

# UX Design Proposal

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A collage of four screenshots from the IPS website, showing different service pages and a landing page. The top-left screenshot shows a landing page with a man in a yellow shirt, a bar chart, and circular icons for Tax, Business Advisory, Bookkeeping, and Accounting. The top-right screenshot shows a service page for 'First Consul' with a woman at a desk, circular icons for Accounting, Bookkeeping, Business Advisory, and Medical Contractors, and a testimonial from a rental property owner. The bottom-left screenshot shows an 'Accounting' service page for small business owners, featuring an umbrella icon and a testimonial from a self-employed tax preparer. The bottom-right screenshot shows another 'Accounting' service page, highlighting 'Fast, connect &amp; grow' and 'the only tax and accountancy firm you'll ever need'. The overall design is clean, modern, and professional.

# UX Design Proposal

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# The Dream Team

## Team Intro



**Olga Garin**  
Content Creator

- Defined and prioritised user and organisational requirements
- Identified user pain points and ideate to resolve those
- Responsible for the preparation of written content for the report



**Zoe Lee**  
Researcher

- Conducted UX research (in the form of surveys) for the report
- Documented and analysed the research data by making journey maps and personas
- Provided research insights to the stakeholders



**Dave Hwang**  
Designer

- Tasked with the intricate design of user-friendly navigation structure
- Responsible for creating a mock-up and an interactive prototype
- Implemented user interface based on research feedback

## Client Profile

IPS Accountancy Services Limited (IPS) is an accounting and business advisory services provider, with a particular interest in small New Zealand businesses and enterprises across all industries.

Established in 2014 by Iva and Zan Stoev (who have been in the accountancy business for well over twenty years) IPS is a reputable accounting services firm with a long-standing history of providing effective and practical solutions to its clients. Over the number of years of its existence, IPS has been able to help many of its clients achieve both of their short-term goals and maximise their long-term potential.

## Project Schedule

The project report deadline is 22 August 2022.

The report will consist of three separate steps. In particular:

**Step 1:** Research and draft design of the end project. This will include, but not be limited to, client and project briefs, preparation and distribution of user surveys, user interviews and data evaluation.

**Step 2:** User testing and optimisation of the end project. This will include, but not be limited to, reviewing the draft project against the results of our research and perfecting the project inline with user feedback.

**Step 3:** Finalising the end project. This will include, but not be limited to, developing the prototype, preparing the wireframe and presenting the final design of the end project.

## Target audience

IPS is a solid performer in the accounting and business advisory field, having a close working relationship with many small businesses across New Zealand. IPS' main audience, and its primary target market, are small businesses with (on average) fewer than twenty employees.

## Project Overview

Most of IPS' current clients have been word-of-mouth referrals, limiting its market reach and presence. With this in mind, IPS has requested a transformation of its website, with a focus on:

1. increasing its current client base (particularly, within the younger demographic);
2. developing its digital presence on the market; and
3. keeping up with ever-growing competition.

# 10 Usability Heuristics for User Interface Design

## Find the problem

### 1: Visibility of system status

The design should always keep users informed about what is going on, through appropriate feedback within a reasonable amount of time.

### 2: Match between system and the real world

The design should speak the users' language. Use words, phrases, and concepts familiar to the user, rather than internal jargon. Follow real-world conventions, making information appear in a natural and logical order.

### 3: User control and freedom

Users often perform actions by mistake. They need a clearly marked "emergency exit" to leave the unwanted action without having to go through an extended process.

### 4: Consistency and standards

Users should not have to wonder whether different words, situations, or actions mean the same thing. Follow platform and industry conventions.

### 5: Error prevention

Good error messages are important, but the best designs carefully prevent problems from occurring in the first place. Either eliminate error-prone conditions, or check for them and present users with a confirmation option before they commit to the action.

### 6: Recognition rather than recall

Minimize the user's memory load by making elements, actions, and options visible. The user should not have to remember information from one part of the interface to another. Information required to use the design (e.g. field labels or menu items) should be visible or easily retrievable when needed.

### 7: Flexibility and efficiency of use

Shortcuts – hidden from novice users – may speed up the interaction for the expert user such that the design can cater to both inexperienced and experienced users. Allow users to tailor frequent actions.

### 8: Aesthetic and minimalist design

Interfaces should not contain information that is irrelevant or rarely needed. Every extra unit of information in an interface competes with the relevant units of information and diminishes their relative visibility.

### 9: Help users recognize, diagnose, and recover from errors

Error messages should be expressed in plain language (no error codes), precisely indicate the problem, and constructively suggest a solution.

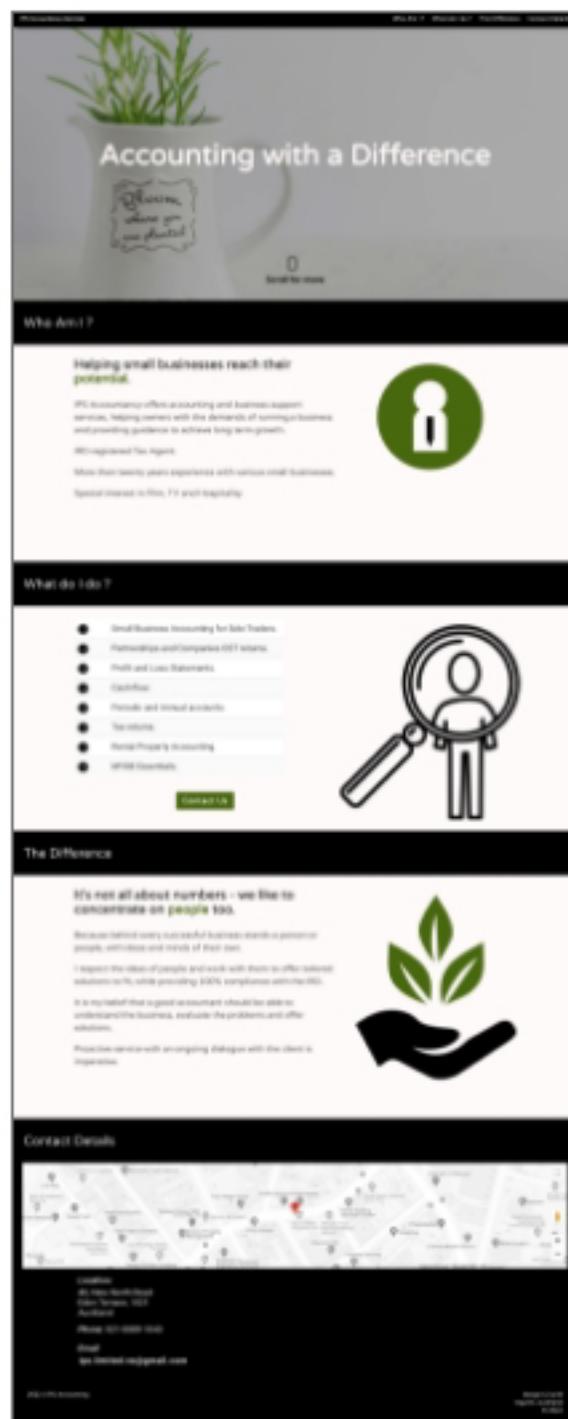
### 10: Help and documentation

It's best if the system doesn't need any additional explanation. However, it may be necessary to provide documentation to help users understand how to complete their tasks.

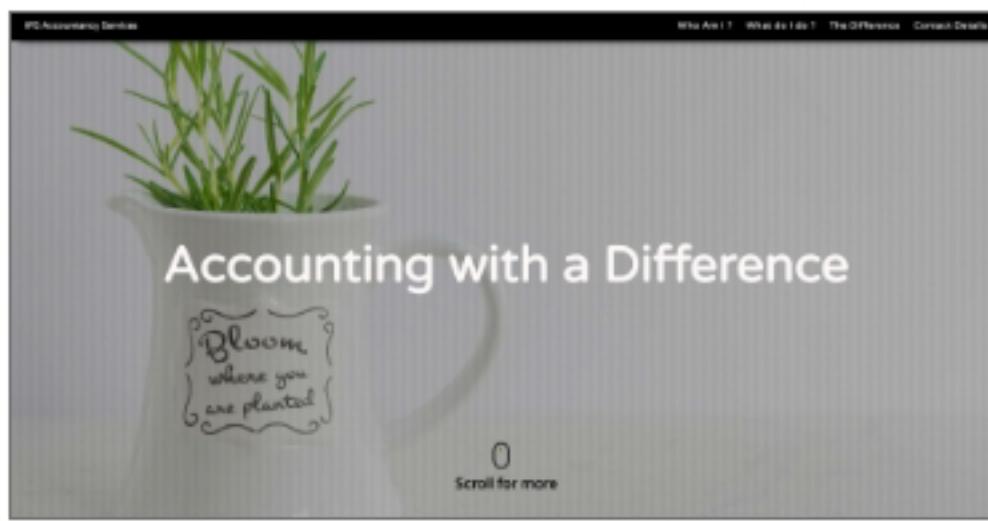
# Current website

## Visualise the problem

The current website is facing a number of issues, including but not limited to an outdated design and a lack of current information about the services IPS is providing. We will dive deeper into the issues by means of our UX research.



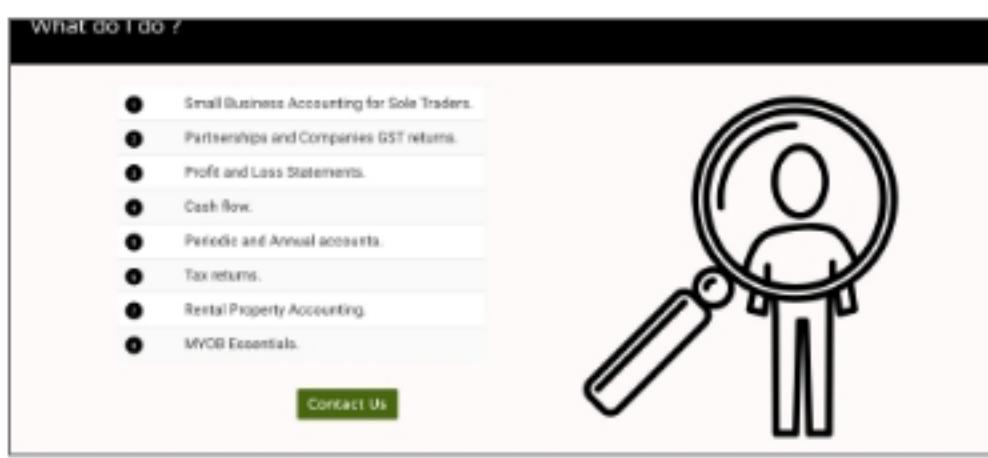
Main page(Currently)



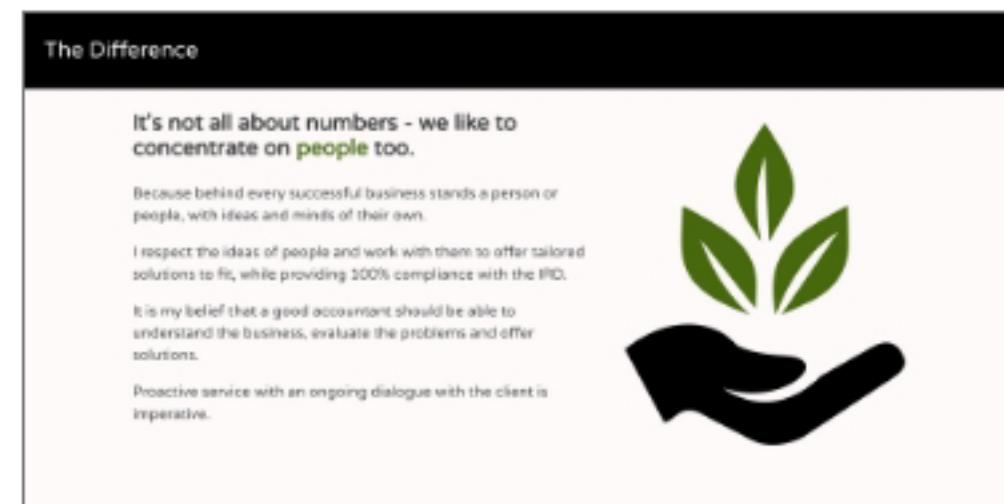
Main image



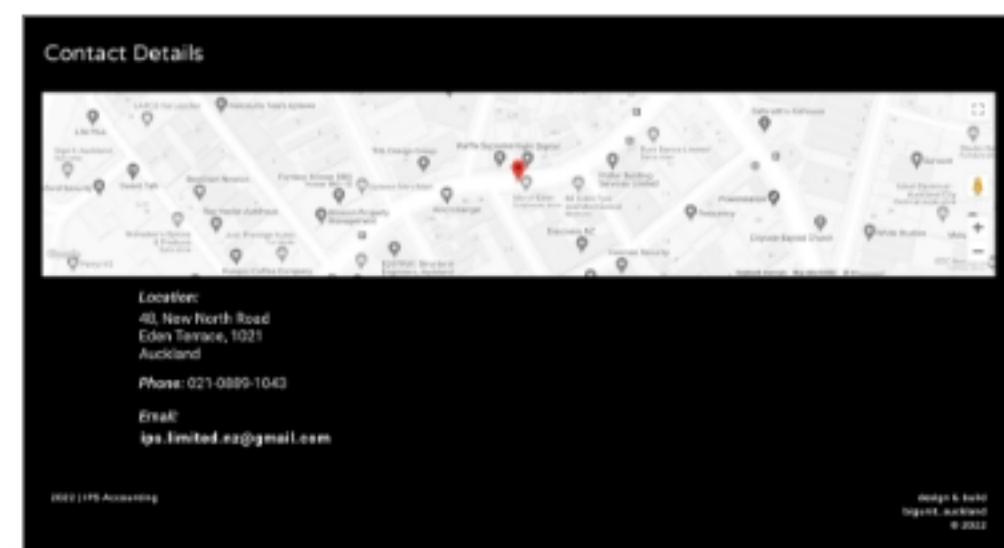
Who am I?



