



User Experience Design

PRESENTED BY

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AUGUST 2022

Background

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

IPS Accountancy offers accounting and business support services, helping owners with the demands of running a business and providing guidance to achieve long term growth. This company is IRD registered Tax Agent and has more than twenty years experience with various small businesses. Special interest in Film, TV and Hospitality.

The owner of IPS Accountancy, IVA, would like to redesign the existing site and encourage more people visit her website to expend her business. The goal of the website are to attract more customers, clearly showcase the business and convert users into customers.



Kick-off Meeting

1. Do you have a favorite colour that you would like us to incorporate into the website design?

I love warm colours - orange/red.

2. Are there any competitor websites that you would like as inspiration? here are some suggestions:

<https://barebones.nz>

<https://bakertillysr.nz>

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

<https://www.accounting-plus.co.nz/>

I like my website the way it is - but refreshed.

3. Your Prices? Do you have any set fee estimates we can include on the website? Some sites do include them :
<https://barebones.nz/our-pricing/>

In terms of prices, I do not have set prices for the reason that every business is different and needs different taxes done.. so, I speak to clients and based on their needs I can give a quote.

4. Is there anything specific would you like to improve upon for your existing website?

Up to you, I am not very creative that way...

5. Would you like your logo to be updated ?

Yes, please! Something in Red. Surprise me!

6. From previous answers we know your current customers, is there another type of customer you would like to attract ?

Not particular clients, as I can help small businesses in general, as they all require GST Returns, PAYE Returns, Income tax.

7. What makes IPS special? Is there anything you would like to emphasize about yourself or your service within the site?

As I spoke to Kevin, I offer boutique services - I meet my clients, get to know them and work with the way they run their business, not the way I think it should be done. Everyone has different approach, but we end up with the same results! Once I understand their business and the way they want to run it, I can advice on various things - how to make it more tax effective, how to minimize costs etc. My fee generally includes all advice and communication - at no extra costs - so people do not feel worried about emailing and calling and asking all sorts of questions.

8. What does success look like to you and how would you measure that success?

Success is having happy clients, as only they would recommend my services to future clients, and the financial benefits will flow from there.

Kick-off Meeting

9. Would you write a short bio about yourself - so site users can get to know you? a few paragraphs...

I have come to NZ from Macedonia in 1995, and have been living in Auckland ever since.

I studied English at University there before coming here, and once here I returned to my first interest - Accounting. I studied Accounting in AUT, and graduated with a Bachelors Degree, Major in Accounting. I worked for a few Chartered Accountancies in Auckland, before setting up my own Agency. I am approved Tax Agent with IRD - which means, I can be the middle man between clients and IRD. I am happily married with two teenage children. Personal interests - I like reading and writing - poetry and short stories :-)

10. Where do new clients of the firm come from (e.g. word of mouth)?

>>All from Word of Mouth, (so far), and people that I used to know previously in my work and personal life -

11. What are your top three most commonly asked questions by your current clients?

The questions I always get asked are - where I am from? - I know totally irrelevant, but my name is clearly foreign, and some people do not relate to it at all! And may decide that are not good match... Stereotypes are everywhere! But - to my benefit - and to counteract this stigma, I did study and get my qualification here - and my English is good, so no issues, once I talk to people... >>People also want know what services I can provide (GST, PAYE, Income Tax Returns...etc)- and mostly how much would that cost them.

12. What type of small businesses do you predominately work with?

I have clients from all over - many hospitality businesses, as my husband is in hospitality and we know hospitality industry very well between us, but I have also a builder, a film and TV people...Uber drivers...

13. Which services are most important for your clients?

All the services I provide are important. As they say - only death and taxes are sure thing in this life, so as I work with clients to get all their tax return done and filed with the IRD on timely basis, there is no particular service more important than another.. but, communication is vital, both ways.

Key Points

OF THE KICK-OFF MEETING

Goal

- Attract more younger users, clearly communicate the tones of the business.

