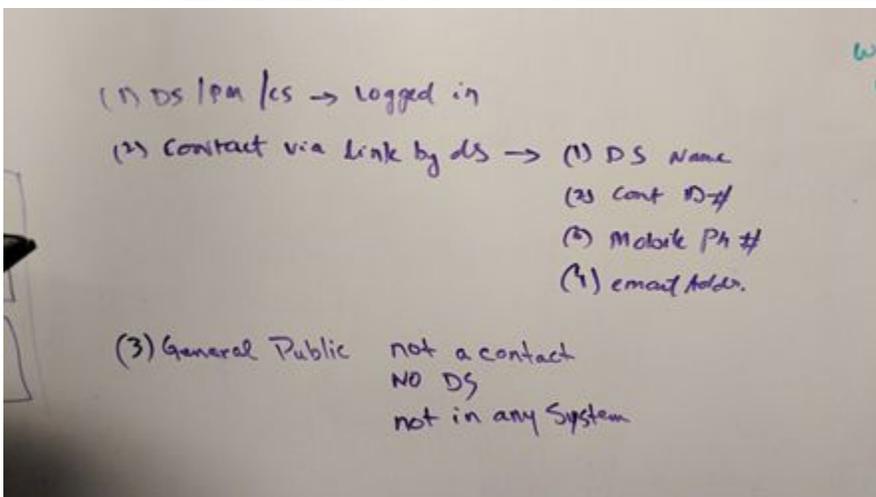
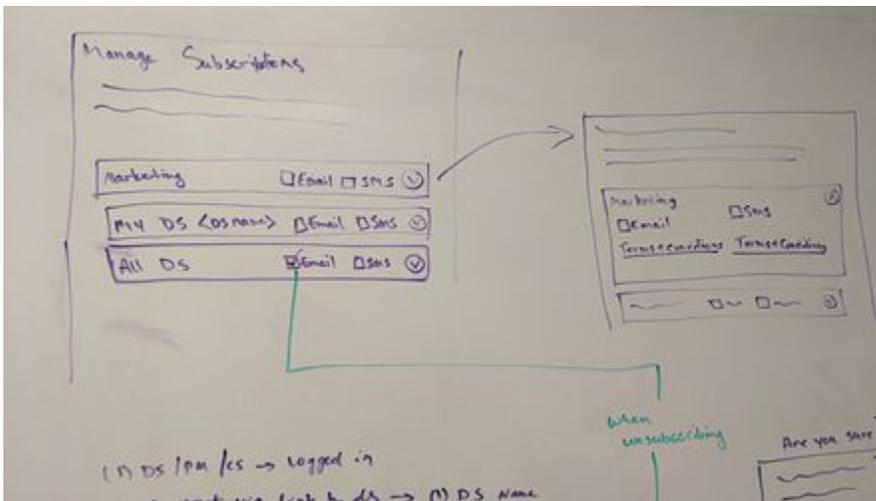
- Add potential challenges here

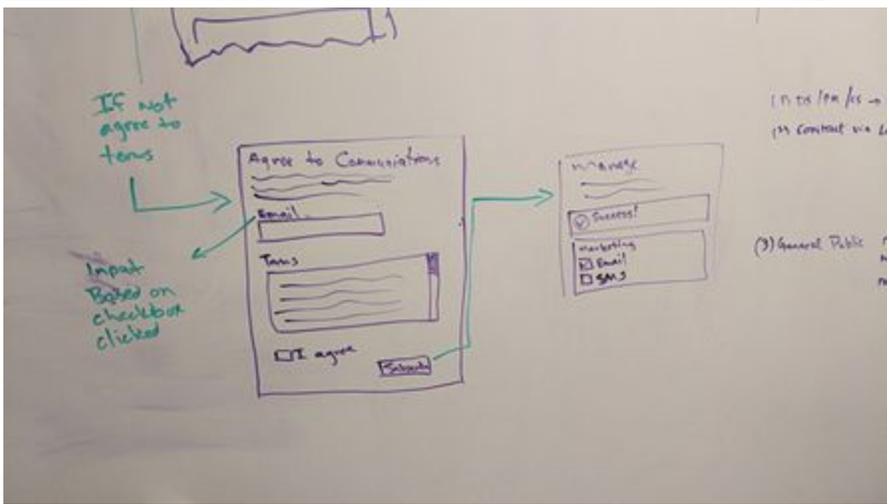
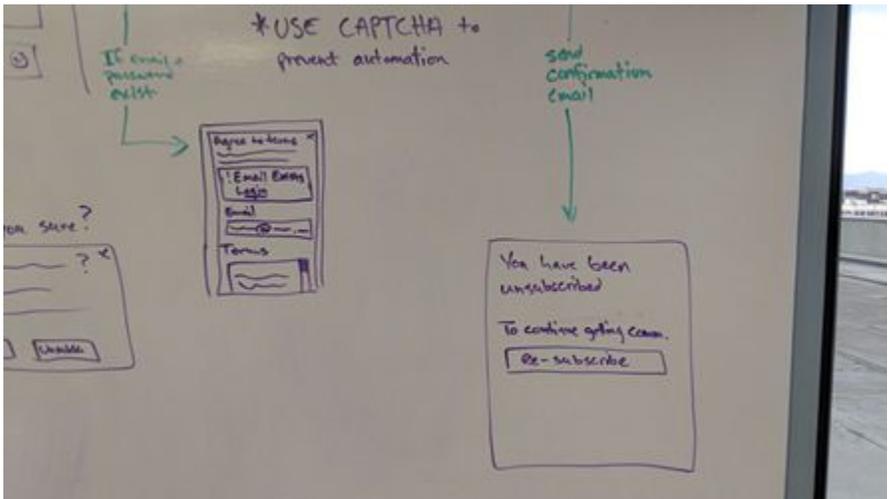
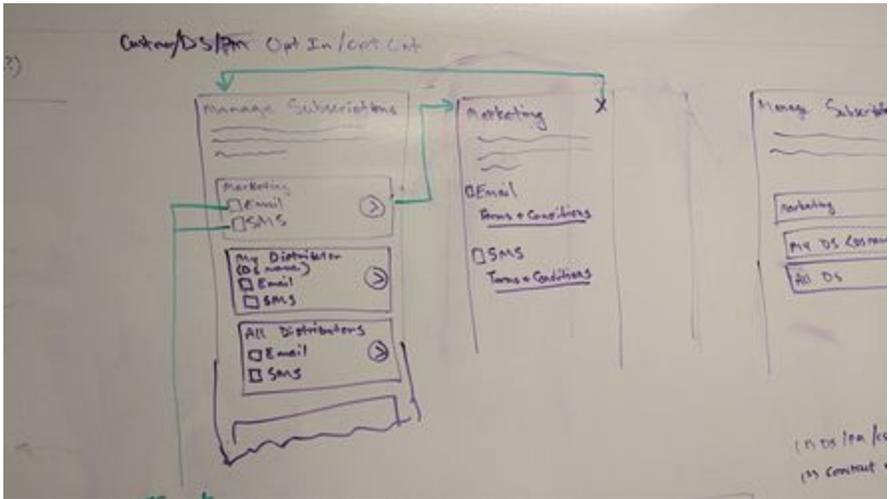
### Are there any gaps?