What do I do?



The difference

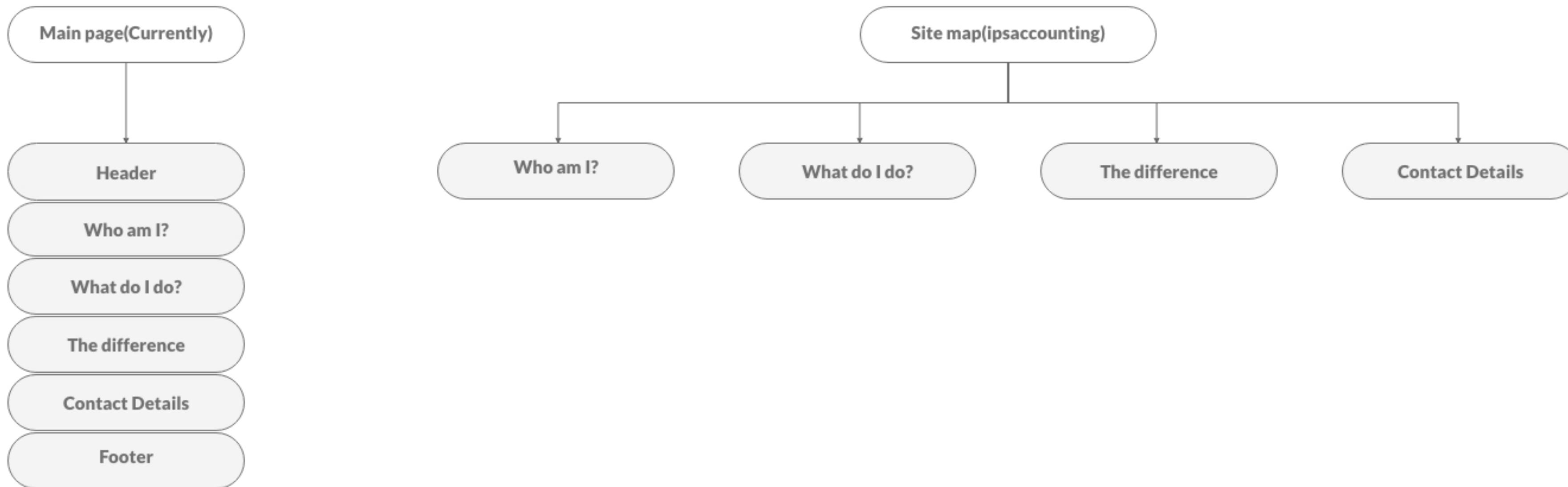


Contact Details

# Site Map

## IPS(Current)

A site map is a list of pages of a web site within a domain. There are three primary kinds of site map: Site maps used during the planning of a Web site by its designers. Human-visible listings, typically hierarchical, of the pages on a site. Structured listings intended for web crawlers such as search engines. Below is a site map of the current IPS website 'as is'.



# Current Website Evaluation

## Define the problem

We have undertaken a full and detailed analysis of the IPS website and have made the following observations:

- 1: The website is overly simplified, with **no real content or information** about the business or the services it provides. Should an existing, or a new user, navigate to the website they will be unable to find any information on the business, such as the description of services or costs.
- 2: The overall design of the website is **dated and not fit for purpose**. The design does not capture or reflect the intended target audience.
- 3: The use of **colours** and layout needs work - both are far too simplistic and **do not reflect the professionalism** expected of a website providing tax and accounting services. A coherent colour and layout schemes need to be adopted.

- 4: **New colours and default fonts** need to be selected. Poor use of imagery across the website. More appropriate photos or illustrations need to be added to the website to make the website more 'approachable', user friendly and feel more modern.
- 5: The business, and by implication the website, does not have a **personality** that would make it distinguishable from its competitors. A unique aspect to the business must be determined in order to add a point of difference to the website.
- 6: Similarly to the above, it has become apparent that the business **does not have a logo** that would represent the business and would make it stand out from competition.
- 7: The website does not have any kind of **digital presence**, including any use of Google Ads or SEO that would make the business known amongst competition and easily searchable to users.

8: As the users become more active online, there is an increased reliance on **online reviews** by the users prior to the engagement with the relevant business. The current IPS website has no success stories, testimonials or any kind of reviews that would add **credibility** and weight to the **reputation** of the business. Current reviews and testimonials should be added to the website.

9: Unlike its competitors, IPS does not have clear '**call to action**' functions or buttons available for the user. The website does not encourage productive interaction with the website and its services.

# Stakeholder Interview

## Discuss the problem

We have had an opportunity to meet with Iva of IPS on 15 August 2022 to discuss her vision for the website. Some of the interview findings are recorded below as part of the report.

### **Who do you work with mostly as far as clients are concerned?**

Most of my clients are hospitality businesses. Started with one and then my reputation has spread by word of mouth to other hospitality businesses. Early on, I specialised in the hospitality industry but now have a variety of businesses. For future clients, I'm looking for entities with a turnover of just under \$1m.

### **How do new customers prefer to contact you?**

Typically, new customers will email first and very rarely call.

### **What sets you apart from the competition?**

I think what sets me apart is my personal approach. I like to sit down together with new or current clients, for coffee in a relaxed environment. I also have a very flexible approach and work hard to expand on the way the client is already operating while fitting in their idea of their business into my practice. To me, clients are not numbers but unique people. Money comes as a secondary thing.

### **Is there something you really love about the website?**

Nothing in particular. Overall, if I had to summarize, I like websites that are easy to operate. If there are too many things going on, too many functions and I can't find what I need to find, I'm not going to dig any deeper and will abandon the website.

### **What are your aspirations for the business?**

I would like to expand my client base and have more work with younger people and businesses. My current clientele are generally older and a lot of them are in the process of returning and 'closing shop'.

### **Would you like to have more links to articles?**

I think it would be great to have more links to IRD articles. People are scared of referring back to the IRD website but they have refurbished their site and it's now looking great!

### **What colour schemes are you wanting to maintain in your website?**

I take a very holistic approach to my website. In saying that, I would like to focus on warm colours for the website - I like warm colours generally.

# User Experience Survey Results

## Survey Size



15 people surveyed from 12 August to 15 August 2022

Ages of surveyed people ranged from 20 to 60

## Location



100% of the people are located in Auckland, New Zealand

## Method of Contact

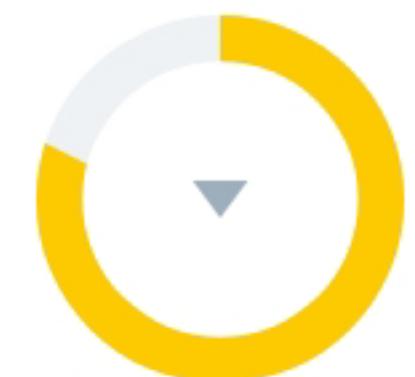
66.7% prefer contact via email



## Imagery

80%

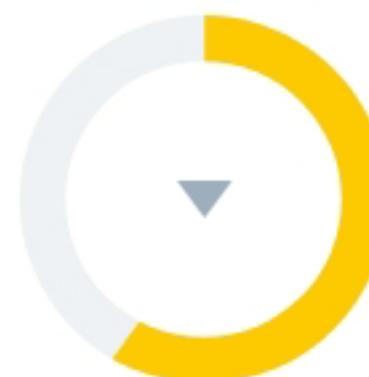
think the website needs more imagery



## Missing elements

60%

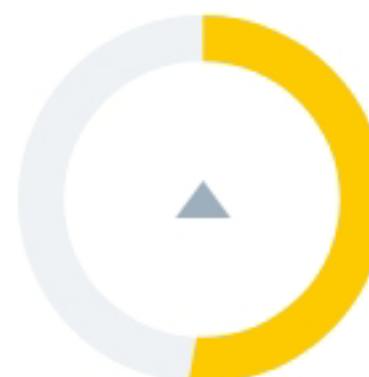
think the website is missing information on services



## Aesthetics

53.3%

think the website is unappealing



# User feedback



"I like the colour palette of white green and black working together. However, it might even better if there are some real photos of people as well."



"A nice simple design that presents all the relevant information without having to search for it."

"Perhaps a brighter colour to substitute the black."



"The information provided by the website is not attractive for customers to select this accounting service. There is no information available to help them make a decision."



"I think you could maybe show some prices and deals etc. By making what people want to know first will bring the positive results."



"It would be good if intuitive content were provided on how the company's strengths are helpful to users, and what roadmap the service is provided to users."



"Very clean and minimalistic. The structure is simple and straightforward."

"Good nice web site with useful information, easy to use."



*"Finally I opened my own coffee shop"*

**AGE** 28

**JOB TITLE** Small cafe owner

**STATUS** Single

**LOCATION** Auckland,NZ

#PASSIONATE #EMPATHETIC  
#CURIOUS #ADVENTUROUS

#### FAVORITE BRANDS



COLUMBUS  
COFFEE

# USER PERSONA

## Jane Doe

### ABOUT

Jane is a small coffee shop owner based in Auckland. Ever since she was a student, she loved coffee, interior design and interacting with people. After she graduated university, she decided to open her own cafe. While she was trying to open the cafe, she had a lot of worries because of COVID-19. Notwithstanding this, she still had the courage to open her own business. Adding to her worries are Jane's concerns in relation to managing her business' finances. As she does not have an accounting or tax background, she is having trouble with taxation matters necessary to run the business.

### GOALS

- Grow her business to have more staff or open a second shop
- More customers to make profit and higher income from this business

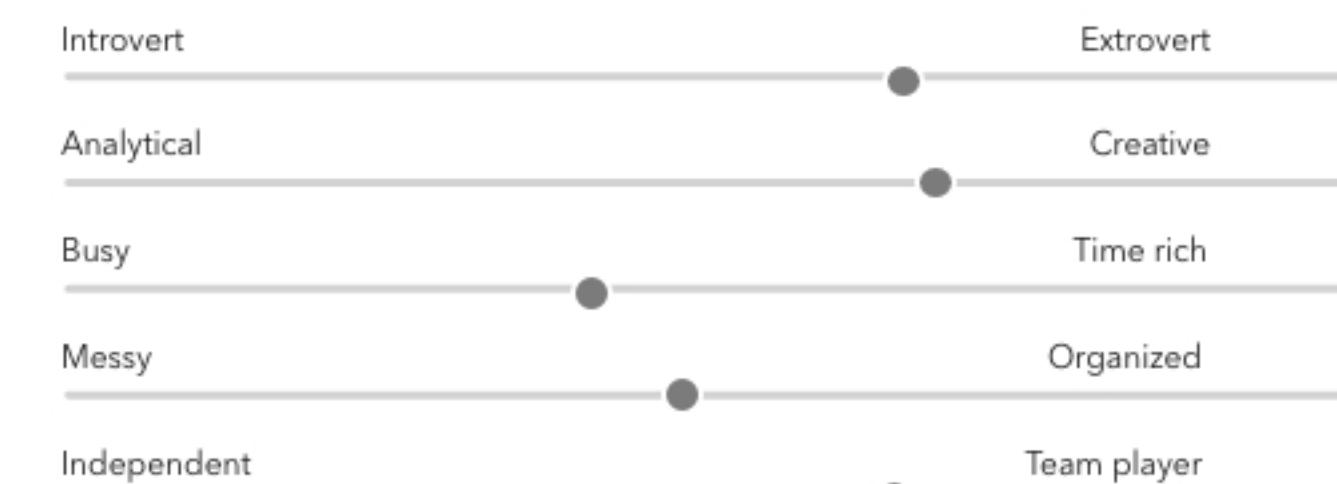
### PAIN POINTS

- Enjoys doing her job but dislikes the business way of thinking. Also not comfortable with figures
- Cannot rely on other people's opinions because there is no one to ask for advice