Needs

- To attract and convert users into customers.
- Showcase the business and Share news and update regulation of IRD,PAYE and Tax
- Adding logo and warm tone of web page design

Target

- Gain more traffic to the site and important pages. Communicate IPS's accounting services clearly to new users

Issue

- The existing site does not clearly communicate the services IPS accounting provides, the site requires more depth to convert users.
- Not enough accounting information for young people who just start to work

User Testing

After the kick-off meeting, we conduct some user testing to determine how well the current website is used and what aspects need to be improved for users.

PERSON 1: AGE 25, OCCUPATION CONTRACTOR IN THE FILM & TV INDUSTRY	PERSON 2: AGE 60, OCCUPATION OWNS A KARATE CLUB	PERSON 3: AGE 40, OCCUPATION MANAGER OF A TRUST	PERSON 4: AGE 34, OCCUPATION SELF EMPLOYED IN EDUCATION INDUSTRY
Background question: What services do you think a small business needs from an accounting firm?			
Someone to do their tax information and manage the daily accounting	Taxation/ GST, advisory and annual accounts.	Taxation and accounting training	Taxation

Usability Audit

TASK 1: HOW WOULD YOU CONTACT IVA ON THE WEBSITE?

- HOW WOULD YOU MESSAGE IVA?
- CAN YOU FIND THE OFFICE ADDRESS?

Person 1	Scrolled down the page to find the contact information. She commented that there was no contact form or booking process. Information found easily. Would inquire further via email.
Person 2	Clicked the contact details button in the header. Office address was found and he liked the map.
Person 3	Scrolled down to the bottom of the page and found all relevant information easily. She said she liked having the phone number visible.
Person 4	Scrolled down and clicked on the email. She can see the office address when she tried to message Iva

Usability Audit

TASK 2: HOW WOULD YOU APPROACH INQUIRING ABOUT TAX ACCOUNTING SERVICES ON A RENTAL PROPERTY?

- WHERE WOULD YOU FIND INFORMATION ON SERVICES?
- DO YOU KNOW WHAT SERVICE CATEGORY RENTAL PROPERTY TAXATION SERVICES WOULD BE FOUND UNDER?

Person 1	List of services was found easily by scrolling down the page. She did not know if she was a small business as a contractor. The list of services confused her and was unsure of the category her task fell under.
Person 2	Clicked on the "what do I do" tab. Found the services section easily but wanted more information and clarification on the details of each service. Further said rental property accounting would cover property tax services.
Person 3	She simply said she would call to get the relevant information from Iva
Person 4	:Clicked on "what do I do" and found the service. But the service is not related to rental property and she don't know what service she needs from the 8 choices. Then click on Contact us but she would prefer to call the company instead of sending email, so scroll down and look for the phone number.

Usability Audit

TASK 3: WHERE WOULD YOU FIND BACKGROUND INFORMATION ABOUT IPS ACCOUNTING?

- WOULD YOU LIKE MORE PERSONAL INFORMATION DISPLAYED ABOUT IVA?
- WOULD YOU LIKE MORE BACKGROUND ON HER CLIENTS?

Person 1	She said a photo would be nice with a little bit about her. Some testimonials from her clients would be nice to include & information about client size so I know if I am the right customer for her.
Person 2	Clicked on "the difference" tab. Said the information on the website is more than enough.
Person 3	She scrolled through the site and did not use the header to find this information. She would like a little more background information on her and some testimonials.
Person 4	Click on Who am I and I can't find who Iva is. I would like more information on Iva and reviews from her clients or story.

Usability Audit

CONCLUSION QUESTIONS

- WOULD YOU LIKE TO BOOK AN APPOINTMENT WITH YOUR ACCOUNTANT THROUGH THE WEBSITE?

Person 1	A booking system would be nice so I have a bit of guidance as to what I need for an inquiry.
Person 2	I don't mind sending an email but a contact form would save me the hassle.
Person 3	I would use a booking to schedule a call or an appointment with a potential accountant.
Person 4	I would like to call personally and direct response from this company

- WOULD YOU LIKE MORE OF A PERSONAL TOUCH TO THE WEBSITE?

