

UX Portfolio

Ladislav Szolik

User Experience Designer

Selected projects



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

[Page 3](#)



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 12](#)



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 16](#)



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)

[Page 21](#)



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)

[Page 28](#)

Hosted BPX web portal

Mar 2022 - present

Problem statement

Swisscom products and services are constantly evolving and often sold from separate web sites. Based on the firm's vision, the next step was to bring all business services into a unified portal.

This meant that the telephone configuration portal, where I was responsible for user experience, needed to be migrated as well.

Project goal

Migrate the portal to the new business to business portal and adapt the visual experience to match it with it. Additionally, include new features and improvements.

Team

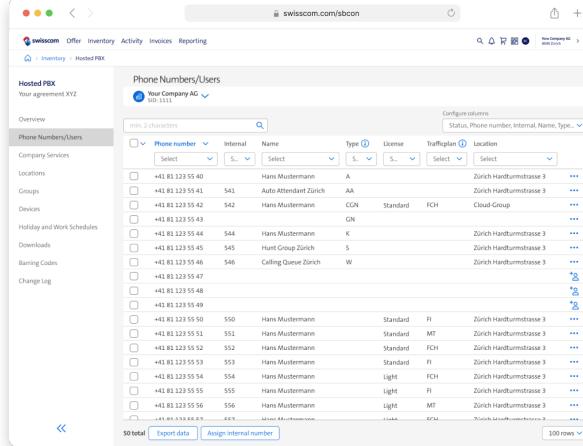
4 developers, product owner, scrum master, 2 product manager and a customer care agent.

Roles

Me and another designer were responsible for the product experience.

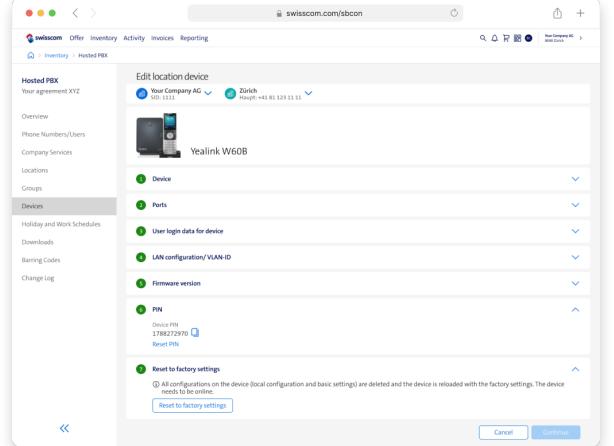
Activities

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



Phone number	Internal	Name	Type	License	Trafficline	Location
+41 81 123 55 40		Hans Mustermann	A		Zürich Hardturmstrasse 3	
+41 81 123 55 41	541	Auto Attendant Zürich	AA		Zürich Hardturmstrasse 3	
+41 81 123 55 42	542	Hans Mustermann	CCN	Standard	FCH	Cloud-Group
+41 81 123 55 43			GN			
+41 81 123 55 44	544	Hans Mustermann	K		Zürich Hardturmstrasse 3	
+41 81 123 55 45	545	Hunt Group Zürich	S		Zürich Hardturmstrasse 3	
+41 81 123 55 46	546	Celling Queue Zürich	W		Zürich Hardturmstrasse 3	
+41 81 123 55 47						
+41 81 123 55 48						
+41 81 123 55 49						
+41 81 123 55 50	550	Hans Mustermann	Standard	FI	Zürich Hardturmstrasse 3	
+41 81 123 55 51	551	Hans Mustermann	Standard	MT	Zürich Hardturmstrasse 3	
+41 81 123 55 52	552	Hans Mustermann	Standard	FCH	Zürich Hardturmstrasse 3	
+41 81 123 55 53	553	Hans Mustermann	Standard	FI	Zürich Hardturmstrasse 3	
+41 81 123 55 54	554	Hans Mustermann	Light	FCH	Zürich Hardturmstrasse 3	
+41 81 123 55 55	555	Hans Mustermann	Light	FI	Zürich Hardturmstrasse 3	
+41 81 123 55 56	556	Hans Mustermann	Light	MT	Zürich Hardturmstrasse 3	
+41 81 123 55 57						
+41 81 123 55 58						
+41 81 123 55 59						
+41 81 123 55 60						
+41 81 123 55 61						
+41 81 123 55 62						
+41 81 123 55 63						
+41 81 123 55 64						
+41 81 123 55 65						
+41 81 123 55 66						
+41 81 123 55 67						
+41 81 123 55 68						
+41 81 123 55 69						
+41 81 123 55 70						
+41 81 123 55 71						
+41 81 123 55 72						
+41 81 123 55 73						
+41 81 123 55 74						
+41 81 123 55 75						
+41 81 123 55 76						
+41 81 123 55 77						
+41 81 123 55 78						
+41 81 123 55 79						
+41 81 123 55 80						

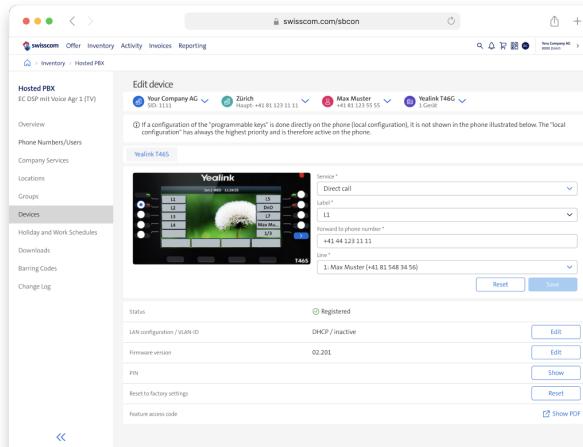
Phone numbers overview screen



Hosted PBX
Your agreement XYZ
Overview
Phone Numbers/Users
Company Services
Locations
Groups
Devices
Holiday and Work Schedules
Downloads
Banning Codes
Change Log

Edit location device
Your Company AG No: 1111 Zürich Host: +41 81 123 11 11
Device
Ports
User login data for device
LAN configuration/VLAN-ID
Firmware version
PIN
Device PIN 1781272970 Reset PIN
Reset to factory settings
All configurations on the device (local configuration and basic settings) are deleted and the device is reloaded with the factory settings. The device needs to be online.
Reset to factory settings

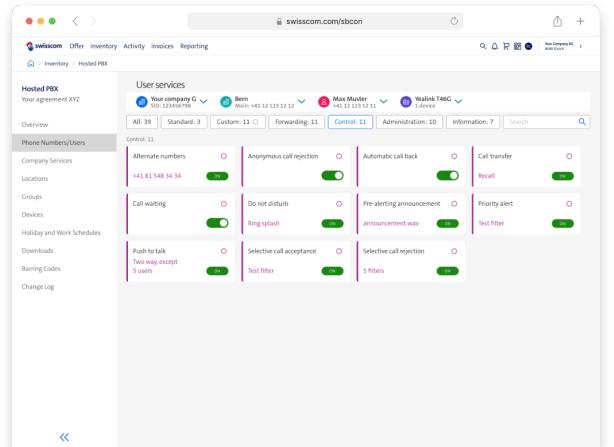
Edit device details screen



Hosted PBX
Your agreement XYZ
Overview
Phone Numbers/Users
Company Services
Locations
Groups
Devices
Holiday and Work Schedules
Downloads
Banning Codes
Change Log

Edit device
Your Company AG No: 1111 Zürich Host: +41 81 123 11 11 Max Muster +41 81 548 34 56 Yealink T46G
If a configuration of the "programmable keys" is done directly on the phone (local configuration), it is not shown in the phone illustrated below. The "local configuration" always has the highest priority and is therefore active on the phone.
Yealink T46G
Service: Direct call
Value: 11
Forward to phone number: +41 81 123 11 11 User: 1 Max Muster (+41 81 548 34 56)
Status: Registered
LAN configuration / VLAN-ID: DHCP/reactive
Firmware version: 02.201
PIN
Reset to factory settings
Feature access code Show PDF

Configure telephone buttons screen



Hosted PBX
Your agreement XYZ
Overview
Phone Numbers/Users
Company Services
Locations
Groups
Devices
Holiday and Work Schedules
Downloads
Banning Codes
Change Log

User services
Your company G No: 1234567890 Bern Host: +41 81 123 11 11 Max Muster +41 81 123 11 11 Yealink T46G
Content: 11
Standard: 3
Custom: 11
Forwarding: 11
Control: 11
Administration: 10
Information: 7
Search
Alternate numbers
Anonymous call rejection
Automatic call back
Call transfer
Do not disturb
Ring splash
Pre alerting announcement
Priority alert
Selective call rejection
Selective call acceptance
Test filter
Push to talk
Two way except
User
Test filter
Feature access code Show PDF

Telephone user services screen

Hosted BPX web portal

Getting started

Challenges

Moving Hosted PBX to the new portal meant to reimplement more than 30 use cases. We needed to find out what functionality to move, what to change and what to newly implement.

We faced with an other challenge regarding the requirement documentation. We received a feedback from developers, that requirements are often outdated and very long to read. We wanted to address this situation as well.

Proposed solution

We started with the documentation review of the current version. Based on that we created a table in Confluence containing all use cases for the new service, Hosted PBX. We used this document to capture new requirements, make priorities and attach links to design files. After that, we scheduled a series of workshops, where we adjusted the uses cases based on stakeholders feedback.

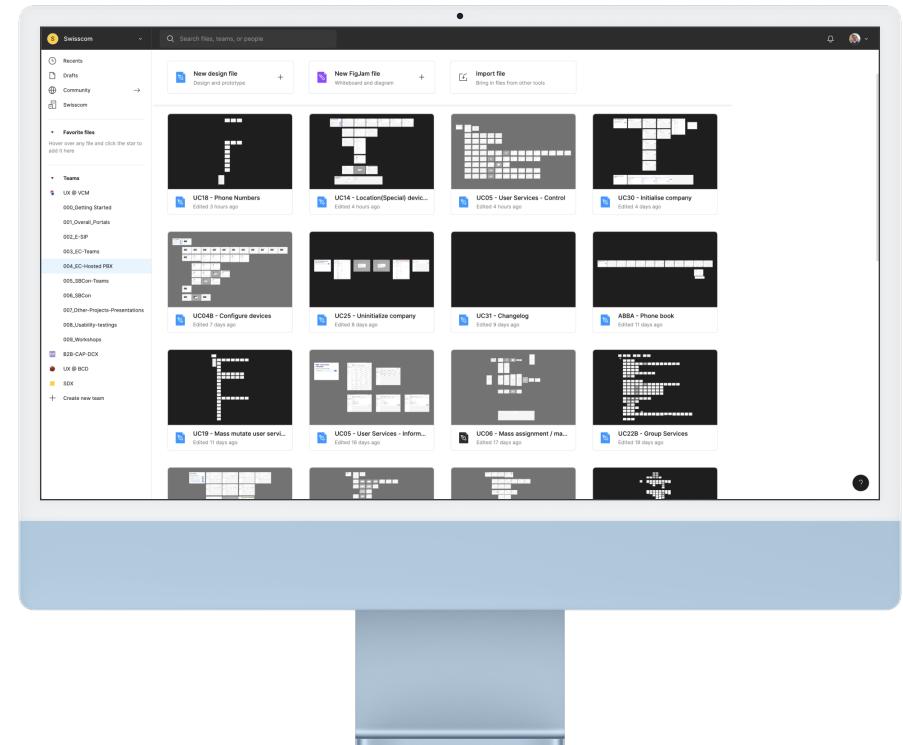
To address the challenge with documentation, we decided to use Figma only. Instead of writing, we designed and prototyped all essential scenarios and added comments only when it was necessary.

