My UX Process - In Detail

Josh Cooley | 10/ 12 / 2015

Example: Instant Checkmate - Dashboard Redesign

Contextual Inquiry - User Testing - Information Architecture - Personas - Interaction Design - Visual Design

Problem

The sole way the company was understanding its users was through analytics, leaving a void in understanding of who their users were, what they wanted, and what prohibited them from reaching their goals. The team was struggling to innovate new ways to obtain and retain users.
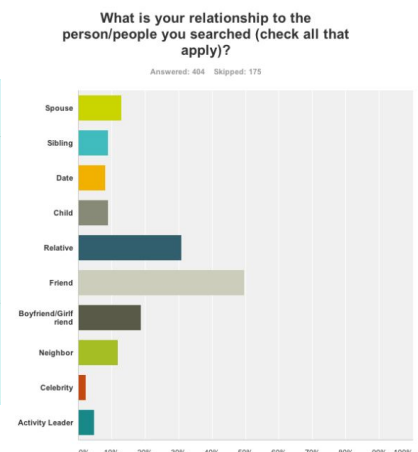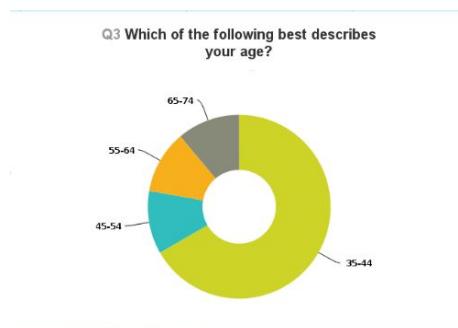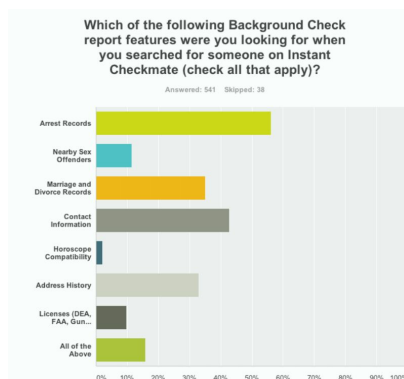
Proposal

A complete redesign of the Instant Checkmate dashboard using user data and empathy as the foundation.
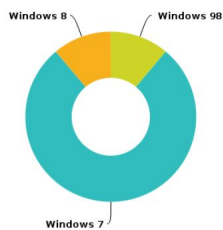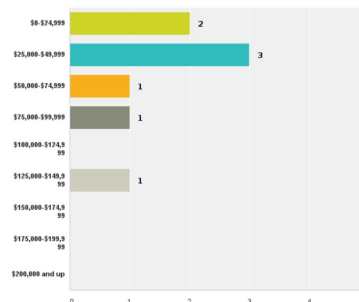
Process

1. Survey

I coordinated with an email marketing team member to compose a SurveyMonkey email blast to our current registered customers. This was to get a good high-level idea of our user demographics.

Q1 What Operating System are you using?

Q13 What is your approximate average household income?

2. Contextual Inquiry

Using a web service called ethn.io, I set up a remote user testing environment to talk to real users who were about to use the product for the first time. I recorded and annotated all tests (40 in total) via Google Hangout and GoToMeeting. I used the "think-aloud" process, where I asked users to navigate through the site as if I wasn't there but annunciate their thoughts out loud. I would then drill down into interesting commentary or cognitive phenomena. After every 5 tests, I compiled and presented the results of my findings that included: usability errors, bugs, video snips of interesting interactions, and trends that several users repeated.

You can view one of my presentations here. (The video clips are blocked since I no longer have access to the private YouTube account where they were posted).

3. Persona Creation

Based on the survey data and research, I was able to whittle down our user base into four key personas as follows:

Rich
The Power User

Looking For
I'm looking for a background check service that allows me to run multiple, reliable arrest record searches quickly.

Motivation
I want to ensure that employees and volunteers don't have any criminal records

Questions
What exactly do I get in a report?

How is instancheckmate better than competitors?

What is the price?

Interests:

Age: 58 |

I am an entrepreneuer and sole operator of a small business called LetsWorkTogether Inc. My business focuses on recruiting reliable volunteers by means of social media to aide in disaster relief. Since my business relies heavily on the rapport of complete strangers around the coutnry, I spend alot of time doing research on the internet to find the right people. I currently use facebook and LinkedIn as primary tools to qualify people who sign up with my company.
I have previous experience using background check services, but none of thme have been able to offer me the depth in a report that I require. I am aware that these services cost money, and am willing to pay for them I am convinced that the information provided is worth my while.