### NEEDS

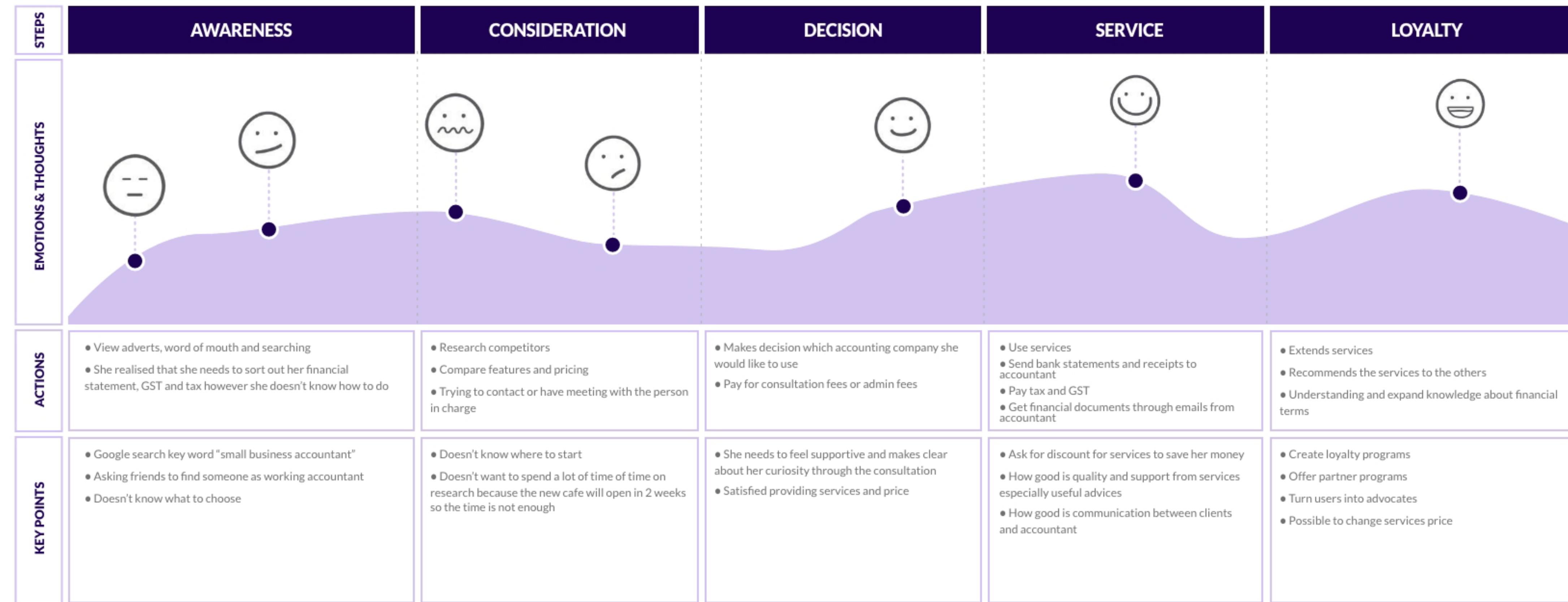
- Looking for an accountant to plan and manage her financial statements
- Develop better quality of coffee and customer services

### PERSONALITY



# Journey Map Jane Doe

Hiring Accountant





*"A great photographer shares what they fear losing most"*

AGE	36
JOB TITLE	Photographer
STATUS	Single
LOCATION	Auckland, NZ

#PASSIONATE #EMPATHETIC  
#CURIOUS #ADVENTUROUS

#### FAVORITE BRANDS



# USER PERSONA

## Jacob Bertrand

### ABOUT

Jacob Bertrand is an accomplished explorer, photographer, creative director, speaker, and author. Traveling throughout the year to pursue the farthest expanses of Earth, Bertrand works to capture stories that inspire humans to consider their relationship with nature, while promoting the preservation of wild places everywhere.

His visionary perspective has earned him opportunities to work on global, prominent campaigns with Fortune 500 clients, speak on the TED stage, design product lines, educate, and publish a growing collection of books.

### GOALS

- Establish and develop his business in New Zealand
- Have his accounting and tax obligations outsourced so that he can focus on business development

### PAIN POINTS

- Outdated and unprofessional looking websites
- Due to frequent travel, finds it hard to find accounting firms that can work online
- Needs to be able to have different forms of communication

### NEEDS

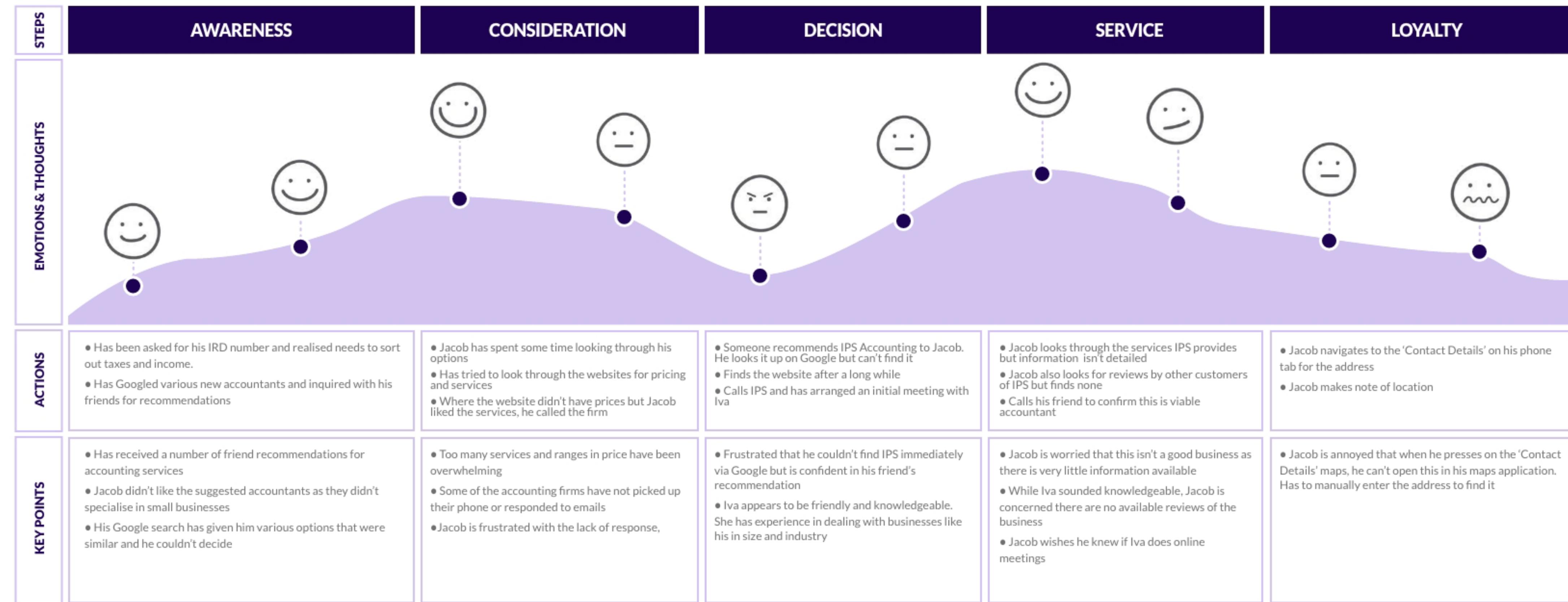
- Looking for a new provider of accounting and tax services following immigration into New Zealand
- An accountant available online as regular travelling is part of Jacob's job

