

UX Portfolio

Ladislav Szolik

User Experience Designer

Selected projects



Calendar for medical practice software (2025)

Design of calendar module.

Activities: Usability testing • Interaction design • Stakeholder management • IT hands off

Platform: Desktop

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Hosted BPX web portal (2022)

Redesign the telephone configuration web portal and improve overall usability.

Activities: Usability testing • Interaction design • Stakeholder management • IT handover

Platform: Desktop

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Hosted PBX design system (2022)

Create a design system in Figma for Hosted PBX web portal.

Activities: Visual design • Interaction design • Stakeholder management • IT handover

Platform: Desktop

[Page 20](#)



CSX mobile banking (2020)

Redesign the mobile banking app.

Activities: Focus groups • Usability testing • Interaction design • Prototyping • Design thinking workshop facilitation • Stakeholder management • IT handover

Platform: Mobile and tablet (iOS and Android)

[Page 24](#)



Online payments (2019)

Redesign the payment entry flows for private and business clients.

Activities: Usability testing • Interaction design • Design thinking workshop facilitation • Stakeholder management • IT handover

Platform: Desktop, Tablet, Mobile (iOS and Android)



Banking design system (2020)

Create a design system in Sketch for online banking.

Activities: Visual design • Interaction design • IT handover

Platform: Desktop, Tablet, Mobile (iOS and Android)

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Calendar for medical practice software

Jun 2024 - Sept 2024

Problem statement

Medical professionals were not happy with the current calendar module due to usability issues and missing features. Additionally, the company lost several prospects due to this module.

Project goal

Design a calendar module to serve medical assistants, physiotherapists, and psychotherapists across their user journey.

Team

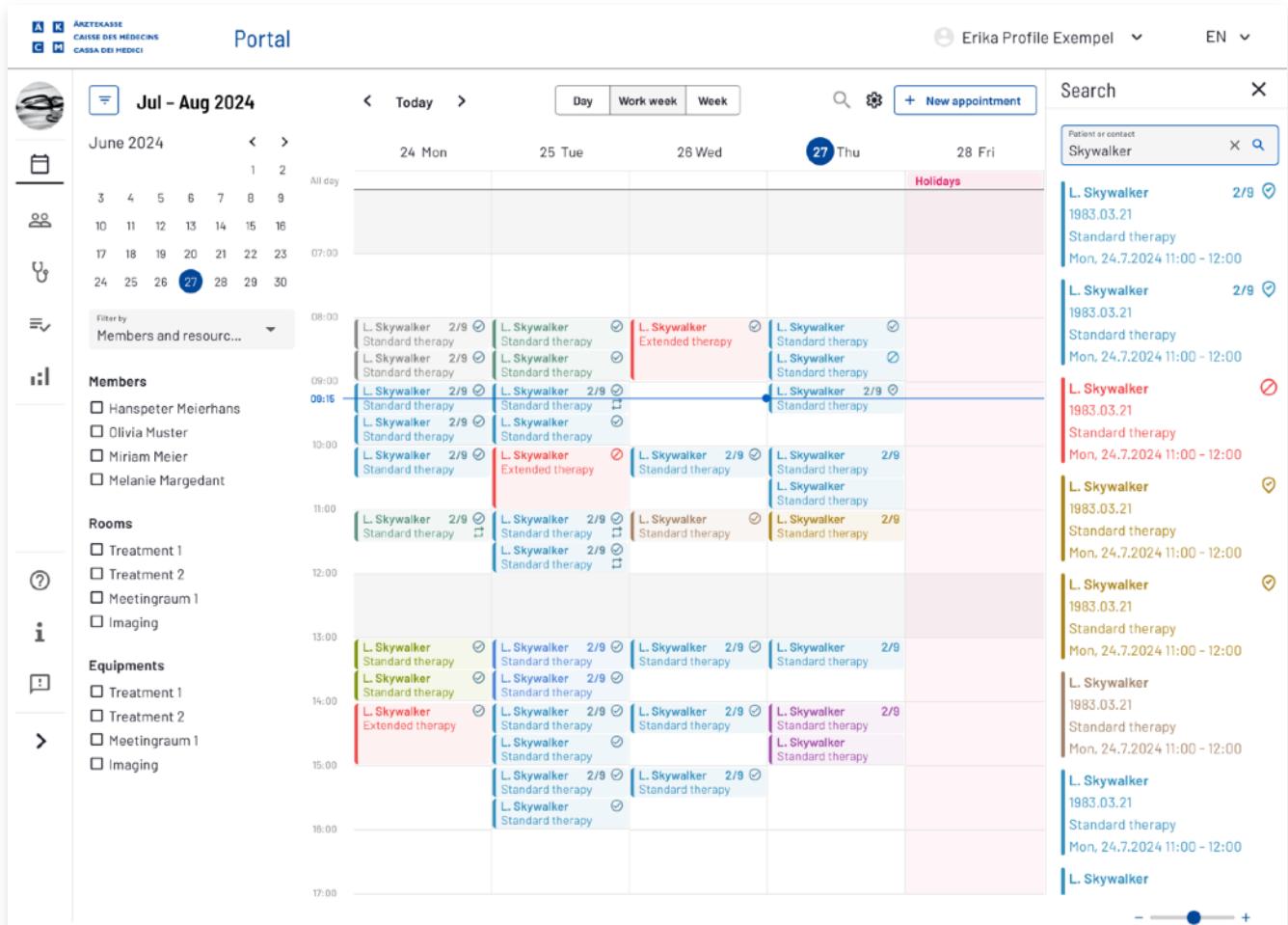
5 Developers, Business Analyst, UX designer

Roles played

I was responsible for designing the overall experience of using the calendar module.

Activities

- UX Design (Figma)
- Workshops with Engineers and Business
- Usability testing (in-person and MS Teams)



Design of calendar overview with filters and search

Calendar for medical practice software

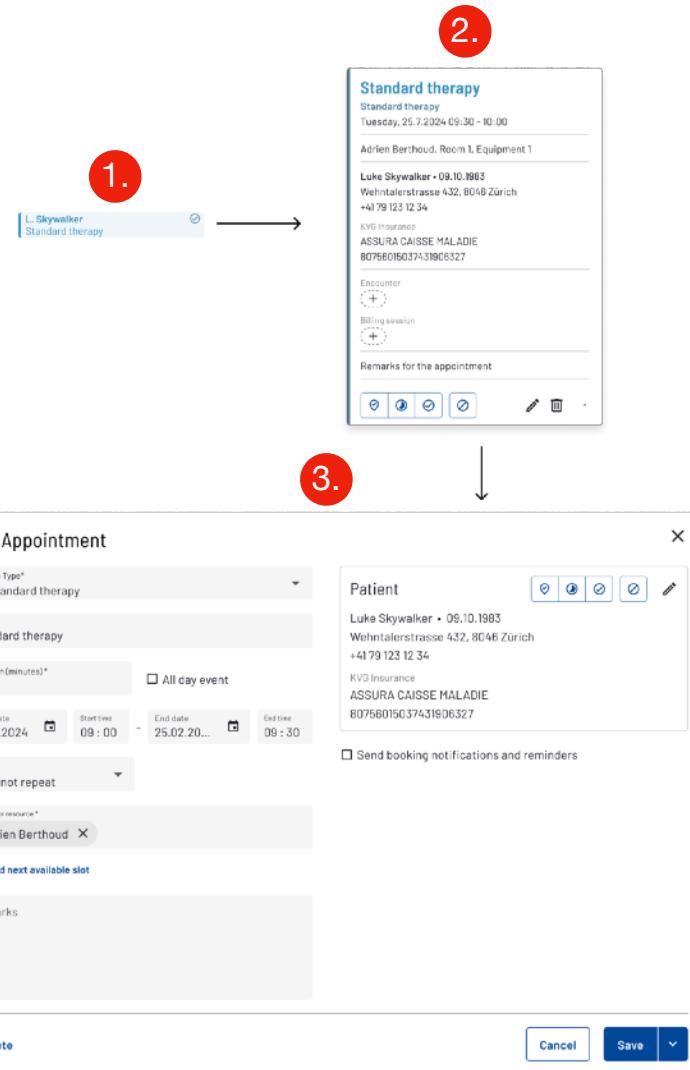
Getting started

Challenges

1. Incorporate all the requested user features, but remain simple. Many users requested viewing patient name, birthday, insurance card, contact number, status whether the appointment was billed or not, status whether the appointment is done, and many others.
2. Find balance between calendar configuration and settings. What can we already preconfigure that is specific to this client? What shall we keep inside of the calendar as editable settings? Can we provide defaults valid across all clients?

Proposed solution

1. We conducted interviews with users and SMEs. I used progressive disclosure to address most of the requests. First, users see the minimal appointment card. On click, the preview appears. If more information or data manipulation is required, users can edit the details. (See screenshots on the right)
2. We learned that clients have very individual opening hours, which don't change that often. Additionally, the printed appointment card has a structure which they reuse several times. Therapists provide services which have standard durations. These we decided to move to configuration.



1. Appointment card, 2. Appointment preview, 3. Edit appointment

Calendar for medical practice software

View schedules

Challenges

1. Medical assistants should have an overview of the schedule of all practitioners.
2. Finding an appointment and seeing conflicts at a glance.

Proposed solution

For a practice, the week and a day view is very essential. Point 2 on the screenshot shows how users can perform common calendar navigation, like going to next week or viewing only the day schedules.

Point 1 on the screenshot depicts the standard month view and a quick filter for practitioners' calendars. This helps assistants to check for a specific practitioner's calendar.

We introduced a side panel to depict search results to keep users in the flow, see Point 4.

The screenshot shows a 'Portal' calendar interface. On the left, a sidebar contains a month view (1.) showing July-August 2024, a navigation bar (2.) with buttons for Today, Day, Work week, Week, and a search bar, and a list of practitioners (Members) and rooms. The main area displays a weekly calendar grid (3.) from Monday to Friday, showing appointments for multiple practitioners (L. Skywalker) across different time slots. A red box highlights the weekly grid. On the right, a search panel (4.) lists practitioner profiles, with one entry for 'L. Skywalker' selected. A red box highlights the search results panel.

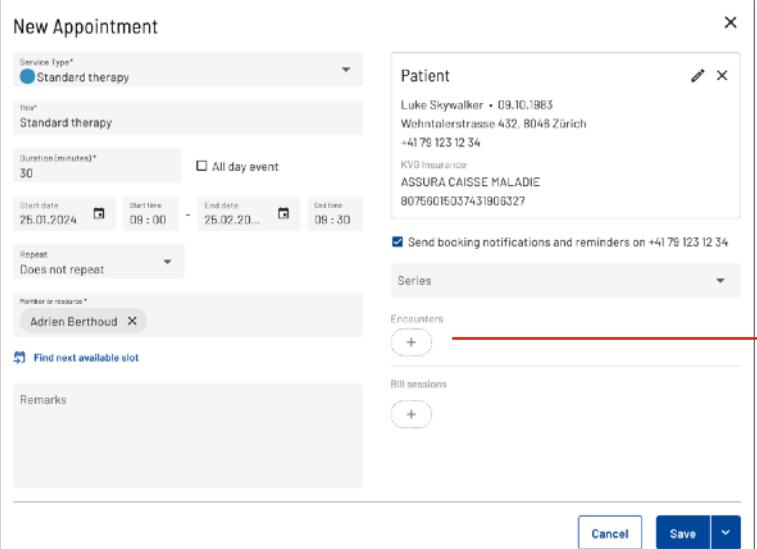
1. Month overview and filters,
2. Navigation bar, 3. Appointments, 4. Search results

Calendar for medical practice software

Take medical notes and bill from appointment

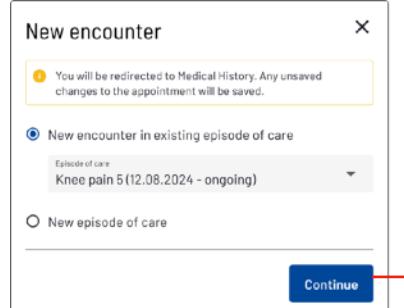
To provide a seamless experience, we wanted to allow medical professionals to take notes anytime they are in a context of a patient, like in a calendar.

As medical history is a separate module and could not be integrated into the calendar, I proposed to transition from an appointment to medical history and keep the two entities linked. (See the screens below)



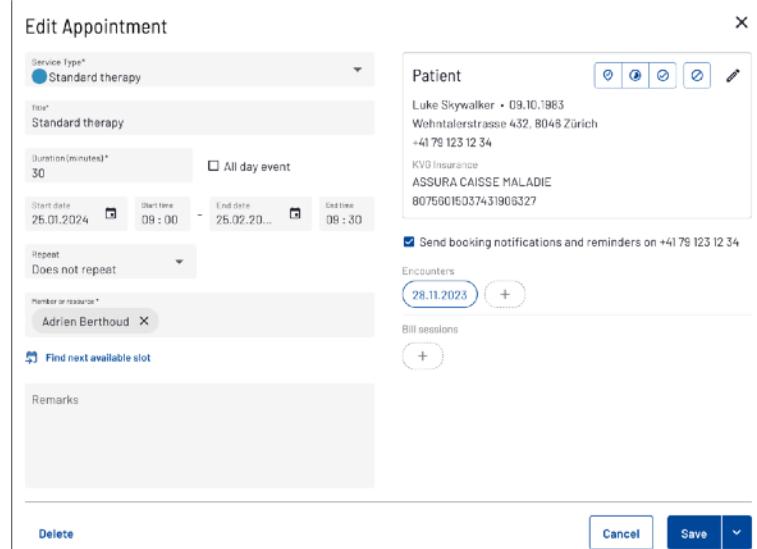
The 'New Appointment' screen shows basic appointment details: Service type (Standard therapy), duration (30 minutes), date (26.01.2024), time (09:00), and end time (09:30). It includes a 'Patient' section with Luke Skywalker's information and a 'Series' dropdown. A red arrow points from this screen to the 'New encounter' dialog.

New appointment



The 'New encounter' dialog offers two options: 'New encounter in existing episode of care' (selected) or 'New episode of care'. It shows an episode of care for 'Knee pain 5 (12.08.2024 - ongoing)'. A red arrow points from this dialog to the 'Edit Appointment' screen.

User can choose where to store the medical note



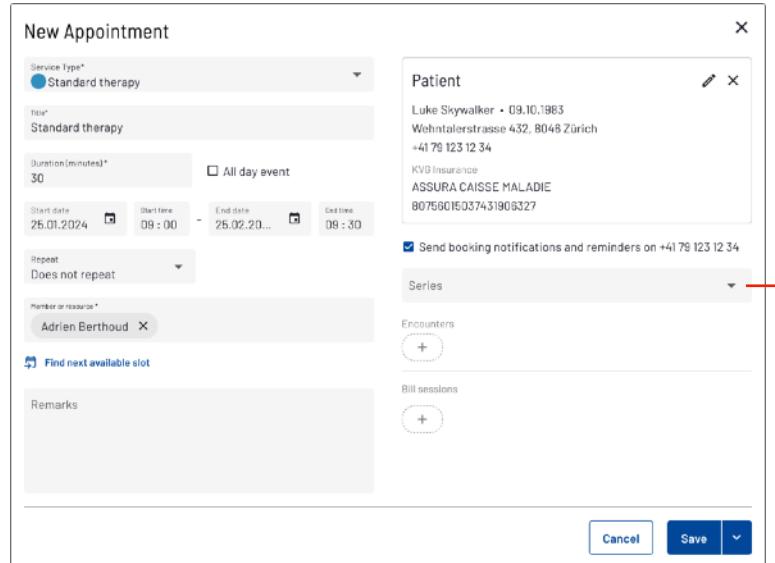
The 'Edit Appointment' screen shows the same appointment details as the first screenshot. It includes a 'Patient' section, a 'Series' dropdown, and a 'Bill sessions' section. A red arrow points from this screen back to the 'New appointment' screen.

