

UX Portfolio

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SELECTED PROJECTS

Investing for retail clients

Showcase of ux research

Retail banking mobile app

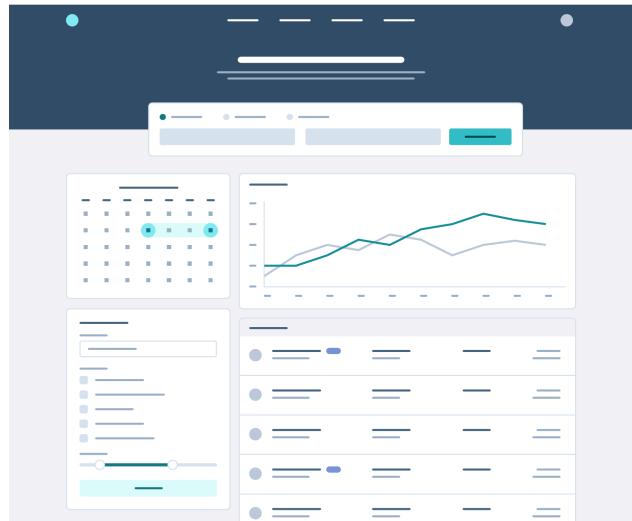
Showcase of interaction and visual design

Payment entry flows

Showcase of iterative design based on user feedback

Online banking design system

Showcase of building design system for multiple platforms



INVESTING FOR RETAIL CLIENTS

PROJECT BRIEF

Client

My previous employer, Credit Suisse AG Zurich, Switzerland

Scope

Problem statement

Retail clients were not able to invest with low amount of funds. Based on market research we learned that people are open to invest with only 100 CHF.

Goal

To discover new opportunities in the field of retail investments, as a part of Credit Suisse Academy project, my team had a goal to develop a concept for an automated investment solution advisor for retail clients

Deliverables

- Competitor analysis
- iOS mobile design
- Native iOS app

Activities

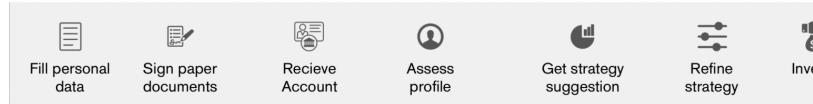
- User interviews
- Visual design
- Prototyping
- Stakeholder management
- Usability testing
- Native iOS development

Team

I was a sole UX Designer and developer working with a team of SMEs from various financial domains.

INVESTING FOR RETAIL CLIENTS

COMPETITOR ANALYSIS



Slide from stakeholder presentation.
Comparison of competitors' user flows.

INVESTING FOR RETAIL CLIENTS

EARLY DESIGNS

Challenges

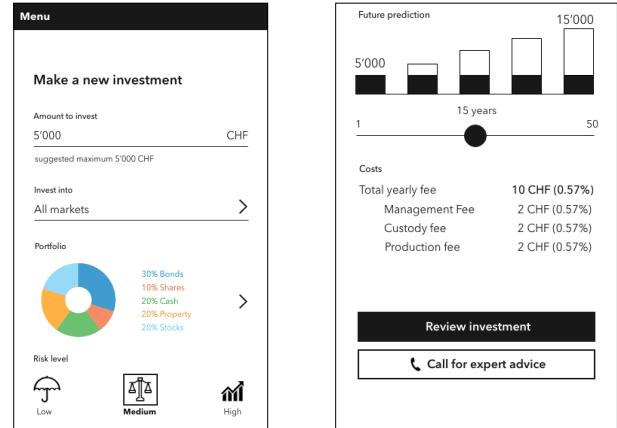
Our first challenge was to envision how such a solution can look. What platform to use? Who are typical clients?

Proposed solution

As I worked with people, who have more abstract thinking, to align them and start discussion, I came up with the simplest visualisation to get feedback.

Lessons learned

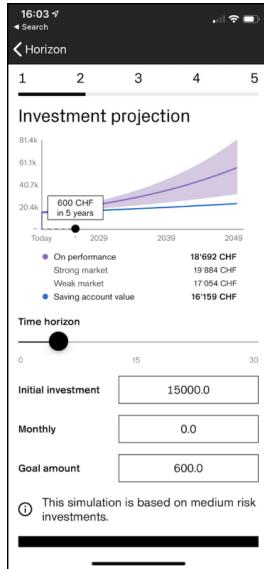
This simple screen helped team mates and stakeholders to provide meaningful feedback about constraints and legal aspects.



Investment overview screen.
Result of initial ideation sessions.