Personality Traits: - Observant - Skeptical - Intelligent

Not Looking For
A service that asks for my money without giving me a taste of what I'm going to get.

Demotivation
I don't like irroneous or incomplete information. I just want to know what to know how much a product costs and what I'm getting for my money.

Interests

| Criminal Records | | Contact Information | Licenses |

Julia
The Nosey One

Looking For
I want to find out what other juicy details are available online for my friends and family. I would also want to check on people that come in contact with my children.

Motivation
I'm bored and want a search tool that will satisfy my curiosity.

Questions
What do I get for free?

What information is available about myself?

What has my troublesome cousin gotten into?

Interests:

Age: 34 |

I am a mother of twin girls and a part time student going trying to get my Associates degree in Psychology. I spend most of my time at home with my kids watching TV or browsing facebook and news articles online. Facebook provides me with alot of information on what's going on in everyone's life, but I know the internet has alot more information on it that people aren't willing to publicly state. I'd like to be able to search my friends and family to find out what else is out there on them, just for fun. I'd also like to search any babysitters or parents of friends that my children go to play with.

Personality Traits: - Cheap - Nosey - Impatient

Not Looking For
Information that I have to sort through that is not relevant to my search.

Demotivation
The ad I clicked said "Free Lookup" so I wouldn't like it if I had to pay for anything. I would leave the moment something lead me to believe I had to pay.

Interests

| Criminal Records | Sex Offenders | Related Persons | Marriage & Divorce |

4. Affinity Diagram

After transcribing all of my comments, cognitive phenomena, ideas and observations into sticky notes, I hosted a week long session of affinity diagramming sessions to create what was known as "the wall" to figure out what were the key needs and pain points our users were having. Here's a few snaps of some up close groupings:
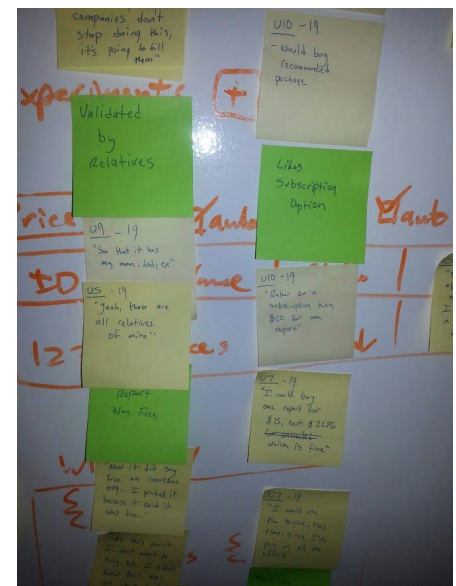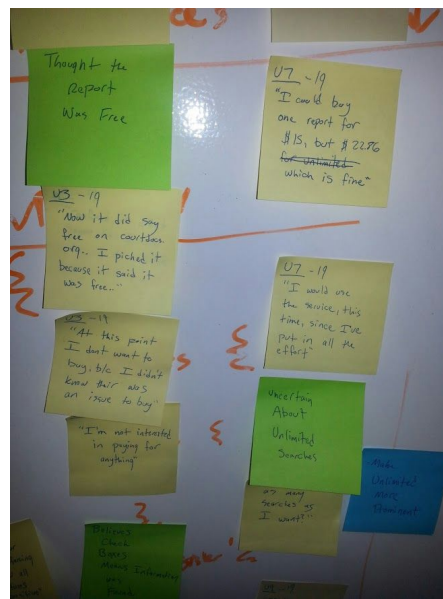
Some data from yielded from the sessions:

Usability Inhibitors
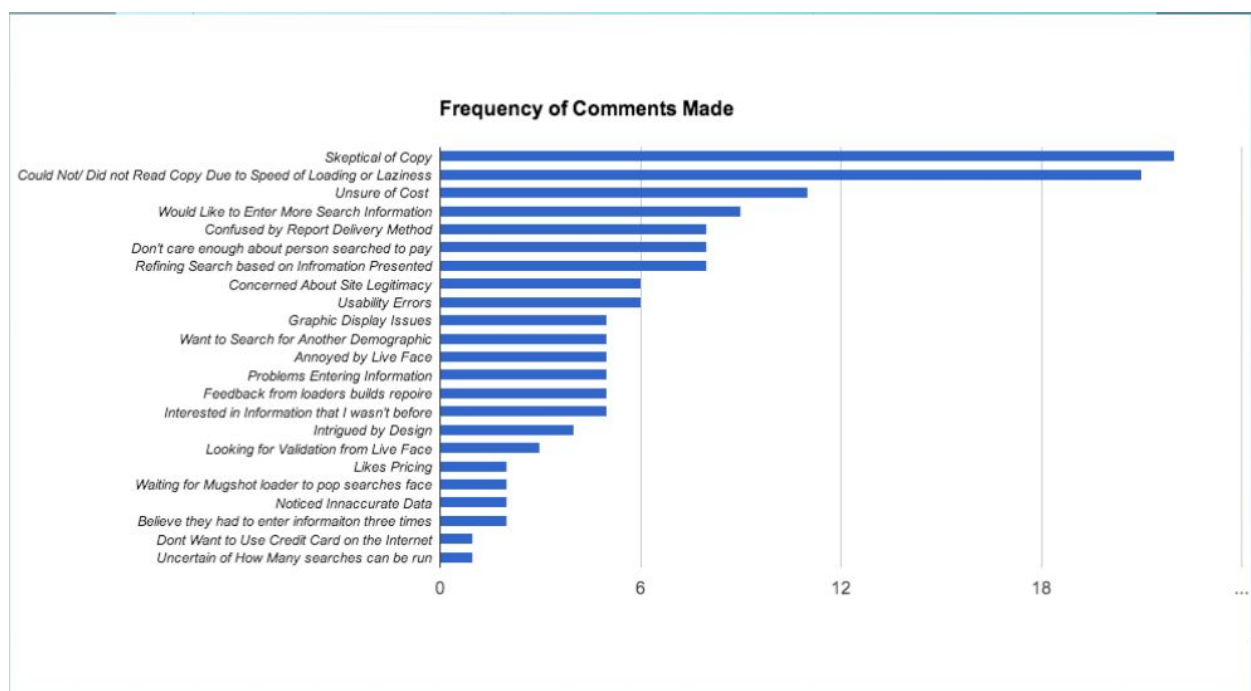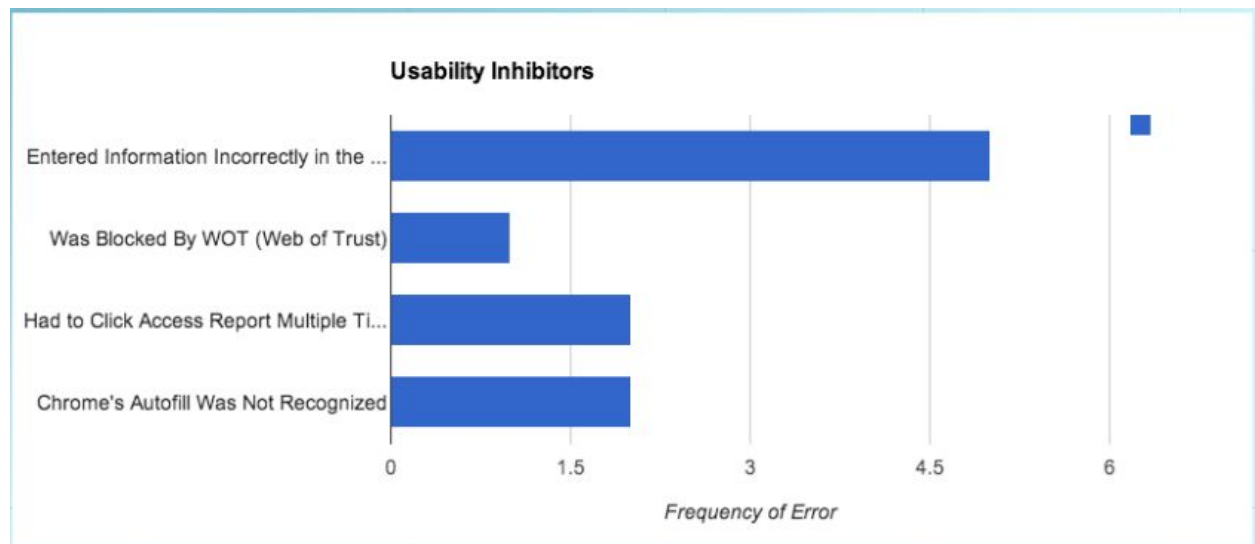
To retain this data and to build on it for future research, I transcribed and organized all of my notes here. I recommend viewing if hundreds of lines of user feedback is how you'd like to spend your afternoon (If so, we should hang out).