Returning to the calendar and viewing the link to the note

Calendar for medical practice software

Plan therapy series

Therapists in Switzerland work with a series of appointments. To support them to track these appointment easier, we created a special flexible feature (Series) to connect an appointment with a medical note and bill together. A therapist can, but is not forced to, use a calendar to plan a series. Also, an appointment can, but it's not a must, to belong to a series.



New Appointment

Service type*: Standard therapy

Title*: Standard therapy

Duration (minutes)*: 30

Start date: 25.01.2024

Start time: 09:00

End date: 25.02.20...

End time: 09:30

All day event

Repeat: Does not repeat

Member or resource*: Adrien Berthoud

Encounters: +

Bill sessions: +

Remarks

Send booking notifications and reminders on +41 79 123 12 34

Series

Send booking notifications and reminders on +41 79 123 12 34

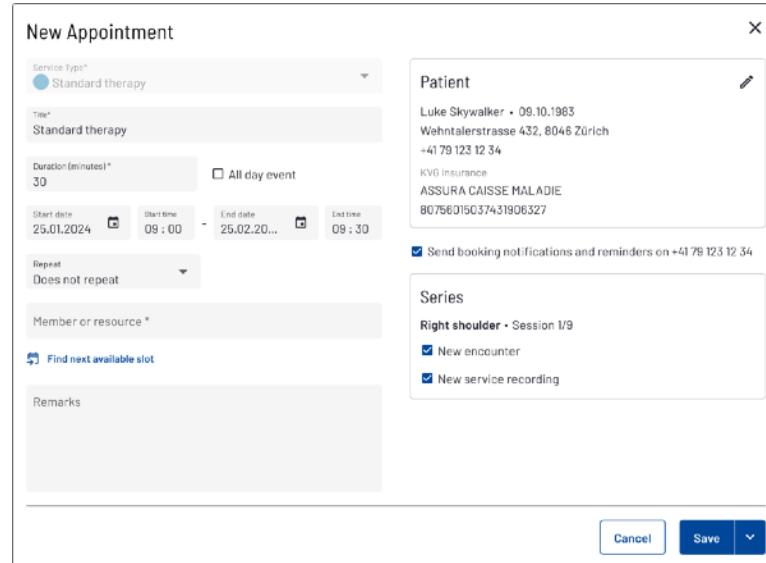
Series

New encounter

New service recording

Cancel Save

New appointment without series



New Appointment

Service type*: Standard therapy

Title*: Standard therapy

Duration (minutes)*: 30

Start date: 25.01.2024

Start time: 09:00

End date: 25.02.20...

End time: 09:30

All day event

Repeat: Does not repeat

Member or resource*: Right shoulder - Session 1/9

Encounters: +

Bill sessions: +

Remarks

Send booking notifications and reminders on +41 79 123 12 34

Series

Send booking notifications and reminders on +41 79 123 12 34

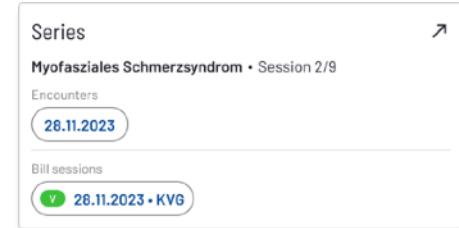
Series

New encounter

New service recording

Cancel Save

Series attached to the new appointment



After save the notes and the bill is automatically created.

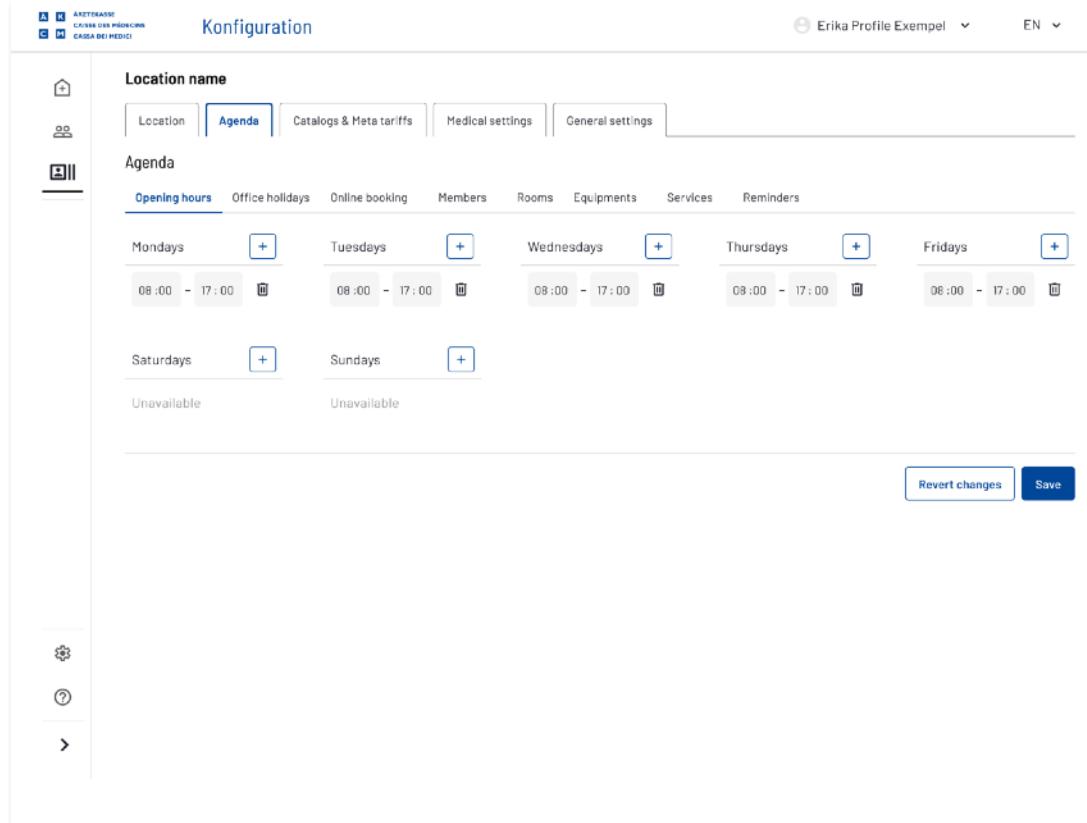
Calendar for medical practice software

Configuration

As mentioned earlier, certain settings were moved to the configuration module to keep the user's productivity high:

- Set opening hours
- Set custom holidays
- Allow online booking for patients
- Define practice members who are bookable and have their calendar in the system
- Define equipment and rooms to be bookable
- Define what kind of services should the practice offer
- Toggle on/off the option to remind patients about their appointments.

The primary users are people from the onboarding team. They help the new clients set up their system. At the time of documentation, the firm's client base was small, and no metrics were set to measure efficiency.



Setting opening hours in the configuration module

Calendar for medical practice software

Conclusion

The development of this module faced high pressure and a tight schedule from the business. However, thanks to easy access to SMEs and clients, we were able to prototype and test our assumptions efficiently. The project complexity increased due to the distributed team. Despite this, the module was shipped and received positive feedback. The next steps involve collaborating with the business to establish metrics and continuously improve the experience.

Hosted BPX web portal

Mar 2022 - Dec 2023

Problem statement

Swisscom's products and services are continuously evolving and frequently sold through separate websites. In line with the company's vision, the next step involved consolidating all business services into a unified portal.

As a result, the telephone configuration portal, for which I was responsible for user experience, also needed to be migrated.

Project goal

Transition the portal to the new business-to-business platform and adjust the visual experience to align with it. Furthermore, incorporate new features and enhancements.

Team

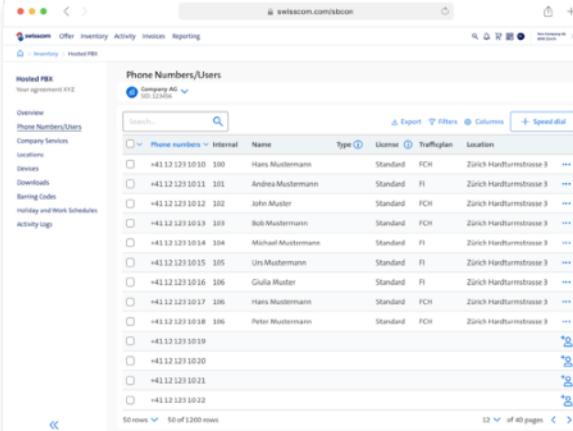
12 full-stack developers, product owner, scrum master, 2 product manager and a customer care agent.

Roles

Me and another designer were responsible for the overall product experience.

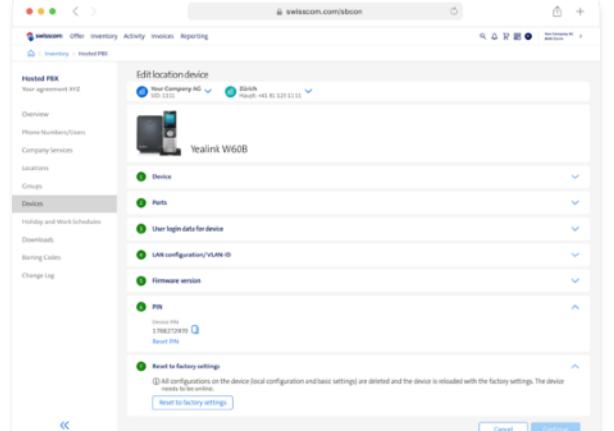
Activities

- Interviews in a form of shadowing days
- Requirement engineering (Jira, Confluence)
- Interaction design (Figma)
- Prototyping (Figma)
- Usability testing

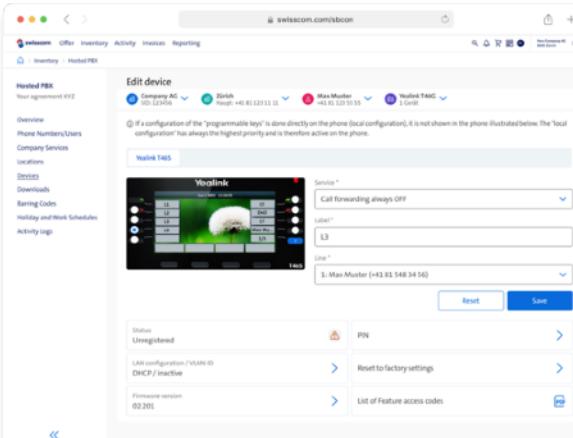


Phone number	Name	Type	User	Trafficplan	Location
+41 21 231 0100	Hans Mustermann	Standard	FCH	Zürich Hardturmstrasse 3	
+41 21 231 0111	Andrea Mustermann	Standard	FI	Zürich Hardturmstrasse 3	
+41 21 231 0112	John Muster	Standard	FCH	Zürich Hardturmstrasse 3	
+41 21 231 0113	Bibi Mustermann	Standard	FCH	Zürich Hardturmstrasse 3	
+41 21 231 0114	Michael Mustermann	Standard	FI	Zürich Hardturmstrasse 3	
+41 21 231 0115	Urs Mustermann	Standard	FI	Zürich Hardturmstrasse 3	
+41 21 231 0116	Giulia Muster	Standard	FI	Zürich Hardturmstrasse 3	
+41 21 231 0117	Hans Mustermann	Standard	FCH	Zürich Hardturmstrasse 3	
+41 21 231 0118	Peter Mustermann	Standard	FCH	Zürich Hardturmstrasse 3	
+41 21 231 0119					
+41 21 231 0120					
+41 21 231 0121					
+41 21 231 0122					

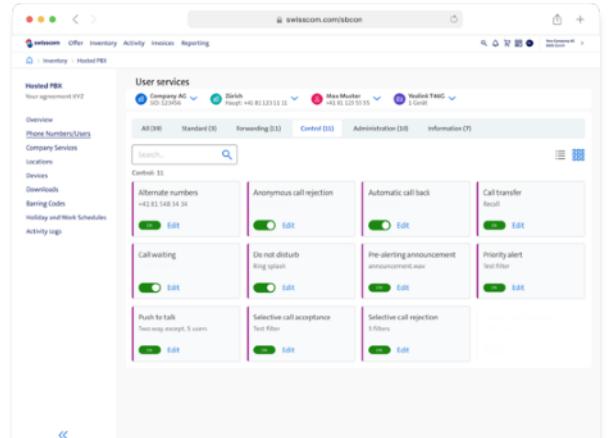
Phone numbers overview screen



Edit device details screen



Configure telephone buttons screen



Telephone user services screen

Hosted BPX web portal

Getting started

Challenges

Transitioning the Hosted PBX to the new portal required the reimplementation of over 30 complex use cases. We had to determine which functionalities to transfer, modify, and implement anew.

Another challenge we encountered was related to requirement documentation. Developers provided feedback that the requirements were often outdated and excessively lengthy to read. We aimed to address this issue as well.

Proposed solution

We began by reviewing the documentation of the current version. Based on this, we created a table in Confluence containing all the use cases for the new service, Hosted PBX. This document was used to capture new requirements, set priorities, and attach links to design files. Following that, we organized a series of workshops to adjust the use cases based on stakeholder feedback.

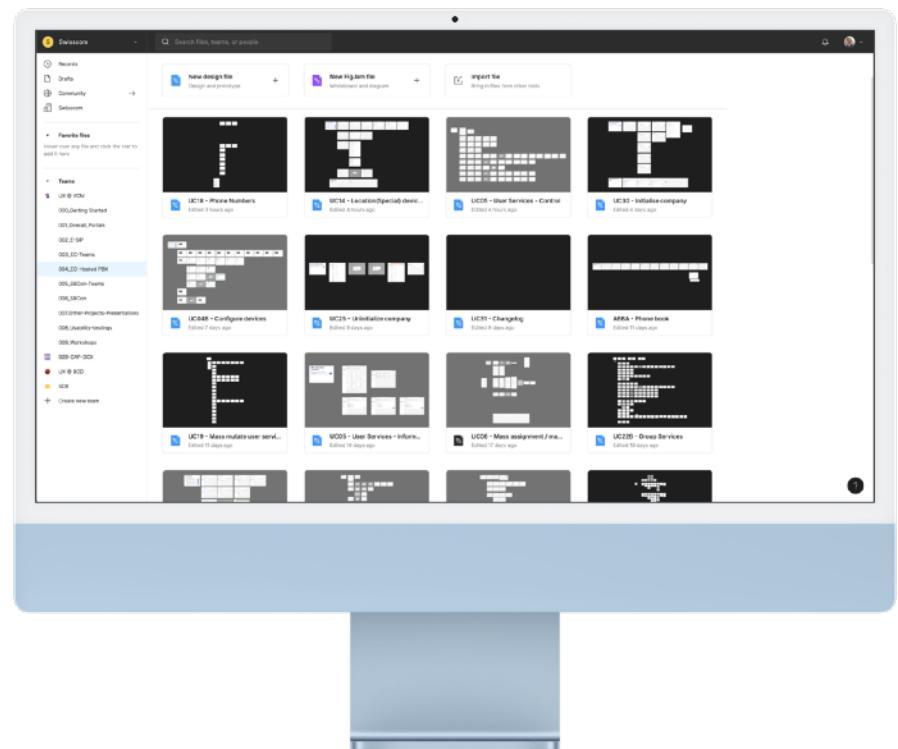
To tackle the challenge associated with documentation, we opted to exclusively use Figma. Rather than relying on written documentation, we designed and prototyped all crucial scenarios and added comments only when necessary.

Lessons learned

The combination of Confluence and Figma worked very good. Developers appreciated the brief documentation and clickable prototypes.