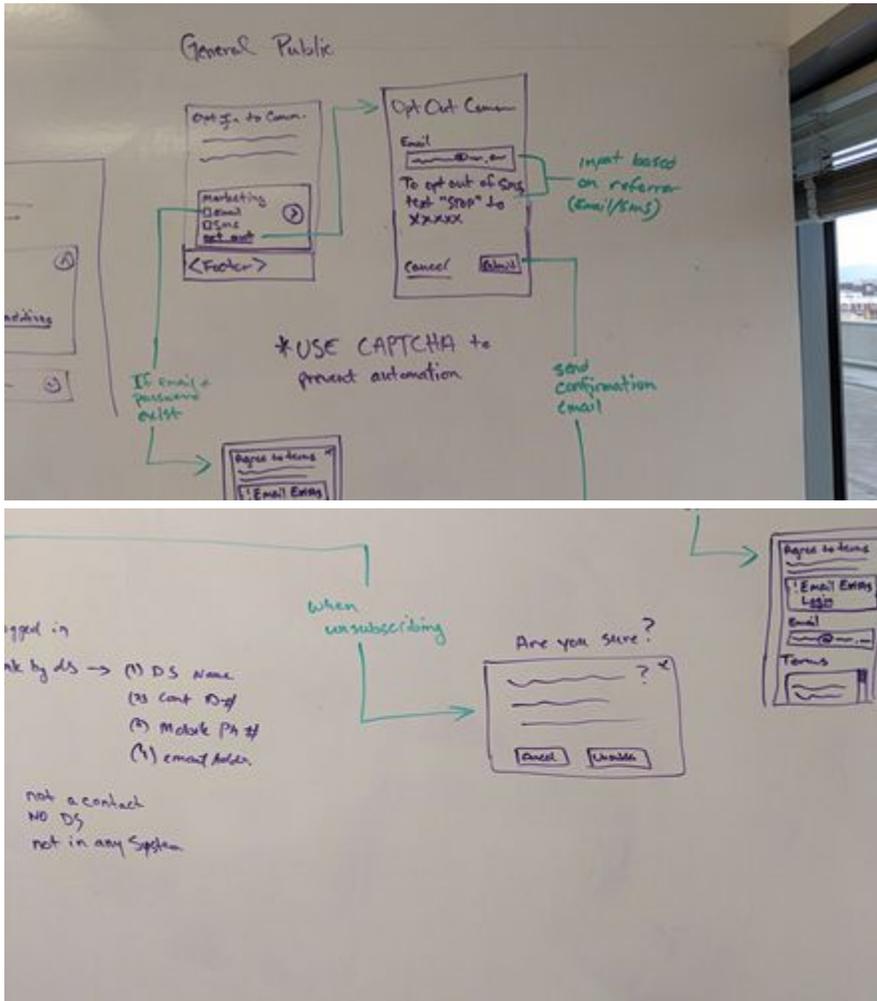
- Add potential gaps here

## Concepts & Concept Systems

### Initial Drawings







- Add Epics, features, user stories, sketches, lo-fi wireframes

## Prototypes

1. **exploratory**
  - a. Add exploratory links here
2. **appearance**
  - a. Add appearance links here
3. **usability**
  - a. Add usability links here

What type of prototype is needed?

## Strategies

- Add strategies here

## Recommendations

Based on:

- Add things that influenced your recommendation here

Recommendations:

- *Add your recommendations here*