### PERSONALITY



# Journey Map Jacob Bertrand

New Accountant



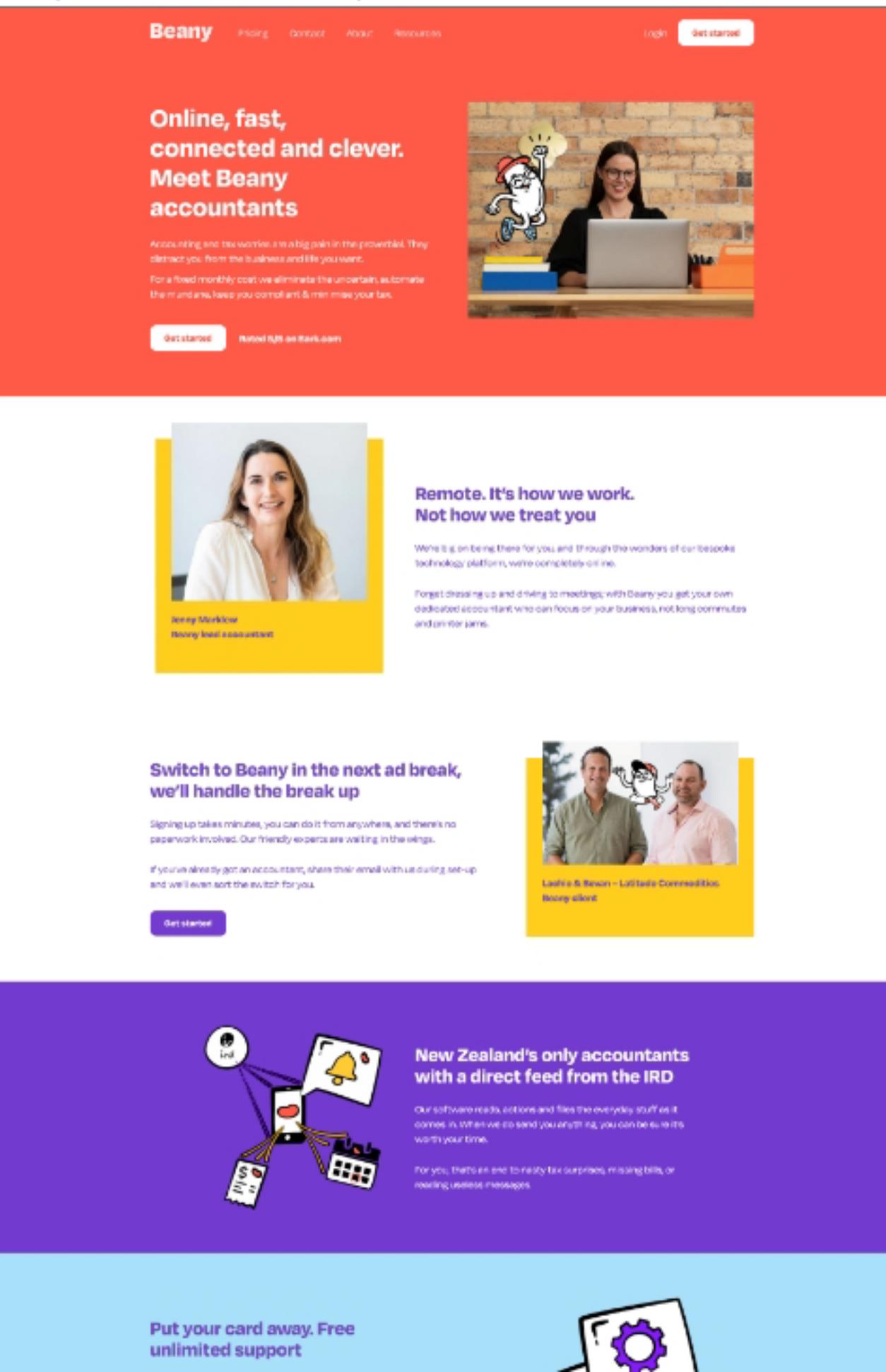
# References

## Case Study Research

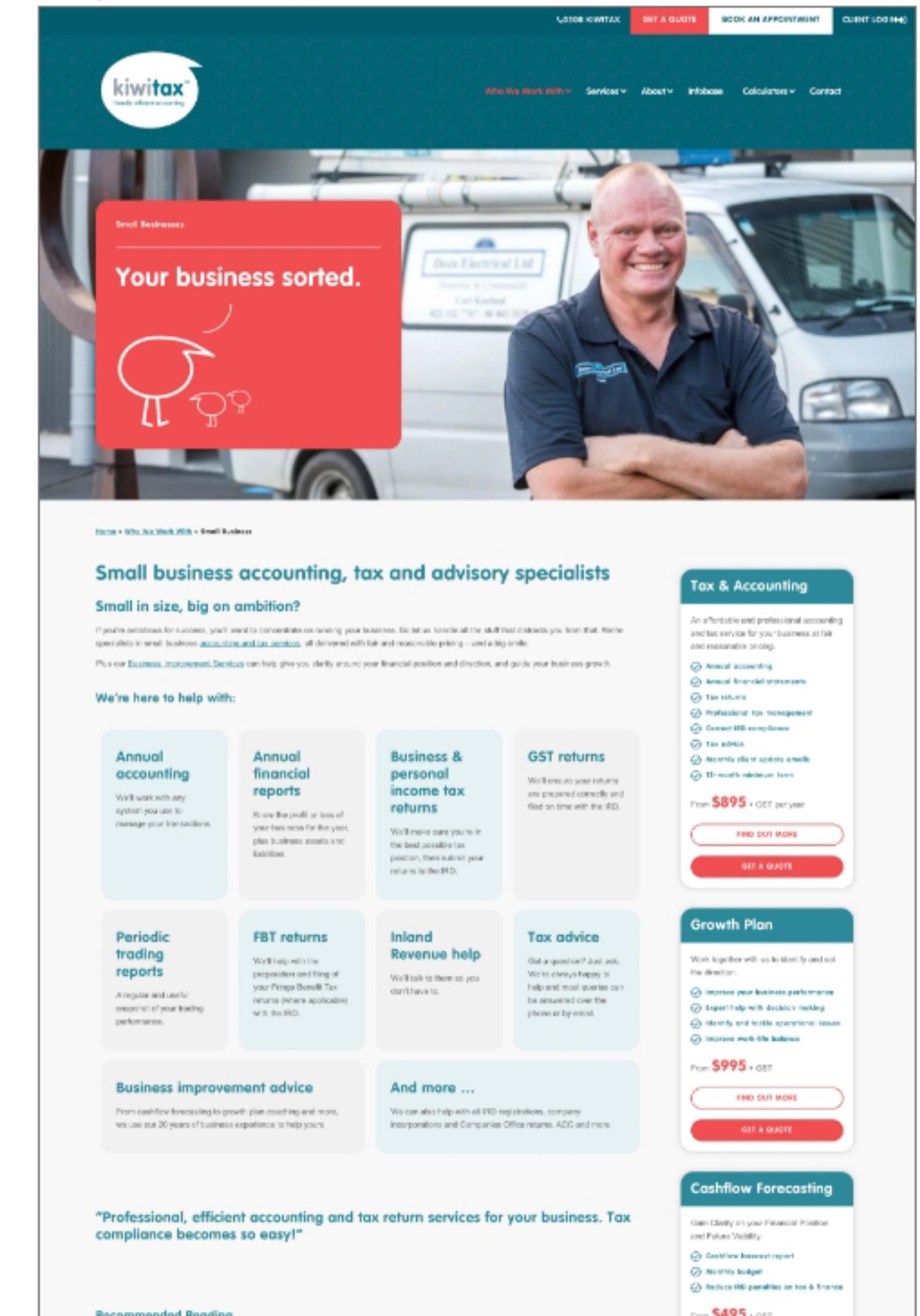
<https://hnry.co.nz/>



<https://www.beany.com>



<https://kiwitax.co.nz>



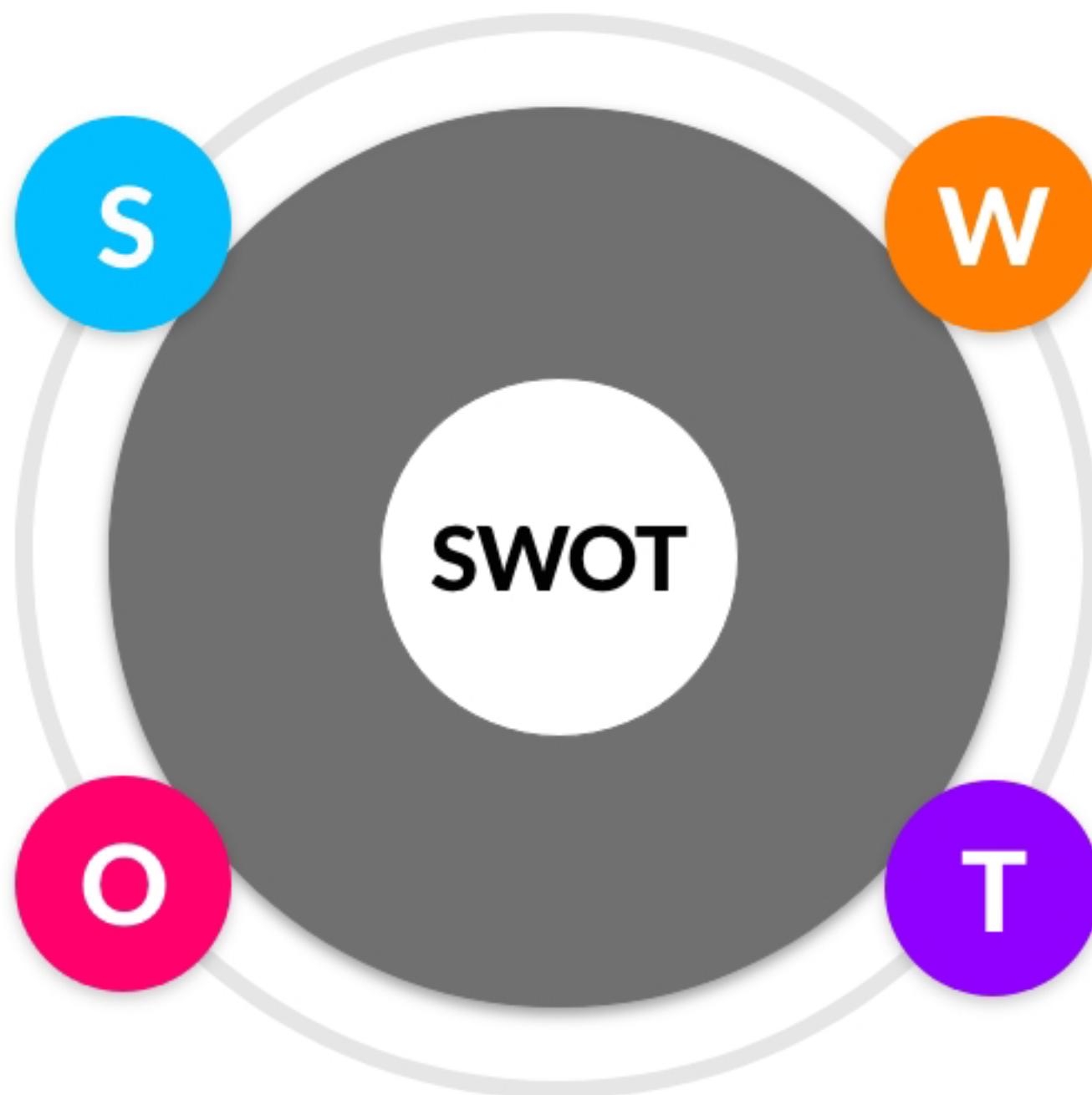
During the research phase of this report, we have identified four direct competitors of IPS. In the way of design, we have picked three of the competitors (as below) as they have best reflected IPS' design requirements. The modern, bright and simple approach to the designs have made them the preferred studies, suitable for the purposes of this report.

## Strengths

- A professional looking website, with a good and simple website colour palette (and in particular the 'call to action' buttons)
- Good use of Google Ads (one of the first to appear on a Google search)
- Simple navigation bar, with a clear section for services and detailed information
- Use of testimonials to emphasise credibility

## Opportunities

- IPS should avoid using unprofessional default fonts and content layouts, to be appealing to the small business owner audience
- IPS should look into establishing a social media presence, posting articles and guides on current and 'hot' topics



A New Zealand company established in 1999 and in the accounting and advisory business for over twenty years. Have been awarded the highest partnership status by both Xero and MYOB.

## Weaknesses

- The font is simplistic and not overly appropriate for the audience
- Content across the website is not set out professionally and is hard to read
- Haphazard and inconsistent use of social media (only LinkedIn and Facebook with limited posts)

## Threats

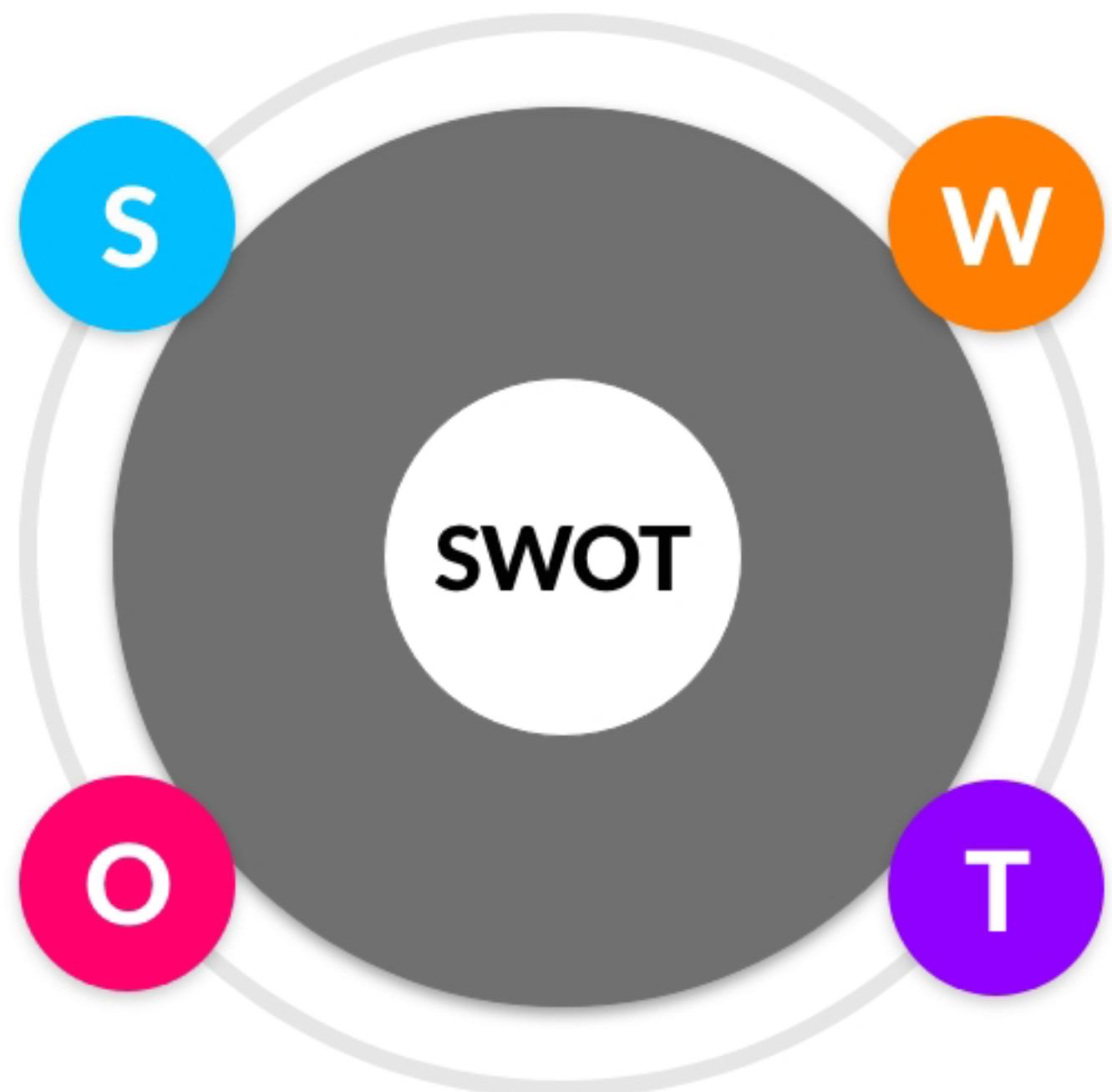
- The website is informative and easy to engage with, unlike IPS that includes minimal information and no clear 'call to action' buttons
- IPS should invest in Google Ads and would benefit from SEO assistance, in order to have a better digital presence

## Strengths

- Neat and tidy design
- Easy to navigate, customers can easily locate the services they require
- Good resources and articles about helping customers' business grow
- give prominence to their achievements

## Opportunities

- SBA has huge number of branches and numerical value in NZ therefore customers will be very familiar and trusting of the company, able to approach this company without concerns.



founded since 1997, 20,000 business using SBA to do their accounting, 80 branches NZ wide

## Weaknesses

- lack of visual design, the website is very simple and doesn't attract customers
- hard to estimate service prices, which leads to an increasing reluctance in selecting this company

## Threats

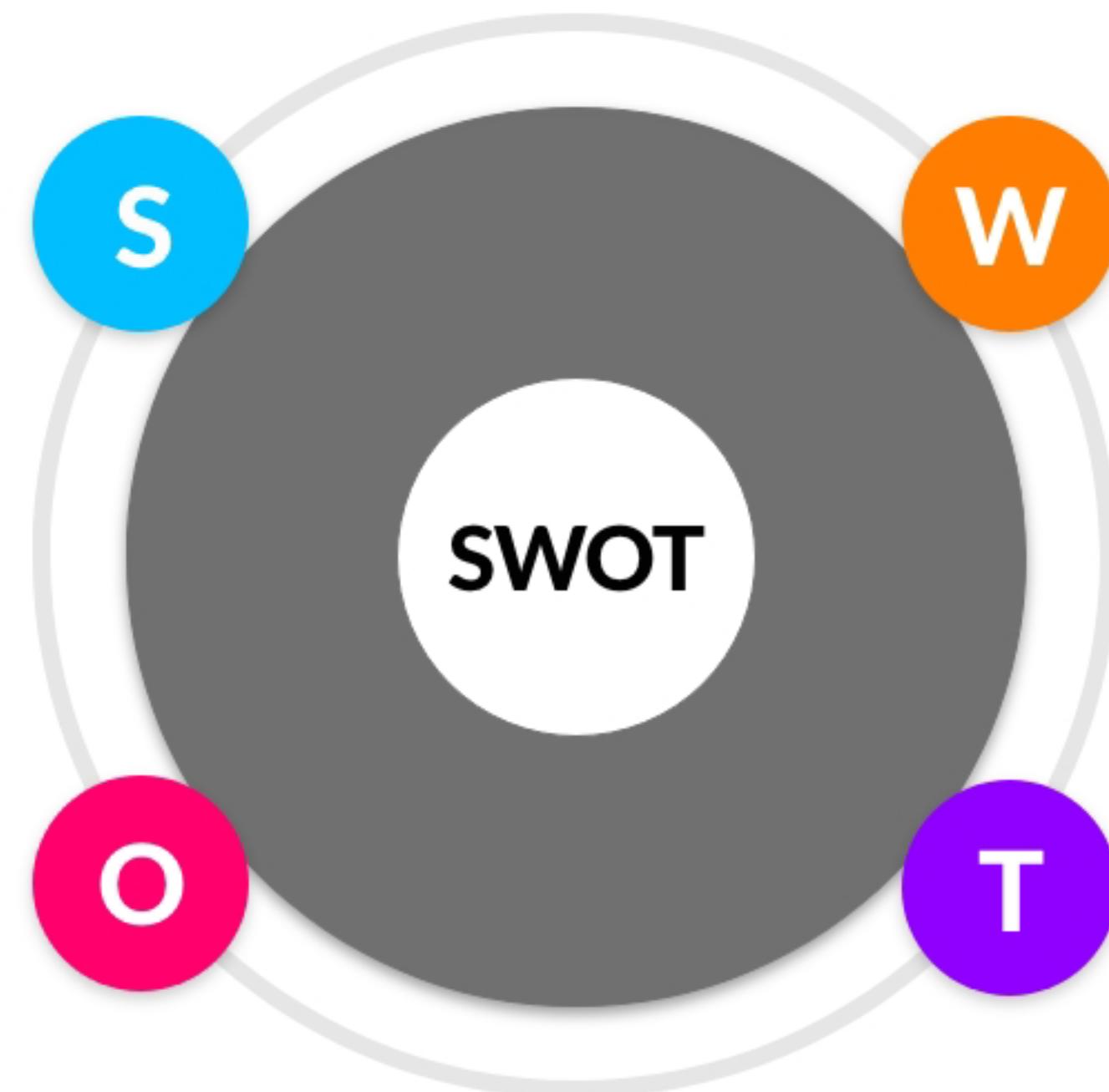
- As there are many branches, each worker will have different capabilities. It is not known how satisfied the clients are.
- There are lots of competitors as this company grows.
- There is a change in the market - authentic, local and more private companies have a better chance of success, rather than businesses with a large number of franchises.