With the help of Figma's design libraries we created rich design documents with speed. We learned to architect design files with component variants in mind.

Instead of listing all 30 use cases, on the following pages I detailed few major changes we made on Hosted PBX.



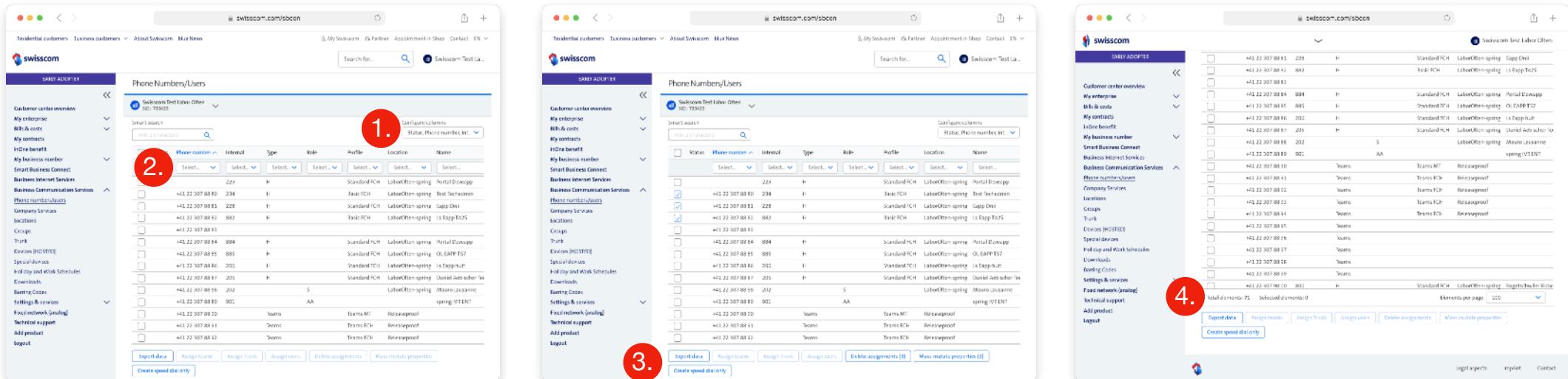
Hosted PBX Figma design files containing all essential use cases

Hosted BPX web portal

Redesigning the phone numbers table

Previous version

According to Adobe Analytics and user feedback, the table displaying phone numbers has emerged as the most frequently accessed page. Through engaging in conversations with users and customer care representatives, we have pinpointed several areas of usability that require improvement:



Status	Phone number	Interval	Type	Role	Profile	Location	Name
	+41 22 307 88 80	234	H	Standard FCH	LatentOffspring	Partial Offspring	
	+41 22 307 88 81	228	H	Standard FCH	LatentOffspring	Test Technicon	
	+41 22 307 88 82	882	H	Standard FCH	LatentOffspring	Sapp Dev	
	+41 22 307 88 83						
	+41 22 307 88 84	884	H	Standard FCH	LatentOffspring	Partial Offspring	
	+41 22 307 88 85	885	H	Standard FCH	LatentOffspring	OI_EAMP_T2	
	+41 22 307 88 86	202	I	Standard FCH	LatentOffspring	Le Delpach	
	+41 22 307 88 87	203	H	Standard FCH	LatentOffspring	Daniel Aebischer	Xia
	+41 22 307 88 88	202	S	LatentOffspring	Marco Jassine	Spring TEST	
	+41 22 307 88 89	901	AA	Teams FCH	Reinseepf		
	+41 22 307 88 90	Yanns	Teams M7	Reinseepf			
	+41 22 307 88 91	Team	Teams FCH	Reinseepf			
	+41 22 307 88 92	Team	Teams FCH	Reinseepf			

- Column configuration - user settings are not stored between sessions, therefore users stoped to them
- Column quick filters - our analytics shows the “Smart search” is used over the column filters due to its performance and capability to search across the entire table

- All table actions are always visible and they are displayed in two rows. This takes up space from the phone numbers table. Users have difficulty to learn what options they have with the current selection.

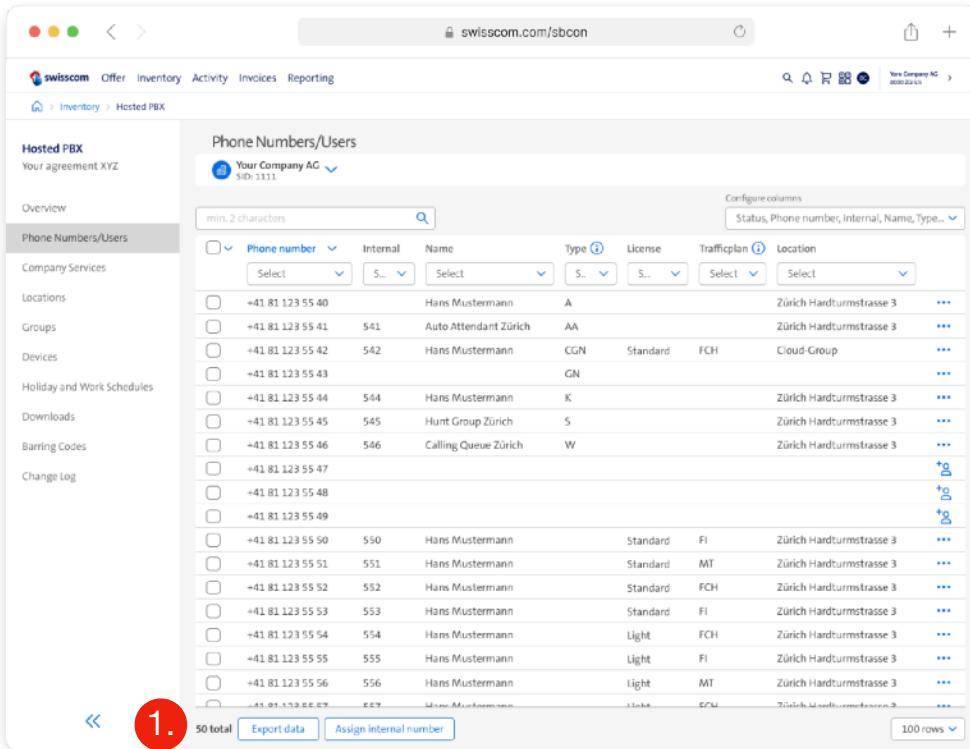
- The total /selected items, together with pagination setting is only visible after the user scrolled to the end of the table. Most of the users never discovered this section

Hosted BPX web portal

Redesigning the phone numbers table

Temporary solution

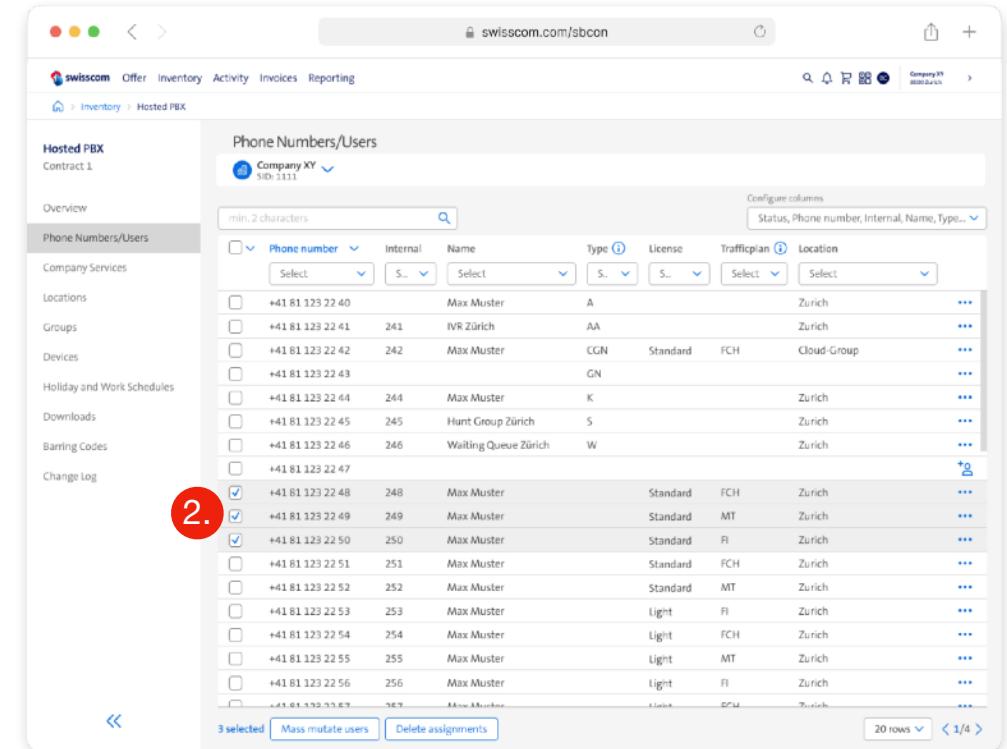
As a quick-win towards better usability we made the following table improvements:



This screenshot shows the original state of the "Phone Numbers/Users" table. It lists multiple rows for each phone number, such as "+41 81 123 55 40" and "+41 81 123 55 41". Each row contains columns for Phone number, Internal, Name, Type, License, Trafficplan, and Location. The "Name" column consistently displays "Hans Mustermann". The "Type" column includes options like "Standard", "FCH", and "CGN". The "License" column includes "GN" and "K". The "Trafficplan" column includes "Cloud-Group" and "Zürich Hardturmstrasse 3". The "Location" column includes "Zürich Hardturmstrasse 3" and "Zurich". Each row has a "More" button at the end.

1.

- The two rows were merged into a single row. Only the actions relevant to the current context are displayed, everything else stays hidden.



This screenshot shows the redesigned state of the "Phone Numbers/Users" table. The previous two rows for "+41 81 123 55 40" and "+41 81 123 55 41" have been merged into a single row. The "Name" column now shows "Auto Attendant Zürich" for the first row and "Hans Mustermann" for the second row. The "Type" column shows "AA" for the first row and "Standard" for the second row. The "License" column shows "GN" for the first row and "K" for the second row. The "Trafficplan" column shows "Cloud-Group" for the first row and "Zürich Hardturmstrasse 3" for the second row. The "Location" column shows "Zürich Hardturmstrasse 3" for both rows. The "More" button is still present at the end of the row.

2.

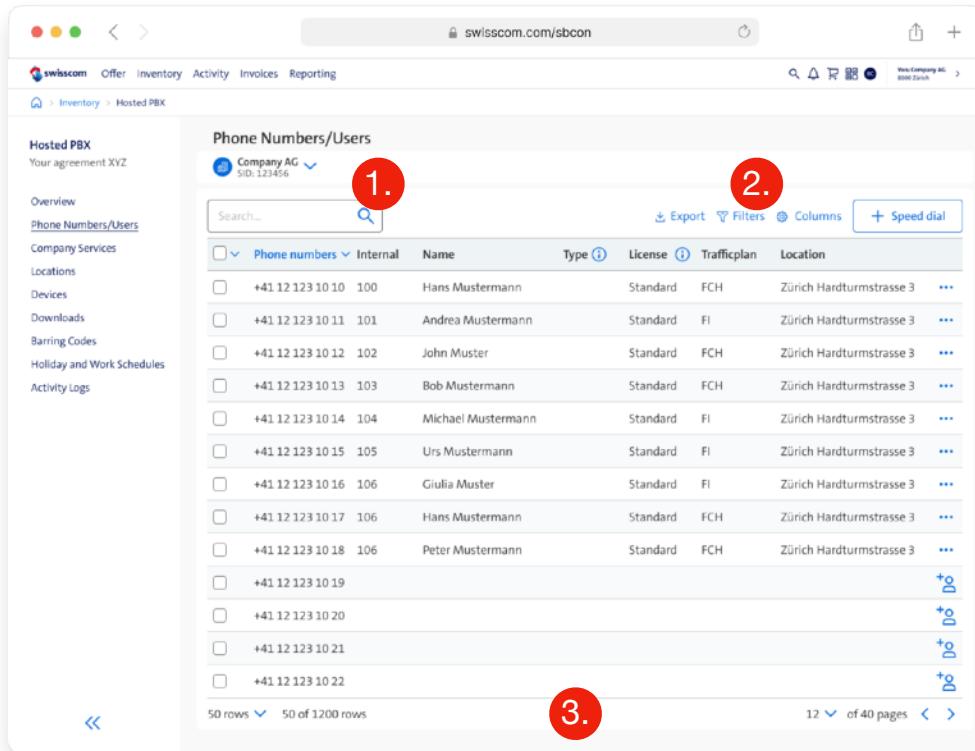
- When phone numbers are selected, the footer shows only the selected items and possible actions with those items.

Hosted BPX web portal

Redesigning the phone numbers table

Final version

The result of the ideation session, usability testing and alignment with other UX teams.



Phone Numbers/Users

Search... 🔍

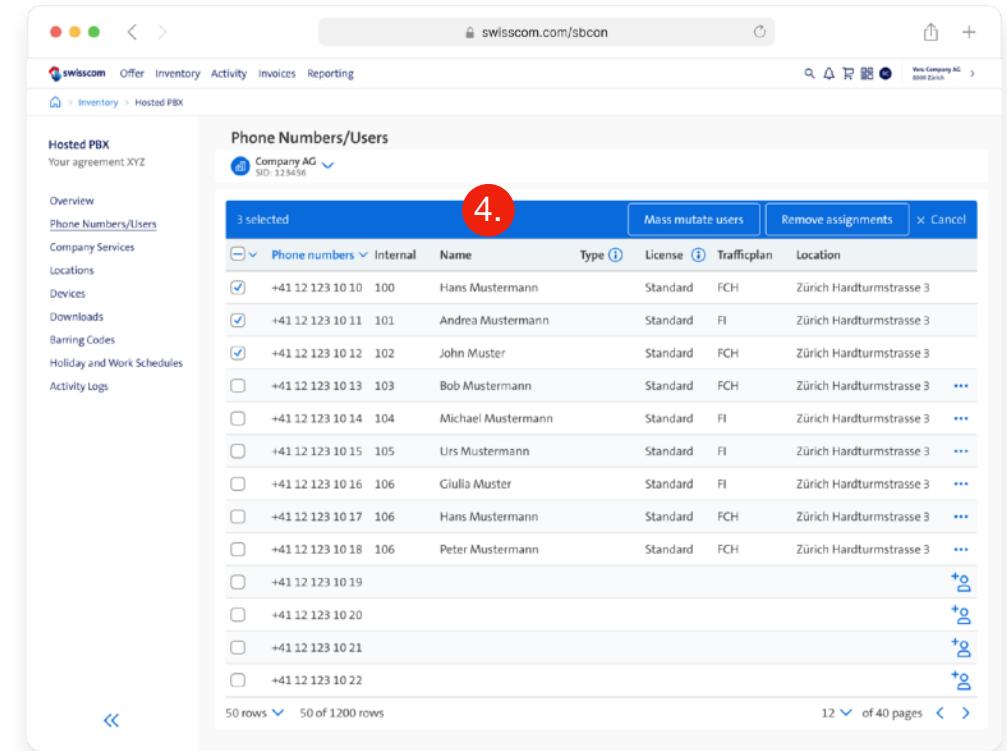
Export Filters Columns + Speed dial

<input type="checkbox"/>	Phone numbers	Internal	Name	Type ⓘ	License ⓘ	Trafficplan	Location	⋮
<input type="checkbox"/>	+41 12 123 10 10	100	Hans Mustermann	Standard	FCH	Zürich Hardturmstrasse 3	...	
<input type="checkbox"/>	+41 12 123 10 11	101	Andrea Mustermann	Standard	FI	Zürich Hardturmstrasse 3	...	
<input type="checkbox"/>	+41 12 123 10 12	102	John Muster	Standard	FCH	Zürich Hardturmstrasse 3	...	
<input type="checkbox"/>	+41 12 123 10 13	103	Bob Mustermann	Standard	FCH	Zürich Hardturmstrasse 3	...	
<input type="checkbox"/>	+41 12 123 10 14	104	Michael Mustermann	Standard	FI	Zürich Hardturmstrasse 3	...	
<input type="checkbox"/>	+41 12 123 10 15	105	Urs Mustermann	Standard	FI	Zürich Hardturmstrasse 3	...	
<input type="checkbox"/>	+41 12 123 10 16	106	Giulia Muster	Standard	FI	Zürich Hardturmstrasse 3	...	
<input type="checkbox"/>	+41 12 123 10 17	106	Hans Mustermann	Standard	FCH	Zürich Hardturmstrasse 3	...	
<input type="checkbox"/>	+41 12 123 10 18	106	Peter Mustermann	Standard	FCH	Zürich Hardturmstrasse 3	...	
<input type="checkbox"/>	+41 12 123 10 19							
<input type="checkbox"/>	+41 12 123 10 20							
<input type="checkbox"/>	+41 12 123 10 21							
<input type="checkbox"/>	+41 12 123 10 22							