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.



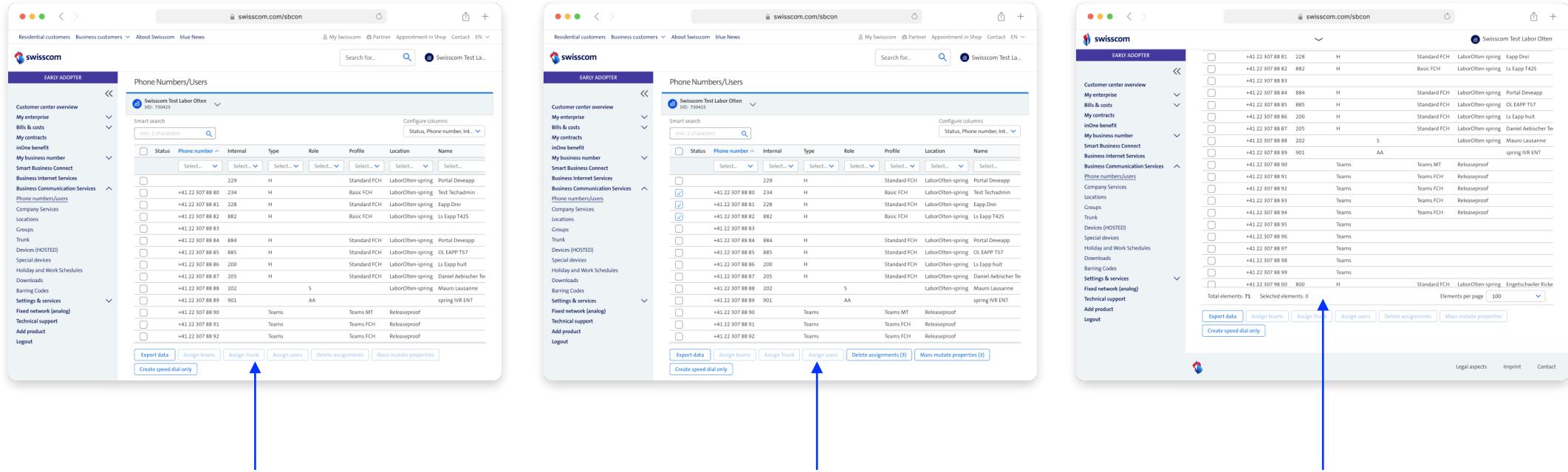
Hosted PBX Figma design files containing all essential scenarios

Hosted BPX web portal

Redesigning the phone numbers table footer

Previous version

Based on Adobe Analytics and user feedback, the phone numbers table is the most used site in the application. After talking to users and customer care we identified that on this site the footer causes several usability issues:



Action	Description	Original Footer (Left)	Redesigned Footer (Right)
Export data	Always visible	Enabled	Enabled
Assign teams	Always visible	Enabled	Disabled
Assign Trunk	Always visible	Enabled	Disabled
Assign users	Always visible	Enabled	Enabled
Delete assignments	Always visible	Enabled	Enabled
Mass mutate properties	Always visible	Enabled	Enabled
Create speed dial only	Always visible	Enabled	Enabled

All actions are always visible and they are displayed in two rows. This takes up space from the phone numbers table.

Disabled actions make it difficult to see what the user can do with the current phone number selection.

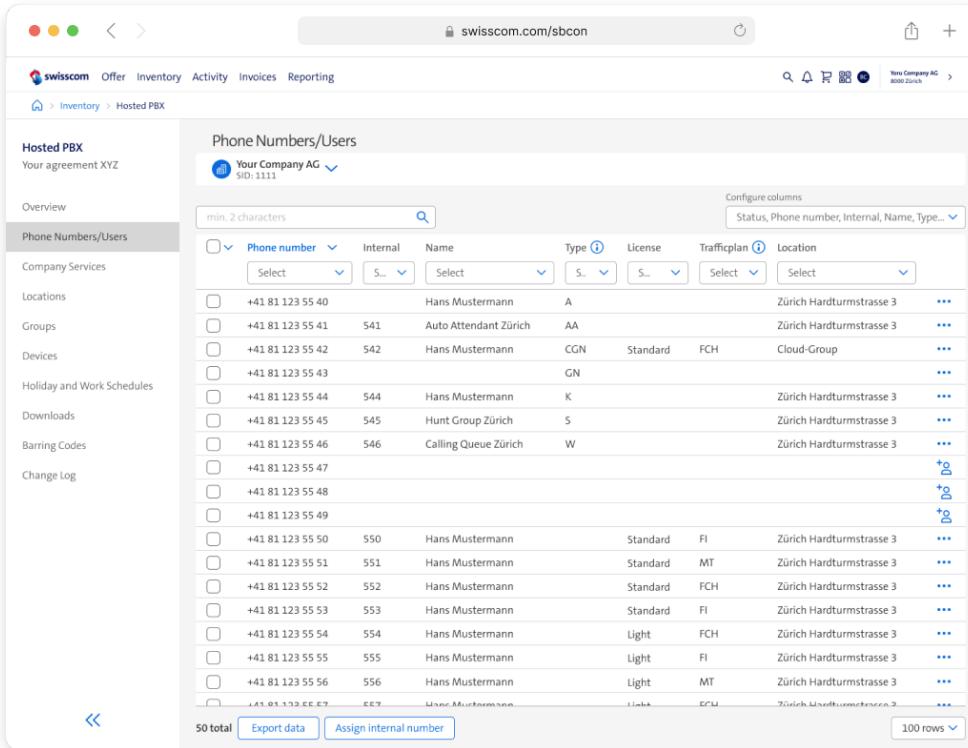
The total and selected items, together with pagination setting is only visible after the user scrolled to the end of the table.

Hosted BPX web portal

Redesigning the phone numbers table footer

Final version

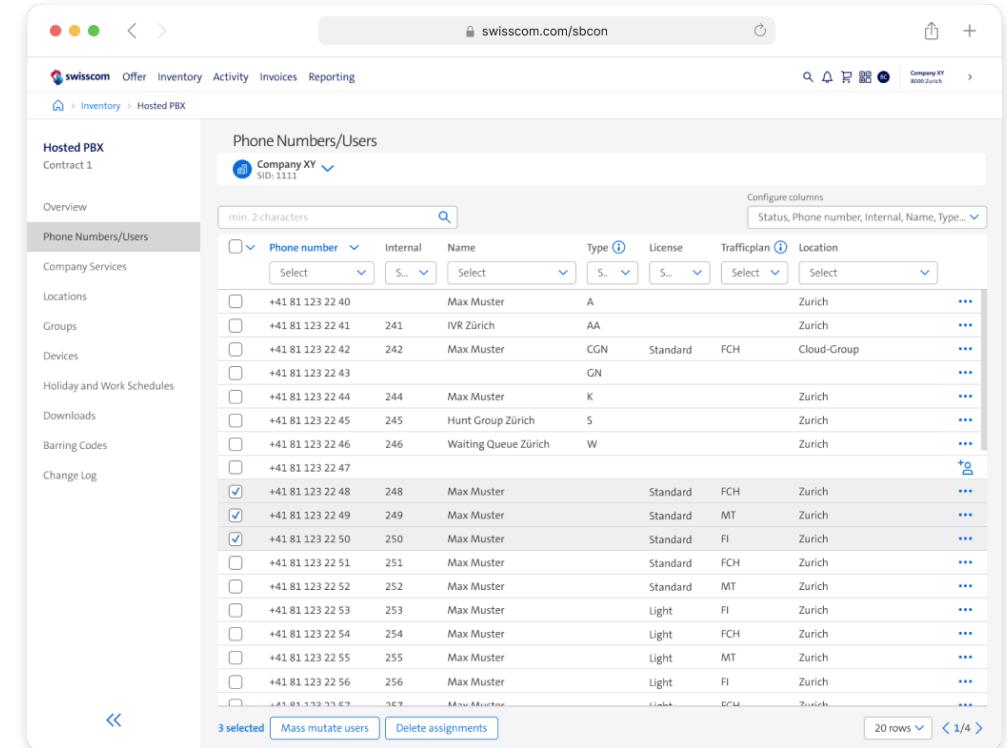
Throughout the design process we wanted to increase the table visibility and remove other noise:



The screenshot shows the 'Phone Numbers/Users' table with the following columns: Phone number, Internal, Name, Type, License, Trafficplan, and Location. The table lists several entries for 'Hans Mustermann' with various internal numbers and locations. The footer of the table includes a search bar, column configuration options, and a row selection count of 50 total rows.

Phone number	Internal	Name	Type	License	Trafficplan	Location
+41 81 123 55 40		Hans Mustermann	A			Zürich Hardturmstrasse 3
+41 81 123 55 41	541	Auto Attendant Zürich	AA			Zürich Hardturmstrasse 3
+41 81 123 55 42	542	Hans Mustermann	CGN	Standard	FCH	Cloud-Group
+41 81 123 55 43			GN			
+41 81 123 55 44	544	Hans Mustermann	K			Zürich Hardturmstrasse 3
+41 81 123 55 45	545	Hunt Group Zürich	S			Zürich Hardturmstrasse 3
+41 81 123 55 46	546	Calling Queue Zürich	W			Zürich Hardturmstrasse 3
+41 81 123 55 47						
+41 81 123 55 48						
+41 81 123 55 49						
+41 81 123 55 50	550	Hans Mustermann	Standard	FI		Zürich Hardturmstrasse 3
+41 81 123 55 51	551	Hans Mustermann	Standard	MT		Zürich Hardturmstrasse 3
+41 81 123 55 52	552	Hans Mustermann	Standard	FCH		Zürich Hardturmstrasse 3
+41 81 123 55 53	553	Hans Mustermann	Standard	FI		Zürich Hardturmstrasse 3
+41 81 123 55 54	554	Hans Mustermann	Light	FCH		Zürich Hardturmstrasse 3
+41 81 123 55 55	555	Hans Mustermann	Light	FI		Zürich Hardturmstrasse 3
+41 81 123 55 56	556	Hans Mustermann	Light	MT		Zürich Hardturmstrasse 3
+41 81 123 55 57	557	Hans Mustermann	Light	ECU		Zürich Hardturmstrasse 3

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



The screenshot shows the 'Phone Numbers/Users' table with the following columns: Phone number, Internal, Name, Type, License, Trafficplan, and Location. The table lists several entries for 'Max Muster' with various internal numbers and locations. The footer of the table includes a search bar, column configuration options, and a row selection count of 3 selected rows. It also includes buttons for 'Mass mutate users' and 'Delete assignments'.

