Support & Training Portal Revamp

Redesign of a complex global support and training portal serving thousands of gas stations and convenience stores. Improved user experience for technicians, store managers, and internal teams -- delivering streamlined workflows and measurable product adoption.

Crystal Pappas
Content Strategist | UX-Focused Storyteller

The Study

Support and Training Portal Revamp for a Global Payment Technology Provider

Project Type: Content Strategy & User Experience Design
Duration: 8 weeks (with ongoing optimization)

Project Overview

This was a comprehensive support and training portal redesign for a global leader in point-of-sale and payment systems serving thousands of gas stations and convenience stores worldwide. The project addressed mounting support ticket volume and user complaints while managing a complex system transition and corporate rebranding initiative.

My Role

Served as a UX-Focused Content Strategist with end-to-end ownership of portal content strategy, documentation systems, and user experience.

• Responsibilities included content audits, editorial planning, stakeholder coordination, and direct collaboration with trainers, development teams, and subect matter experts.

• Maintained decision-making authority for content direction while managing approval workflows for technical accuracy and compliance.

The Users

A complex multi-stakeholder environment spanning external field professionals and retail staff across thousands of locations, plus internal teams managing training, support, and system operations.

• External users included field technicians requiring detailed installation and repair procedures, plus store managers and retail staff needing operational troubleshooting guidance for daily operations.

• Internal stakeholders encompassed training teams, support staff handling escalated issues, and product management teams coordinating system transitions and rollouts.

• User expertise levels ranged from highly technical field service professionals to non-technical retail staff, requiring content tailored to vastly different knowledge bases and use cases.

The Challenge

The existing support & training portals suffered from two critical, interconnected problems: outdated documentation due to ongoing system transitions, as well as sunsetting of legacy products, and poor information architecture that made essential resources difficult to locate. These issues created a cascade effect where technicians sometimes lacked current installation and repair procedures,

graphic by Vecteezy

while store managers and end-users couldn't easily find troubleshooting steps for common issues. The result was an increasing volume of support tickets for problems that should have been resolved through self-service documentation. This created operational inefficiency and user frustration across multiple stakeholder groups.

KEY PAIN POINTS:

• Outdated and soon-to-be-deprecated content across multiple system versions

• User complaints about findability & usability (and resultant excess down time)

• High volume of avoidable support tickets for documented issues

• Complex multi-audience needs (including technicians, store managers, and internal staff)

• Inconsistent branding following corporate rebrand

• Poor information architecture hiding critical resources from users

"I waste so much time trying to find the right install guides. Even when I find documentation, I'm not sure it's current. Sometimes it's just easier to call support and wait."
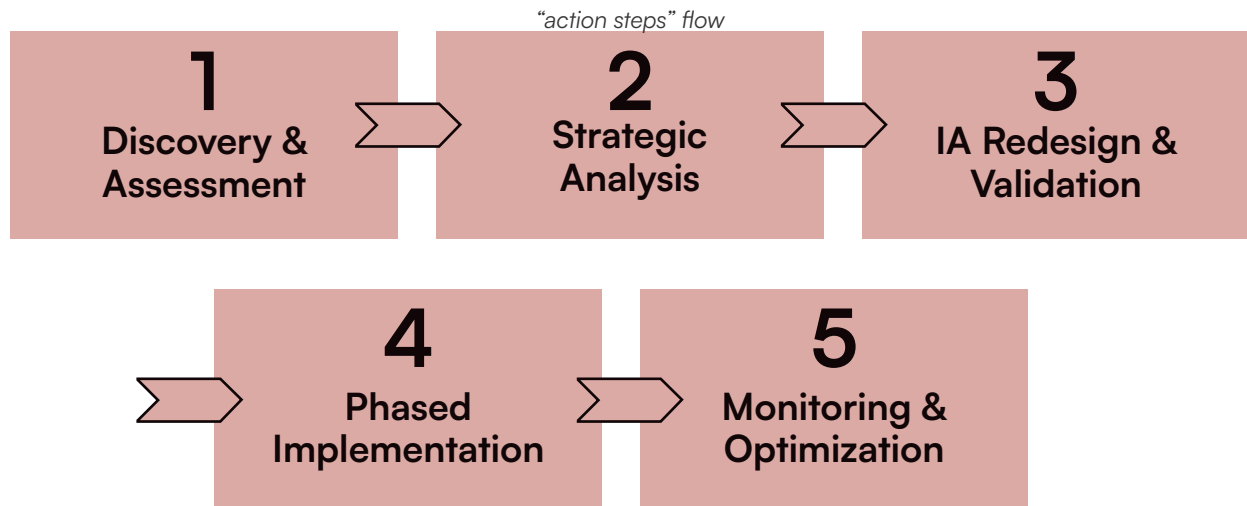-- Jason D., Field Tech