50 rows ⏮ 50 of 1200 rows

12 ⏮ of 40 pages < >

1. Search bar - remains the main action due to it's high usage
2. Table Actions, exports, filters - actions related to the table content were moved to the top-right area of the header. Inspired by Carbon Design system from IBM
3. Table footer - contains only generic table actions like pagination



Phone Numbers/Users

3 selected

Mass mutate users Remove assignments × Cancel

⋮ Phone numbers Internal Name Type ⓘ License ⓘ Trafficplan Location

<input checked="" type="checkbox"/>	Phone numbers	Internal	Name	Type ⓘ	License ⓘ	Trafficplan	Location	⋮
<input checked="" type="checkbox"/>	+41 12 123 10 10	100	Hans Mustermann	Standard	FCH	Zürich Hardturmstrasse 3	...	
<input checked="" type="checkbox"/>	+41 12 123 10 11	101	Andrea Mustermann	Standard	FI	Zürich Hardturmstrasse 3	...	
<input checked="" type="checkbox"/>	+41 12 123 10 12	102	John Muster	Standard	FCH	Zürich Hardturmstrasse 3	...	
<input type="checkbox"/>	+41 12 123 10 13	103	Bob Mustermann	Standard	FCH	Zürich Hardturmstrasse 3	...	
<input type="checkbox"/>	+41 12 123 10 14	104	Michael Mustermann	Standard	FI	Zürich Hardturmstrasse 3	...	
<input type="checkbox"/>	+41 12 123 10 15	105	Urs Mustermann	Standard	FI	Zürich Hardturmstrasse 3	...	
<input type="checkbox"/>	+41 12 123 10 16	106	Giulia Muster	Standard	FI	Zürich Hardturmstrasse 3	...	
<input type="checkbox"/>	+41 12 123 10 17	106	Hans Mustermann	Standard	FCH	Zürich Hardturmstrasse 3	...	
<input type="checkbox"/>	+41 12 123 10 18	106	Peter Mustermann	Standard	FCH	Zürich Hardturmstrasse 3	...	
<input type="checkbox"/>	+41 12 123 10 19							
<input type="checkbox"/>	+41 12 123 10 20							
<input type="checkbox"/>	+41 12 123 10 21							
<input type="checkbox"/>	+41 12 123 10 22							

50 rows ⏮ 50 of 1200 rows

12 ⏮ of 40 pages < >

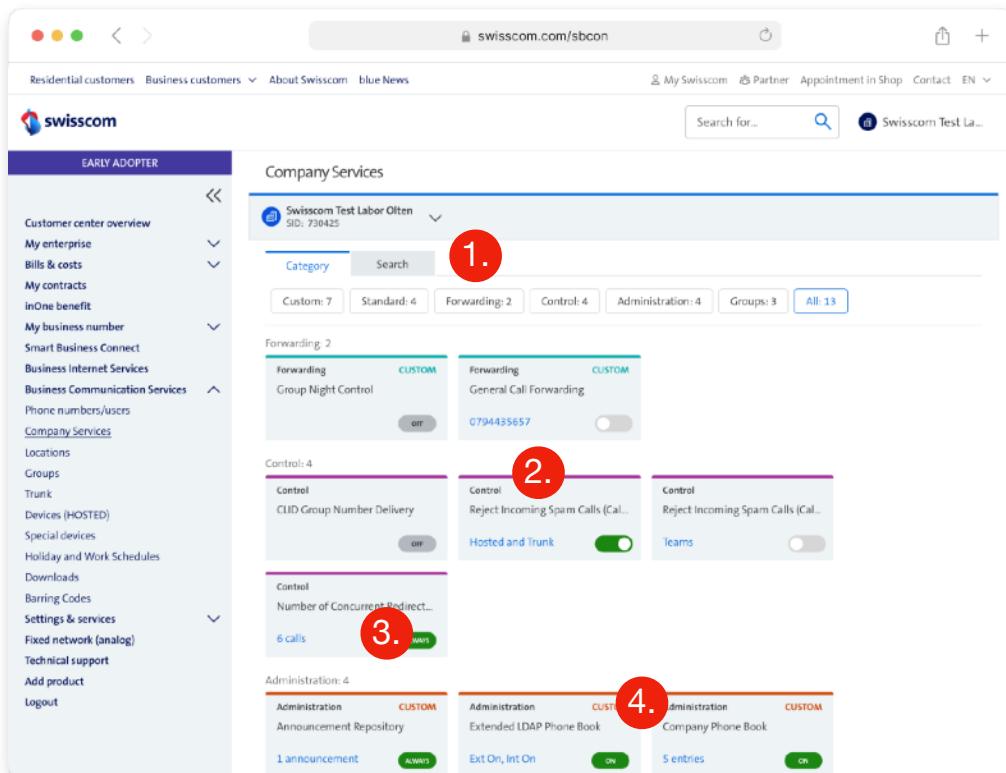
4. When phone numbers are selected, the header conceals search and additional actions, instead emphasizing the actions that are currently available based on the given selection.

Hosted BPX web portal

Redesigning the Services overview

Previous version

The application provides additional features to users throughout Services overview page. There are different services for the company, groups, devices and users. These services are critical to change settings like call forwarding, do not disturb and many other telephone configurations. The following issues were identified:



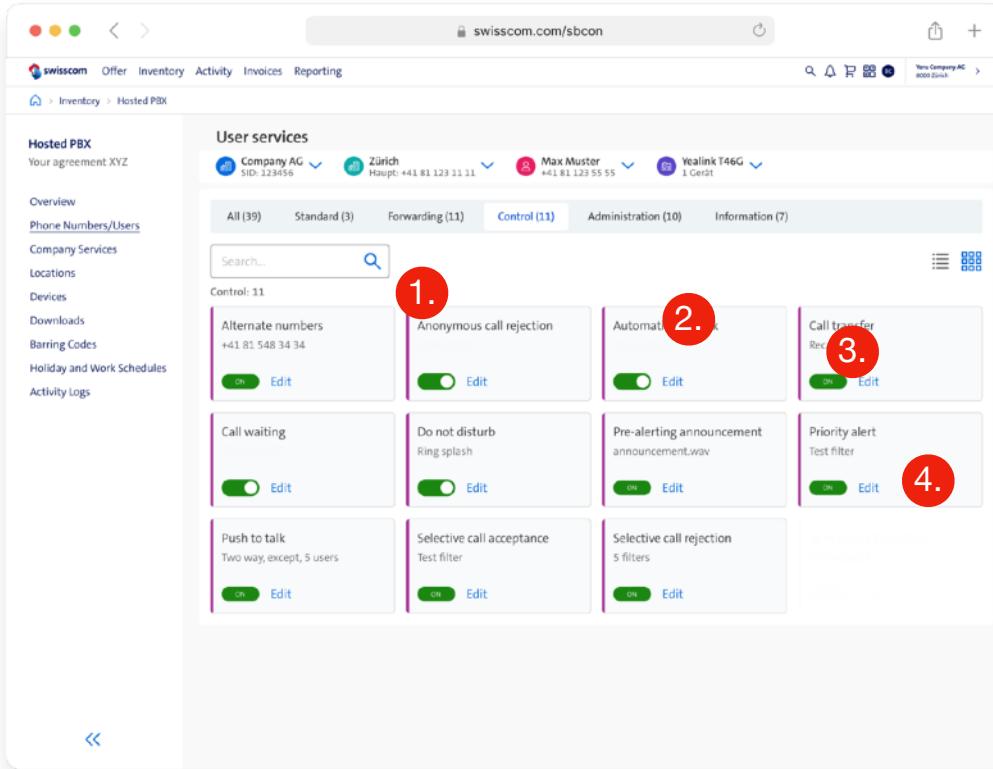
1. Most of the users use the built-in browser search as it is more convenient as switching to search tab, select search input and start typing.
2. The layout for the most commonly used screen size has 3 columns. Because of this users see only fewer services at a time.
3. Too many service status makes it hard to understand and remember them.
4. The service category titles are displayed redundantly.

Hosted BPX web portal

Redesigning the Services overview

Final version

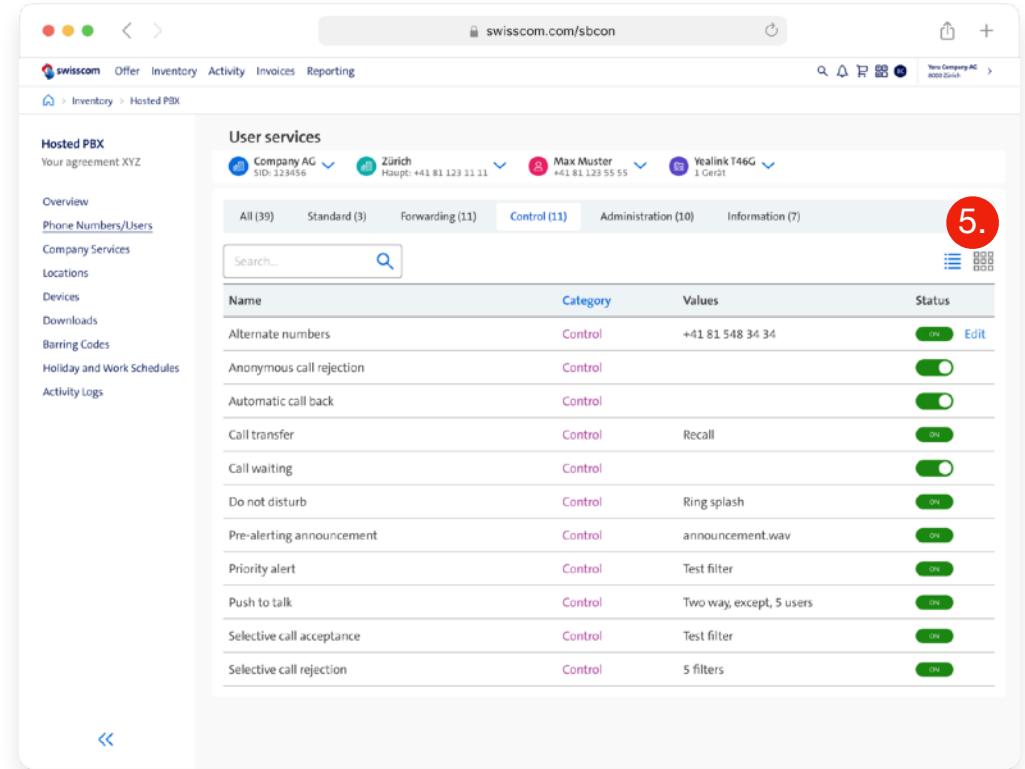
This overview serve as a cross-route where end users want to quickly find and configure, or turn on/off a service. The final design received many positive feedback from users and other stakeholders.



The screenshot shows the final version of the services overview. At the top, there's a header with the Swisscom logo, navigation links (Offer, Inventory, Activity, Invoices, Reporting), and user information (Yara Company AG, Zürich). Below the header is a breadcrumb trail: Inventory > Hosted PBX. The main content area is titled "User services" under "Hosted PBX". It displays a grid of service cards. A search bar is positioned above the grid. The cards are arranged in four columns. Red circles with numbers 1 through 4 point to specific features: 1. Search field moved next to category filters, 2. Four columns for better readability, 3. Refactored service status (off, on, toggle), and 4. Cards containing only relevant information. On the left side, there's a sidebar with navigation links: Overview, Phone Numbers/Users, Company Services, Locations, Devices, Downloads, Barring Codes, Holiday and Work Schedules, and Activity Logs.

1. Search field moved next to category filters.
2. For the same resolution we now provide 4 columns, which makes the page compacter and allows to display more services at once.
3. The service status was refactored to contain only 3: off, on, and a toggle.
4. The cards contain only relevant information without additional noise.

As a next step the search field requires a keyboard shortcut as the users use mostly keyboard.



The screenshot shows the redesigned version of the services overview. The layout is similar to the previous one, with the Swisscom logo, navigation links, and user information at the top. The breadcrumb trail is the same: Inventory > Hosted PBX. The main content area is titled "User services" under "Hosted PBX". Instead of a grid, it uses a table view with columns for Name, Category, Values, and Status. Red circles with numbers 1 through 4 point to specific features: 1. Search field moved next to category filters, 2. Four columns for better readability, 3. Refactored service status (off, on, toggle), and 4. Cards containing only relevant information. A red circle with number 5 points to the table icon in the top right corner, indicating a new view introduced for readability. On the left side, there's a sidebar with navigation links: Overview, Phone Numbers/Users, Company Services, Locations, Devices, Downloads, Barring Codes, Holiday and Work Schedules, and Activity Logs.

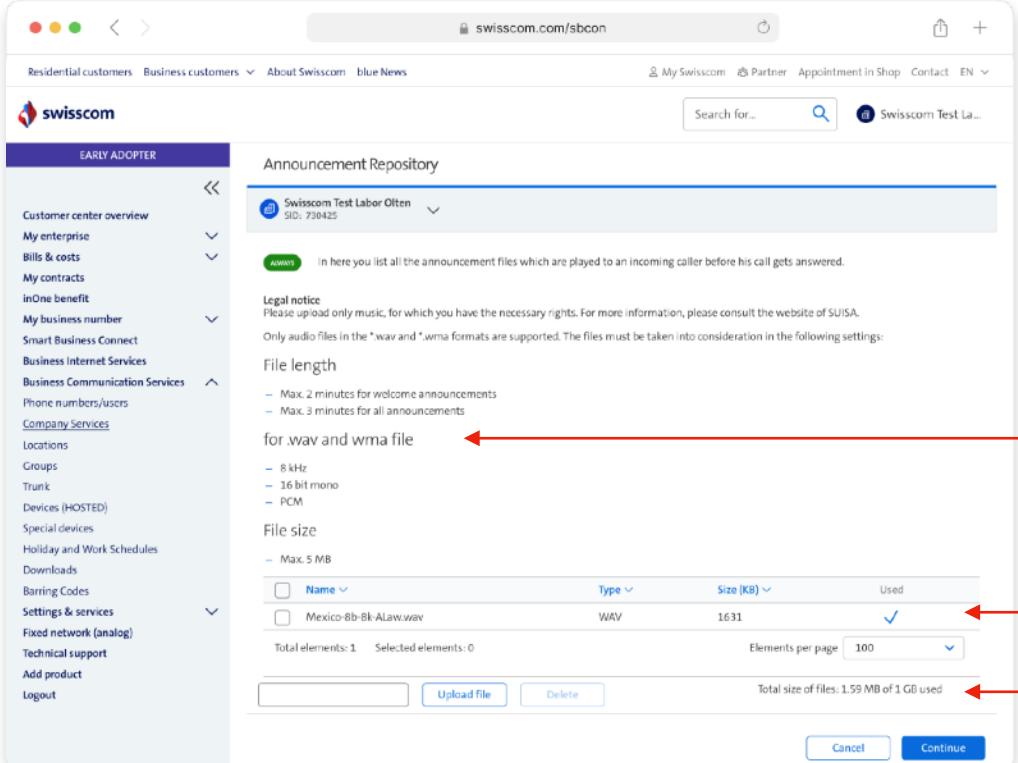
5. We introduced a new view, as some users preferred the classic list view due to readability

Hosted BPX web portal

Redesigning the Announcement repository

Previous version

Compared to the phone numbers table, this feature is used infrequently; however, it helps with an important user goal: manage announcement files across the entire company. Our usability testing revealed few usability issues:



Name	Type	Size (KB)	Used
Mexico-8b-8k-ALaw.wav	WAV	1631	<input checked="" type="checkbox"/>

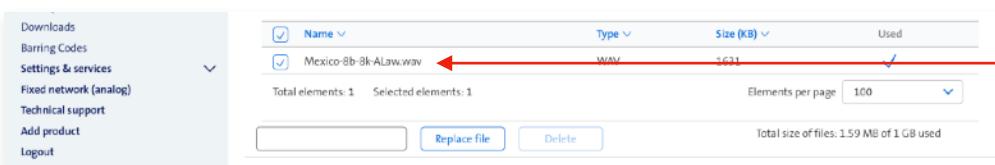
Total elements: 1 Selected elements: 0 Elements per page: 100 Total size of files: 1.59 MB of 1 GB used

Cancel Continue

Legal notice and information about file requirements are taking up too much space. The most important part, where users manage the files is at the bottom of the screen.