INVESTING FOR RETAIL CLIENTS

RESULTS



1. Simulating possible investments



2. Reviewing the purchase.

Challenges

As an academy challenge the concept was rated by senior management. Our team needed to find a the best way to present the solution.

Proposed solution

I decided to go native and develop a prototype iPhone app which has hard coded data, so that they can try out few scenarios. We preinstalled the app in several test phones. Our stakeholders could experience the app during our pitch.

Lessons learned

The project raised awareness as we managed in such a short period of time, to produce a realistic prototype and test with the target audience.

RETAIL BANKING MOBILE APP

PROJECT BRIEF

Client

My previous employer, Credit Suisse AG Zurich, Switzerland

Scope

Problem statement

The mobile banking solution for retail clients lacks in many respects performance and user expectations.

Goal

To envision the future of the mobile banking app for private clients. The ultimate goal with the concept was to raise funds to redesign and implement a new banking application.

Deliverables

- iOS mobile design
- Recorded mobile interactions
- Interactive prototype made in Origami app

Activities

- Wireframing
- Visual design
- Origami prototyping
- Usability testing
- Stakeholder presentation

Team

I collaborated with an another senior UX designer. Through the project we had weekly alignment with business stakeholders.

RETAIL BANKING MOBILE APP

STARTING

Challenges

In this short project we faced with three major challenges:

1. What concepts should we include into the solution from the user and also from technological point of view.
2. We needed to use a different visual language as the existing one. How to invent a new and appropriate visual language?
3. In what form will we present the solution to the stakeholders?

Proposed solutions

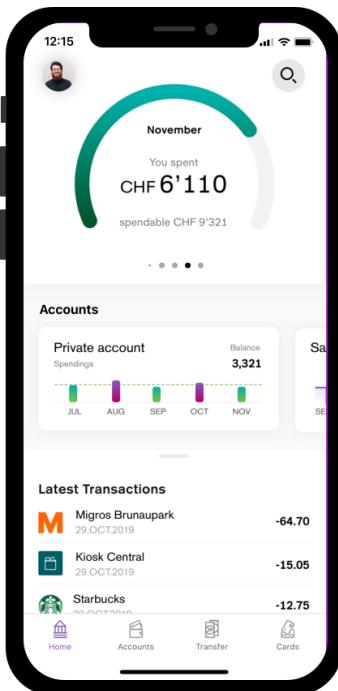
1. We interviewed our key stakeholder to understand their expectations. Additionally, as we continuously researched in this problem space, we already developed proposals as well. Finally it was decided to focus on these key features: personal financial manager, payments, accounts overview and cards.

2. It was required to have a different look and feel as the current app was developed out of desktop guidelines. We used the standard iOS guides, like the swiping cards, to make the app more mobile friendly. We respected the timeline and therefore kept the visual elements at minimum, so that we could develop them properly.
3. The project was about setting a vision, to find out what is possible to on mobile. Because mobile devices are highly interactive compared to big screens, we handed over a test device to the stakeholders, instead of preparing presentation slides. On the test iPhone we preinstalled the app prototype using Origami prototyper. This allowed to our audience a closer interaction and better understanding.

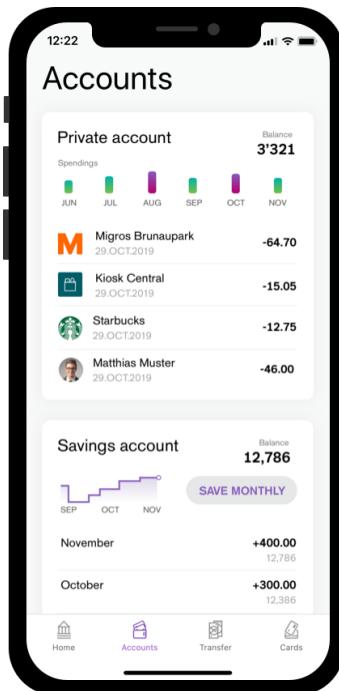
RETAIL BANKING MOBILE APP

FINAL APP SCREENS 1/2

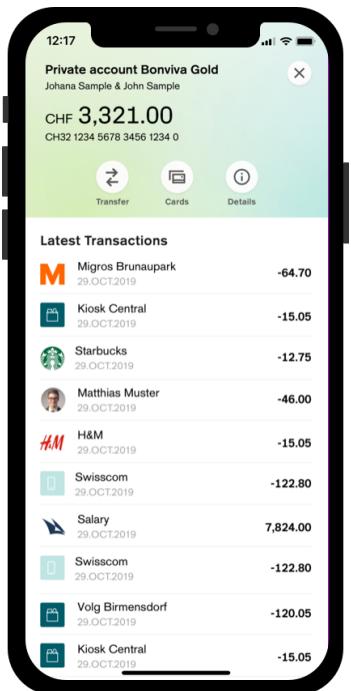
Retail banking (3/5)