Phone number	Internal	Name	Type	License	Trafficplan	Location
+41 81 123 22 40		Max Muster	A			Zürich
+41 81 123 22 41	241	IVR Zürich	AA			Zürich
+41 81 123 22 42	242	Max Muster	CGN	Standard	FCH	Cloud-Group
+41 81 123 22 43			GN			
+41 81 123 22 44	244	Max Muster	K			Zürich
+41 81 123 22 45	245	Hunt Group Zürich	S			Zürich
+41 81 123 22 46	246	Waiting Queue Zürich	W			Zürich
+41 81 123 22 47						
+41 81 123 22 48	248	Max Muster		Standard	FCH	Zürich
+41 81 123 22 49	249	Max Muster		Standard	MT	Zürich
+41 81 123 22 50	250	Max Muster		Standard	FI	Zürich
+41 81 123 22 51	251	Max Muster		Standard	FCH	Zürich
+41 81 123 22 52	252	Max Muster		Standard	MT	Zürich
+41 81 123 22 53	253	Max Muster		Light	FI	Zürich
+41 81 123 22 54	254	Max Muster		Light	FCH	Zürich
+41 81 123 22 55	255	Max Muster		Light	MT	Zürich
+41 81 123 22 56	256	Max Muster		Light	FI	Zürich

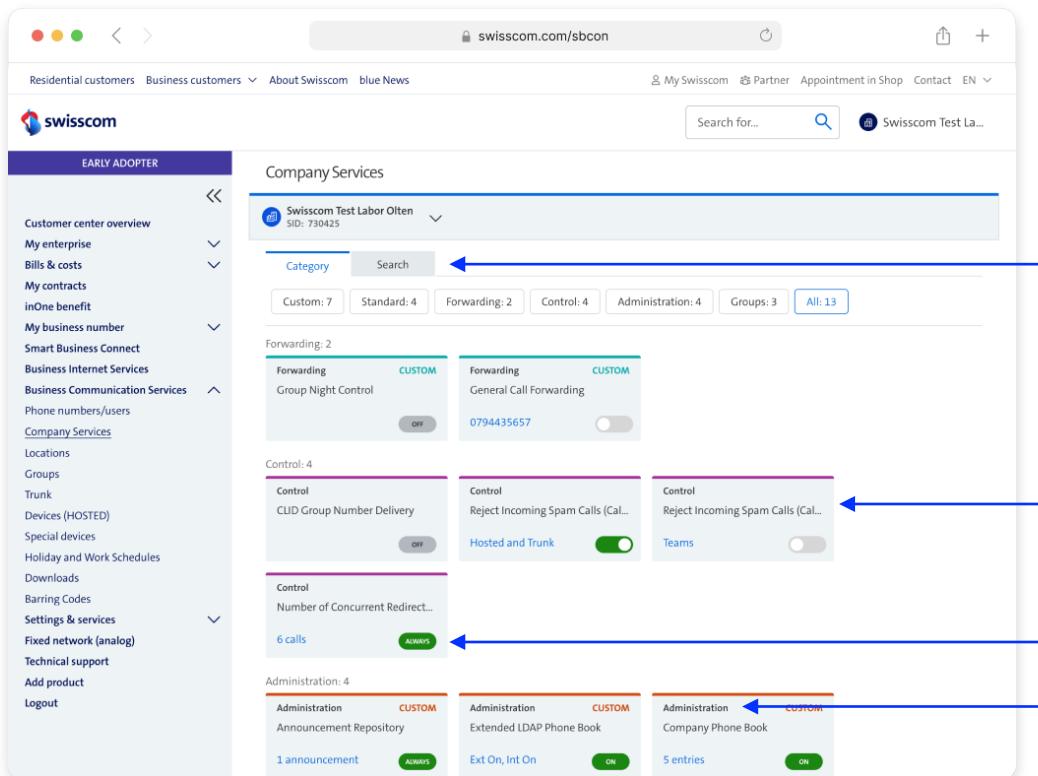
When phone numbers are selected, the footer shows only the selected items and possible actions with those items.

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:



The screenshot shows the 'Company Services' section of the portal. On the left is a sidebar with a dark blue header 'EARLY ADOPTER' containing a navigation menu. The main content area has a light gray header 'Company Services' with a dropdown showing 'Swisscom Test Labor Olten SID: 730425'. Below this is a search bar with tabs for 'Category' and 'Search', and a button to switch between them. The search bar also includes filters for 'Custom: 7', 'Standard: 4', 'Forwarding: 2', 'Control: 4', 'Administration: 4', 'Groups: 3', and 'All: 13'. The main content is organized into three columns. The first column contains 'Forwarding: 2' services: 'Forwarding Group Night Control' (OFF) and 'Forwarding General Call Forwarding' (ON, value 0794435657). The second column contains 'Control: 4' services: 'Control CLID Group Number Delivery' (OFF), 'Control Reject Incoming Spam Calls (Call...' (ON, value 'Hosted and Trunk'), and 'Control Reject Incoming Spam Calls (Call...' (ON, value 'Teams')). The third column contains 'Administration: 4' services: 'Administration Number of Concurrent Redirect...' (OFF), 'Administration Announcement Repository' (ALWAYS ON), 'Administration Extended LDAP Phone Book' (ON), and 'Administration Company Phone Book' (ON). Blue arrows point from the text descriptions below to specific parts of the interface: one arrow points to the 'Search' tab in the search bar, another to the 'Control' service in the second column, and two arrows point to the 'Administration' services in the third column.

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.

The layout for the most commonly used screen size has 3 columns. Because of this users see only fewer services at a time.

Too many service status makes it hard to understand and remember them.

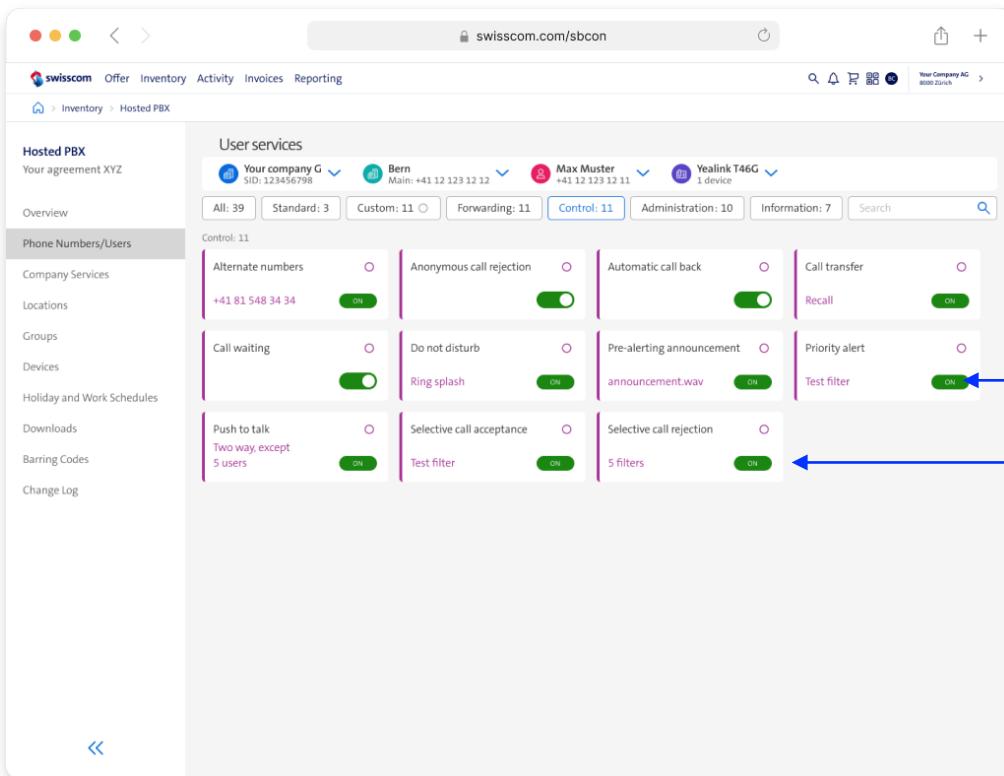
The service category titles are displayed redundantly.

Hosted BPX web portal

Redesigning the Services overview

Final version

We started with a blank page and left only the necessary information as services serve as a cross-route where users want to quickly decide which is their service they are looking for.



Results

The compact page with simplified statuses received positive feedback, as users want to find services as fast as possible.

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

Search field moved next to category filters.

For the same resolution we now provide 4 columns, which makes the page compacter and allows to display more services at once.

The service status was refactored to contain only 3: off, on, and a toggle.

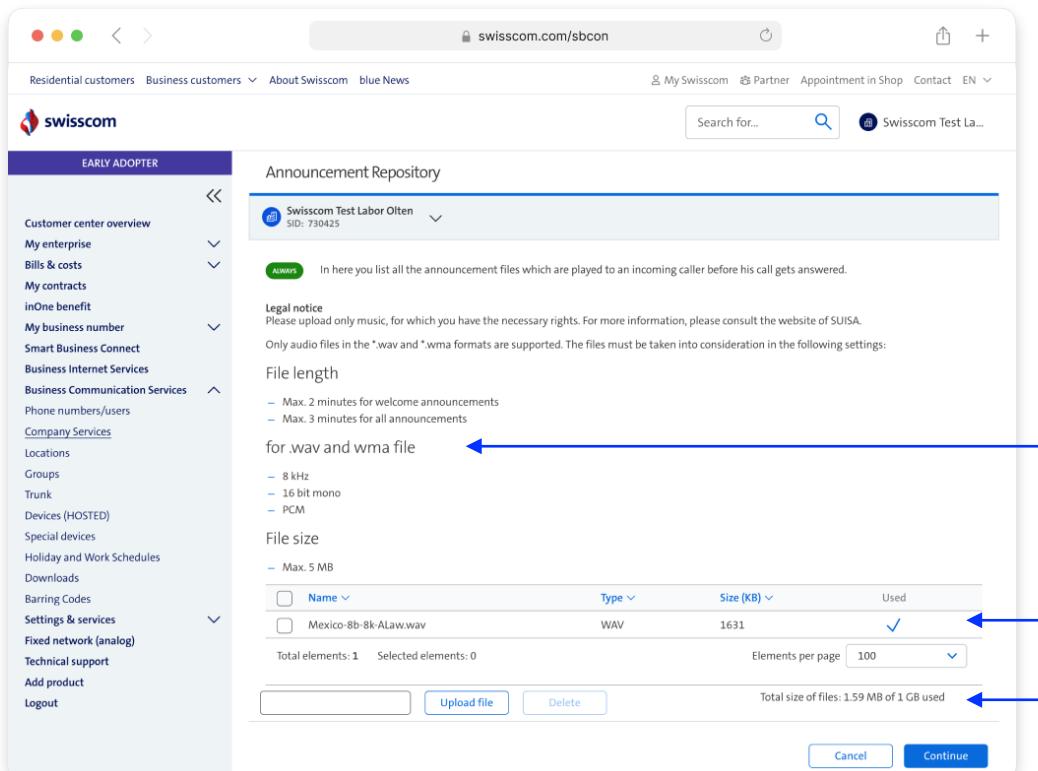
The cards contain only relevant information without additional noise.

Hosted BPX web portal

Redesigning the Announcement repository

Previous version

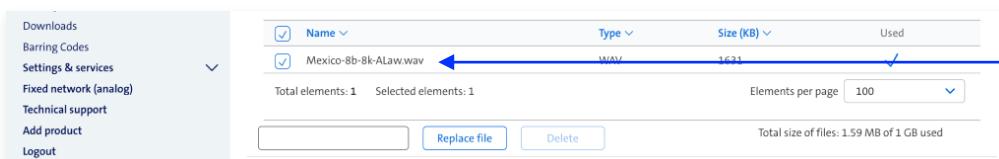
Compared to phone numbers table, this feature is used infrequently, however it helps with an important user goal: manage announcement files across the entire company. Our usability testing revealed few usability issues:



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.