We learned that users want to download the announcement files to reuse them for other companies or they wanted to have a backup. This was not possible.

The site displays 3 different file units (kB, MB, GB) which is confusing for users.



Name	Type	Size (KB)	Used
<input checked="" type="checkbox"/> Mexico-8b-8k-ALaw.wav	WAV	1631	<input checked="" type="checkbox"/>

Total elements: 1 Selected elements: 1 Elements per page: 100 Total size of files: 1.59 MB of 1 GB used

Replace file Delete

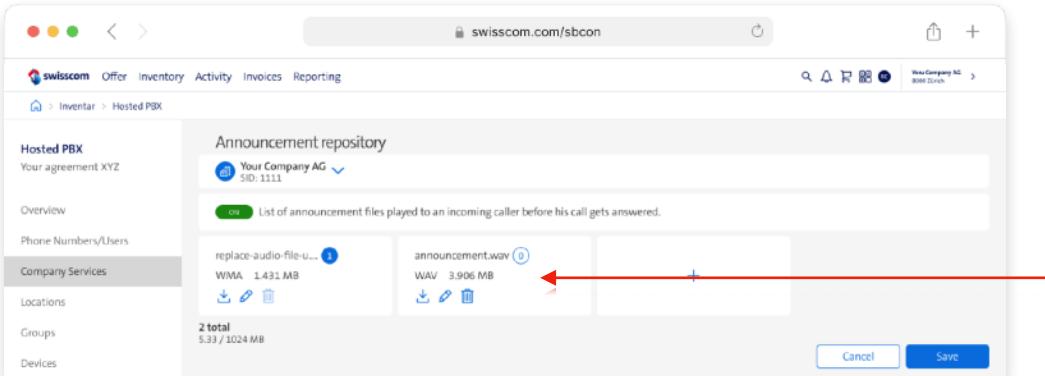
When an announcement file is used in several places and if it needs to be updated, the replace feature can simplify this task. However most of the users did not know about it as it is hidden.

Hosted BPX web portal

Redesigning the Announcement repository

Final version

Apart from improving the feature usability, we wanted to make it more modern, therefore we experimented with a new layouts and we settled with the card layout:

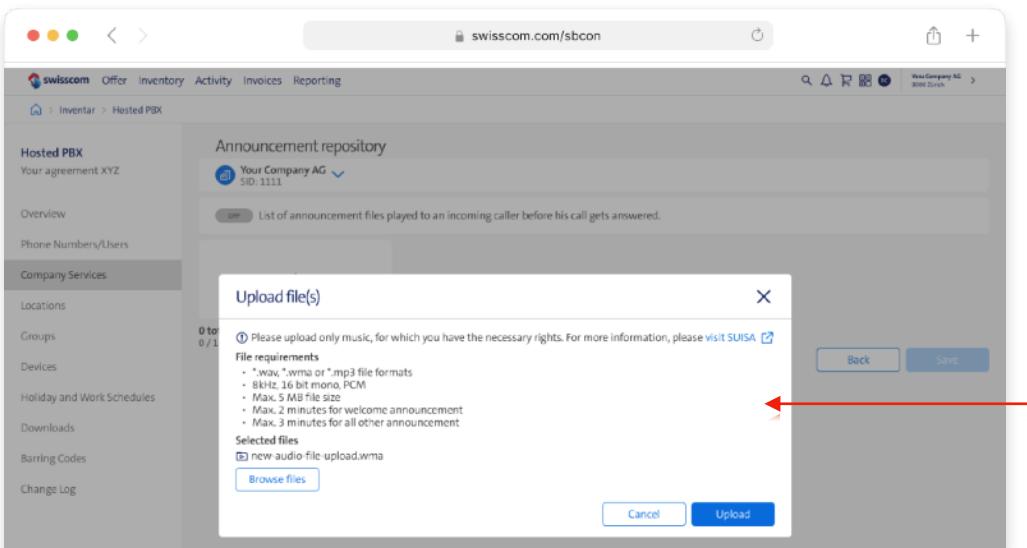


The screenshot shows the 'Announcement repository' page. It displays a list of files with their names, sizes, and file types. One file, 'announcement.wma', is highlighted with a red arrow pointing to its 'replace' icon. The interface includes a sidebar with navigation links like 'Overview', 'Phone Numbers/Users', 'Company Services' (which is selected), 'Locations', 'Groups', and 'Devices'. At the bottom right are 'Cancel' and 'Save' buttons.

Results

Using the pencil icon to replace the file is not the best solution, but from all the alternatives this one worked the best.

Card layout works in this context, because our target clients have low number of announcement files (3-4).



The screenshot shows the 'Announcement repository' page with a modal window titled 'Upload file(s)'. The modal contains instructions about file requirements, a list of selected files ('new-audio-file-upload.wma'), and upload buttons ('Back', 'Save', 'Upload'). A red arrow points to the top of this modal window. The sidebar and bottom buttons are visible at the bottom of the page.

Only single file unit is used

User can download, replace and delete announcements.

Based on user feedback, we extended the usage information. The badge shows how many times and where the announcement is used.

We moved legal and file requirements related information into a modal, right before the upload happens.

Hosted BPX web portal

Conclusion

At the time of writing this documentation, all use cases have been designed, and the project is currently in development. We have received positive feedback not only from the product owner but also from customer care and our early adopter user group.

To enhance collaboration, we conducted two full-day design thinking workshops involving business stakeholders and developers, which significantly improved our internal communication.

Moving forward with the project, our next steps include providing support to the development team and formulating new hypotheses that will serve as the foundation for additional features.

Hosted PBX design system

Feb 2022 - Dec 2023

Problem statement

To create a consistent experience for business customers, all web applications at Swisscom will be merged into a single portal. The telephone configuration portal called Smart Business Connect (new name: Hosted PBX) was also part of this project and needed to be adapted.

Additionally, the development team required the detailed visualization of several scenarios, which meant that we needed a way to produce consistent screens fast.

Project goal

Create a design system which includes new guidelines and consists of reusable elements which align developers.

Team

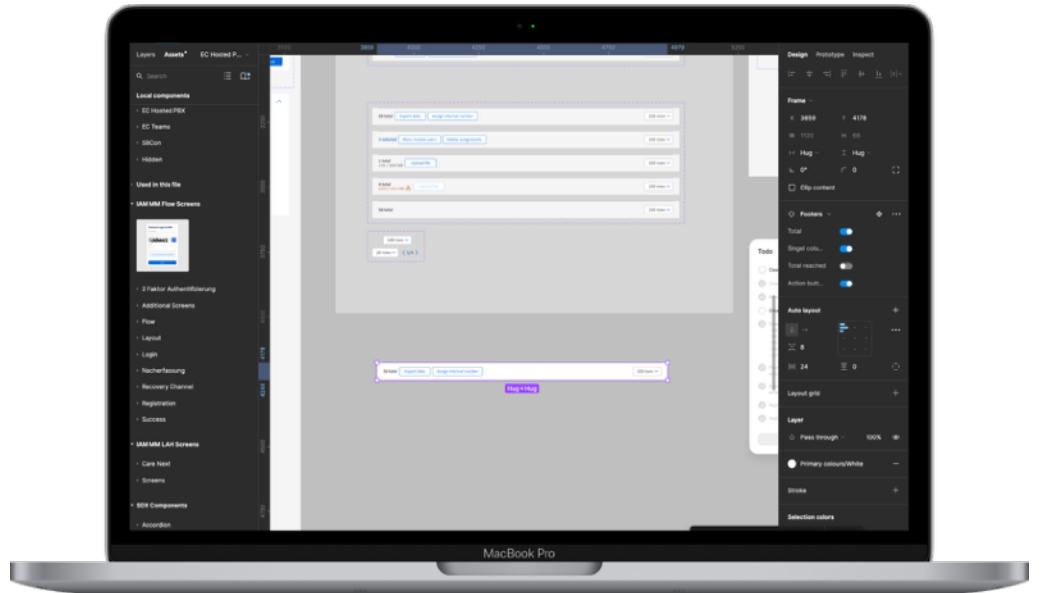
2 UX Designers

Roles

I worked with another UX designer to create this design system.

Activities

- Visual design (Figma)
- Interaction design (Figma)
- Prototyping (Figma)
- Usability testing
- IT handover



Designing a reusable footer component with different variants in Figma.

Hosted PBX design system

Getting started

Challenges

The first question was, if we really need this system or can we use the global design system from Swisscom?

The second challenge was, if we create such a system, what should we include there?

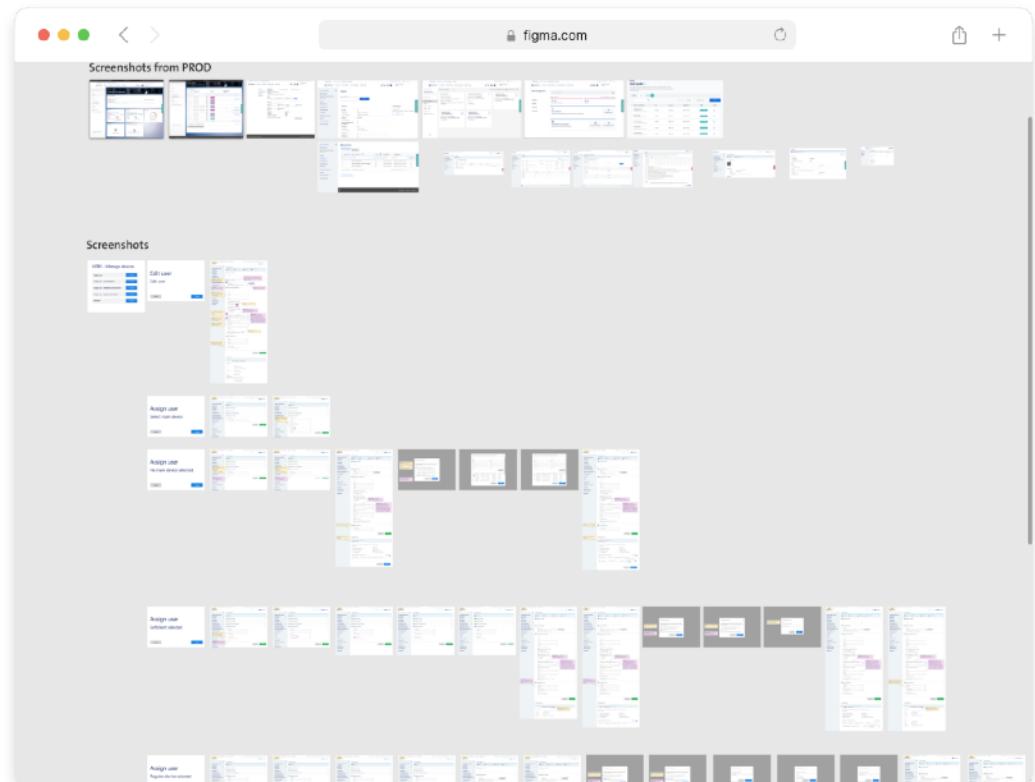
Proposed solutions

While designing the first use cases, we experimented with the global Swisscom design system. It proved from the beginning that many edge cases were not covered and the components were unnecessarily complex. The goal of such a system should be productivity and consistency, which was not delivered. We've decided to create our own system.

Regarding the challenge about the content, we have chosen a pragmatic approach. First, we audited the current application to note all possible layouts. Then, we redesigned those layouts to fit the new style guide. Lastly, we started to produce controls which were required only for the first use cases.

Lessons learned

In retrospect, it was a good decision to build a better usable system. Thanks to tools like Figma, it does not take too much time. The system is flexible, so it is easy to incorporate branding changes.



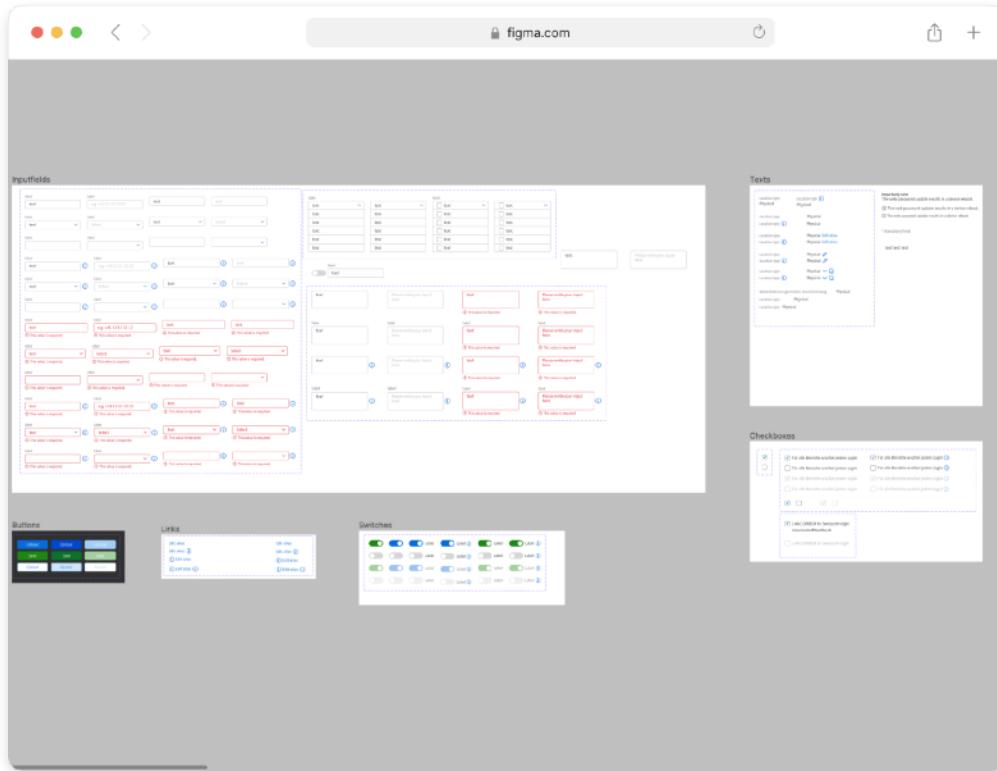
A Figma file with screenshots of current version to identify all high level layouts.