## Strengths

- Website easy to navigate with a very approachable and friendly color palette
- Has an obvious 'pricing' tab and the tab itself includes detailed breakdowns of the prices adding to transparency of the business
- Good use of photos and reviews of its real clients (adds to credibility)

## Opportunities

- The home page can be overwhelming in terms of information and imagery. IPS should consider including concise information on the home page and only simply imagery to add interest
- IPS should consider adding more information about itself, including how it came about and its achievements over the years



A New Zealand company established in 2017. Henry is one of Australasia's largest specialist accountancies, serving tens of thousands of sole traders across Australia and New Zealand.

## Weaknesses

- Navigation tab has more text than is typically expected and is burdensome to look at
- Repetitive use of testimonials and reviews on the home page
- Not a clear company 'origins' story

## Threats

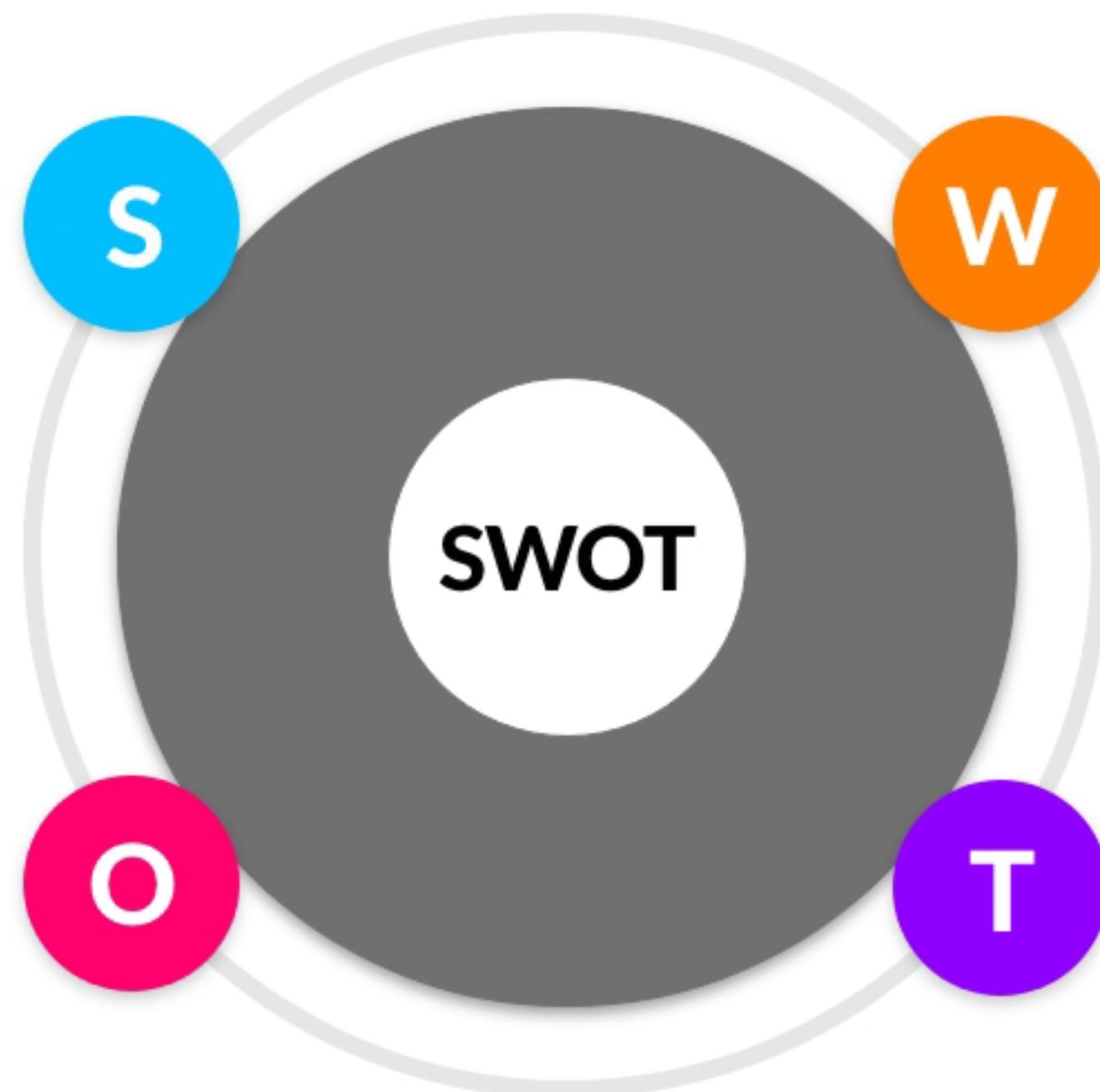
- Provide a very clear pricing structure that IPS doesn't have and should consider providing some examples of its set fees
- Very active with Google Ads - IPS should invest in Google Ads and SEO services to compete
- Hnry has multiple social media platforms and is active on all of them

## Strengths

- Bright and trendy design
- Clearly defined services
- Easy to navigate with the help of icons and drawings
- Detailed explanation to go with staff photos
- Predominantly online systems, which is very useful during the COVID-19 period

## Opportunities

- Has a great growth potential during the pandemic due to its online based systems
- Can benefit from exposure to social media platforms, which can lead to finding clients easily rather than obtaining clients through word of mouth



**Beany**

founded 2013, completely remote online

## Weaknesses

- Lack of testimonials/reviews to provide trustworthiness to the clients
- Due to the completely online nature of the remote system, it could be difficult to use this service for people who are not familiar with computers or who prefer a more face to face approach.

## Threats

- lots of competitors has been created
- Due to pandemic, clients are afraid of smart new business that leads to target audience shrinking

# **Logo Design**

## **Brand Master Logo**

A brand logo is a symbol, emblem, graphic mark, stylized name, or drawing, or the combination of all used by a company to mark its brand's identity. It reflects the value of your brand. It helps the customers to identify and remember the product and quality of the brand. Below are some of our ideas for a new logo for IPS.



# Typography

## Lato font

Lato is a humanist sans-serif typeface designed by Łukasz Dziedzic. It was released in 2015. The name “Lato” is Polish for “summer”. As of August 2018, Lato is used on more than 9.6 million websites, and is the third most served font on Google Fonts, with over one billion views per day.

**Lato Black**

**Lato Bold**

**Lato Medium**

**Lato Light**

**Lato Black**

**Lato Bold**

**Lato Medium**

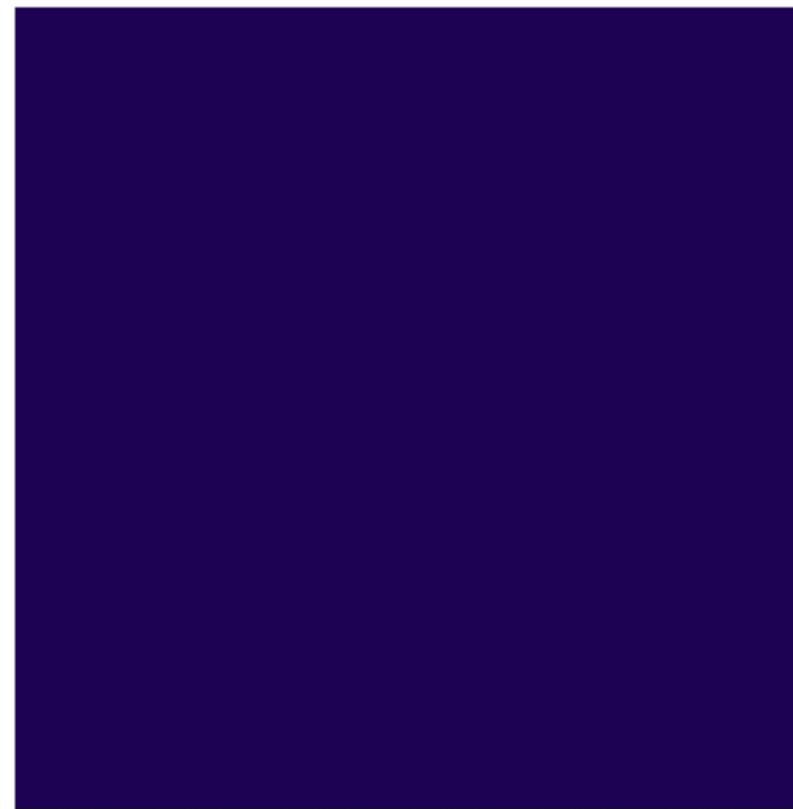
**Lato Light**

# Colour palette

## Brand Colour

A brand logo is a symbol, emblem, graphic mark, stylized name, or drawing, or the combination of all used by a company to mark its brand's identity. It reflects the value of your brand. It helps the customers to identify and remember the product and quality of the brand.

Primary



#1D0254



#FDCA00

Secondary



#01BEFE



#FFDD00



#FF7D00



#FF006D



#ADFF02



#8F00FF

# Signage A

## Hanging Wall Sign

Businesses with eye-catching, informative & easy to read designs attract more customers.



## Signage B

### Window Signage

Businesses with eye-catching, informative & easy to read designs attract more customers.



NPS  
Accountancy Services

# Car Wrapping

## Vehicle Signage

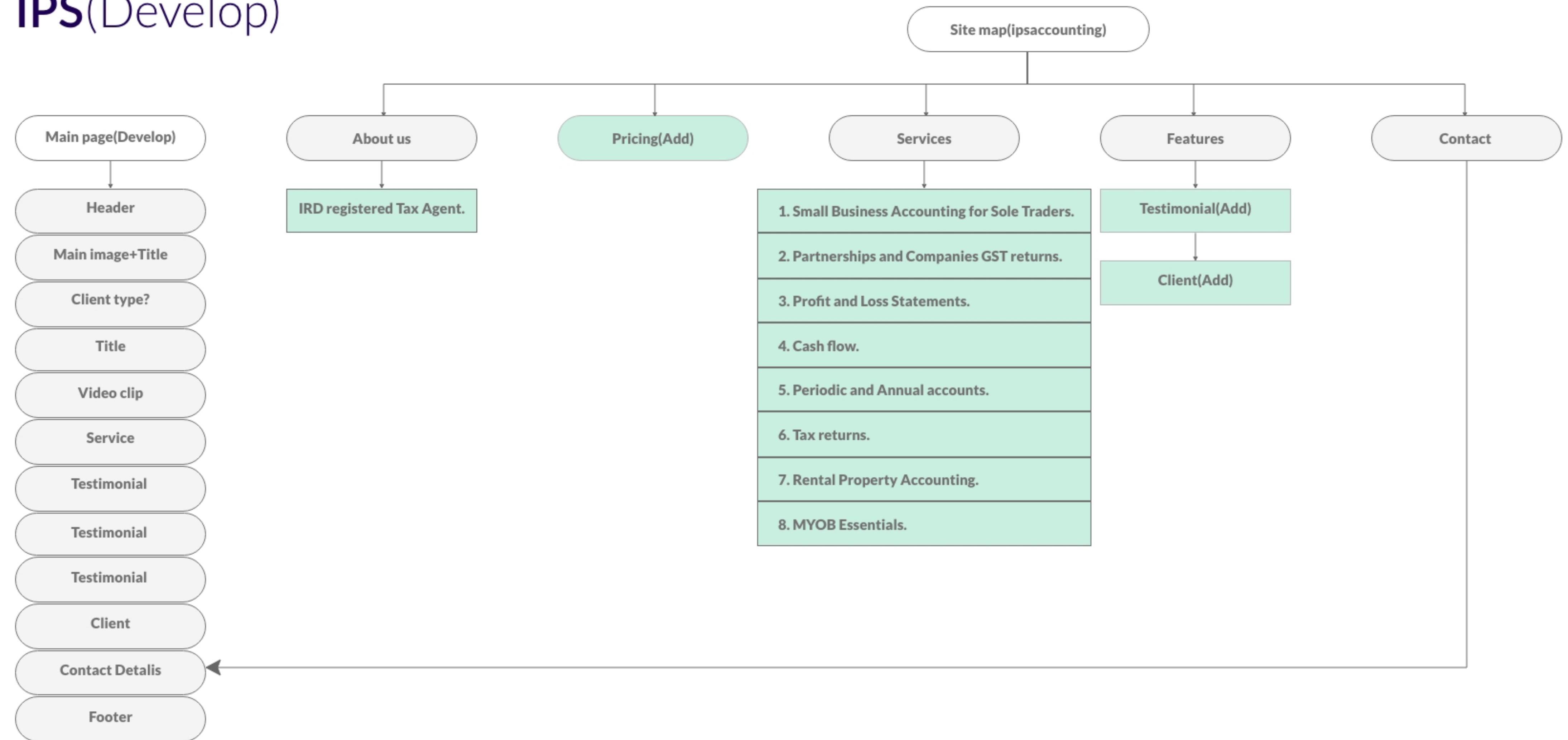
Car wrap advertising or a vehicle wrap is known as the marketing practice of completely or partially covering a vehicle in a vinyl material, which may be for a color change, advertising or custom delivery. The result of this process is essentially a mobile billboard.