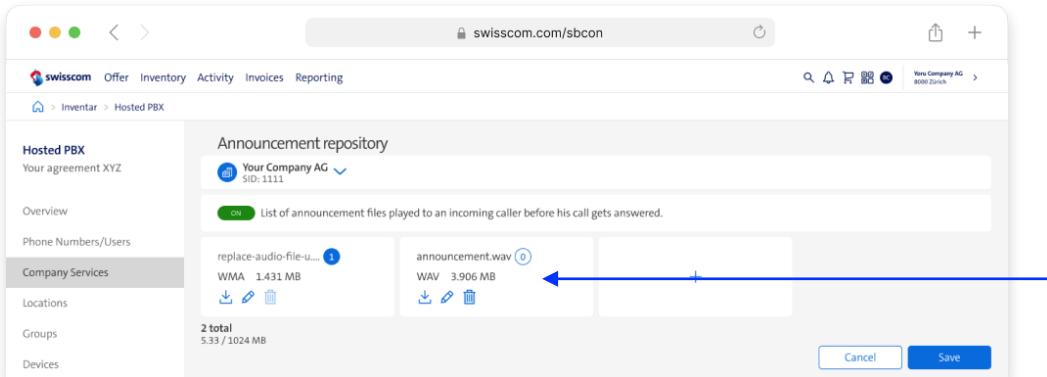
When an announcement file is used in several places and if it needs to be updated, the replace feature can simplify this task. However most of the users did not know about it as it is hidden.

Hosted BPX web portal

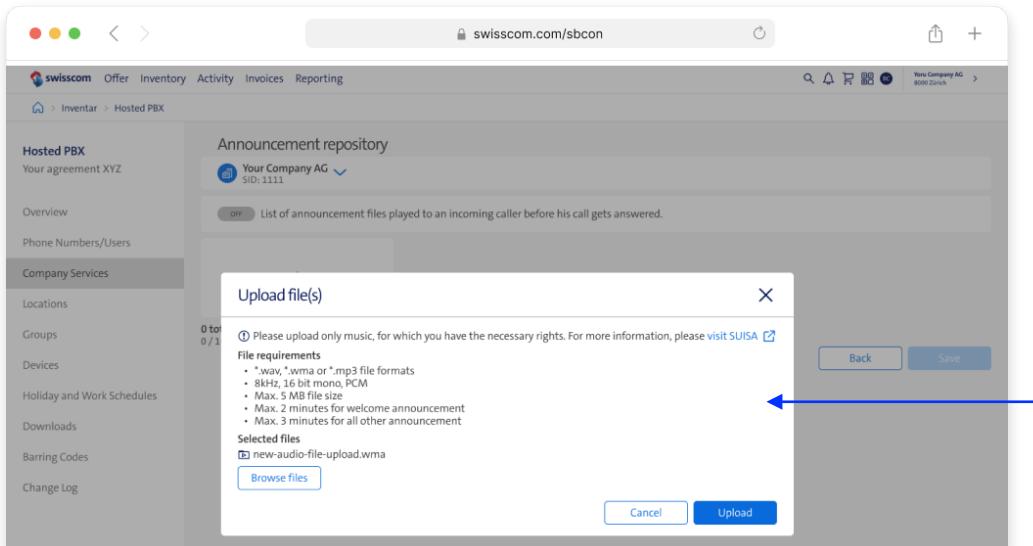
Redesigning the Announcement repository

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' card. It displays a list of files with their names, sizes, and file types. A blue arrow points from the 'replace-audio-file-u...' file to the 'announcement.wav' file, indicating a comparison between two different file entries.



The screenshot shows the 'Announcement repository' card with an open 'Upload file(s)' modal. The modal contains instructions, file requirements, a file selection area, and upload buttons. A blue arrow points from the 'File requirements' section to the 'Selected files' section, highlighting the movement of legal and file requirements information.

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).

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 writing of this documentation all the use cases were designed and the project is in development. We received positive feedback not just from the product owner, but also from customer care and our early adapter user group.

To improve the collaboration we ran two full-day design thinking workshop with business stakeholders and developers. This improved our internal communication.

As a next step for the project, we are supporting the development team and creating new hypotheses which will serve as a base for new features.

Hosted PBX design system

Feb 2022 - Present

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 visualisation 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 consist of reusable elements which align developers.

Team

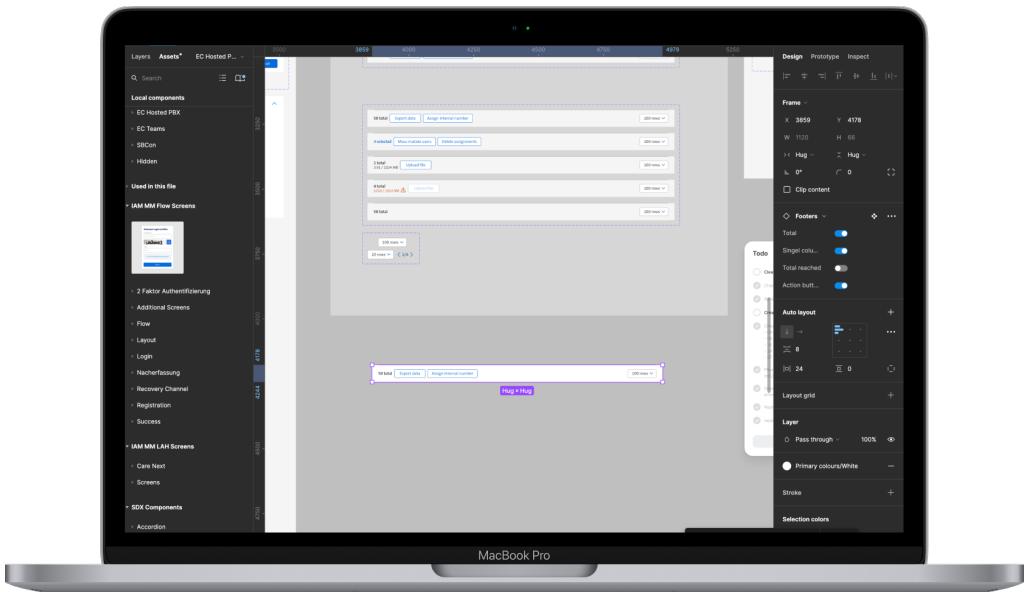
2 UX Designers

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?

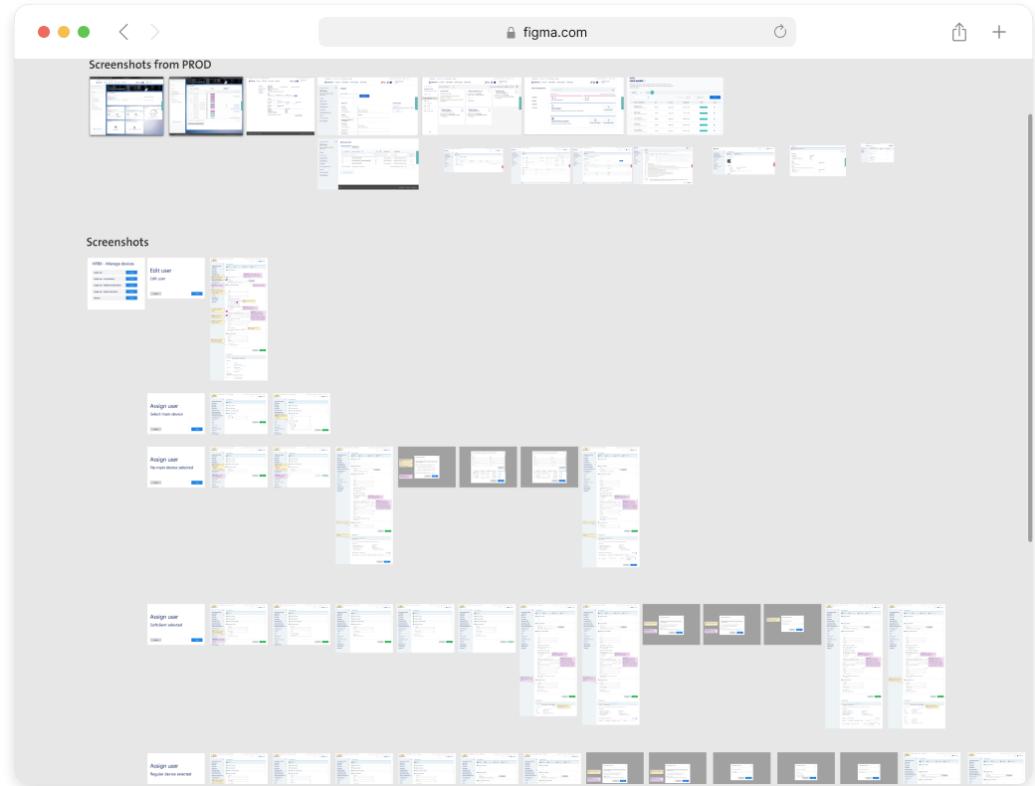
Proposed solutions

While designing the first use cases, we experimented with the global Swisscom design system. It proved from the beginning that many edge cases not covered and the components were unnecessary 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.



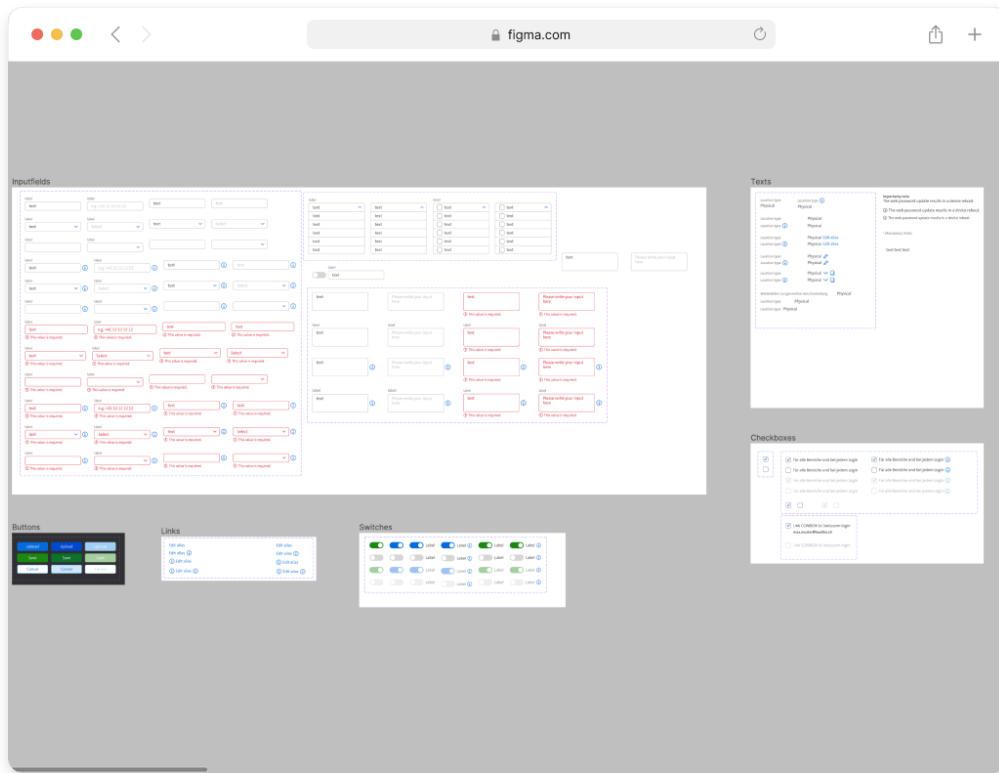
A Figma file with screenshots of current version to identify all high level layouts.