Hosted PBX design system

Designing the system

Creating first component variants

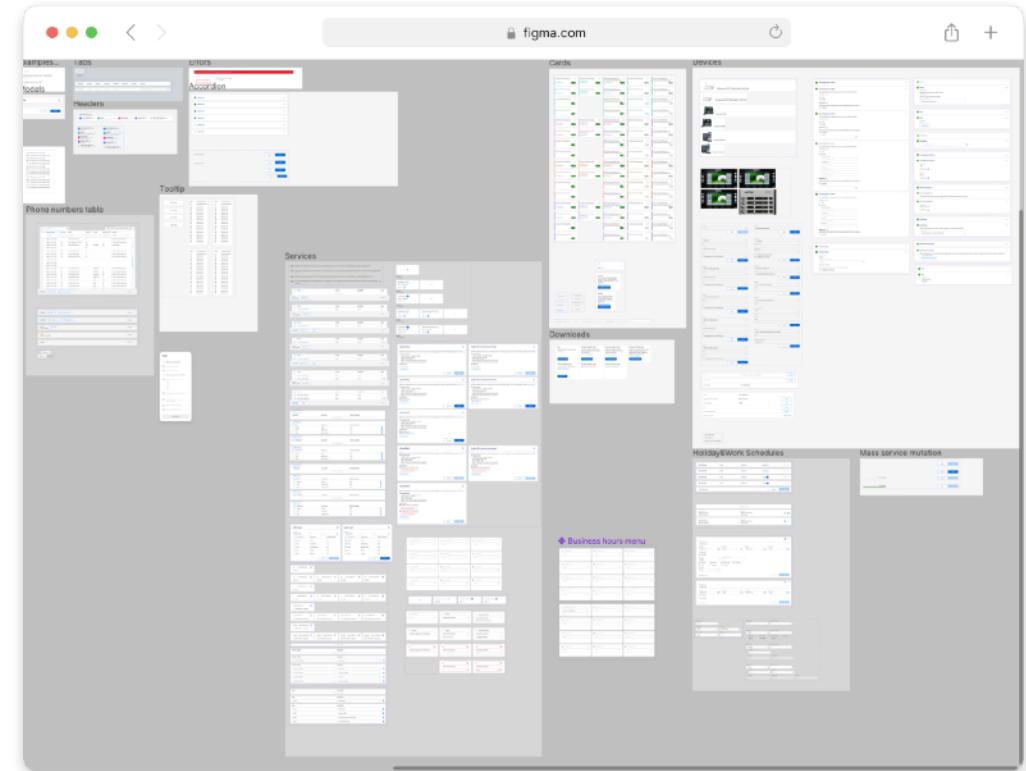
Once we agreed on the common layout styles, we started to produce the first use case designs. As we progressed, we added controls to our system. The very first ones were buttons, text fields, links, checkboxes, and other basic controls.



Control component variations in Figma library

Composing components

Later, it became clear which components are repeated together and therefore they are candidates to be global compositions. We moved from local components into our design system.



Composed components in Figma library

Hosted PBX design system

Conclusion

The design system improved our productivity and helped us to collaborate effectively.

We received compliments from the development team, as they can discover all the variations of components in a single place.

Creating variants is essential to test edge cases. We wanted to use this system for all our designs, so we iterated over components and re-architected the variants.

Component compositions might look like overkill; however, for a multi-language application with many scenarios, flexibility is key.

CSX mobile banking

01.2019 - 06.2020

Problem statement

The mobile banking app for iOS and Android was a hybrid application with low performance and few features. Because of that, the app had low ratings in App Store as well as Play Store.

Goal

Reimagine and design a modern mobile banking experience.

Team

4 native iOS developers, 3 native Android developers, a business analyst, a scrum master, and a product owner.

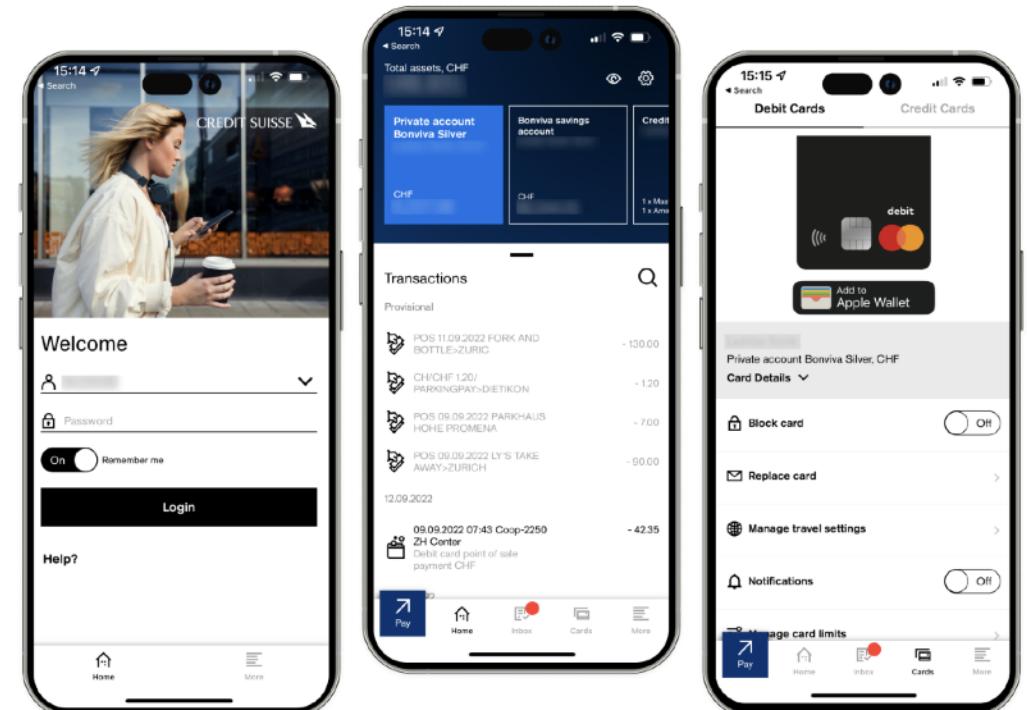
Roles played

I worked with 2 senior UX designers to research and design the concept.

During the implementation, I was integrated into the mobile development team. The team was based in Zürich and India.

Activities

- Wireframing
- Visual design (Sketch)
- Interaction design (Sketch)
- Prototyping (InVision, Origami Studio)
- Focus groups
- Usability testing
- Running design thinking workshops
- Stakeholder management & IT Handover



Final design of the new CSX mobile banking app

CSX mobile banking

Getting started

Challenges

1. The project had a large number of stakeholders with different interests.
2. We had no clear idea about our target audience and their unmet needs.
3. The new concept was constrained by the old backend

Proposed solutions

1. We invited stakeholders to a series of workshops where they shared and voted for ideas. Those ideas served as the first hypotheses about the app. Later, thanks to the workshops, we created a common vision.
2. To clarify who is our primary audience, we interviewed stakeholders and customer facing colleagues. Also, we checked in the database which customers use mobile banking and what do they have in common. Lastly, we conducted two focus groups. Combining findings from all sources, we were able to define our target user and her most important goals:
 1. Check how much money I have?
 2. What were my latest transactions?
 3. I need to pay this bill.
3. We talked with engineers early to understand what data is available and what are possible changes they can make. Unfortunately, we needed to discard few ideas at the beginning due to technical limitations.

Lessons learned

The beginning was very chaotic, but we needed to accept this and trust the process. We learned to keep stakeholders in the loop, in exchange they were helping to push the concept further.



Initial scenarios sketched on a workshop with stakeholders

CSX mobile banking

Designing the home screen

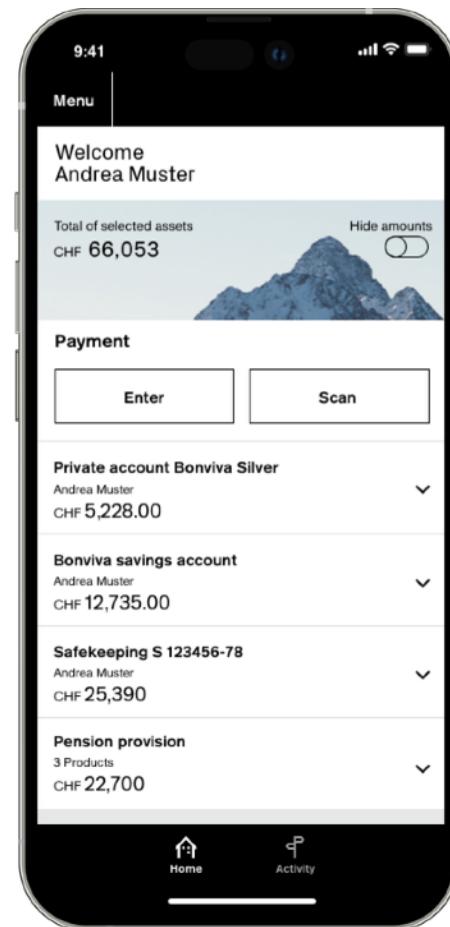
Previous version

The version before the launch of the new app was a hybrid application, it was a responsive website packed into an app. In certain scenarios this solution can work, however for a mobile banking app competing with many other apps it was not an option.

This hybrid solution had many limitations. There was a delay once the user tapped on the screen. Native bottom navigation could not be used. More modern interaction pattern like swiping were not fluent.

When users wanted to check whether a transaction was made they needed to expand an accordion and go to another page and scroll. Once they navigated back, the whole site reloaded, making the application feel slow.

Apart from performance and usability challenges, there was negative feedback on the branding. For the users the black and white was very sad and depressing.



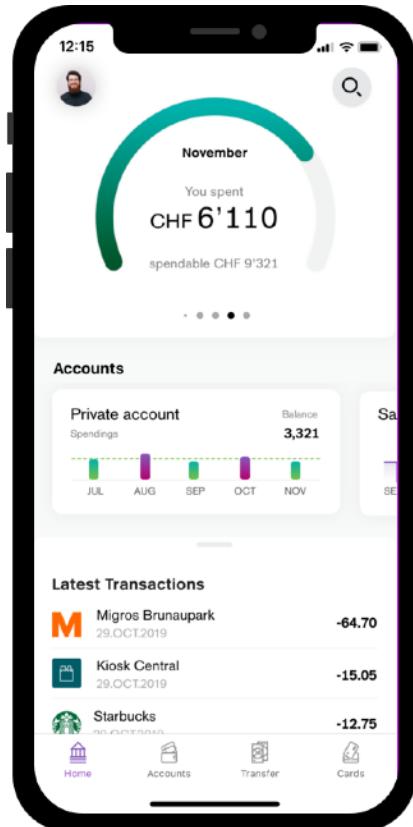
Home screen
Previous version

CSX mobile banking

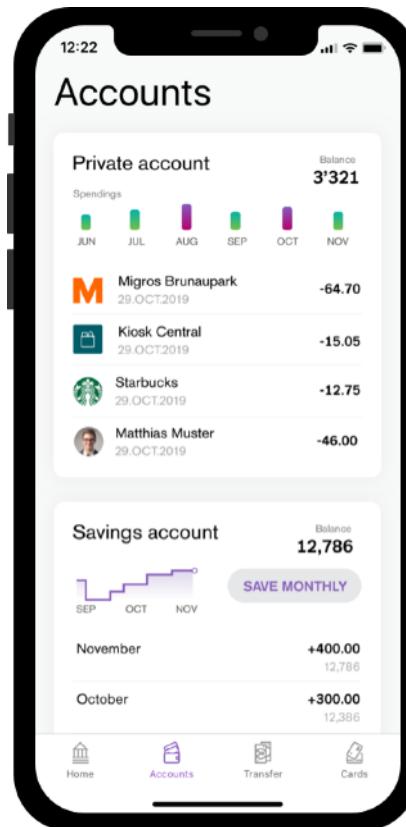
Designing the home screen

Early designs

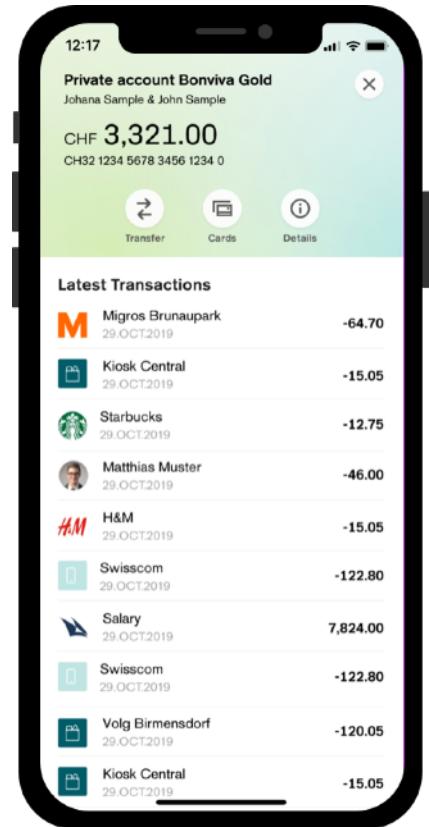
We wanted to set an ambitious vision for the app, therefore we went far away from the current version. The visual language was moderner and brighter. The interactions were fluid, the information kept at minimum.



Home screen
Early design



Accounts overview
Early design



Transactions overview
Early design

Lessons learned

This concept was made interactive by Origami Studio. It motivated the team and gave them the feeling of working on something great and exceptional. However, we needed adapt the design as the data was missing and the visual design was far from our current branding. Additionally, logos and profile pictures showed legal and technical concerns.

CSX mobile banking

Designing the home screen

Final design

As a result of branding decision blue has became the main colour and it was not allowed to use shadows or border radius. We accepted these constrains and use it to design the final version.

The new home page is native, therefore we could use fluent swipe gestures to speed up user navigation. For example, the user can quickly scroll horizontally to check how much money she or he has on her or his accounts. Other example is swiping up the transactions list and continue scrolling.

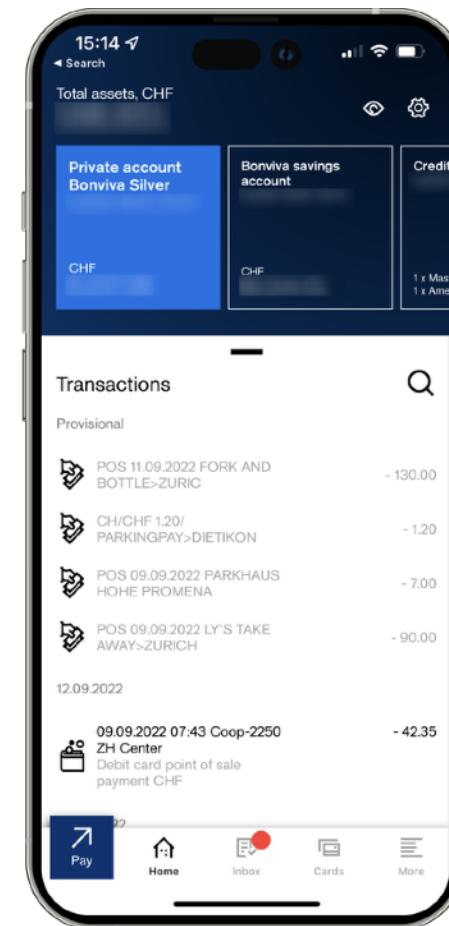
This pattern was borrowed from Apple and Google Maps.

In summary, the top section of the home page answers the question: how much money I have? The middle section helps to find a transaction made or received. Finally, at the bottom we placed actions like pay and showing debit and credit cards.