Person 1	Building trust, a real person behind the website
Person 2	I don't mind not having personal information about her, price is more important to me.
Person 3	Not much more personal information is required maybe an about her section on the homepage
Person 4	Yes, I would like to feel there are real people running this company.

Usability Audit

- HOW SATISFIED ARE YOU WITH THE INFORMATION PROVIDED AND EASE OF USE OF OUR WEBSITE?

Person 1	Likes that the website is simple and easy to navigate. Dislikes that the website has no identity behind the site.
Person 2	Does not like the lack of information, he needs clarity on her services.
Person 3	More detail would be ideal.
Person 4	More explanation on the service and who is it about would be great

SUMMARY

OF THE USER AUDIT

Contact IPA Accounting

- All users are able to find the contact information and address

Inquiring about tax accounting services

- User were confusing on what service they needs and need more clarify on details of different service
- User convert looking information on website to an action and call the company instead

Background information of IPS Accounting

- User prefer to gain more information of the company clients testimonials and background of staffs to gather more background information of the company

Overall

- The users found the website is simple and direct, but lack of information and explanation of the accounting service.
- The user would like to gain more trust from the website with more personal touch.

Assumption

CLIENT NEEDS

- To attract younger users and convert users into customers.
- Showcase the business and share news of update regulation of IRD,PAYE and Tax
- Adding logo and warm tone of web page design

USER NEEDS

- More information and explanation of the accounting service.
- Understanding what service they need
- Personal touch from the company and gain trust from the website

OVERALL

- Explanation of accounting service and using easier wording
- Helping users to understand what service they need
- Building trust by adding testimonials and social media link to enhance interactive

SWOT

Baker Tilly Staples Rodway - <https://bakertillysr.nz/>

WEBSITE SPEED : MOBILE 20 , DESKTOP 53

<p>S</p> <p>STRENGTHS</p> 	<ul style="list-style-type: none"> • Header that is scannable, with dropdowns that expand further on categories. • Very simple index page. Relevant articles for the users displayed center to cater to their audiences relevant interests. Clear display of services. Relevant contact information links. • Services page clean segmentation into further details. • Simple and effective user flow. Further details about individual services (with breadcrumbs to navigate back to old pages).
<p>W</p> <p>WEAKNESSES</p> 	<ul style="list-style-type: none"> • Weak footer. There is little navigational information in the footer and lacks the required complexity to be effective. • Lack of button feedback. Cannot fill out a contact form online.
<p>O</p> <p>OPPORTUNITIES</p> 	<ul style="list-style-type: none"> • International presence: Baker Tilly Staples Rodway is an international accounting firm internationally therefore the brand carries a level of goodwill. • Large equity base means the company can continue to invest in relevant articles to drive traffic to their site.
<p>T</p> <p>THREATS</p> 	<ul style="list-style-type: none"> • Much larger firms run a similar UX such as PWC, EY and Deloitte, these firms with larger capital can invest more money into this UX strategy. • Reliant to compete for popular advertising space for SEO.

SWOT

SBA - <https://sba.co.nz/>

WEBSITE SPEED : MOBILE 56 , DESKTOP 64

<div><div>S</div><div>STRENGTHS</div><div></div></div>	<ul style="list-style-type: none">• Balance between welcoming and professional colour scheme.• Branding is identifiable, SBA accounting has a strong brand image and goodwill that they can add to their company webpage.• Resources are readily available to the public in the header and are updated. Good for SEO.• A clear outline of services available.
<div><div>W</div><div>WEAKNESSES</div><div></div></div>	<ul style="list-style-type: none">• The services page is not very digestible; the content has plenty of words which makes it difficult to scan. Navigation to the relevant subpages within the services page is not obvious.• No ability to search through content on the resources page.
<div><div>O</div><div>OPPORTUNITIES</div><div></div></div>	<ul style="list-style-type: none">• Outlining some franchisee stories could make their branding more relatable to their market, small businesses.• The unique features you can provide to your potential clients.
<div><div>T</div><div>THREATS</div><div></div></div>	<ul style="list-style-type: none">• The website lacks a personal approach to relate to small businesses. This is due to their business structure being a franchise, the face of those individual businesses are hidden from the market.• Reliant to compete for popular advertising space for SEO.