# Site Map

## IPS(Develop)

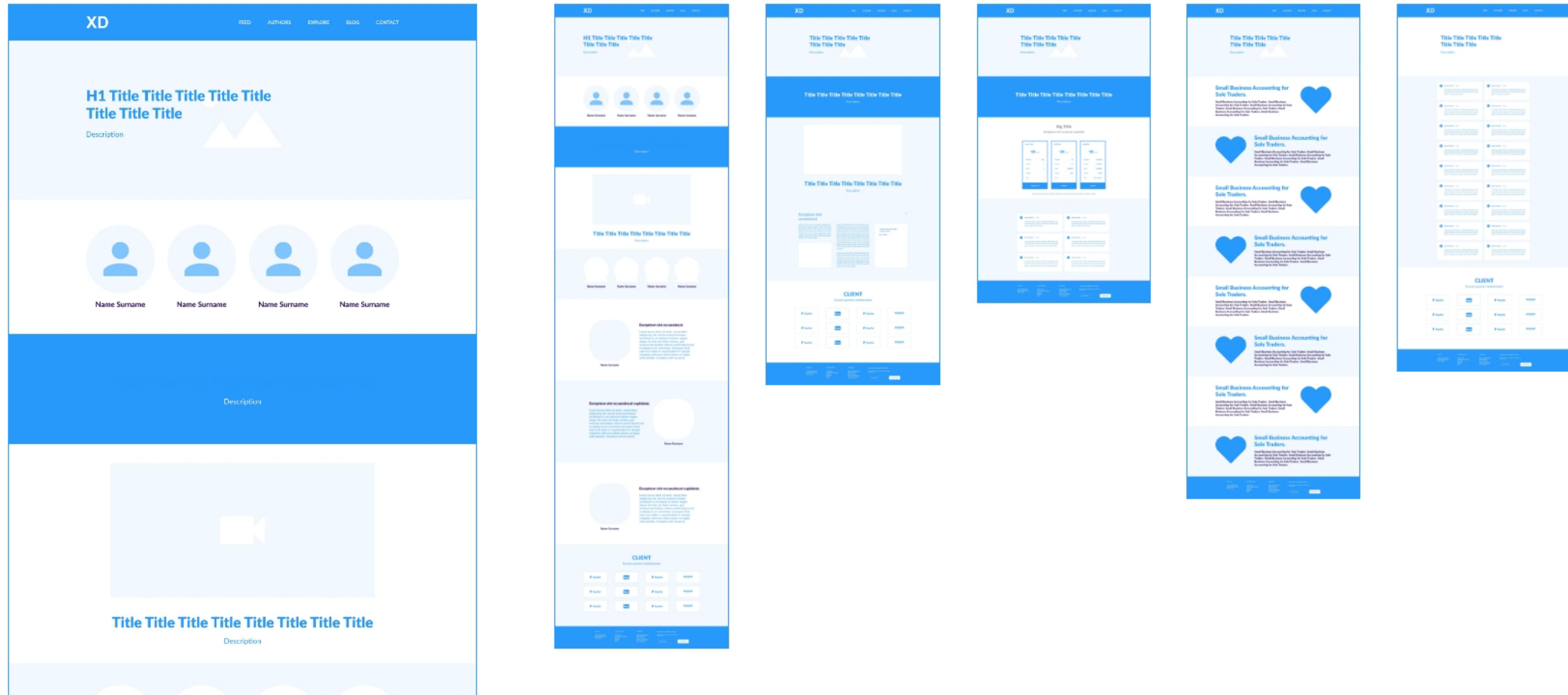
A site map is a list of pages of a web site within a domain. There are three primary kinds of site map: Site maps used during the planning of a Web site by its designers. Human-visible listings, typically hierarchical, of the pages on a site. Structured listings intended for web crawlers such



# Wireframe

## Website wireframe

A website wireframe, also known as a page schematic or screen blueprint, is a visual guide that represents the skeletal framework of a website. The term wireframe is taken from other fields that use a skeletal framework to represent 3 dimensional shape and volume.

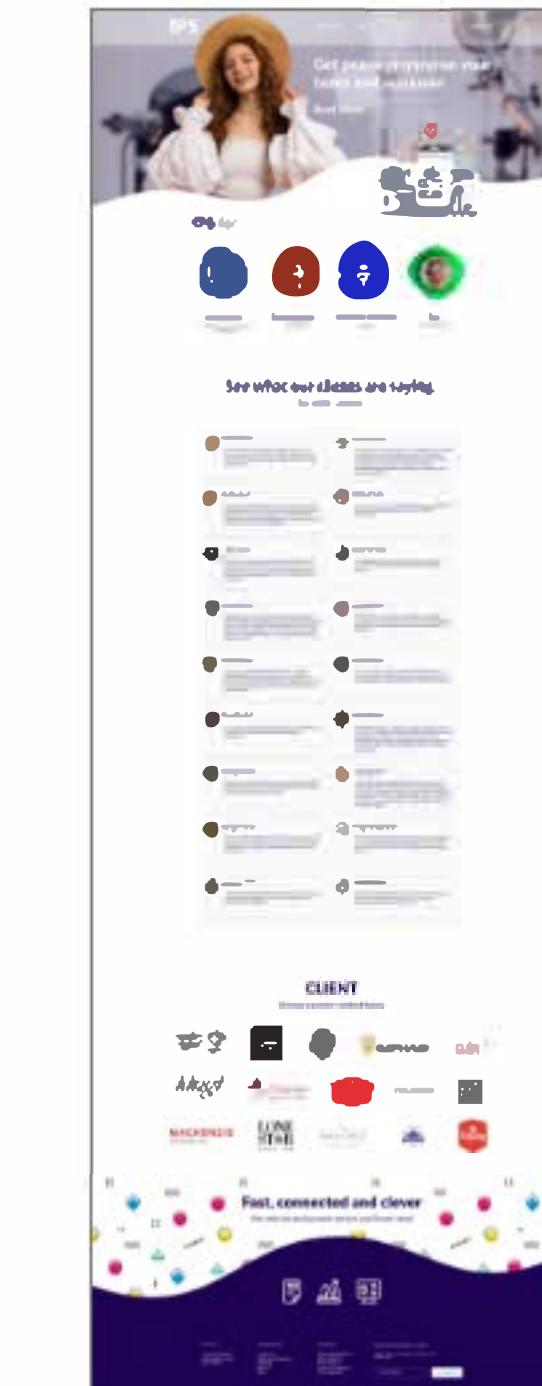
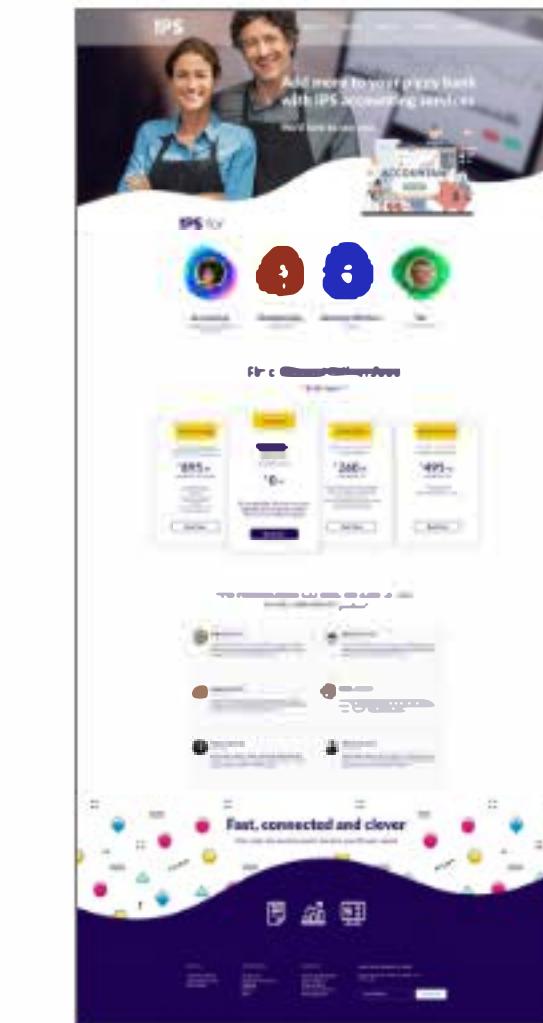
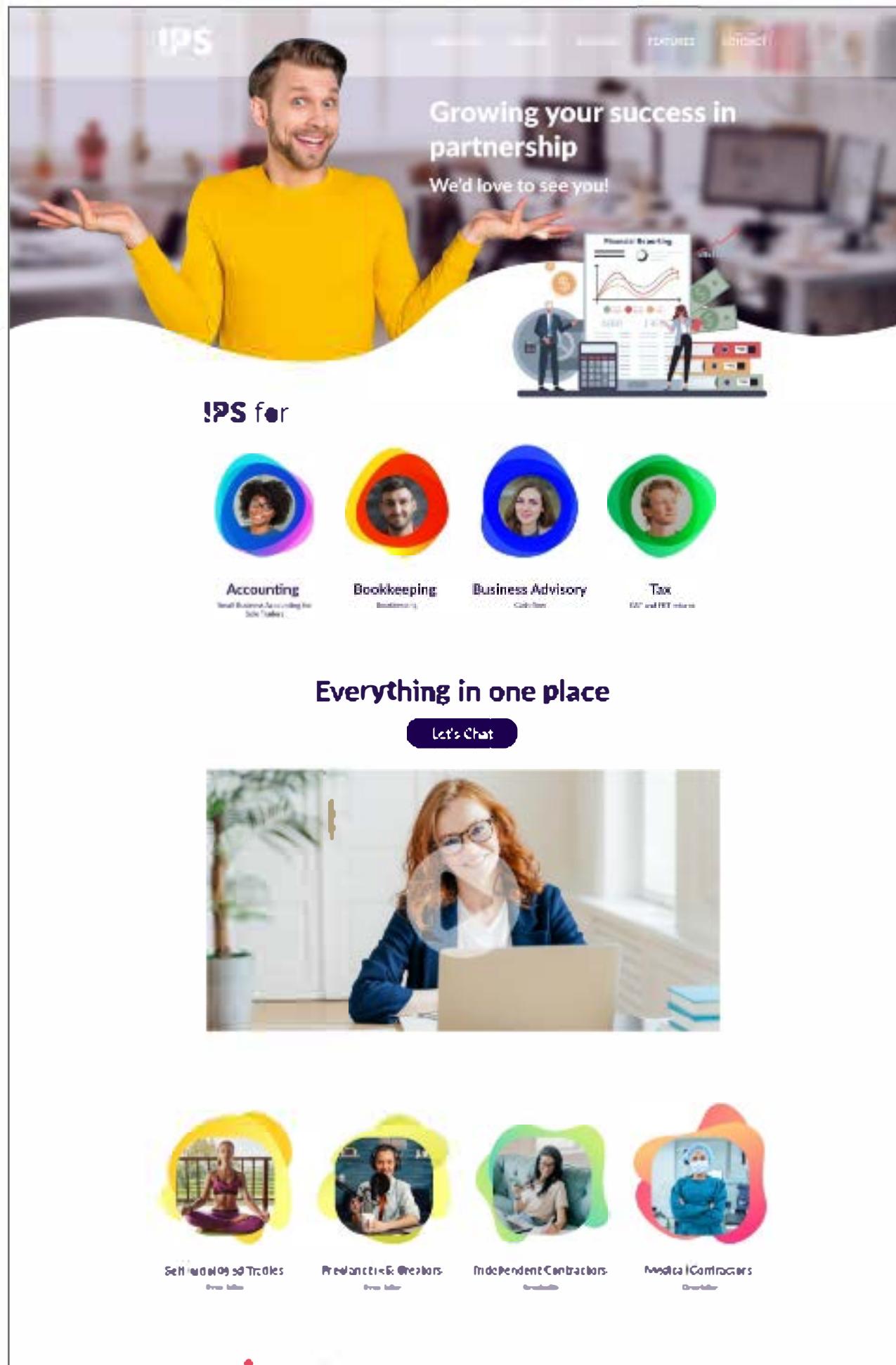