Conclusion

With the help of Origami Studio we were able to quickly prototype and iterate the mobile interactions and test with target users. We were able to improve the page by bringing the data forward and providing an easy way to browse it.

After production release the app received positive feedback from stakeholders and users.



Online payments

Apr 2018 - Jun 2019

Problem statement

Over 80% of the online banking usage is related to payments. However, this module faced several challenges:

- Costly maintenance due to two separated portals for private and business clients
- Advanced features like recurring payments and templates were not used
- High number of open payments, which caused delayed payments
- High number of duplicate payments, which resulted in a loss of clients' money
- Above-average support calls related to payment issues

Project goal

Provide private and business clients with a unified and improved experience.
Resolve the above-mentioned major usability issues.

Team

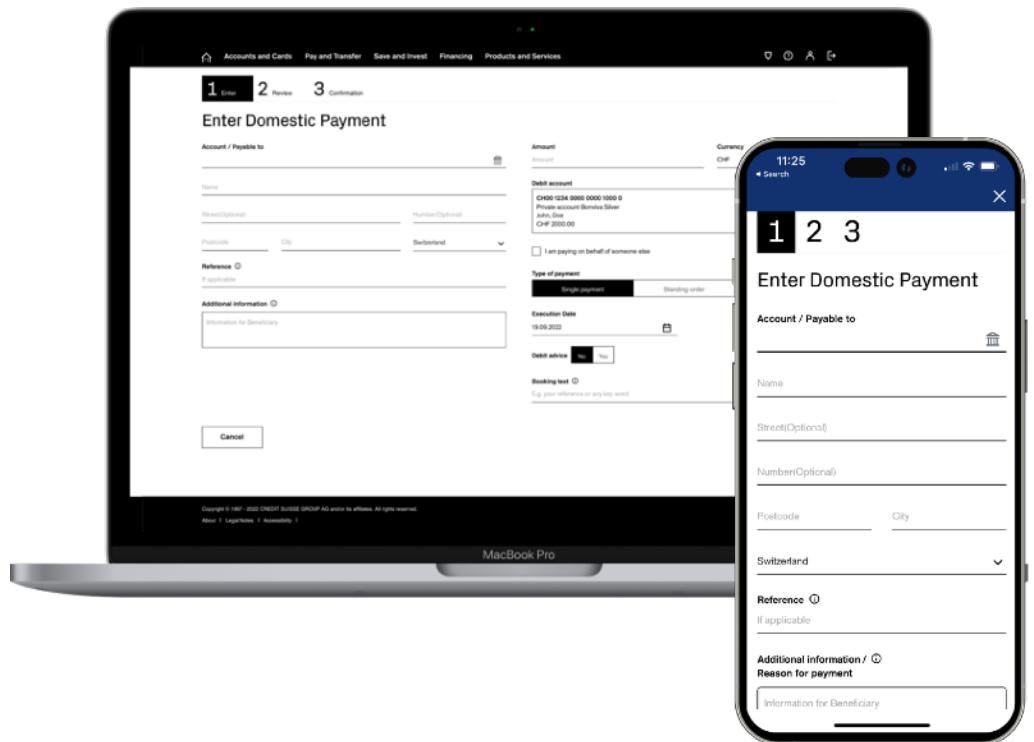
Developers (on-, offshore), business analysts, product owner, scrum master, product managers, and customer support.

Roles

As a lead UX designer, I was responsible for the overall payments experience.

Activities

- Interaction design (Sketch)
- Prototyping (InVision)
- Usability testing
- Running design thinking workshops
- Stakeholder management
- IT handover



Final version of domestic payment on desktop and mobile.

Online payments

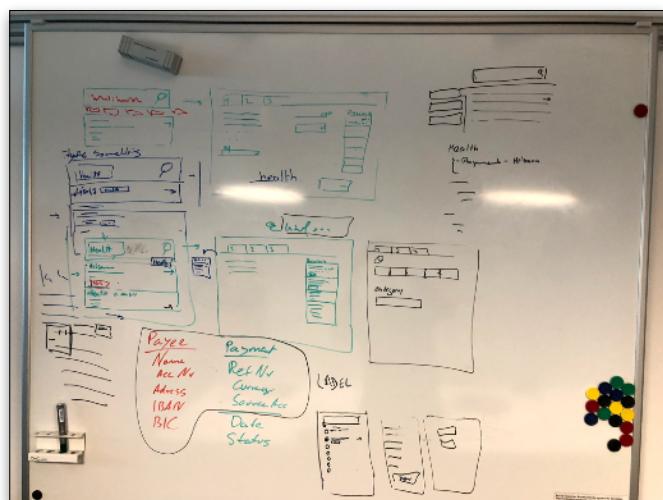
Getting started

Challenges

The two payments portals for private and business users have evolved over the years, and we noticed a change in resistance from the product team side.

The first challenge was to understand the stakeholders' views.

Secondly, we needed to bring all private and business stakeholders together and build a common vision for the new payments module.



Whiteboard sketches from design thinking workshops.
We were merging private and business client layout into one.

Proposed solution

We conducted interviews with stakeholders and knowledge transfer sessions with a subject matter expert. Then, we created a list of features which they want to keep and the features they are open to changing.

Later, we ran a series of design thinking workshops to build a vision.

Lessons learned

To fulfill every stakeholder's requirement is difficult. Workshops helped us to align everyone; additionally, we created the "we are in this together" mindset, which improved our collaboration.



Whiteboard sketches from design thinking workshops.
We defined the information architecture for the payment review page.

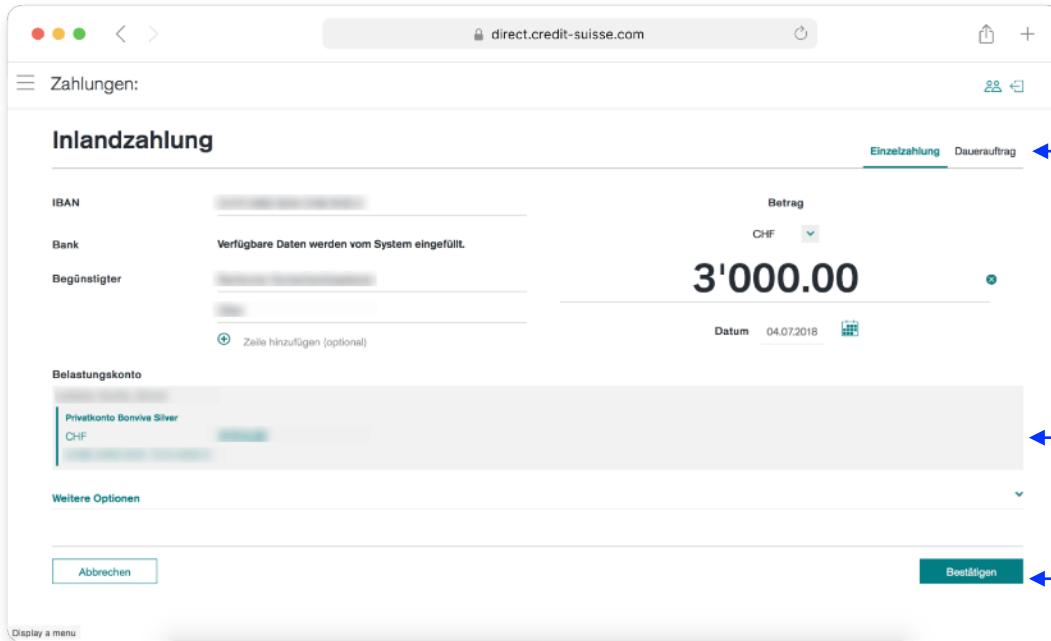
Online payments

Designing the payment entry flows

Previous version

After the research phase, we started preparing designs for payment entry flows of domestic, international, red, orange and later QR payments.

From production database, stakeholders and customer support we learned about existing pain points of the current solution:



Inlandzahlung

IBAN: [REDACTED]

Bank: Verfügbare Daten werden vom System eingefüllt.

Begünstigter: [REDACTED]

Betrag: CHF 3'000.00

Datum: 04.07.2018

Belastungskonto: Privatkonto Bonviva Silver CHF

Weitere Optionen

Abbrechen Bestätigen

Zusätzliche Informationen: Users did not see the standing order feature.

The account section wasn't clear enough and clients used the wrong account while making payments.

Duplicate and incomplete payments, as users did not notice the end of payment flow.

Domestic payment entry
Previous version

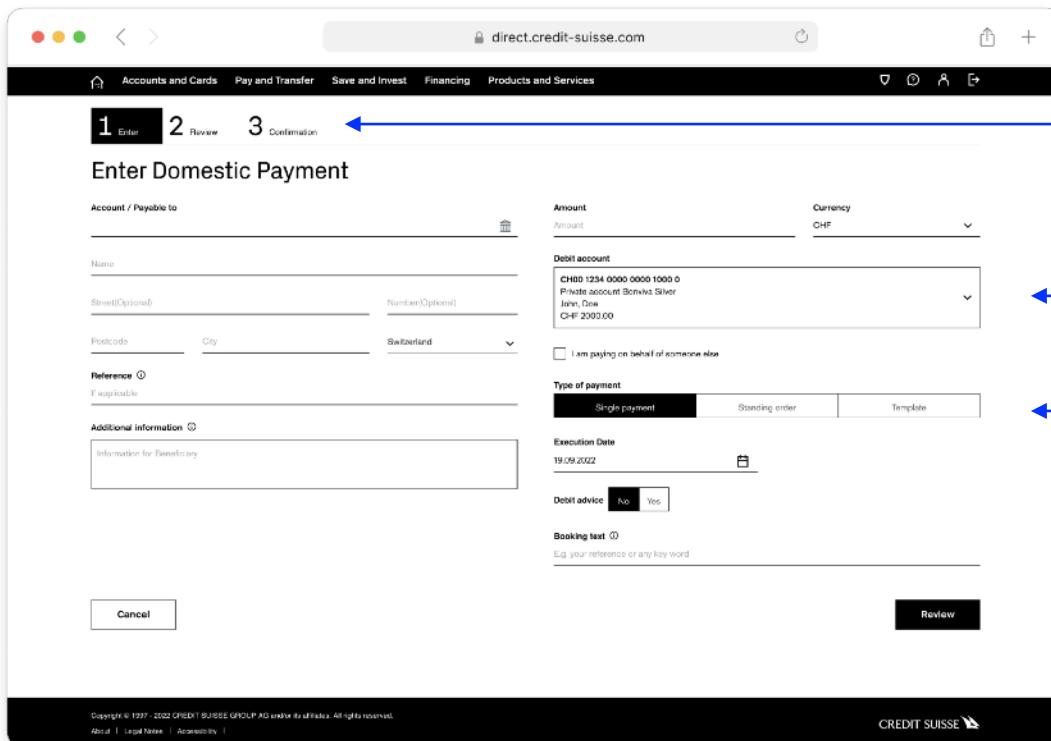
Online payments

Designing the payment entry flows

Final design

We designed the new payment entries using the new corporate brand, which in this case meant changing from turquoise to black.

The entry flows were tested over 16 private and 8 business users.



The screenshot shows a web browser window for direct.credit-suisse.com. The title bar says "direct.credit-suisse.com". The navigation menu includes "Accounts and Cards", "Pay and Transfer", "Save and Invest", "Financing", and "Products and Services". Below the menu, there are three steps: "1 Enter", "2 Review", and "3 Confirmation". A blue arrow points from the "3 Confirmation" step to the "Review" button at the bottom right of the form. The form itself is titled "Enter Domestic Payment". It contains fields for "Account / Payable to" (Name, Street/OPTIONAL, Number/OPTIONAL, Postcode, City, Switzerland), "Debit account" (dropdown menu showing "CH00 1234 0000 0000 1000 0 Private account Boniva Silver Inv. Date CHF 2000.00"), "Amount" (Amount: 1000.00, Currency: CHF), "Type of payment" (radio buttons for "Single payment", "Standing order", and "Template", with "Standing order" selected), "Execution Date" (date: 19.09.2022), "Debit advice" (radio buttons for "No" and "Yes", with "Yes" selected), and "Booking text" (text input field: "E.g. your reference or any key word"). At the bottom left is a "Cancel" button, and at the bottom right is a "Review" button. The footer includes "Copyright © 1997 - 2002 CREDIT SUISSE GROUP AG Zurich Switzerland. All rights reserved.", "About", "Legal Notice", "Accessibility", and the "CREDIT SUISSE" logo.

Results

- Hotlines reported decrease in recurring payment related calls.
- Production database showed decrease in double and abandon payments.

Duplicate & incomplete payments were fixed after we introduced a wizard, which helped users to orient and know when payments are submitted

Instead of showing all accounts, we went back to a simple solution, and used a dropdown instead

Standing order was placed at users' blind spot. We integrated it in the screen, close to the execution date

Domestic payment entry
Final design

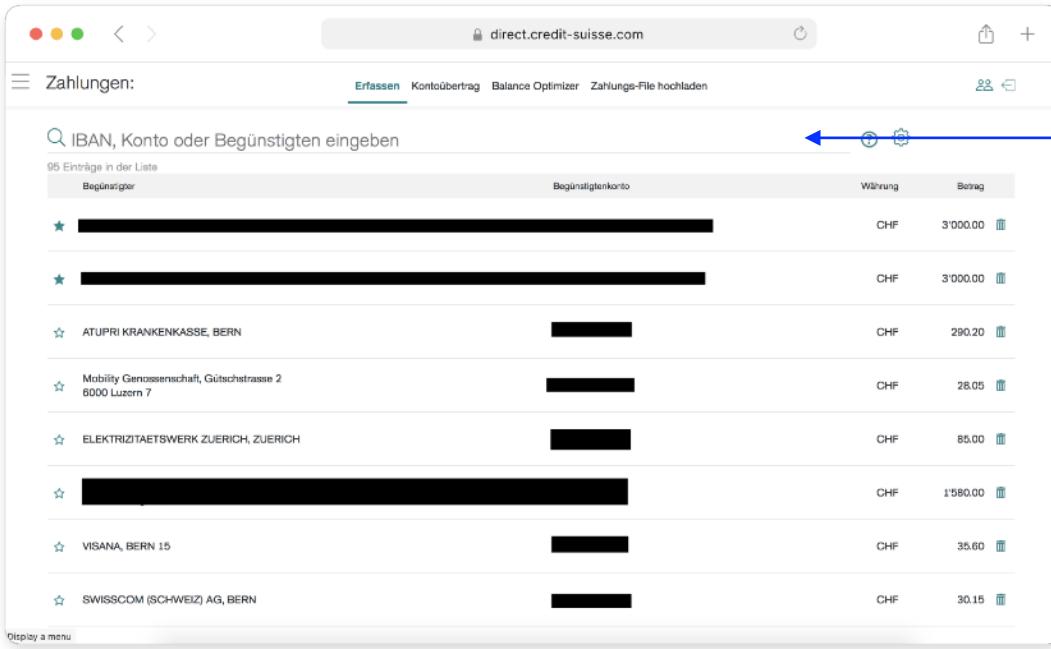
Online payments

Designing the assistant

Previous version

Switzerland has a complex payment system even for private clients. Because of this complexity the bank introduced an assistant to help them.

Unfortunately, this feature brought another layer of confusion. The product team gave up solving this challenge and provided a YouTube video as explanation.