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Process & Actions

In this role, I developed and executed a structured content strategy process that prioritized user needs while managing complex system transitions and diverse stakeholder requirements.

Strategy Process Flow
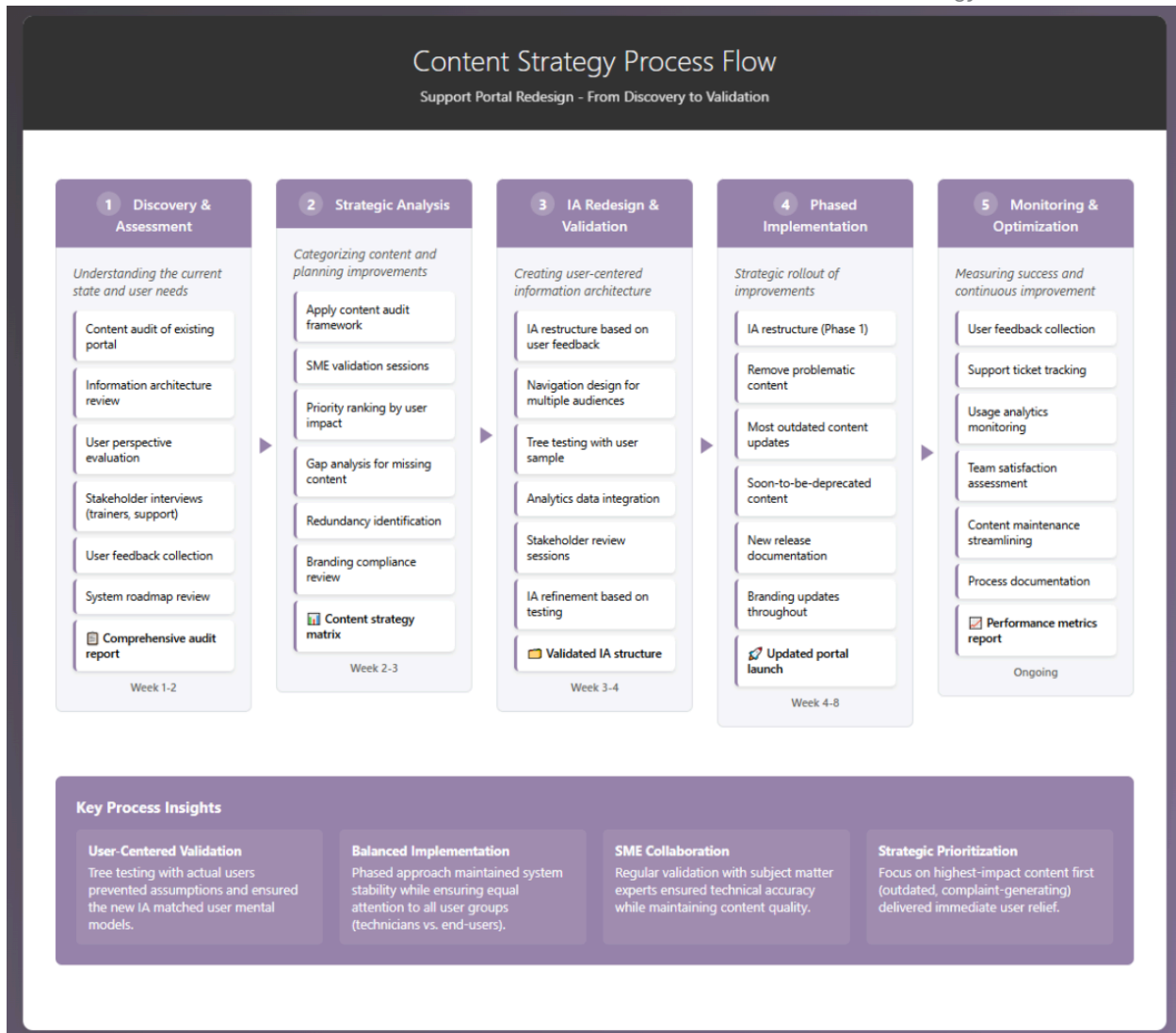
This five-phase methodology balanced speed with thoroughness, prioritizing user validation and operational continuity at every decision point. User feedback and testing were integrated throughout, ensuring the final solution addressed the real needs of diverse audiences.