Home tab, user can browse the most relevant information here



Accounts tab, showing latest transactions and graphs to easier understand trends

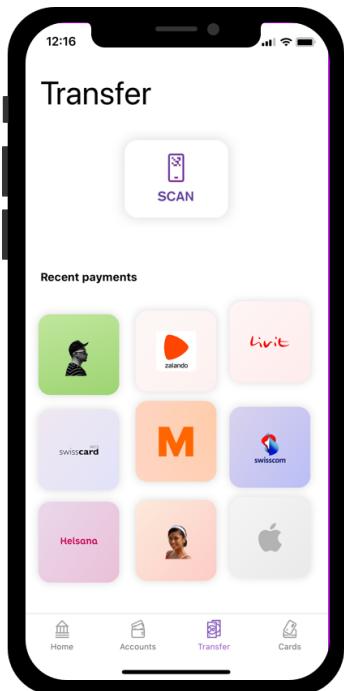


Account details, apart from transactions, relevant actions are included here

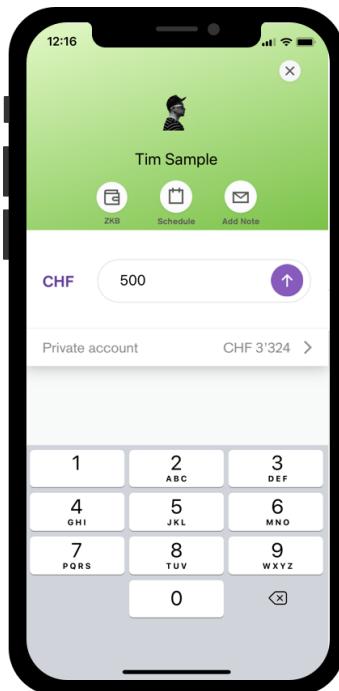
RETAIL BANKING MOBILE APP

FINAL APP SCREENS 2/2

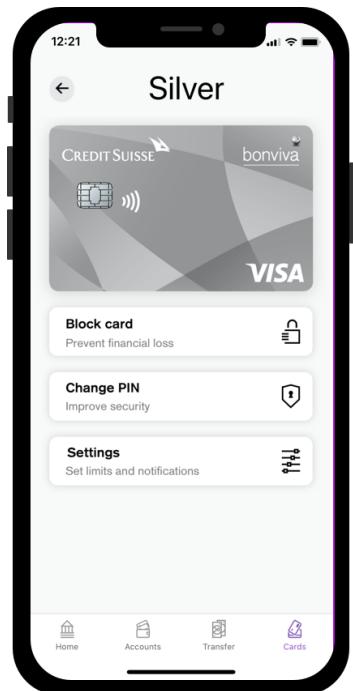
Retail banking (4/5)



Transfer tap, a minimalistic recent payments list and scanning option



Making payment, apart from the amount, every other detail is pre selected to smart default.



Cards tab, contains the cards with the most relevant actions

RETAIL BANKING MOBILE APP

RESULTS

Lessons learned

Thanks to the mobile prototyping tool Origami App, we were able to quickly iterate and discover different concepts. The application allow to install and handover prototypes to users and key stakeholders. Making it so accessible increased trust and feedback loop.

Feedback from users

- *“Very simple and smooth interactions”*
- *“When will you release this?”*

Usability testers

Feedback from stakeholders

The mobile prototype was a great success. It inspired the higher management to invest more into the mobile solution.

This concept has been taken for further analysis from technical, business and legal point of view. This project served as a base for the next mobile application.

PAYMENT ENTRY FLOWS

PROJECT BRIEF

Client

My previous employer, Credit Suisse AG, Zurich, Switzerland

Scope

Problem statement

80% of the online banking usage is related to payments. This module faced the several problems:

- Costly maintenance due to two separated app for private and corporate users
- Difficult to find and use recurring payments
- High number of incomplete and duplicate payments

Goal

Improve the usability, merge the two user portals and decrease support calls related to payment entries.