The screenshot shows a web browser window for direct.credit-suisse.com. The main heading is "Zahlungen:" with sub-options "Erfassen", "Kontoübertrag", "Balance Optimizer", and "Zahlungs-File hochladen". Below this is a search bar with placeholder text "IBAN, Konto oder Begünstigten eingeben". A blue arrow points from the right side of the search bar to a note about bugs in the autocomplete for IBANs. The main content area displays a table of beneficiaries:

Begünstiger	Begünstigtenkonto	Währung	Betrag
★ [REDACTED]	[REDACTED]	CHF	3'000.00
★ [REDACTED]	[REDACTED]	CHF	3'000.00
★ ATUPRI KRANKENKASSE, BERN	[REDACTED]	CHF	290.20
★ Mobility Genossenschaft, Gütschstrasse 2 6000 Luzern 7	[REDACTED]	CHF	28.05
★ ELEKTRIZITAETSWERK ZUERICH, ZUERICH	[REDACTED]	CHF	85.00
★ [REDACTED]	[REDACTED]	CHF	1'580.00
★ VISANA, BERN 15	[REDACTED]	CHF	35.60
★ SWISSCOM (SCHWEIZ) AG, BERN	[REDACTED]	CHF	30.15

Three blue arrows point from the right margin to specific issues:

- An arrow points to the search bar with the note: "The autocomplete for IBANs had many bugs and lead to wrong payment types."
- An arrow points to the payment type column with the note: "Business users wanted a quick way to select payment type, e.g. international payment."
- An arrow points to the right edge of the table with the note: "Business users were missing information from the payment list"

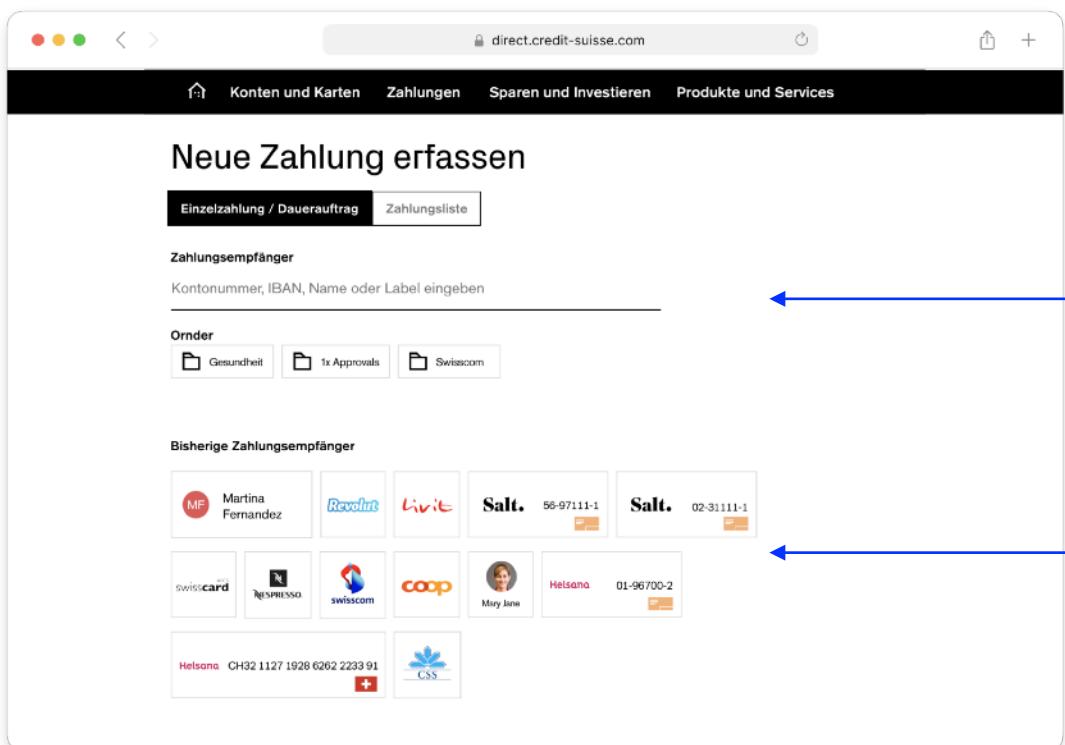
At the bottom of the page, there are links: "Payment assistant" and "Previous version".

Online payments

Designing the assistant

Early designs

We wanted to simplify the assistant as much as possible and come up with a very visual concept:



Neue Zahlung erfassen

Zahlungsempfänger
Kontonummer, IBAN, Name oder Label eingeben

Order
 Gesundheit 1x Approvals Swisscom

Bisherige Zahlungsempfänger

	Martina Fernandez		Revolut		Livit		Salt.	56-97111-1		Salt.	02-31111-1
			Nespresso		swisscom		coop			Helsana	01-96700-2
Helsons CH32 1127 1928 6262 2233 91											

Payment assistant
Early designs

Lessons learned

Payment assistant is used mainly by professional users. It does not mean only business, but also private users. After usability testings and interviews we learned the importance of certain information, which we wanted to erase.

We had also technical limitation with the logos, icons and pictures. We could not use them.

We wanted to show payment types only, when the user selects the input field.

We used logos, icons and images of people to make the assistant more visual.

Online payments

Designing the assistant

Final design

User interviews revealed that we cannot simply distinguish between private and business, instead basic and professional users. This resulted in payment screens with variants for both types. The example below shows the payment assistant final concept for professional users:

The screenshot shows the 'direct.credit-suisse.com' website with the 'Pay and Transfer' tab selected. The main area is titled 'Start New Payment'. It features a search bar for 'beneficiary' and a QR code scanner. Below this, there are two sections: 'Pay a new beneficiary' and 'Reuse an existing payment (173)'. The 'Pay a new beneficiary' section includes buttons for 'QR-bill', 'Orange Payment Slip', 'Red Payment Slip', 'Domestic Payment', 'International Payment', 'Bank Check', and 'Account Transfer'. The 'Reuse an existing payment' section displays a table with 173 entries, each showing a star icon, Beneficiary's name, Beneficiary's account, Currency, Amount, Debit account, and Folder. At the bottom, there is a footer with the text 'Payment assistant' and 'Final version'.

Results

After the release of the new payment assistant we received from customer support and as well from our business clients positive feedback.

User can enter single payment or even a list of payments.

We kept the autocomplete with fixed usability bugs.

All the payment types are now visible

Expanded the list with Beneficiary's account and folder information.

Banking design system

Jun 2018 - Oct 2021

Problem statement

The design guidelines provided by the branding team were focused on print and marketing sites. They missed many application-related aspects. As a result, designers and developers invented their own guides, and the application wasn't consistent and had poor usability.

Project goal

Define a common design language for mobile and web, so that teams become more efficient and achieve a higher level of consistency.

Team

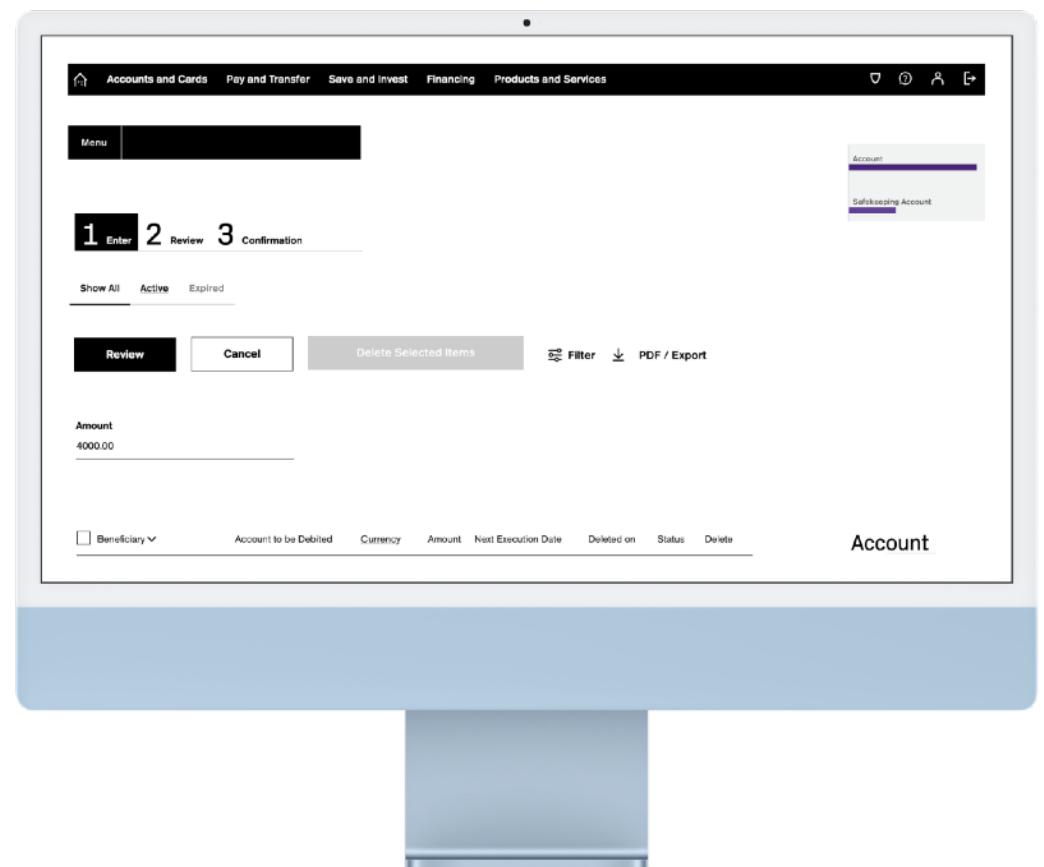
3 developers, 1 brand designer, 2 UX designers

Roles played

Me and another senior UX designer were responsible for defining and approving each part of the design system.

Activities

- Visual design (Sketch)
- Interaction design (Sketch)
- Usability testing
- IT handover



Initial UI elements in Sketch

Banking design system

Getting started

Challenges

First, we needed to find out who everyone would consume this system.
 Secondly, we wanted to know what format would be the best for them.

Proposed solution

We organised a kick-off with all the teams working on the web and mobile banking app. These teams were our target audience.

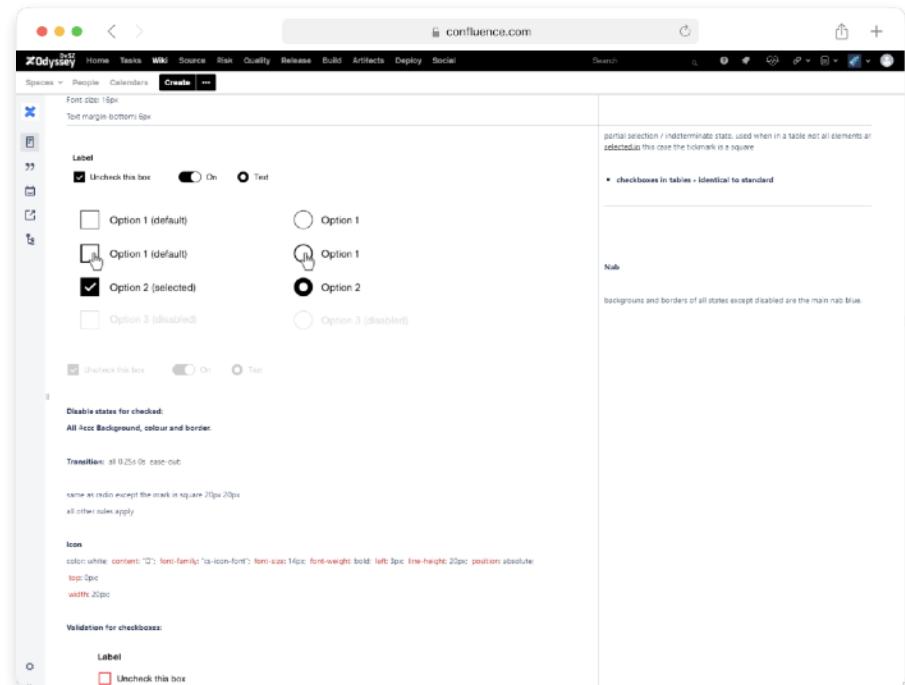
Next, we created the first design system in Confluence. It was a huge design table, consisting of categories, sub-categories, print screens, and measurements.

Confluence is accessible for everyone; no special permissions were required. At that time, it was not possible to share Sketch files, so first, we documented only the elements, which were required for the development team.

Lessons learned

The table was adapted by the teams due to its simplicity and ease of access. But as the content grew, it became difficult to maintain and navigate within. We knew we needed a better solution.

Using Confluence as an MVP helped us to quickly learn what information is important for the engineers.



First version of the design system

A table in Confluence

Banking design system

Designing the system

Creating the component library

We learned that our primary users are designers and developers. For designers, we built a UI Library in Sketch.

Developers needed interactive examples with code snippets. With the collaboration of another development team, we built a component library. This library was shared as a software package for developers; we wanted that each project integrates it and uses it.

To look up a component with its measures and context of use, we migrated the Confluence table to Frontify. It was easier to update design examples and share additional comments.

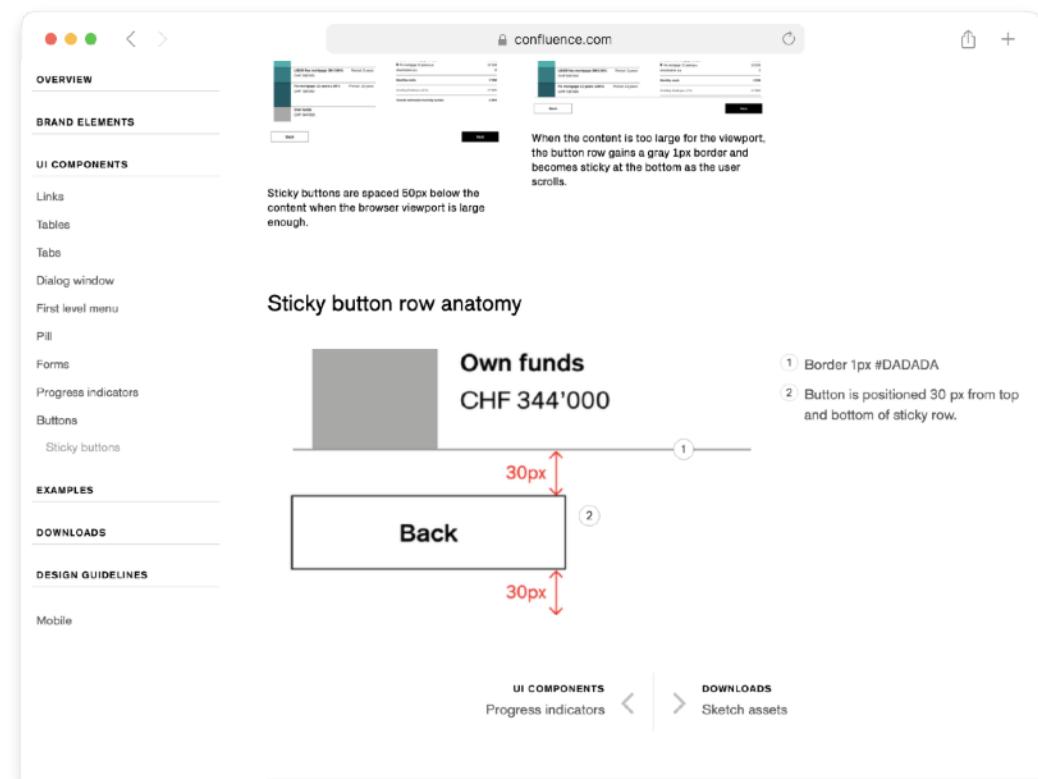
Lessons learned

SketchApp UI libraries worked for us perfectly. Plus, we found that the interactive UI library benefits not only the developers but also the junior designers as they can observe and study certain interactions.

Results

The design system has been successfully adapted by the teams. We introduced a weekly meeting to discuss new components and make further improvements. These recurring meetings keep the system up to date and useful.

The online banking supports 4 languages, and we lose a lot of time with prototype translations. Therefore, the next step is to create a system that allows designers to quickly prototype in multiple languages.



The design system documented in Frontify.