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"action steps" flow

1 Discovery & Assessment	2 Strategic Analysis	3 IA Redesign & Validation

4 Phased Implementation	5 Monitoring & Optimization

Discovery & Assessment

Conducted a comprehensive content and information architecture audit, evaluating the portal from end-user and technician perspectives to identify usability barriers. Gathered stakeholder feedback from trainers, support teams, and users, while reviewing roadmaps for system transitions and product sunsetting to understand future content needs.

Strategic Analysis

Prioritized findability issues first, then systematically assessed content accuracy and gaps with subject matter expert validation. Applied a structured content audit framework evaluating findability, accuracy, relevance, redundancy, user complaints, audience fit, and brand compliance.

Before we dive into IA redesign, phased implementation, and monitoring/optimization, the next infographic shows--in more detail--the evaluation criteria and main framework for my content audit of the support and training portals.

Content Audit Framework
Support Portal Redesign for Global Payment Technology Provider

Evaluation Criteria

Audit Category	Evaluation Questions	Key Considerations
Findability	Can users locate this content intuitively? Does it live in the right place?	IA placement, navigation path, search discoverability
Accuracy	Is information current and technically correct?	SME verification required, system compatibility
Relevance	Does this support current systems and user needs?	Legacy vs. current systems, sunset timeline
Redundancy	Is this duplicated elsewhere? Which version is authoritative?	Content consolidation opportunities
User Complaints	Has this content generated support tickets or feedback?	Known pain points requiring immediate attention
Audience Fit	Is complexity appropriate for intended users?	Technicians vs. end-users vs. internal staff needs
Brand Compliance	Does this reflect current branding standards?	Visual consistency, messaging alignment

Decision Framework & Actions

Keep As-Is `Low Priority`

Content is accurate, well-placed, and user-friendly. Only requires branding updates to new visual standards.

Major Update `Medium Priority`

Core content is sound but needs significant revision for accuracy, clarity, or structure. Prioritized by user impact.

Complete Rewrite `High Priority`

Content is fundamentally flawed, outdated, or incomprehensible. Requires ground-up reconstruction.

Archive

Content serves legacy systems still in use but being phased out. Moved to archive section with clear labeling.

Delete

Content is obsolete, incorrect, or redundant with no ongoing value. Safe for permanent removal.

Relocate

Content is valuable but poorly placed in current IA. Moved to appropriate section for better discoverability.

User-Balanced Implementation Strategy

Balanced Approach: Updates prioritized to ensure roughly equal timeline for technician and end-user content improvements, preventing any user group from being disadvantaged during the transition.