Deliverables

- High-fidelity designs for desktop, tablet and mobile
- InVision Prototypes

Activities

- User interviews
- Visual design
- Prototyping
- Workshop facilitator
- Stakeholder management
- Usability testing

Team

I was a UX Designer working together with an agile team, on- and offshore. Additionally I had two UX Designers as support for validations and visual design.

PAYMENT ENTRY FLOWS

STARTING

Challenges

Before starting with the redesign project I faced with the following major challenges:

1. Payments is a highly complex module which consist of multiple systems.
2. High number of stakeholders due to the multiple systems.

Proposed solution

We organised several knowledge transfer sessions, kick-offs, brainstorming and sketching sessions.

Lessons learned

To fulfil 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 workshops.
The goal was to align stakeholders, IT and to define common vision.

PAYMENT ENTRY FLOWS

EARLY DESIGNS

The screenshot shows a payment entry form titled "Zahlungen:" and "Inlandzahlung". It includes fields for IBAN, Bank, Begünstigter, Betrag (amount CHF 3'000.00), Datum (date 04.07.2018), and Belastungskonto (account type Privatekonto Bonviva Silver). A note says "Verfügbare Daten werden vom System eingefüllt." Below the main form is a "Weitere Optionen" section with a "Bestätigen" button.

Previous version in production

Frequently reported issues:

- Problem to select debit account in case multiple exist
- Problem to setup recurring payment
- Users submitted payments multiple times

The screenshot shows a three-step wizard: 1 Entry, 2 Review, and 3 Confirmed. Step 1: Enter domestic payment. It asks for Recipient (IBAN), Recipient's address (Name, Address), and Debit account (Linnie Ballard, CH Private Account Bonviva Silver, 84.215.36 CHF). Step 2: Review. It shows the payment details: Amount (CHF 3'000.00), Currency (CHF), Debit account (Same as step 1), Reason for payment (e.g. rent), Execution date (03.04.2018), and More options. Step 3: Confirmed. It has a "Cancel" button and a "Review →" button.

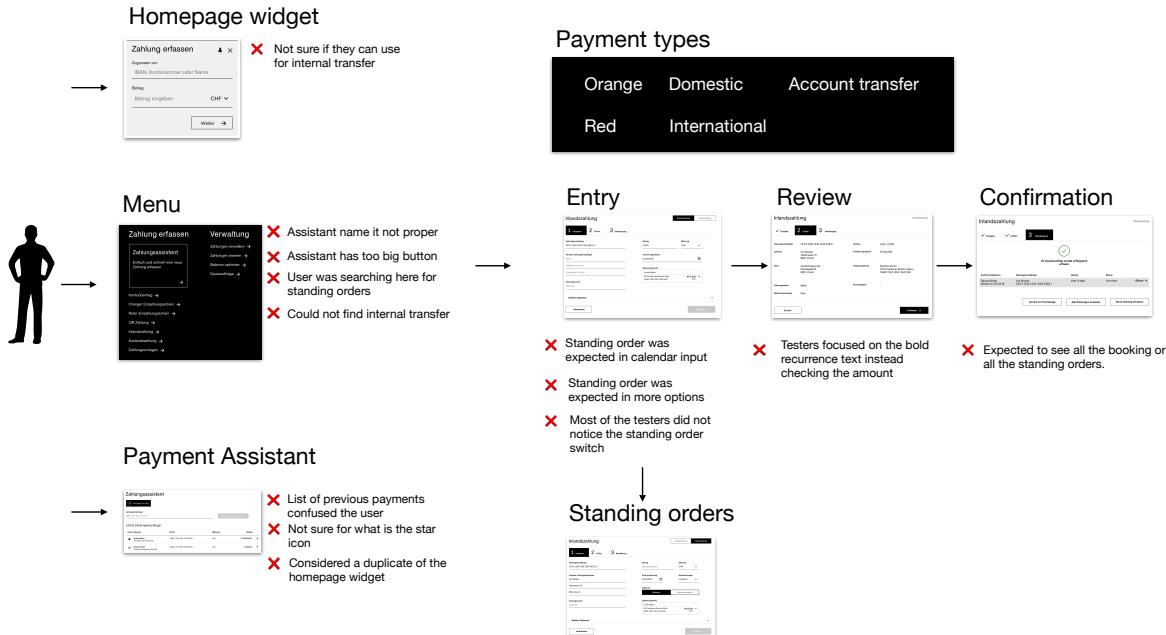
Proposed solutions

- New debit account selection dropdown
- Recurring payment as part of the entry page.
- 3 steps wizard to visualise process.