5. Card Sort

To determine the best information architecture for the application, I recruited more users with ethn.io for a card sort study using Optimal Workshop's Optimal Sort application. I received the following data:
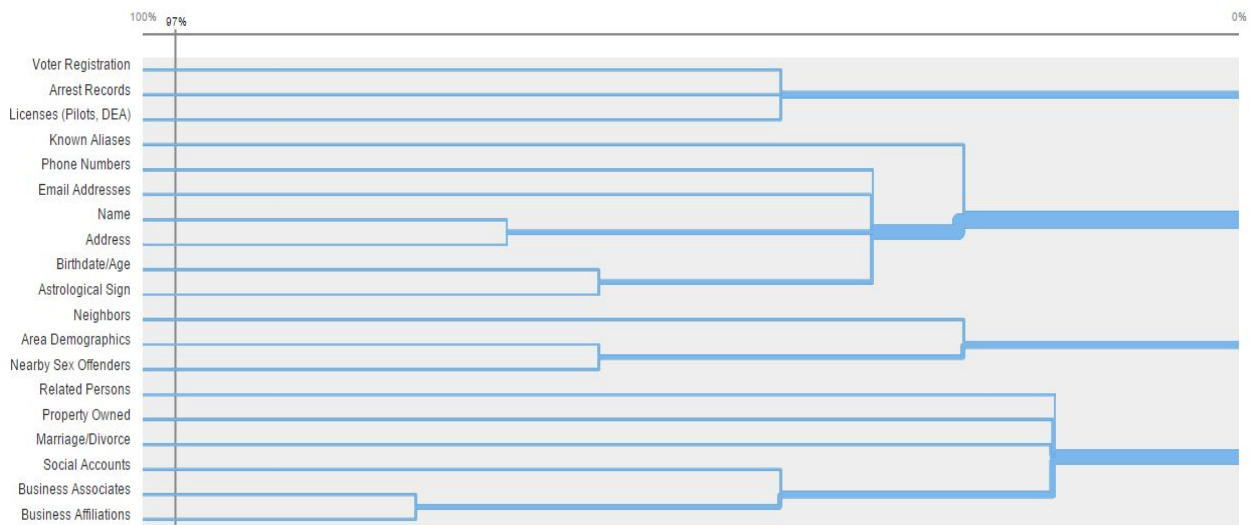
I mainly used the best fit dendrograms to come up with my information architecture, as I was only able to get 12 legitimate responses.

Based on this, I created the following navigation schema:

6. Sketch

Sadly, many trees were sacrificed in the name of user experience to get this design to a state of my liking. I collaborated with a developer to ensure that my creativity didn't run out of bounds. Some sketches that made that cut are as follows:
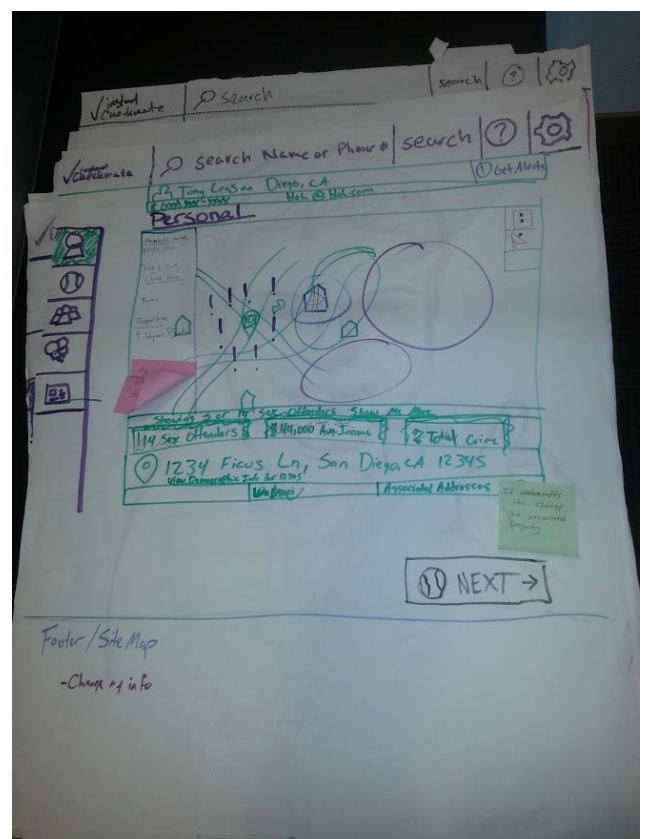
7. Wireframe/Prototype/Test