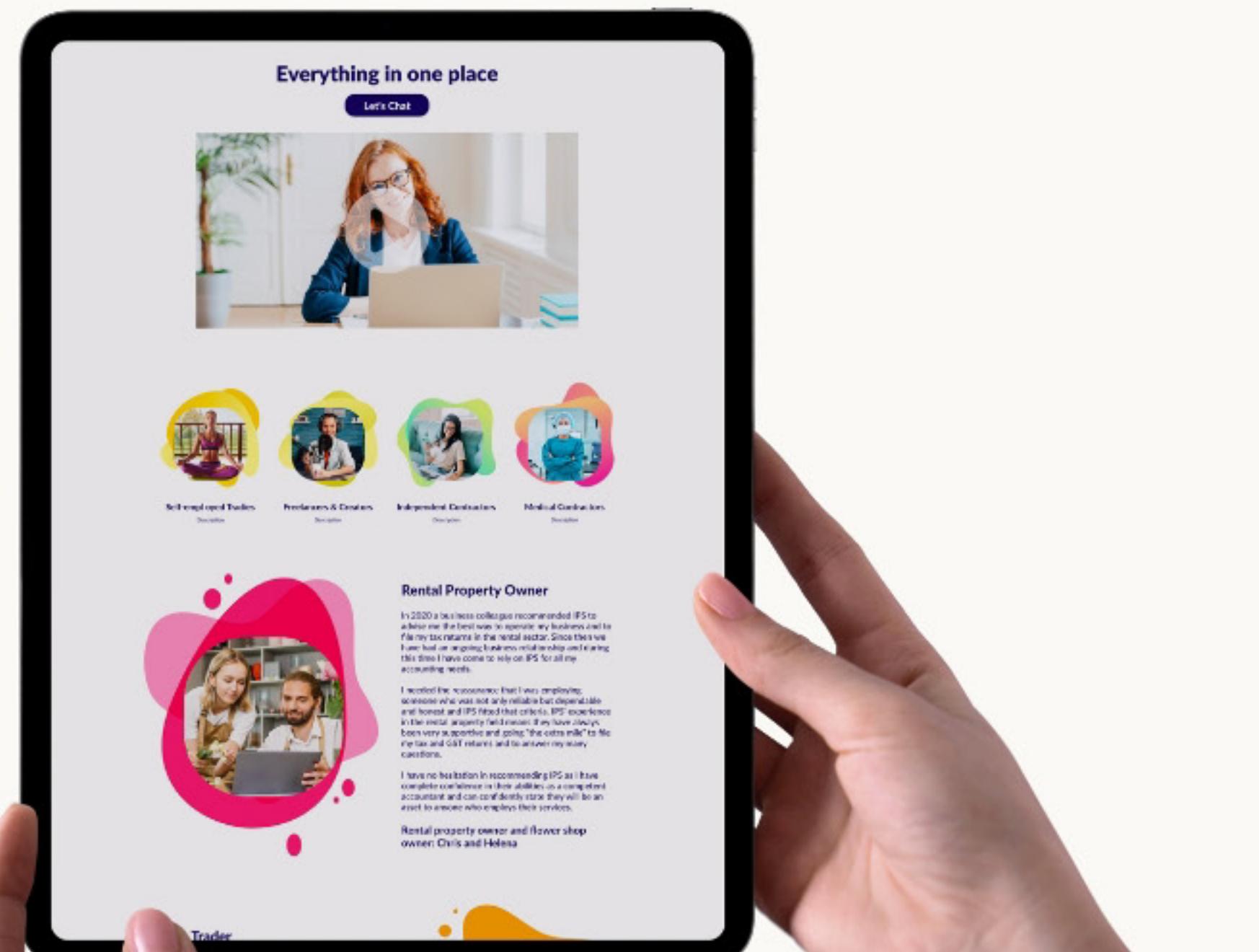
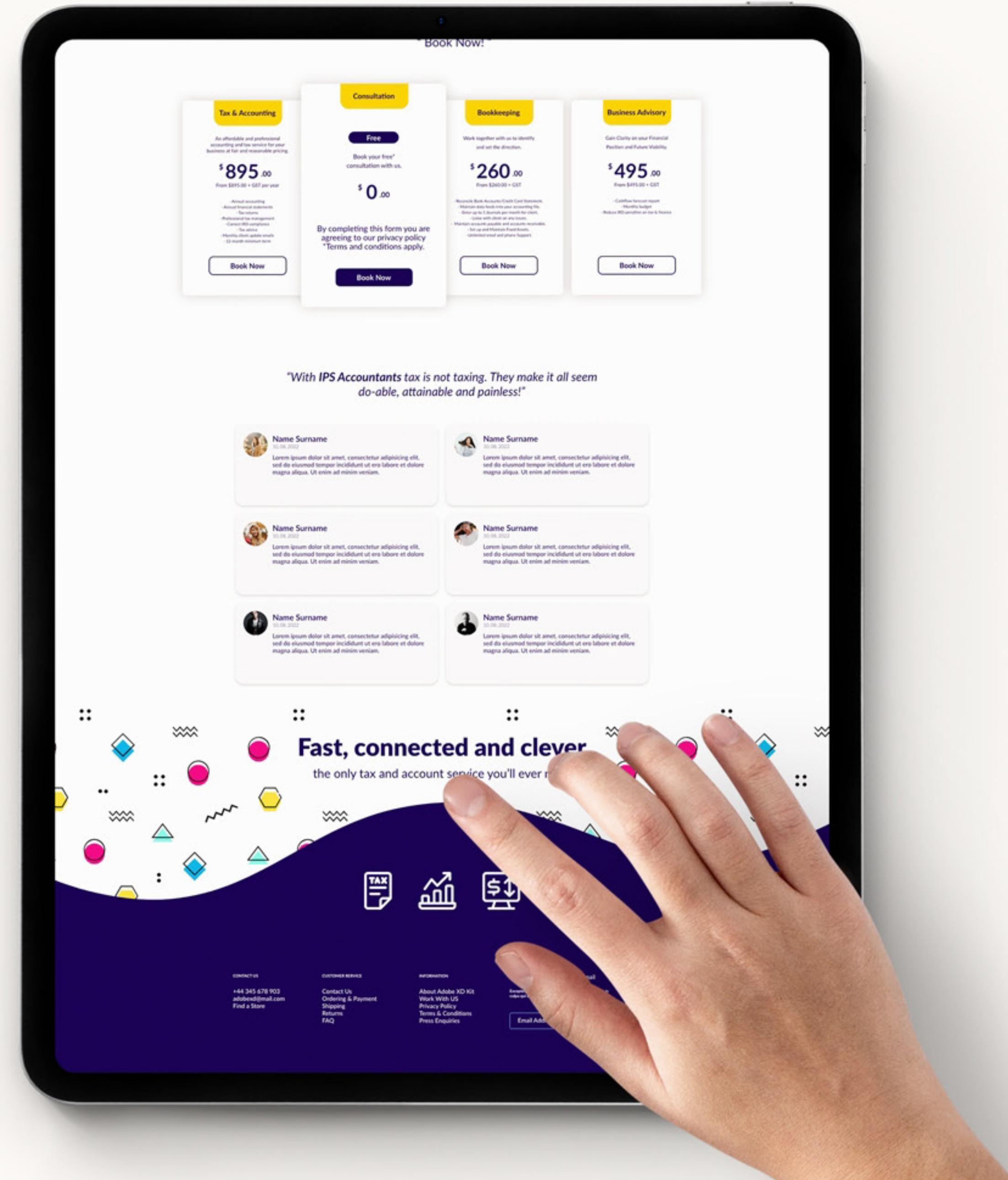
# Design

## Designing Websites

To create our concept, we have borrowed elements from each competitor identified in this report. We have focused on warm colours and a modern design, to bring IPS into the digital space with IPS' requirements in mind. Our designs also reflect the feedback obtained from third parties participating in our focus surveys.

<https://xd.adobe.com/view/5768d0a7-117e-403b-9d80-21313992605e-023b/?fullscreen&hints=off>