PAYMENT ENTRY FLOWS

USABILITY TEST RESULTS

Payment (4/5)



Overview of usability findings. Slide from stakeholder presentation

PAYMENT ENTRY FLOWS

RESULTS

Feedback from stakeholders

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

Feedback from users

- *“The payment review page is very clear and easy to understand.“*
- *“Once I selected domestic payment, I could directly see what goes where and here I see which is my debit account.“*

Usability testers

ONLINE BANKING DESIGN SYSTEM

PROJECT BRIEF

Client

My previous employer, Credit Suisse AG, Zurich, Switzerland

Scope

Problem statement

- Existing design guidelines focusing mostly on print and marketing websites. Often these guidelines were not applicable for an online banking application.
- Designers and developers waste time to define these guides. The consistency suffers as these guides are not shared fast enough.

Goal

Define a commonly used design language so that teams become more efficient and they achieve higher level of consistency.

Deliverables

- Interactive UI library with example codes
- SketchApp UI library
- Detailed design definition shared on Frontify

Activities

- User interviews
- Testing with designers and developers
- Coordinating with implementation team

Team

- 2 senior UX designers
- 1 brand designer
- 3 frontend developers

ONLINE BANKING DESIGN SYSTEM

STARTING

Challenges

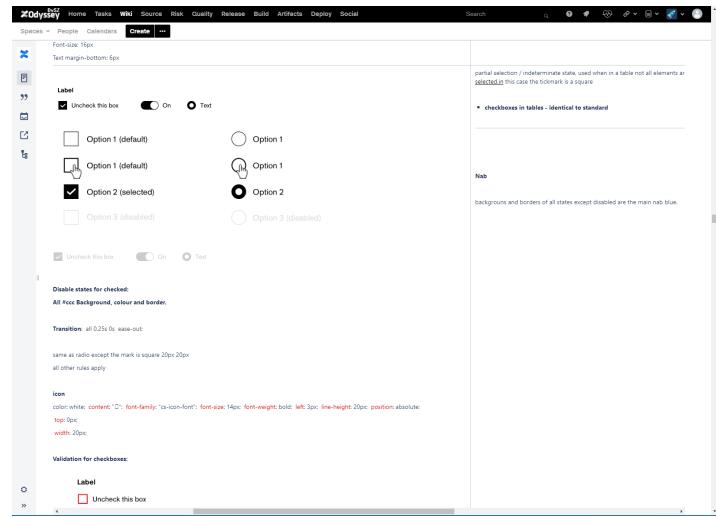
- Find out who is it for?
- How will be used by these different audiences?

Proposed solution

We created an initial version on Confluence by Atlassian. The system was a huge design elements table, consist of categories, sub categories, print screens and measurements. This site was accessible by everyone.

Lessons learned

- The simple site was accessible, but as the content grew, it became difficult to maintain and navigate with in.
- This version was an easy way to learn what the developers and designers care about.



First version of the design system.
Print screen from confluence.

ONLINE BANKING DESIGN SYSTEM

ITERATIONS

The screenshot shows a design system interface with a sidebar containing navigation links like Overview, Brand Elements, UI Components, Examples, Downloads, and Design Guidelines. The main content area displays a 'Sticky button row anatomy' example. It shows a screenshot of a mobile application with a 'Back' button at the bottom. A callout box provides styling details: 'Border 1px #DADADA' and 'Button is positioned 30 px from top and bottom of sticky row'. Below the screenshot, there are sections for 'UI COMPONENTS' (Progress indicators) and 'EXAMPLES' (Sketch assets). At the bottom, it says 'Last modified on Mon, 20 Jan 2020 16:55'.

Migration to Frontify

Proposed solution

- We learned that our primary audience are designers, developers and scrum masters.
- Designers needed a quick way to reuse existing UI elements and usage guidelines. For that need we built a UI Library in SketchApp to host these predefined “symbols”. The guidelines we started to host on Frontify.
- Developers needed interactive examples with code snippets. With the collaboration of a development team, we built this component library.

Lessons learned

- SketchApp UI libraries worked for us perfectly. We found difficulties while upgrading UI element structures. In this case some projects needed to be revisited.
- We found out that the interactive UI library benefits not only the developers, but the junior designers as they can observe and study certain interactions.

ONLINE BANKING DESIGN SYSTEM

RESULTS

Results

- The design system has been successfully adapted and became integral part of every product development for the online and mobile banking.
- Agile teams became more efficient as the number of guidelines related discussion meetings decreased.
- It allowed to the design team be more efficient and therefore perform more usability testings.

Next step

- 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, which allows designers to quickly prototype in multiple languages.