Using Axure, I digitized my sketches into more formal, mid-fidelity wireframes. I also incorporated basic interactivity so that I could run more user tests to identify any key bottlenecks at an early stage. The prototype can be found here (Password: Jc8675309). This was revised several times after gaining feedback from users. Some screenshots provided as follows:

checkmate
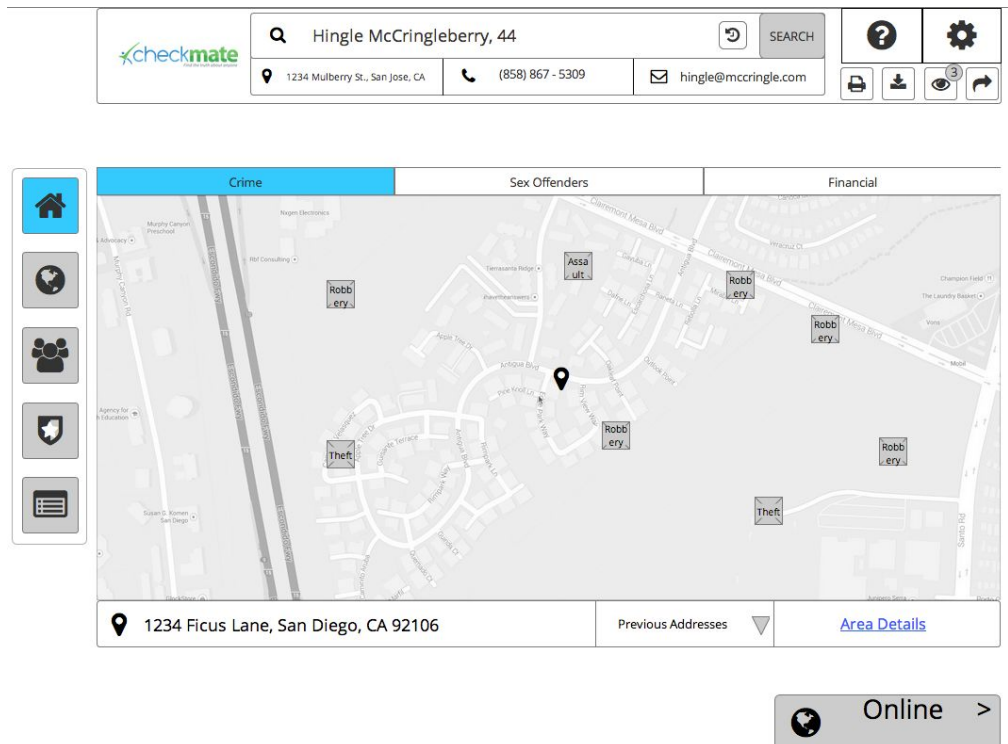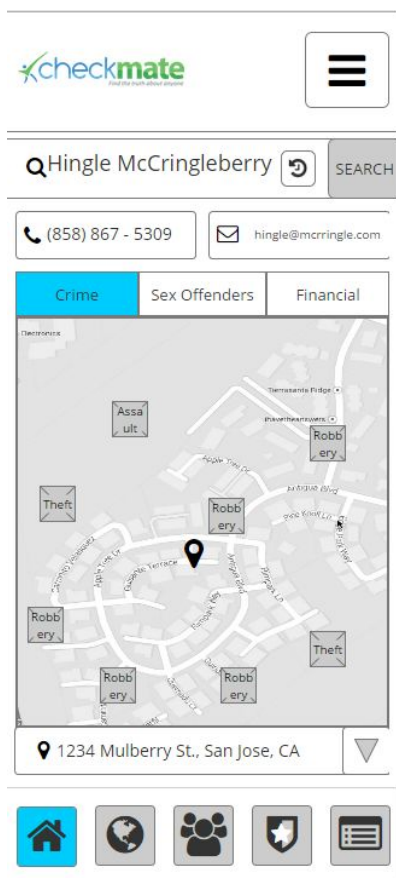
Hingle McCringleberry | SEARCH