SWOT

Bare Bones - <https://barebones.nz/>

WEBSITE SPEED : MOBILE 73 , DESKTOP 79

<div><div>S</div><div>STRENGTHS</div><div></div></div>	<ul style="list-style-type: none">• Clear pricing based on services/ packages provided to their customers.• Personalized details about the owner, build a personal tone to the website and business.• Easy understanding for people who don't have a background in accounting• Good reviews on google
<div><div>W</div><div>WEAKNESSES</div><div></div></div>	<ul style="list-style-type: none">• Header is packed with too much information and has a very bad design.• Bad website aesthetics.• Style are not coherent in different pages
<div><div>O</div><div>OPPORTUNITIES</div><div></div></div>	<ul style="list-style-type: none">• As the economic change, there are more people work as sole trader, and small business start growing• To be able to not only grow with our clients but in many cases to lead clients' growth.• The need for advisory services is expanding very rapidly and many of the innovative firms are jumping on these opportunities.
<div><div>T</div><div>THREATS</div><div></div></div>	<ul style="list-style-type: none">• A direct competitor has better search engine optimization (SEO) and therefore appears earlier in google searches.• Many ingenious premium advisory services will become commoditized, putting pressure on the pricing of those services.

GAP ANALYSIS

Current State

The existing site does not clearly communicate the services IPS accounting provides, the site requires more depth to convert users.

The website is simple and direct, easy to contact the company, but lack of information and explanation of the accounting service.

The site lack of personal touch and interactive with the users. The site need to gain more trust with the users.

Desired State

The competitors sites are clearly display of services with relevant contact information. The most important factor is the sites gain more trust with client's stories and what the company can do for users which enhance to convert users to customer.

Clear heading lead to right service and encourage user to interact and contact the company.

Balance between attracting younger users and professional colour scheme

Action Step

Select warm colour tone to meet the clients needs also create professional impression

Adding details of service with clear heading

Providing ways to help users to meet their needs

Adding testimonials and stories to gain trust from users

Link to social Media to enhance interactive and updates of the company

Persona 1

JOHN SHAW

AGE : 34 YEARS OLD

LOCATION : NEWMARKET,
AUCKLAND

OCCUPATION : OWNER OF A
BOOKSHOP, SELF-EMPLOYED,
SMALL BUSINESS

INCOME : MIDDLE-INCOME
LEVEL

PERSONALITY: INTROVERT,
SENSING, FEELING,
PERCEIVING



BIO

John was working for a global company and did not have much leisure time as his work was taking too much time. So, to start a family, he decided to quit his job and invest his savings in a bookshop, which has been his dream since his university years. All he wants to do is be able to maintain his bookshop.

GOALS

A product that will handle the analysis of his income. He is looking for an easy-to-use product that enables him to see how much money he has made, how much money he has spent. In addition, the accountant must provide accurate tax credit results and increase the time he spends managing the store.

PAIN POINT

John is not great at accounting, Tax, IRD and he is getting lost while following the money he spends and earns. The biggest question he needs to answer is how much profit he makes at the end of the month. He has to spend a long time to make an efficient analysis. And he quit his corporate job to spend more time with his family.

Persona 2

MICHAEL JOHNSON

AGE : 30 YEARS OLD

MICHAEL JOHNSON

LOCATION : CBD, AUCKLAND

OCCUPATION : SELF-EMPLOYED, OWNS A COFFEE SHOP

INCOME : HAS AN UPPER-MIDDLE-INCOME LEVEL & A PROFITABLE BUSINESS.