Hosted PBX design system

Designing the system

Creating first component variants

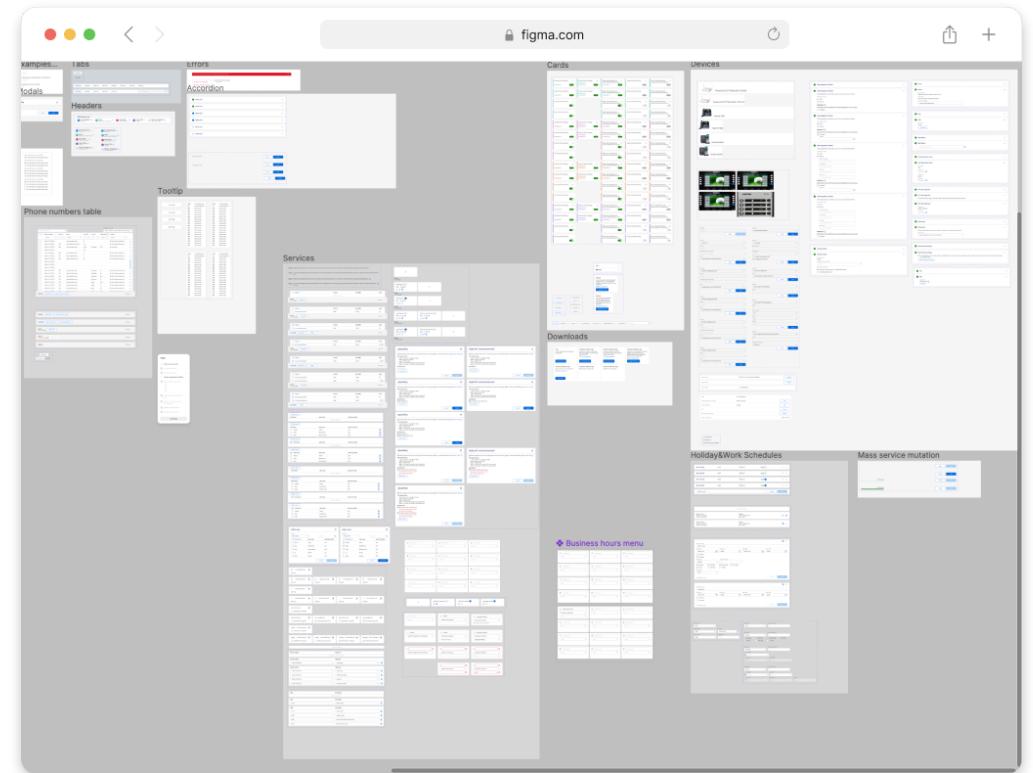
Once we agreed on the common layout styles, we started to produce the first use case designs. As we progressed, we added controls to our system. The very first ones were buttons, text fields, links, checkboxes and other basic controls.



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 compliment 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 as overkill, however for a multi language application with many scenarios flexibility is a 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 rating in AppStore as well as PlayStore.

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.

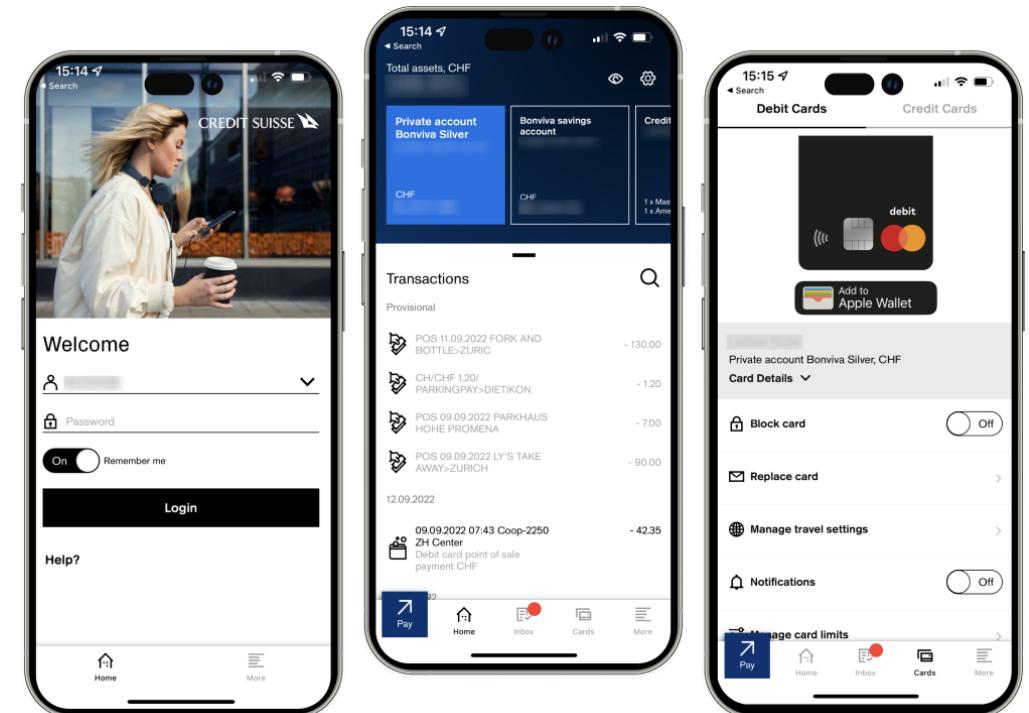
Roles played

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

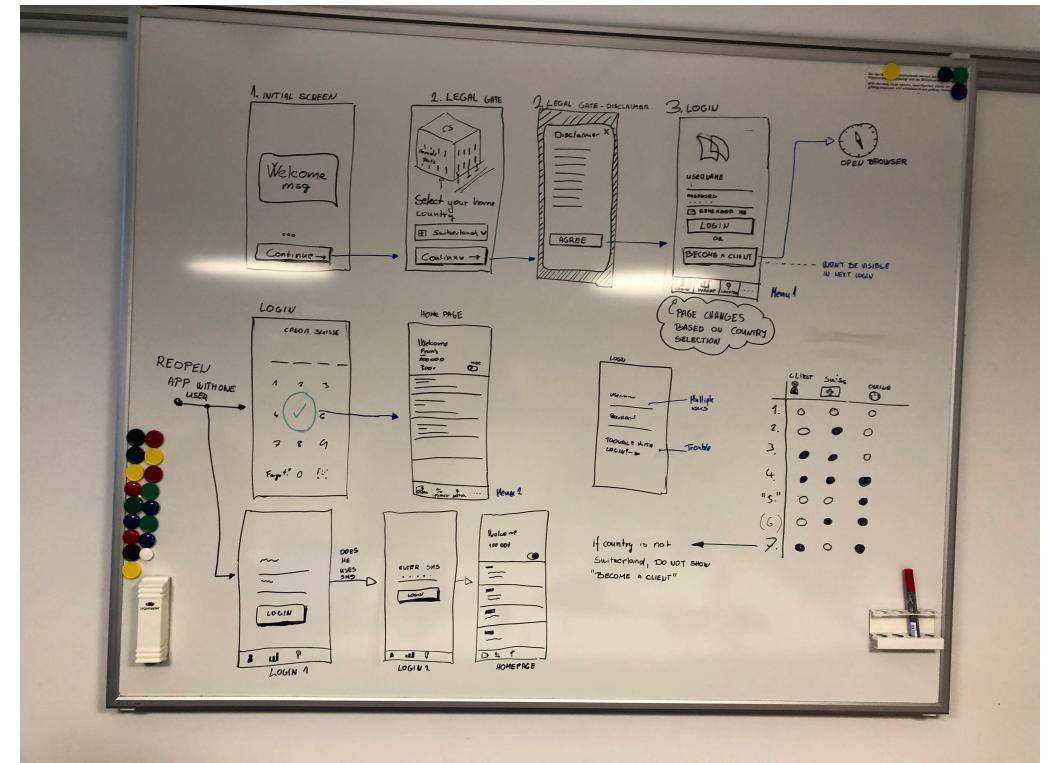
1. The project had a large number of stakeholders with different interests.
2. We had no clear idea about our target audience and their unmet needs.
3. The new concept was constrained by the old backend

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

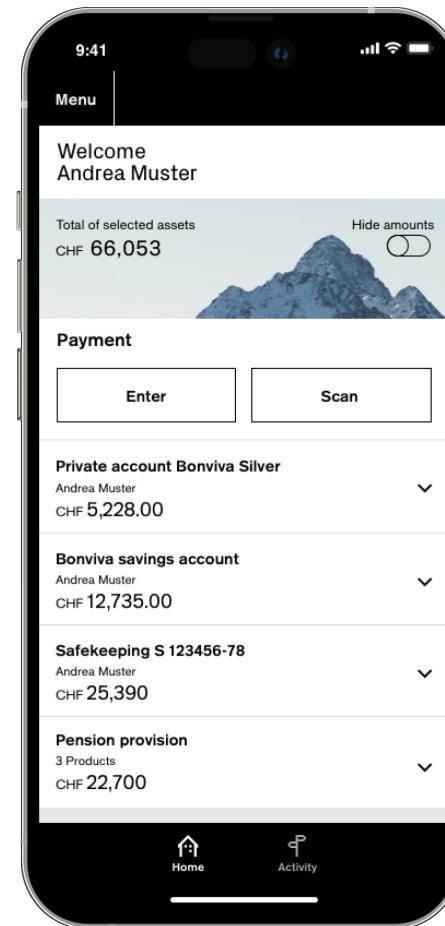
Previous version

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.