Internal Staff: Lower priority unless urgent operational needs, allowing focus on external user experience first.

Implementation Note: All content decisions validated with subject matter experts before implementation. Priority rankings adjusted based on user feedback, support ticket volume, and business impact assessment.

These content audit guidelines provided clear focus and a practical priority matrix, enabling rapid, stakeholder-aligned decisions and guiding effective implementation throughout the final three phases. Every content choice was made to be user-centric, technically sound, and business-justified.

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Information Architecture Redesign & Validation

Used combined user feedback, analytics data, and tree testing with a user sample to redesign the information architecture for intuitive navigation. This validation step ensured the new structure matched actual user mental models rather than internal organizational logic.

Phased Implementation

Implemented Implemented changes in strategic phases: restructured the IA first, removing problematic content while reorganizing existing materials, then tackled content updates in priority order -- most outdated content first, followed by soon-to-be-deprecated materials, and finally documentation for upcoming releases. Simultaneously managed corporate rebranding implementation across all portal content, ensuring messaging consistency and brand compliance.

Monitoring & Optimization

Established ongoing feedback collection and performance tracking to ensure sustainable improvements and identify optimization opportunities.

Key Methodologies

- Multi-stakeholder discovery interviews
- Systematic content audit framework
- User-validated information architecture design
- Tree tested navigation validation
- Balanced implementation across user groups
- SME collaboration for technical accuracy

Outcomes & Results

The portal redesign delivered immediate user satisfaction improvements, with technicians expressing relief at finding current, well-organized information. While support ticket reduction took time as users adjusted their help-seeking behaviors, the support team immediately benefited from easier access to accurate information when assisting callers.
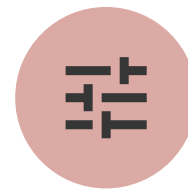
Key Business Outcomes

Improved User Satisfaction

Immediate positive feedback from technicians and end-users

Enhanced Support Efficiency

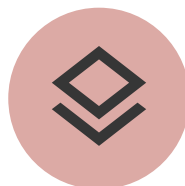Support team could locate accurate information faster

Streamlined Operations

Significantly simplified content maintenance processes

Better Onboarding

Simplified procedures for new system users

Sustainable Framework

Created scalable, maintainable content

Brand Consistency

Unified messaging and visual standards across

Long-term Impact: The restructured information architecture and updated content reduced the friction between users and critical technical information, creating a more sustainable, scalable support system that could adapt to future system changes and user needs.

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Key Takeaways & Lessons

This project demonstrated my ability to manage content strategy at global scale while serving diverse user groups with varying technical expertise and information needs. The experience reinforced the importance of user-centered design in technical documentation: even small improvements in findability and accuracy can have significant operational impact.

Strategic Insights

- <u>User validation prevents assumptions</u>: Direct testing with actual users revealed navigation patterns that differed from stakeholder expectations.
- <u>Balanced implementation builds trust</u>: Ensuring equal attention to all user groups maintained stakeholder buy-in throughout the project.
- <u>SME collaboration ensures accuracy</u>: Regular validation sessions prevented technical errors while maintaining content quality.
- <u>Systematic frameworks scale</u>: The content audit methodology became a reusable tool for ongoing content management.

Working across multiple stakeholder groups (technicians, store managers, internal teams, trainers) highlighted the value of systematic discovery and validation processes. The tree testing phase was particularly crucial for ensuring the new information architecture would actually serve users' mental models, not just internal organizational logic.

The phased implementation approach proved essential for managing complexity while maintaining system stability during the transition period.

"Even small improvements in findability and accuracy can have significant operational impact."

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Let's Connect

Content Management professional focused on clarity, efficiency, and sustainable growth. I bring a strategic, user-centered approach to organizing information and transforming complex documentation systems. Eager to drive business impact and continuous improvement at the intersection of content and UX.

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