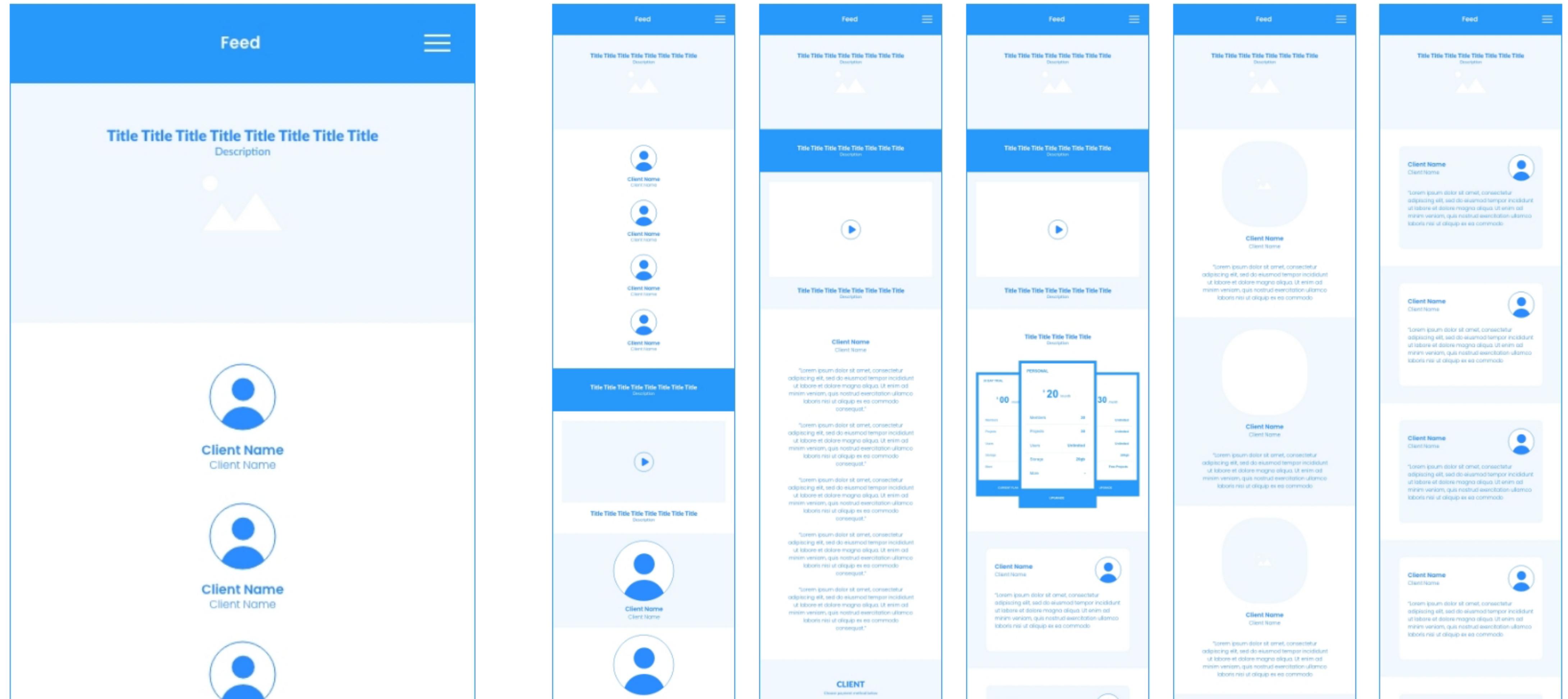




# Wireframe

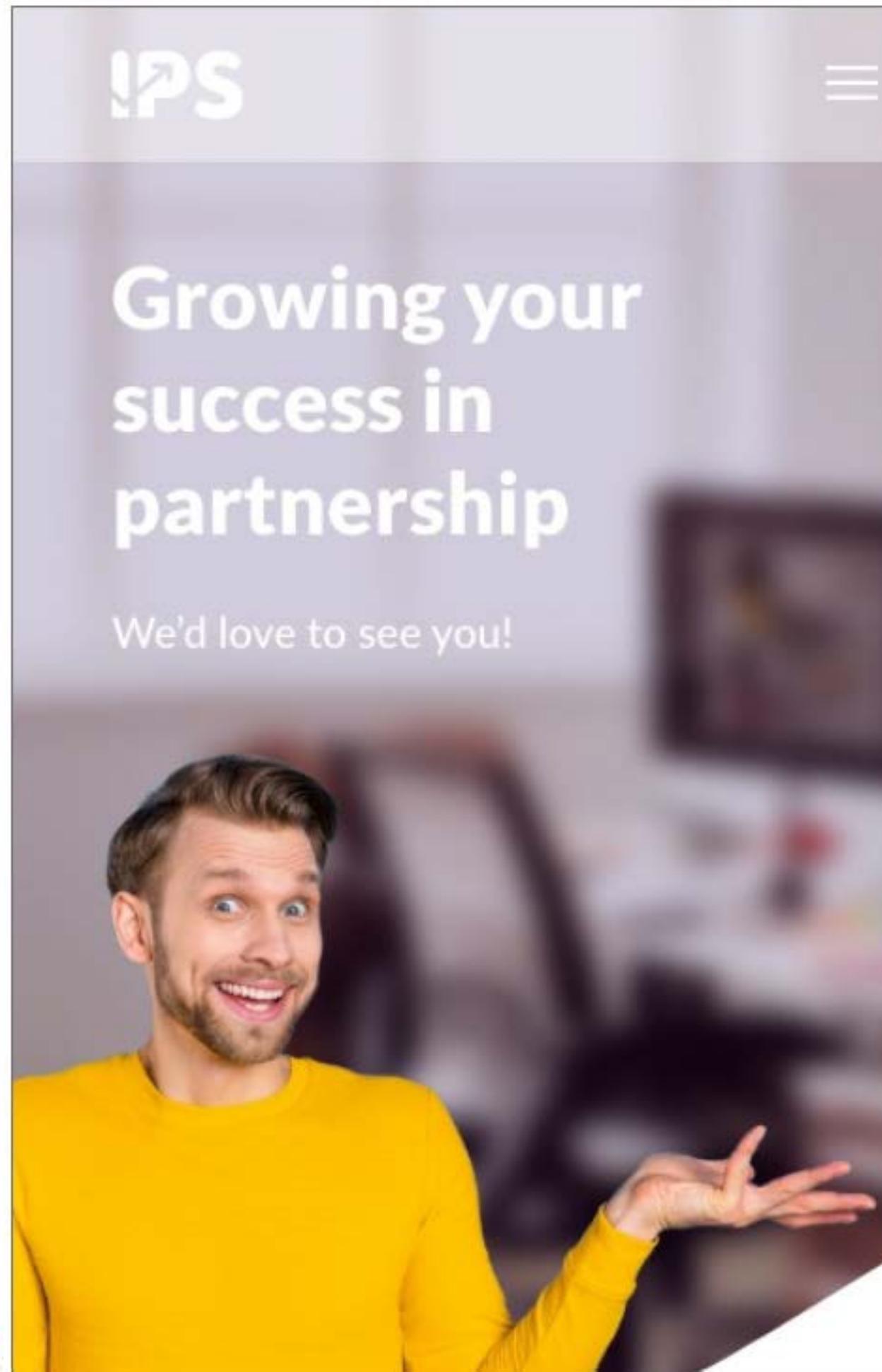
## Mobile wireframe

In simple terms, a mobile app wireframe is a two-dimensional sketch that serves as a visual guide and illustrates how an application will work. A wireframe doesn't represent the full design of the app, but only the key screens and interface elements.



# Design

## Designing Mobile

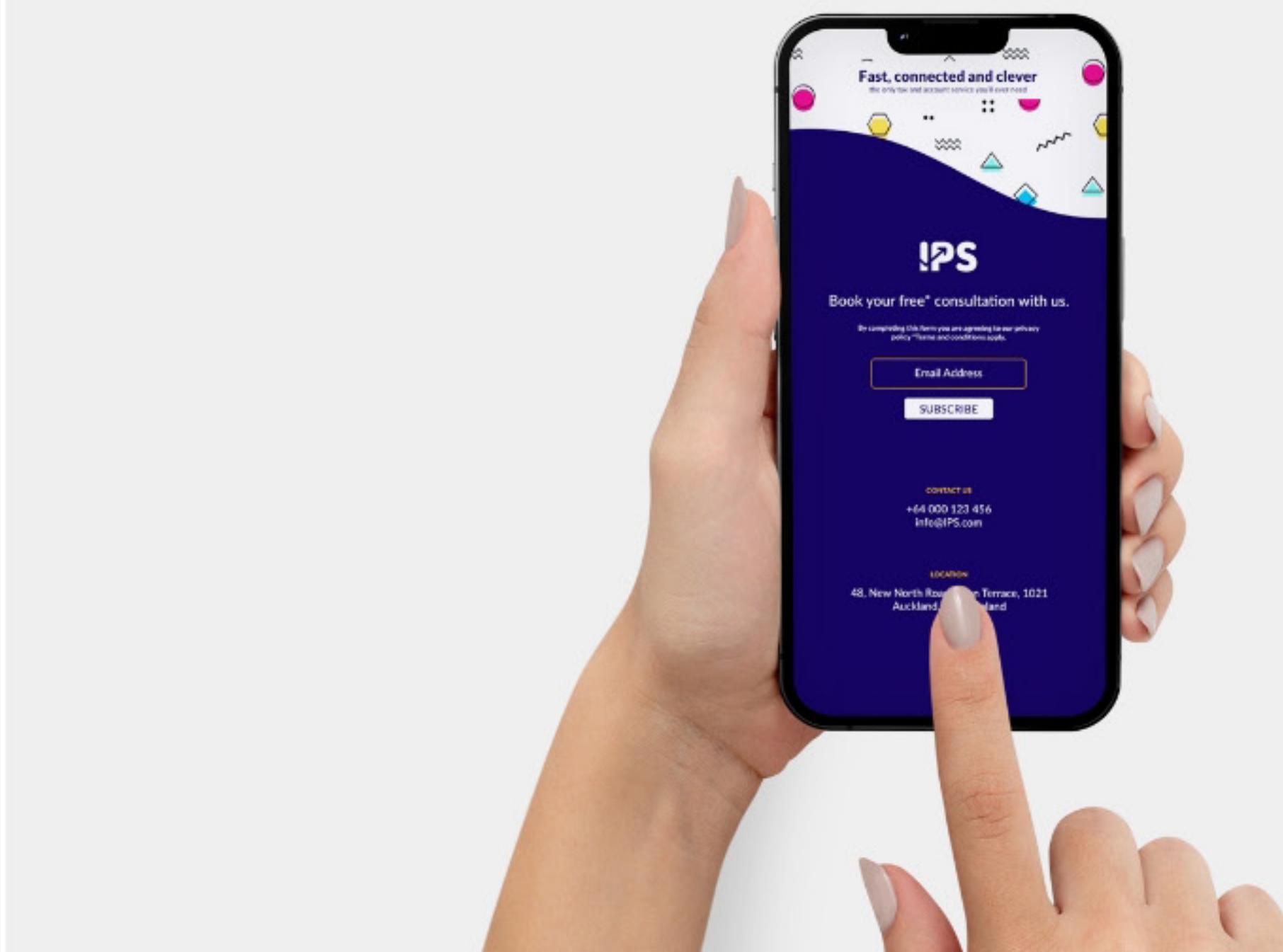
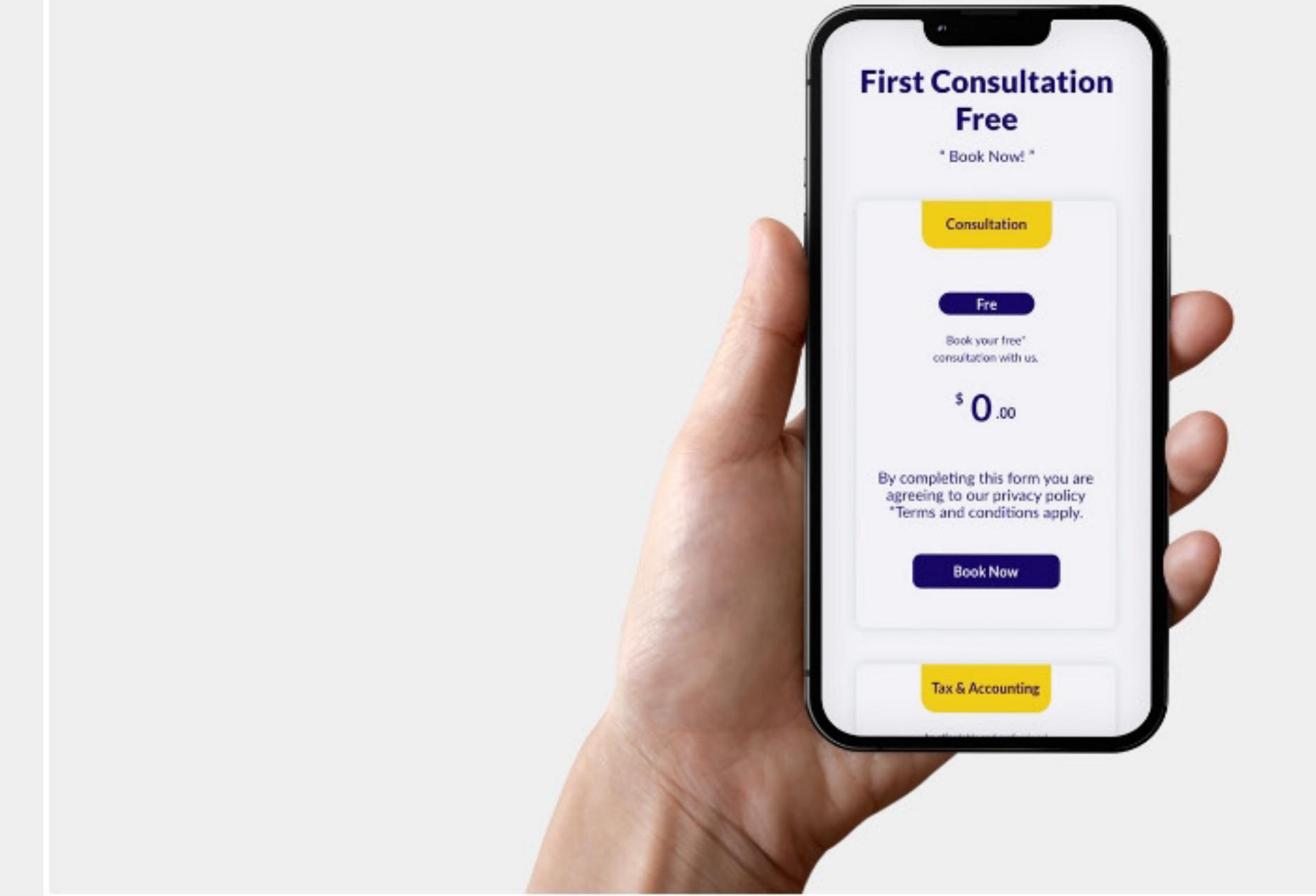


<https://xd.adobe.com/view/06bd8da-5b77-4d8d-b1d4-aa8cab7168c3-53ee/>

The mock-up displays the following sections:

- Business Advisory:** Shows a video of a woman speaking, service details, and a price of \$495.00.
- Accounting:** Shows a video of a woman speaking, service details, and a price of \$495.00.
- Bookkeeping:** Shows a video of a woman speaking, service details, and a price of \$495.00.
- Tax:** Shows a video of a woman speaking, service details, and a price of \$495.00.
- Business Advisory (Bottom):** Shows a video of a woman speaking, service details, and a price of \$495.00.
- Testimonials:** Features a testimonial from "Janie Campbell" dated "1st Oct 2021" with the text: "Very pleased I will have changed to IPS for the best financial service. Everything done easily and quickly. Thanks."
- CLIENT:** Shows logos for "Pain Free Run", "kingi", "HACKERIE", "MACKENZIE", and "JUMP START".
- Fast, connected and clever:** Includes a quote: "With IPS Accountants tax is not taxing. They make it all seem do-able, obtainable and painless!"
- Book your free\* consultation with us.** Includes fields for "Email Address" and "SUBSCRIBE".
- Contact Us:** Includes phone number "+64 09 123 456" and email "Info@IPS.com".
- VISITORS:** Includes address "48, New North Road, Eden Terrace, 1021, Auckland, New Zealand".

Below is our mock-up of the new design for use on mobile devices. The new design follows the theme of its website counterpart, which it simplifies into a mobile format. The design is in the spirit of IPS' requirements and reflects the colour themes set out earlier in this report.



# Reflections and Opportunities for IPS

## Find the solution

### Design Reflections

Our redesigned website reflects both the outcomes of the stakeholder interview and surveys results. The redesign tackles the issues the website previously had with simplistic colours, bringing in warmer tones and creating a more welcoming digital environment for IPS' users.

### Design Opportunities

With more time, there is opportunity for more user testing in relation to the new website. We do not have the benefit of time and are unable to conduct a thorough review of success of the redesign. The review should take form of data collection over the period of several weeks for an accurate measure of performance.

### Content Reflections

Our undertaken survey has shown that 60% of test users found the website lacking in content, describing in more detail the services provided as well as providing more information on the business as a whole. We have added significantly more information to address this issue.

### Content Opportunities

As the business develops and grows, there will be opportunities to further define the services provided to better reflect its clients. IPS must turn its mind to the services requested by both its existing and new customers, and amend the website to better cater to the demand. New service lines may need to be added with the growth of the business. The website must be given an opportunity to naturally evolve.

### Digital Presence Reflections

IPS currently has no digital presence and is unable to be searched with any search engines. The current website is almost impossible to find.

### Digital Presence Opportunities

IPS should consider investing in SEO and Google Ad services in order to bring the website rating up and be searchable via search engines, and in particular Google. This should align the website with its competitors and be searchable via general Google searches.