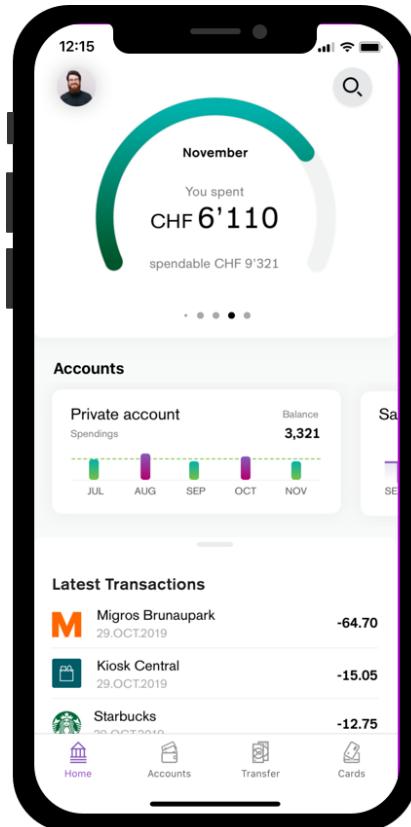
Home screen
Previous version

CSX mobile banking

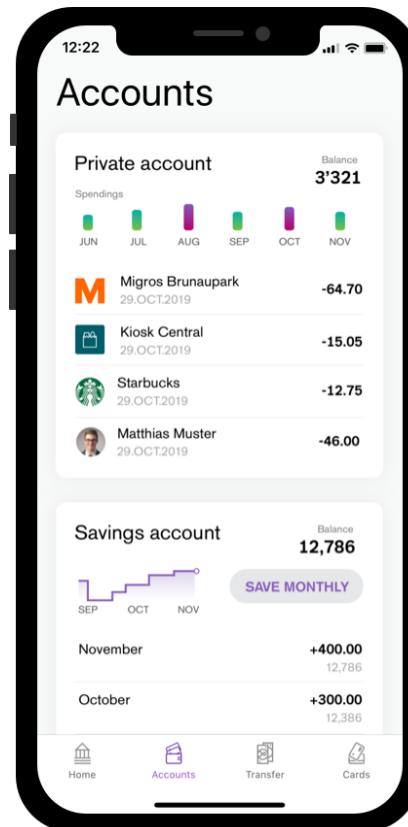
Designing the home screen

Early designs

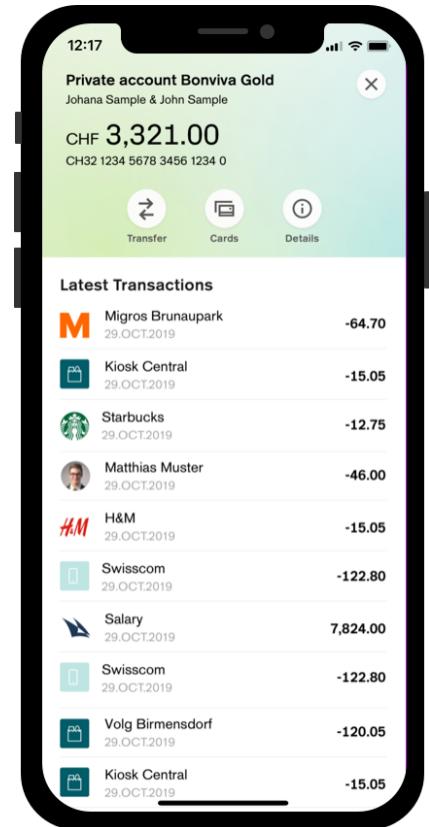
We wanted to set an ambitious vision for the app, therefore we went far away from the current version. The visual language was moderner and brighter. The interactions were fluid, the information kept at minimum.



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.

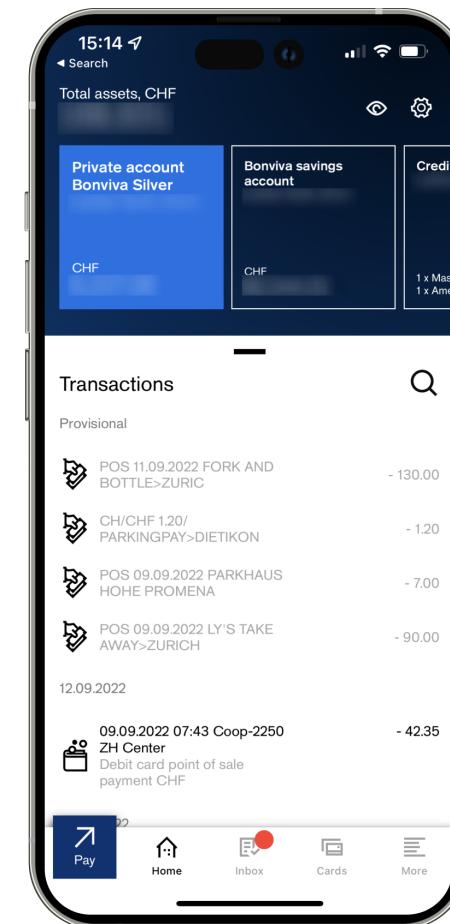
The new home page is native, therefore we could use fluent swipe gestures to speed up user navigation. For example, the user can quickly scroll horizontally to check how much money she or he has on her or his accounts. Other example is swiping up the transactions list and continue scrolling. This pattern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



Home screen
Final design

Online payments

Apr 2018 - Jun 2019

Problem statement

Over 80% of the online banking usage is related to payments. However, this module faced the 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 unsubmitted payments, which caused delayed payments
- High number of duplicate payments, which resulted in a loss of client's money
- Above average support calls related to payment issues

Project goal

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

Team

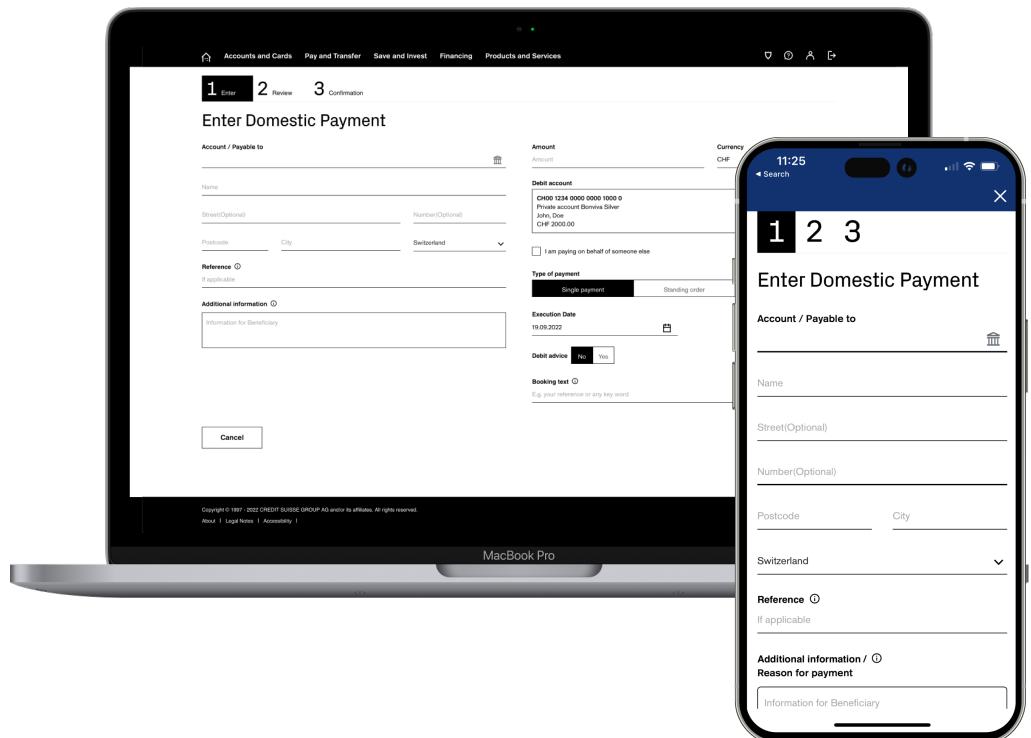
Developers (on-, offshore), business analysts, product owner, scrum master, product managers and customer support.

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

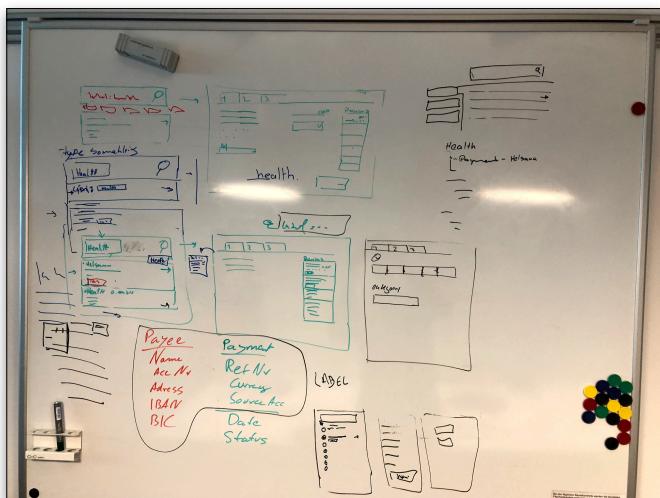
Getting started

Challenges

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

The first challenge was to understand the stakeholders' view.

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.

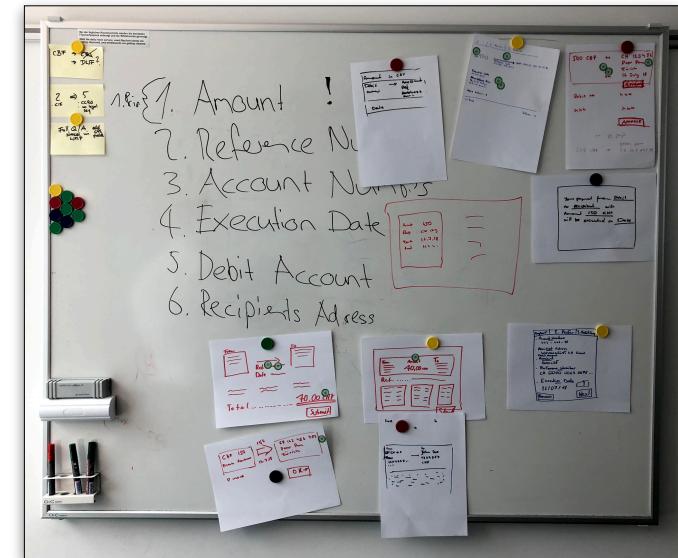
Proposed solution

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 change.

Later, we run a series of design thinkings workshops to build a vision.

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

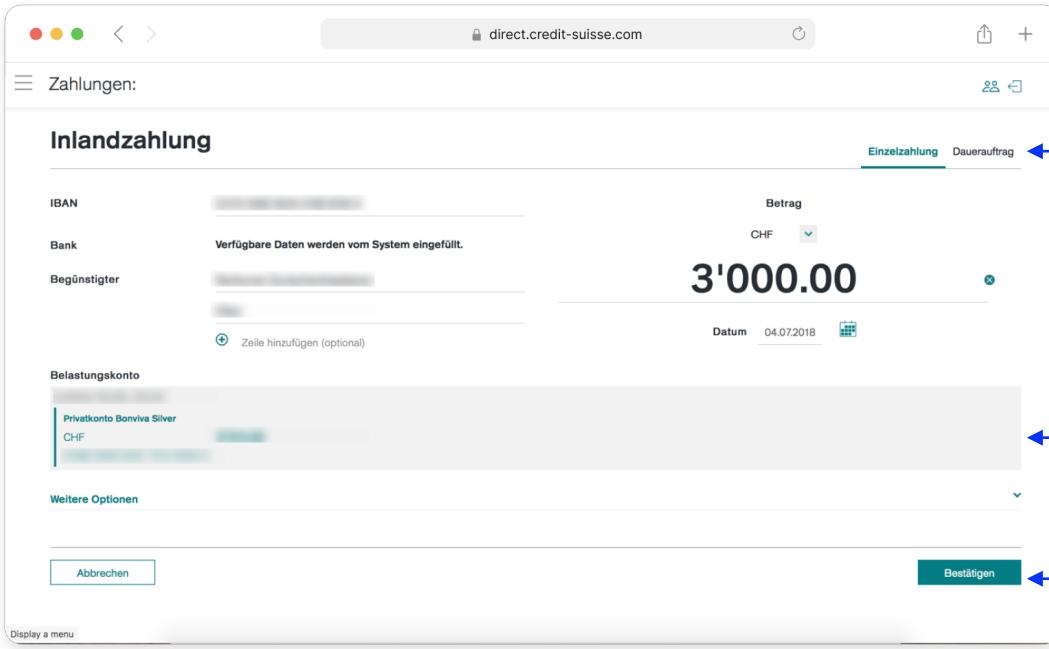
Online payments

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:



The screenshot shows a web-based payment entry form for a domestic transfer. At the top, there are tabs for 'Einzelzahlung' (selected) and 'Dauerauftrag'. Below this, the 'IBAN' field is filled with a placeholder. The 'Bank' field contains the message 'Verfügbare Daten werden vom System eingefüllt.' The 'Begünstigter' field is also filled with a placeholder. The amount 'Betrag' is set to CHF 3'000.00. The payment date is set to 04.07.2018. The 'Belastungskonto' section lists a bank account under 'Privatkonto Bonviva Silver CHF'. At the bottom right is a teal 'Bestätigen' button. Three blue arrows point from the right side of the image to specific parts of the interface, each accompanied by a descriptive text:

- An arrow points to the 'Dauerauftrag' tab with the text: 'Users did not see the standing order feature.'
- An arrow points to the 'Belastungskonto' section with the text: 'The account section wasn't clear enough and clients used the wrong account while making payments.'
- An arrow points to the 'Bestätigen' button with the text: 'Duplicate and incomplete payments, as users did not notice the end of payment flow.'