PERSONALITY:EXTROVERT, INTUITION, FEELING, PERCEIVING



BIO

The man spends the biggest part of the day (5+ hours) on the smartphone making calls, negotiating, or messaging. He is tech-savvy and uses the latest iPhone. Michael's phone is full of apps, as he prefers them to mobile versions of websites. The man knows his way around an app in a matter of seconds, so he always skips tutorials.

GOALS

As a busy man, Michael doesn't like to waste time because time is money. So he needs an accountant to take charge of most of the bank loan services and store accounting. It will soon fulfil the dream of expanding the store. Being a business owner, he also needs to keep his business banking account and a personal one separate. Simultaneously, Michael wants to use both accounts easily and switch between them with no effort.

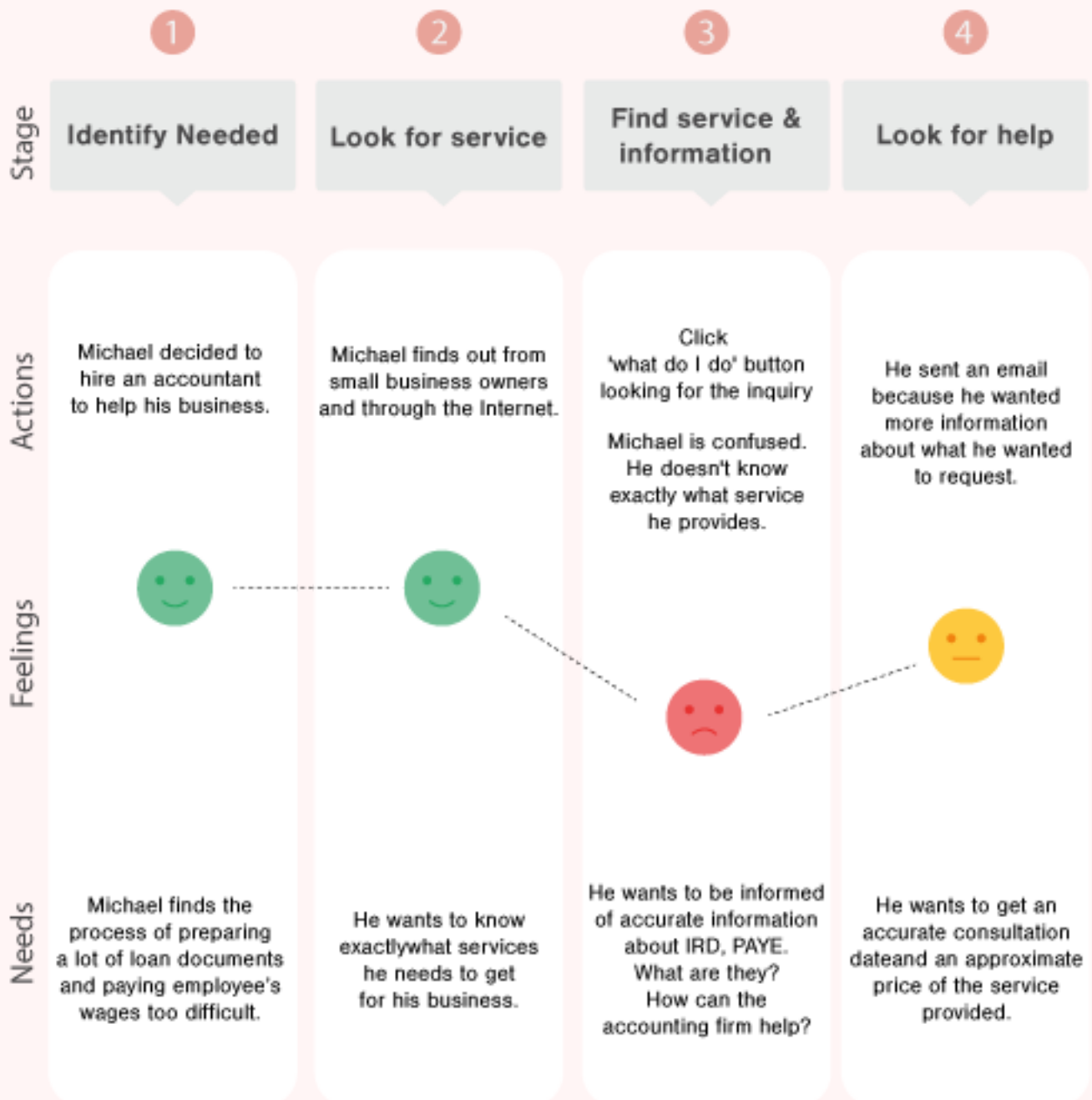
PAIN POINT

Switching different accounts takes too much action on behalf of Michael. He would prefer to do it with a click. In addition, he still has to go to the bank to get a lot of loan documents and information. He also has to manage and pay the salaries and P.A.Y.E of five part-time and full-time employees every week.

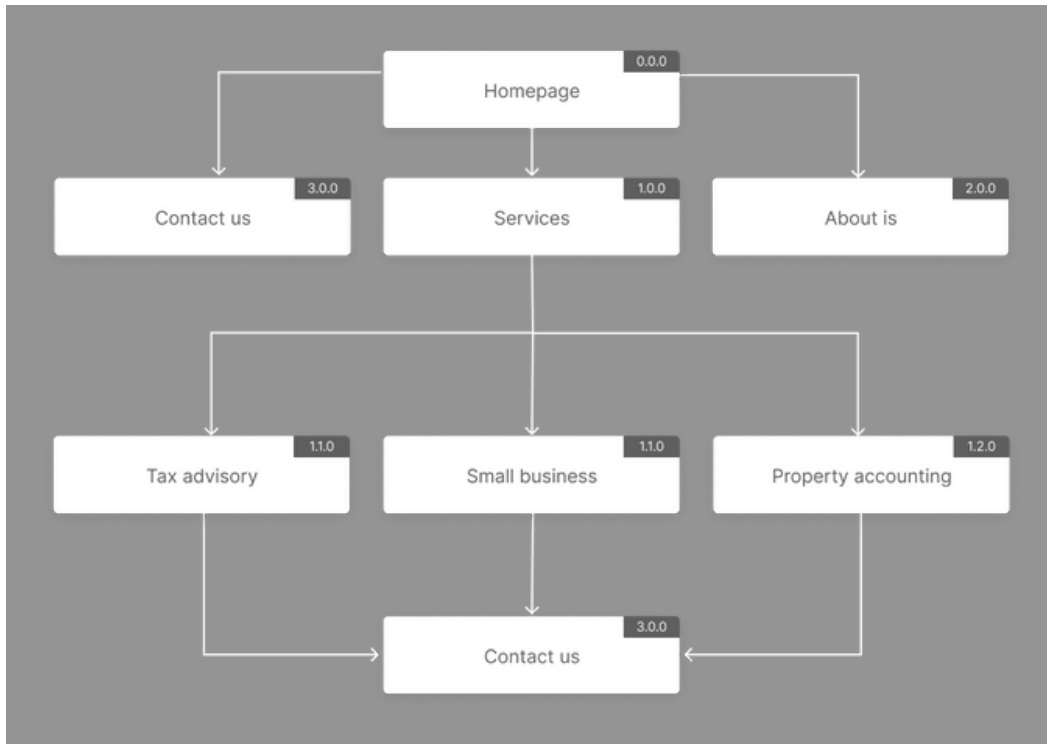
User Journey

Michael need to apply for a loan and need a financial statements.

