4. Design Final

Cogs 187A - Fall 2021

11/23/2021

Matt Lohier - A16556060

Table of Contents

Team Planning Document

Matt Lohier

Although it's more work, I have chosen to solo the project, as it allows me to control the pace and minimize my stress, which helps me produce a better final product that I can *proudly* put on my portfolio :)

Task	Subtask	Who
Team Planning Document		Matt
Introduction	Explain why you chose this site.	Matt
	User 1: Explain why this user is appropriate tell us about any limitations (biases) you think your user selection may have.	Matt
	User 2: Explain why this user is appropriate tell us about any limitations (biases) you think your user selection may have.	Matt
	User 3: Explain why this user is appropriate tell us about any limitations (biases) you think your user selection may have.	Matt
	User 4: Explain why this user is appropriate tell us about any limitations (biases) you think your user selection may have.	Matt
Interview Plan	Make your interview plan State in clear language the questions you will ask your 4 users	Matt

	Explain how you capture their answers	
Analysis 1	User 1: Analyze the results of your user testing. What worked and what did not? Describe the top three usability errors for **each user**	Matt
	User 2: Analyze the results of your user testing. What worked and what did not? Describe the top three usability errors for **each user**	Matt
	User 3: Analyze the results of your user testing. What worked and what did not? Describe the top three usability errors for **each user**	Matt
	User 4: Analyze the results of your user testing. What worked and what did not? Describe the top three usability errors for **each user**	Matt

Finish by
Nov 27th

Task	**Subtask**	**Who**
Choose and Describe 1 component for redesign	Explain what the issues are in that one problematic area by providing a series of screens that displays what went wrong for each user. Be sure to tie your explanations of the issues to annotations that show where in the screenshots the problematic areas are so we can readily see the issues as well as the workflow issues.	Matt
Competitive Analysis	Competitive Analysis Site 1 - (Link) Competitive Analysis on a site that has solutions for this sort of problem. Describe	Matt

	with screens and annotate how they solve this problem.	
	Competitive Analysis Site 2 - (Link) Competitive Analysis on a site that has solutions for this sort of problem. Describe with screens and annotate how they solve this problem.	Matt
	Competitive Analysis Site 3 - (Link) Competitive Analysis on a site that has solutions for this sort of problem. Describe with screens and annotate how they solve this problem.	Matt
Brainstorm and Sketch FOUR quick solutions for redesign for the selected site:	Sketch 1	Matt
	Sketch 2	Matt
	Sketch 3	Matt
	Sketch 4	Matt
TWO High Fidelity Interactive Prototypes:	Prototype 1: Create two high fidelity/interactive prototypes that solve the issues you found in the problematic component. Your redesigns should not be just a higher fidelity version of two of your sketches but **modified redesigns that incorporate several of the good ideas you sketched.**	Matt
	Prototype 2 Create two high fidelity/interactive prototypes that solve the issues you found	Matt

	in the problematic component. Your redesigns should not be just a higher fidelity version of two of your sketches but **modified redesigns that incorporate several of the good ideas you sketched.**	

Finish by
Dec 3rd

2nd User Testing Plan	Make a user test plan to evaluate and compare your 2 redesigns. Be sure to explain how you will be able to decide whether any of your redesigns are better. Be mindful of possible negative side effects of your design on other parts of the site.	Matt
	User 1: Explain why this user is appropriate tell us about any limitations (biases) you think your user selection may have.	Matt
	User 2: Explain why this user is appropriate tell us about any limitations (biases) you think your user selection may have.	Matt
	User 3: Explain why this user is appropriate tell us about any limitations (biases) you think your user selection may have.	Matt
	User 4: Explain why this user is appropriate tell us about any limitations (biases) you	Matt

|	think your user selection may have.	
Analysis 2	User 1: Analyze the results of your user testing. What worked and what did not? Describe the top three usability errors for **each user**	Matt
	User 2: Analyze the results of your user testing. What worked and what did not? Describe the top three usability errors for **each user**	Matt
	User 3: Analyze the results of your user testing. What worked and what did not? Describe the top three usability errors for **each user**	Matt
	User 4: Analyze the results of your user testing. What worked and what did not? Describe the top three usability errors for **each user**	Matt
Final Analysis and Lessons Learned	Analyze the results and discuss the strength and weakness of your redesigns by referring back to your rationale for your changes and whether what you predicted would happen did happen. If not why not?	Matt
Recommendations	Tell us your bottom line recommendation for which redesign should be adopted, as if you are presenting to the head designer.	Matt

Finish by Dec 7th (DUE DATE)

The Site to redesign

The site: **firstrepublic.com**

First Republic is an American bank that offers personal, business, and wealth management financial solutions. Their customer base are primarily high net-worth individuals. They try to set themselves apart from other banks by providing a personalized customer experience that shows they prioritize their customer feedback.