Domestic payment entry
Previous version

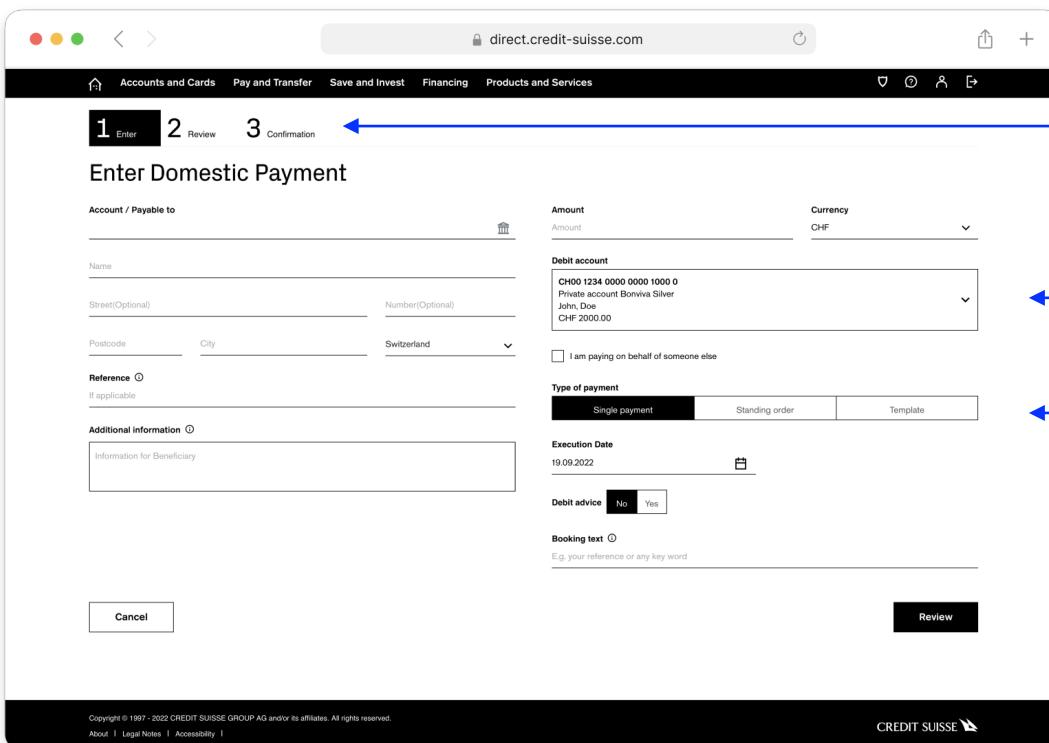
Online payments

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.



direct.credit-suisse.com

1 Enter 2 Review 3 Confirmation

Enter Domestic Payment

Account / Payable to

Name _____

Street(OPTIONAL) _____ Number(OPTIONAL) _____

Postcode _____ City _____ Switzerland _____

Reference ⓘ If applicable _____

Additional Information ⓘ

Information for Beneficiary _____

Amount

Currency CHF

Debit account

CH00 1234 0000 0000 1000 0
Private account Bonviva Silver
John, Doe
CHF 2000.00

I am paying on behalf of someone else

Type of payment

Single payment Standing order Template

Execution Date 19.09.2022

Debit advice No Yes

Booking text ⓘ Eg. your reference or any key word _____

Cancel Review

Copyright © 1997 - 2022 CREDIT SUISSE GROUP AG and/or its affiliates. All rights reserved.
About | Legal Notes | Accessibility

CREDIT SUISSE

Domestic payment entry
Final design

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

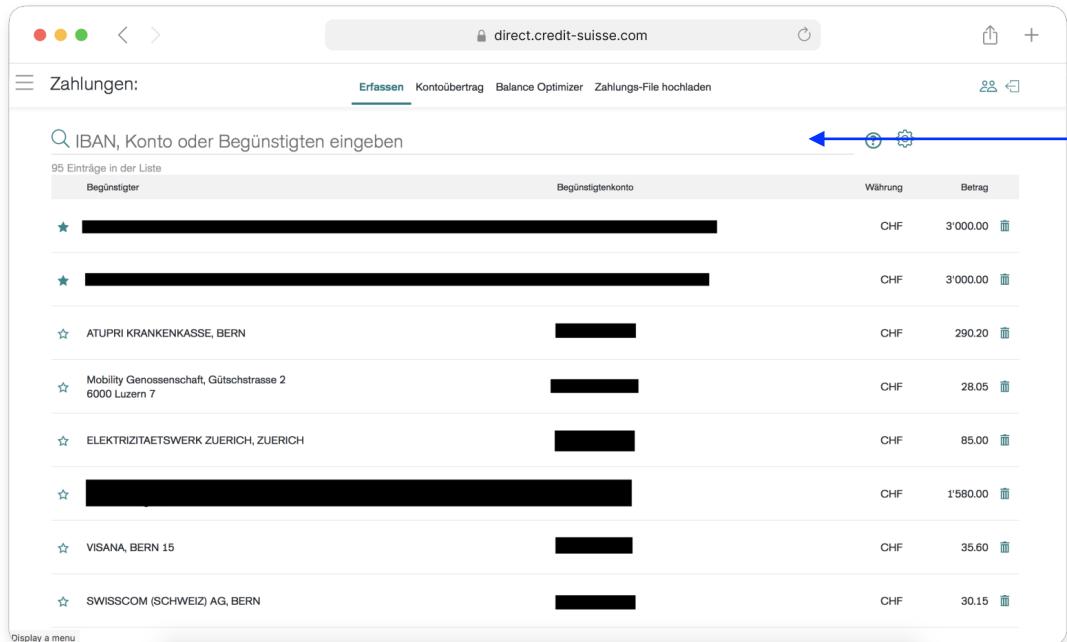
Online payments

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 page title is "Zahlungen:" and the sub-section is "Erfassen". A search bar at the top says "IBAN, Konto oder Begünstigten eingeben". Below it is a table with columns: "Begünstigter", "Begünstigtenkonto", "Währung", and "Betrag". The table lists several entries, each with a star icon and a redacted name. The first entry has a value of 3'000.00 CHF. The second entry has a value of 3'000.00 CHF. The third entry is ATUPRI KRANKENKASSE, BERN with a value of 290.20 CHF. The fourth entry is Mobility Genossenschaft, Gütschstrasse 2, 6000 Luzern 7 with a value of 28.05 CHF. The fifth entry is ELEKTRIZITAETSWERK ZUERICH, ZUERICH with a value of 85.00 CHF. The sixth entry is redacted with a value of 1'580.00 CHF. The seventh entry is VISANA, BERN 15 with a value of 35.60 CHF. The eighth entry is SWISSCOM (SCHWEIZ) AG, BERN with a value of 30.15 CHF. At the bottom left is a "Display a menu" link.

The autocomplete for IBANs had many bugs and lead to wrong payment types.

Business users wanted a quick way to select payment type, e.g. international payment.

Business users were missing information from the payment list

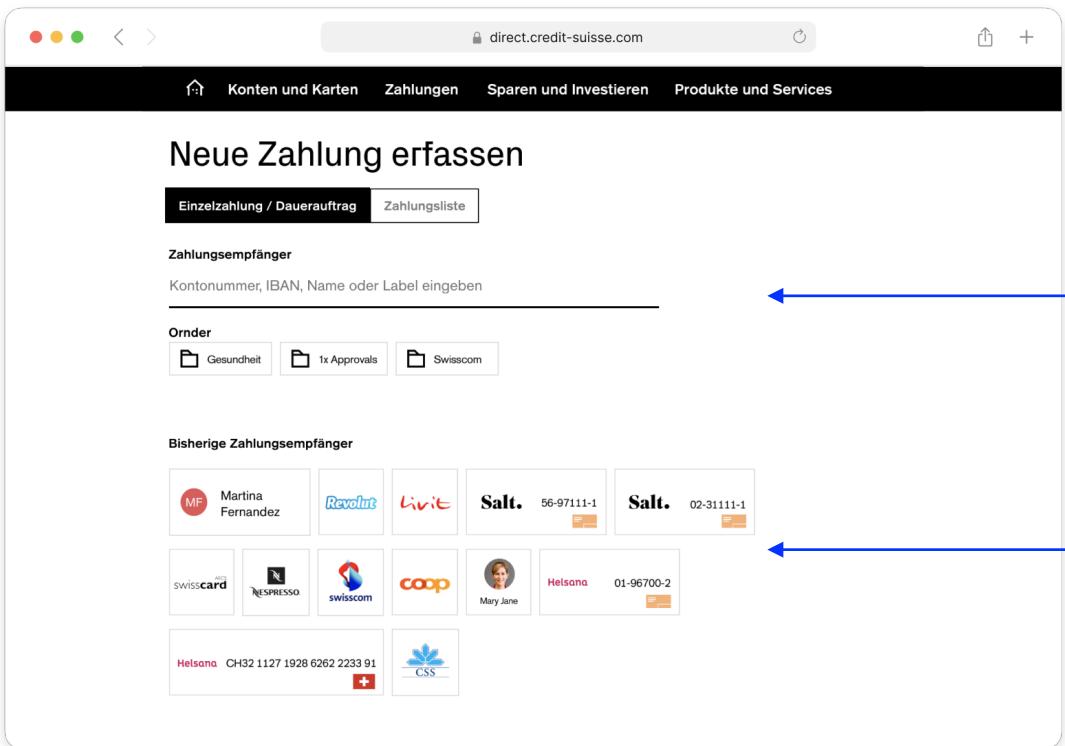
Payment assistant
Previous version

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:



The screenshot shows the 'Neue Zahlung erfassen' (New payment capture) page. At the top, there are tabs for 'Einzelzahlung / Dauerauftrag' (selected) and 'Zahlungsliste'. Below this, there's a section for 'Zahlungsempfänger' (Payment recipient) where users can enter a bank account number, IBAN, name, or label. There are also sections for 'Order' (with buttons for Gesundheit, 1x Approvals, and Swisscom) and 'Bisherige Zahlungsempfänger' (Recent payment recipients). The 'Recent payment recipients' section displays a grid of logos and names, such as MF Martina Fernandez, Revolut, Salt. (two entries), swisscard, NESPRESSO, coop, Mary Jane, Helsana, and CSS.

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.