Associated People

Possible Friends, Relatives & Partners

Sally Perrywinkle
3 Social | 3 C... | 2 Licenses Found! | VIEW

Harry Perrywinkle
3 | 1 | 2 | VIEW

John Huberschmitt
3 | 1 | 2 | VIEW

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checkmate

Hingle McCringleberry, 44 | SEARCH

1234 Mulberry St., San Jose, CA | (858) 867 - 5309 | hingle@mccringle.com

Associated People

Possible Friends, Relatives & Partners

Sally Perrywinkle	Harry Perrywinkle	John Huberschmitt	Jerry Jonson
3 1 2 VIEW	2 1 2 VIEW	3 1 2 VIEW	3 1 2 VIEW

Possible Associates

Sally Perrywinkle	Harry Perrywinkle	🔒 John Huberschmitt	Jerry Jonson
3 1 2 VIEW	3 1 2 VIEW	3 1 2 VIEW	3 1 2 VIEW

Possible Neighbors

Sally Perrywinkle	Harry Perrywinkle	🔒 John Huberschmitt	Jerry Jonson
3 1 2 VIEW	3 1 2 VIEW	3 1 2 VIEW	3 1 2 VIEW

🛡 Criminal >

Q Main	🏠 Home	🌐 Online	👥 Associated People	🛡 Criminal	Licenses	Information
Search History	Sex Offenders	Profiles	Possible Friends & Relatives	Records	Firearms	Remove
Record Detector	Property		Possible Associates		Pilots	Correct
Share	Crime		Possible Neighbors		DEA	
Print	Demographics				Marriage/Divorce	
Download	Financial					
Settings	Tax Liens					
Help	Bankruptoies					
	Property					

8. Visual Design/Prototype/Test

I then added the aesthetic layer to draw attention to desired interactions. Prototype can be found [here](#). Aesthetics were tweaked based on user feedback. Some screenshots provided as follows:

checkmate

Firearms

Unlock to Search

California
January 23rd, 2014
#FA43263C

Unlock to Search
Nevada
January 23rd, 2014
#FA43263C

Mississippi
January 23rd, 2014
#FA43263C

Unlock to Search
New York
January 23rd, 2014
#FA43263C

Unlock to Search
Kentucky
January 23rd, 2014
#FA43263C

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checkmate — Search for a Name or Phone Number — HELP · SETTINGS

Hingle McCringleberry
900 Second St.
Coronado, CA 92118
(858) 145 - 1234
hingle@mccringle.com

Record Detector · Print · Share · Download

Firearms

Unlock to Search — California — January 23rd, 2014 — #FA43263C
Nevada · Mississippi · Kentucky — January 23rd, 2014 — #FA43263C
New York · Kentucky — January 23rd, 2014 — #FA43263C

Pilots

Hingle McCringleberry — California — January 23rd, 2014 — #FA43263C
Nevada · Mississippi — January 23rd, 2014 — #FA43263C
New York · Kentucky — January 23rd, 2014 — #FA43263C