Why I chose this site
I'm interested in going into the finance sector and I thought this would be a fun way of looking at UI design in that field. After looking at several mobile banking sites, I thought this was the one I could do the best job at improving.
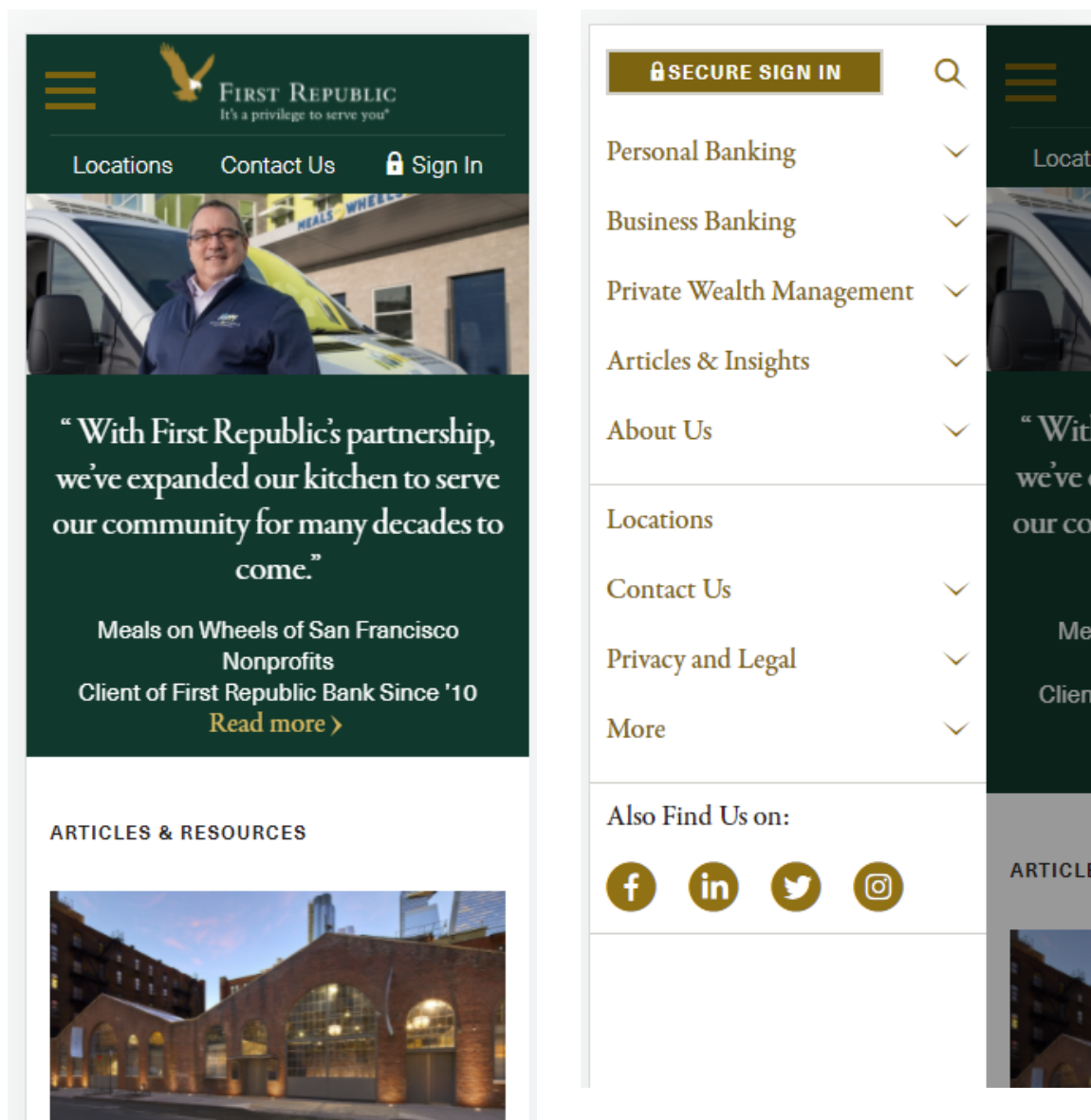
1st User Test Users

The 4 Users:

User 1 (FL): 49 year old tech CTO

- frequently using banking sites. Prefers desktop UI's over mobile ones. Has experience in the finance fields, is well aware of different kinds of banking. As an engineer, he has little experience with interface design, and generally isn't picky.
- Banks with Chase on Desktop
- Has heard of First Republic

User 2 (MZ): 23 year old software engineer.