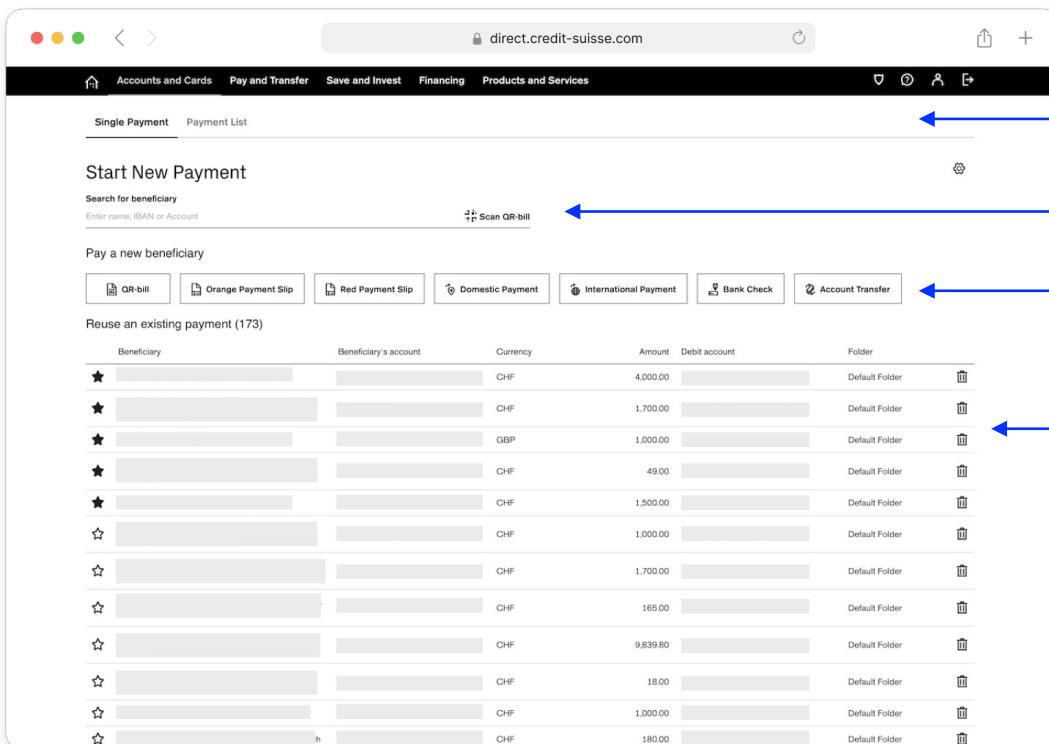
We used logos, icons and images of people to make the assistant more visual.

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 'Accounts and Cards' tab selected. The main header includes 'Pay and Transfer', 'Save and Invest', 'Financing', and 'Products and Services'. Below the header, there are three tabs: 'Single Payment' (selected), 'Payment List', 'Start New Payment', and 'Reuse an existing payment (173)'. The 'Start New Payment' section contains a search bar for 'beneficiary' and a 'Scan QR-bill' button. The 'Reuse an existing payment' section lists 173 previous payments in a table with columns: Beneficiary, Beneficiary's account, Currency, Amount, Debit account, and Folder. At the bottom of the page, there is a footer with the text 'Payment assistant 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 they achieve higher level of consistency.

Team

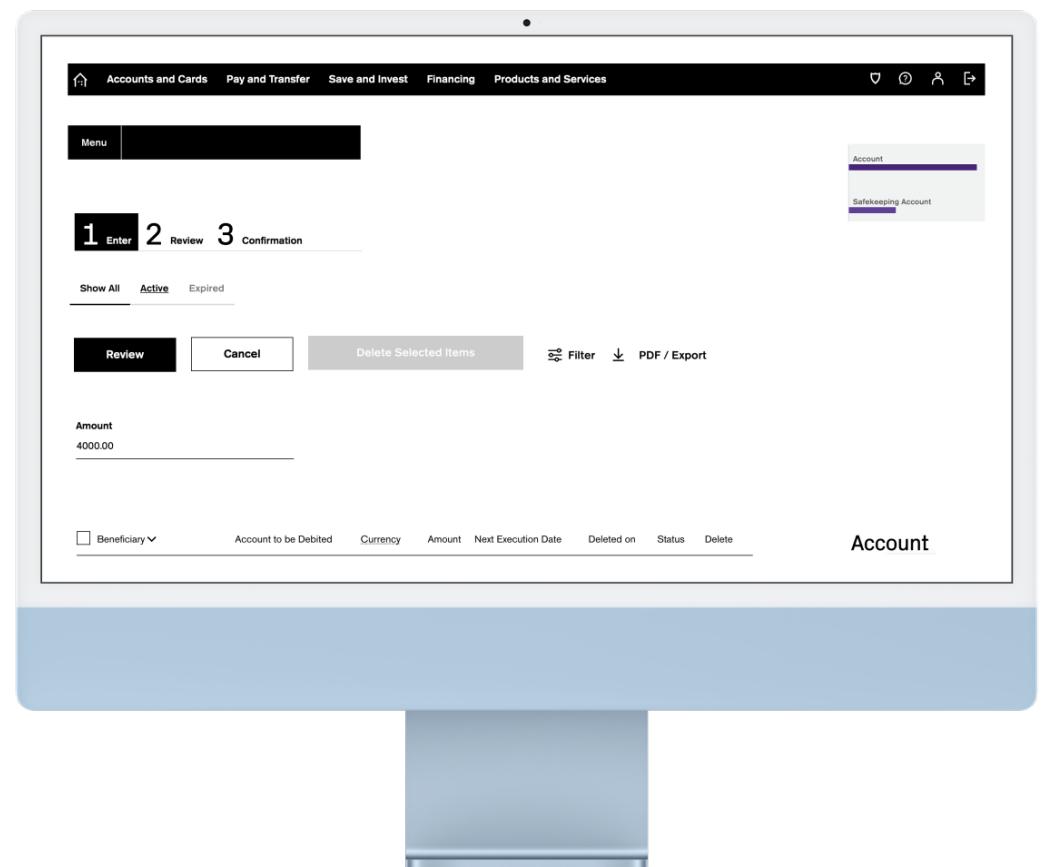
3 developers, 1 brand designer, 2 UX designers

Roles played

Me and another senior UX designer were responsible to define and approve 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 will 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.

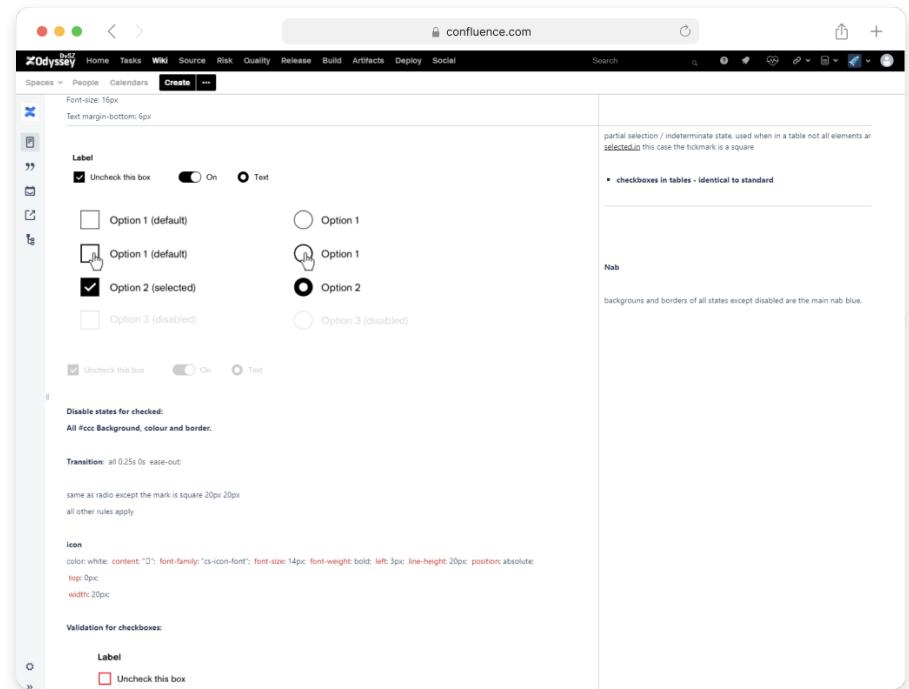
Next, we created the first design system in Confluence. It was a huge design table, consist of categories, sub-categories, print screens and measurements.

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 easy of access. But as the content grew, it became difficult to maintain and navigate with in. 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 use it.

To lookup 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.

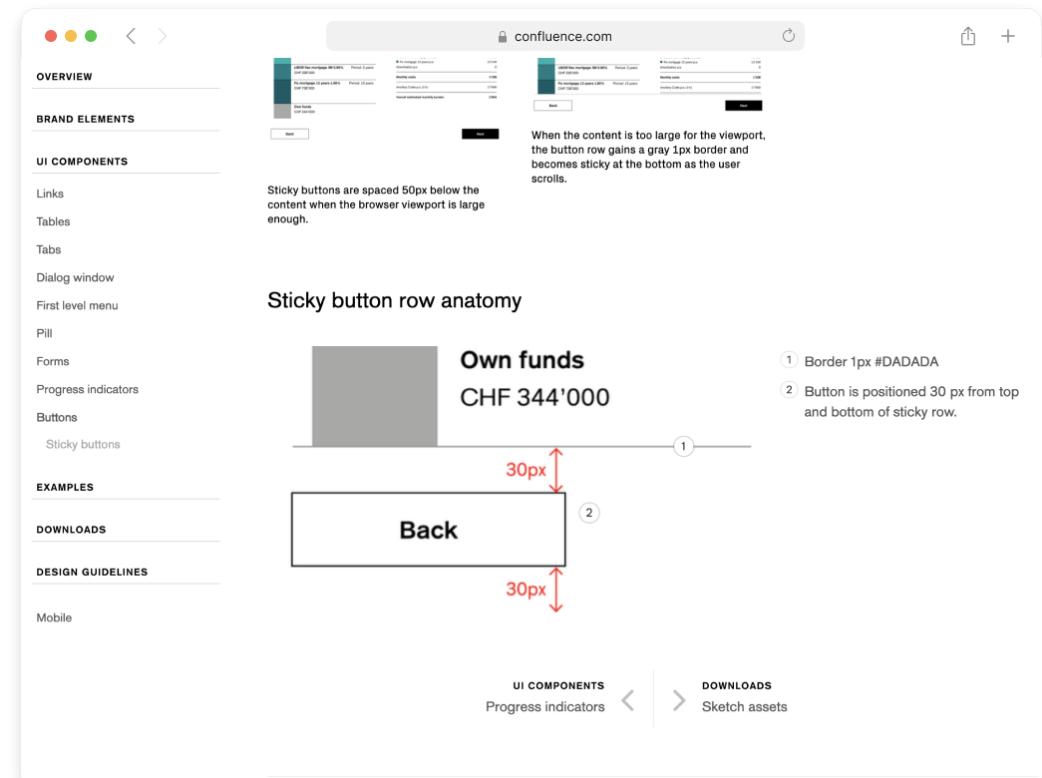
Lessons learned

SketchApp UI libraries worked for us perfectly. Plus, we found that the interactive UI library benefits not only the developers, but 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, which allows designers to quickly prototype in multiple languages.



The design system documented in Frontify.