Drug Enforcement Agency

Hingle McCringleberry — California — January 23rd, 2014 — #FA43263C
Nevada · Mississippi — January 23rd, 2014 — #FA43263C
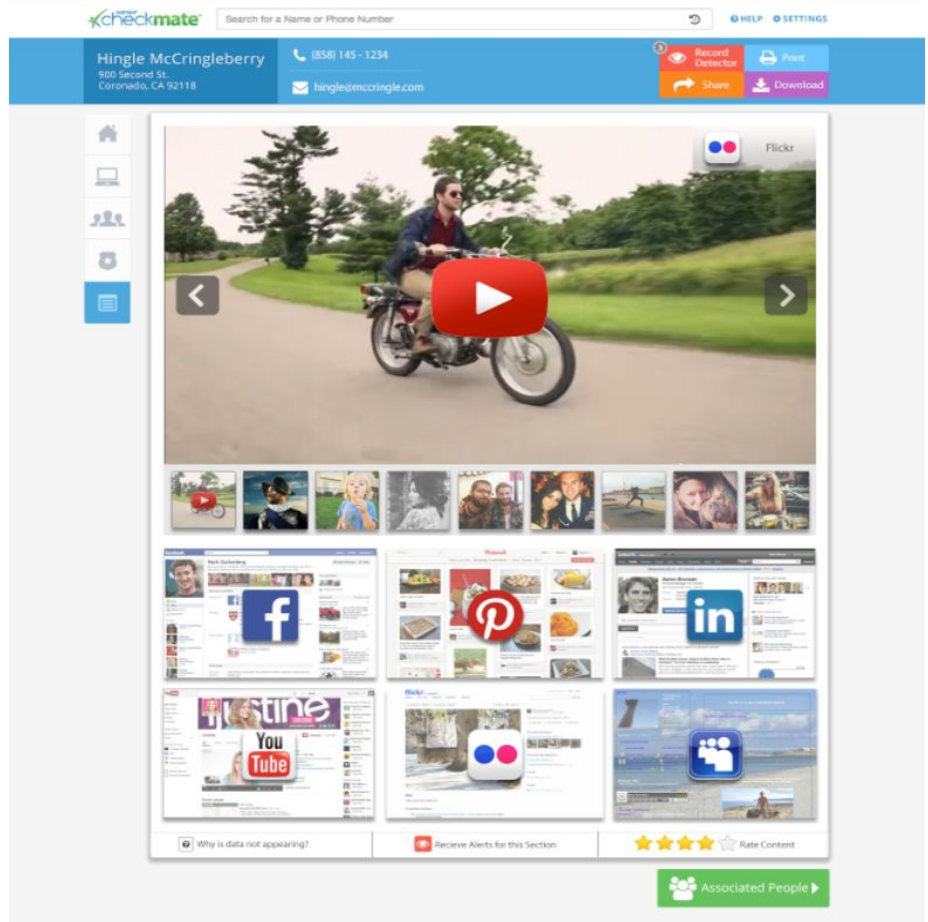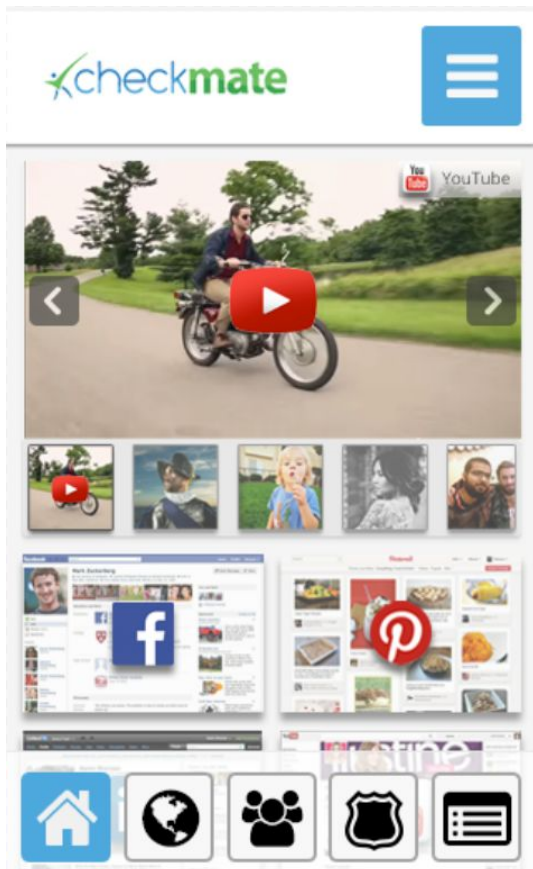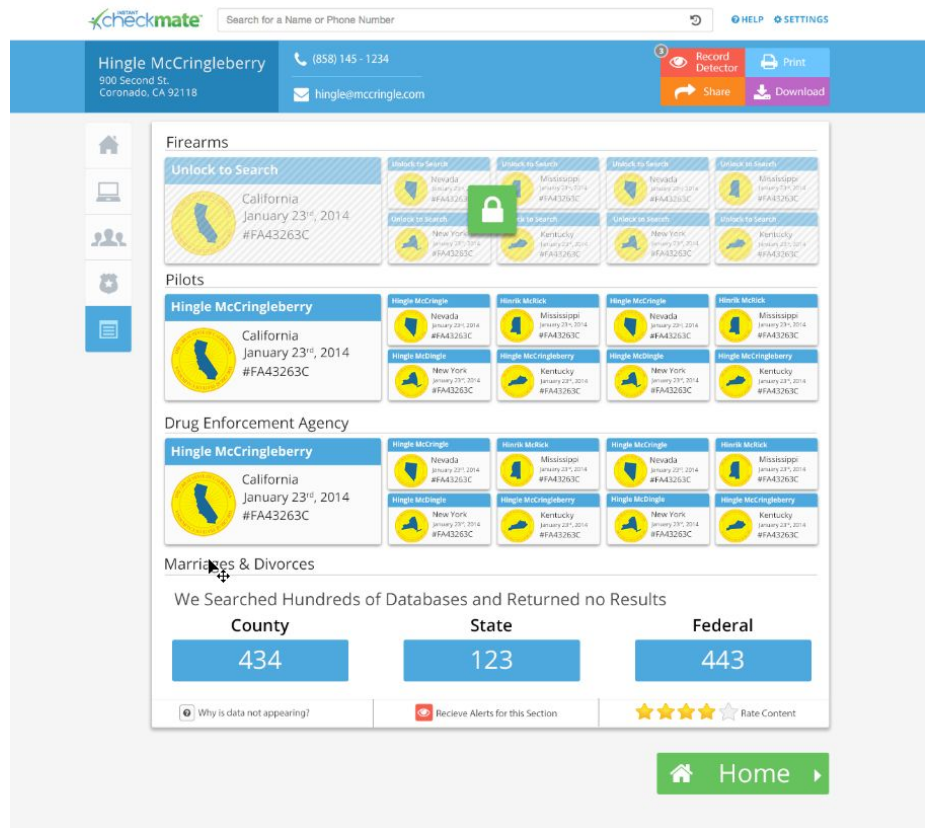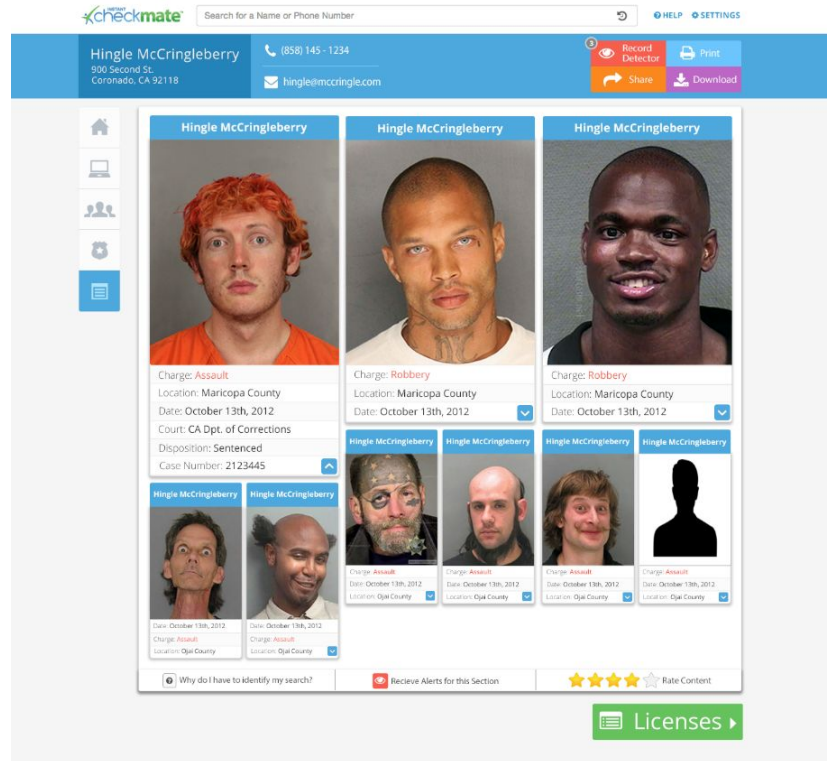New York · Kentucky — January 23rd, 2014 — #FA43263C

Marriages & Divorces

We Searched Hundreds of Databases and Returned no Results

County	State	Federal
434	123	443

Why is data not appearing? · Recieve Alerts for this Section · Rate Content

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checkmate

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Associated People

Takeaway

The design proposals were all phased in and A/B tested. The result yielded **over a 40% increase in conversion rate.** Further user tests confirmed a great decrease in frustration, and the customer support call center claims they had noticed a significant decrease in phone calls and negative reviews.