Michael Johnson
 AAge : 30 years old
 Michael Johnson
 Location : CBD, Auckland
 Occupation : Self-employed, owns a coffee shop



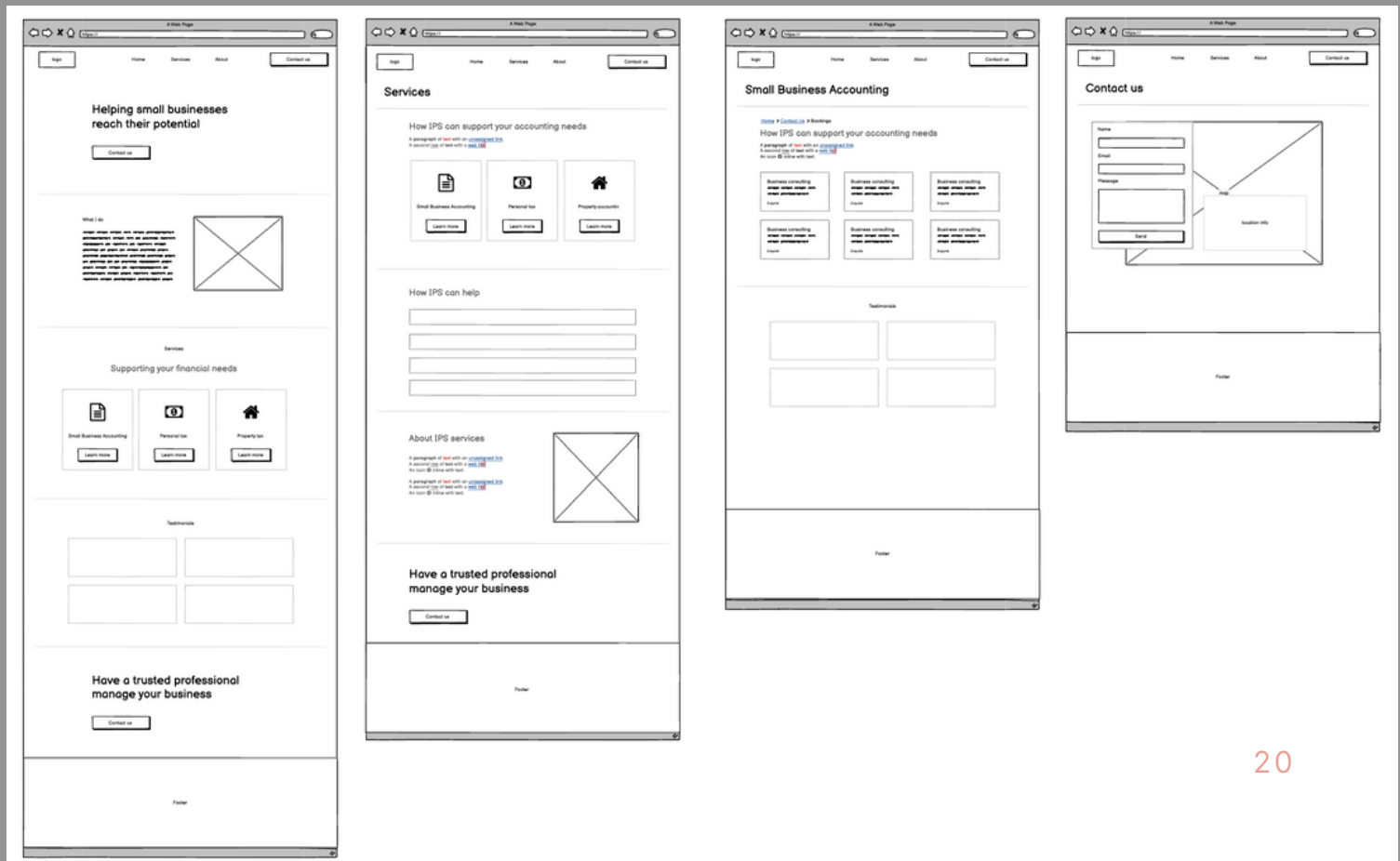
Sitemap & wireframe



DESIGN NOTES

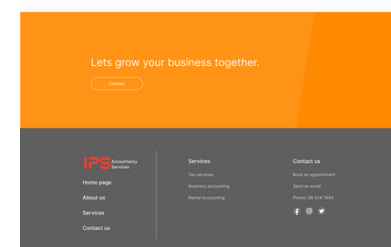
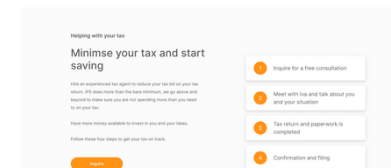
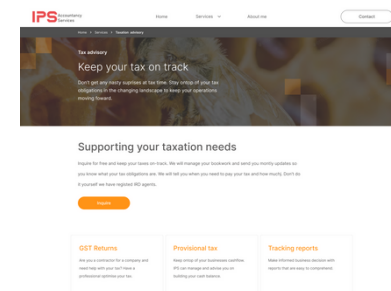
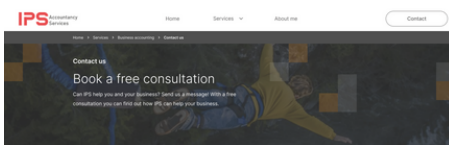
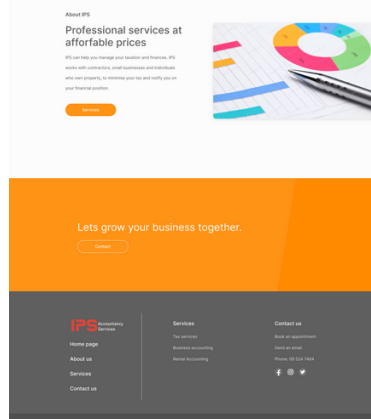
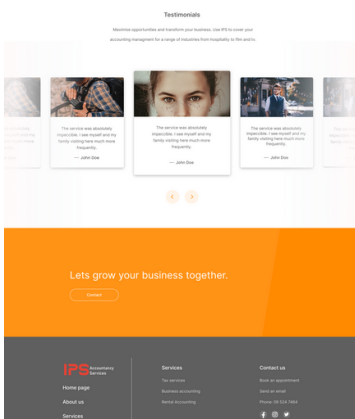
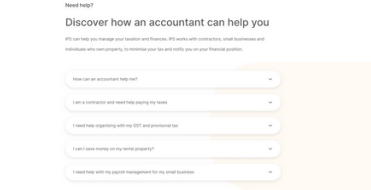
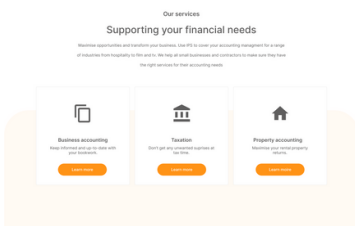
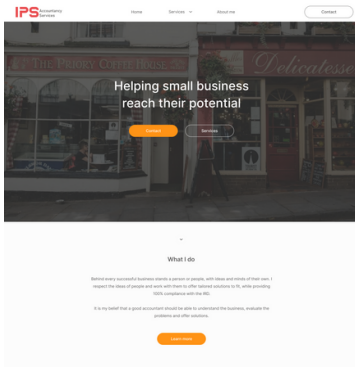
The information architecture is structured to increase page loading speeds for and targeting long tail key words for SEO purposes.

Therefore minimum images will be used to increase page loading speeds and emphasis on headers to attract young professional.



USER EXPERIENCE REPORT

Mockups



USER TESTING NOTES

From testing the wireframes we discovered that potential customers prefer the fresh site design to the previous site.

User testing indicated that those people who do not have much experience with accountancy need more assistance from the flow than what has currently been provided for.

Further information about Iva and her qualifications were requested to be displayed for legitimacy and assurance from the use

Mood Board



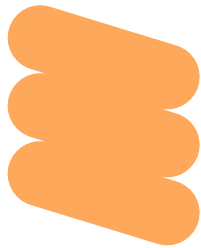
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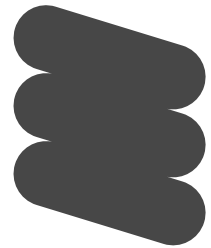
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Logo



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Font 2 :Bahnschrift Regular 12pt

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Font

Title 1, Inter 50pt

Title 1, Inter 34pt

Title 1, Inter 24pt

Title 1, Inter 20pt

Title 1, Inter 16pt