- Is generally very tech savvy, picky, and has experience with interfaces and interface design.
- Banks with Wells Fargo on Mobile
- Has *never* heard of First Republic

User 3 (FD): 18 year old college freshman

- Has limited experience with high school checking accounts and is not very familiar with the industry. Is generally good with technology and web browsing.
- Banks with Chase on Mobile
- Has *never* heard of First Republic

User 4 (MD): 24 year old recent college graduate working for a recruitment firm

- Has some experience using baking sites, and is generally aware of different kinds of banking products. This user isn't as tech savvy as others on the list.
- Banks with Bank of America on Mobile
- Has *never* heard of First Republic

1st User testing plan

Question the Subject answers after the tasks (see responses above)
- Who do you bank with normally?
- Do you use their app, their desktop site?
- Have you ever heard of FirstRepublic?

The tasks that the Users are presented with:
- Find firstrepublic's page about their *Eagle Invest* tool (Wealth M. → Additional Services → The Eagle Invest)
- What is the introductory fixed APR rate for small business loans? (1.95%)
- Find firstrepublic's 2020 annual report (about us → financial overview)
- Find the business interest checking rate for southern california (articles and insights → client resources → deposit rates)
- Name a senior manager of the wealth management branch based out of LA. (Wealth M. → Main offerings → The Team)
- What do you do if you lose your debit card? Look up some information

Question the Subject answers after the tasks
- What did you think of the on-page explanations?
- What did you think of the navigation?
- Do you prefer FirstRepublic's mobile site over what you use currently?
- Do you like the customer reviews?
- How will you remember FirstRepublic now that you have seen their site?
- Did you enjoy the articles, would you actually read them as an average user?

Method for observing users while working:
- Make sure the user is in a comfortable environment, and make sure they have been briefed on the importance of thinking aloud as much as possible.
- The user will interact with the mobile site while on a zoom call with the notetaker that fills out the spreadsheet
- The notetaker will time the subject for each task, and collect answers to questions after the task

- The notetaker should write down the challenges the subject faces, their reactions, and how the steps they take in their approach to each task.

Analysis of initial results

Check out the appendix:
I added a category for each error from Nielsen's 10 Heuristics so the results are clearer.
User 1 (FL) - 49 year old tech CTO
General Feedback: User 1 found the site dated but thought the functionality was 'okay'.

Top 3 usability errors:

Error #1: *(Flexibility and efficiency of use):* User 1 thought that the navigation layout on the homepage was not great. Being a bit older and not used to mobile interfaces, he fat fingered quite a few times and had a hard time going back and forth in the hamburger menu, which he had to reopen each time. He thought the hamburger menu could be better since that is what is relied on for navigation.

Error #2 *(Match between system and the real world)* **:** User 1 thought that the use of customer reviews felt a bit tacky and scripted. Although Firstrepublic tries to distinguish themselves with the reviews, User one felt it was too much, explaining that a banking site should cater to functionality first if they care about their users like they say they do.

Error #3 *(recognition rather than recall)***:** User 1 found that items in the hamburger menu were a bit scattered and thought that could be improved. Things related to business are located on other pages, like "Client resources" under "articles and insights" instead of under "business" where you would think they are

Question the Subject answers after the tasks
- **What did you think of the on-page explanations?**
  This user thought they were good, detailed, and thorough
- **What did you think of the navigation?**
  This user thought the navigation was bad for a mobile design.
- **Do you prefer FirstRepublic's mobile site over what you use currently?**
  No
- **Do you like the customer reviews?**
  This user liked them, and thought it made the site feel a bit more personable
- **How will you remember FirstRepublic now that you have seen their site?**

This user reported the site felt a bit old, dated, country club ish.
- **Did you enjoy the articles, would you actually read them as an average user?**
  They're nice to have, but this user would rather do their own research

User 2 (MZ): 23 year old software engineer

General Feedback: Overall, User 2 didn't like the site. He was surprised by how dated it looked, and thought it was confusing to use.

Top 3 usability errors: User 2

Error #1 (*Recognition Rather than Recall*)**:** User 2 disliked the filtering options on the articles section of the site. He noted that when you click an option from the drop down, nothing happens. You have to click "filter articles" once you have made that selection, which is weird, since on any other site you would think that button was for an entirely different filtering feature. He also noted that the use of the hamburger menu coincided with the use of the drop down selector for the article pages, which he found redundant.

Error #2: (*Aesthetic and minimalist design*)**:** User 2 thought the reliance on text was overbearing. The entire site uses text headings for navigation, and makes almost zero use of any icons or intuitive elements. The page also has very little flow, and doesn't really tell you where to go when you first land.

Error #3: (*Flexibility and Ease of Use)***:** User 2 thought the filtering options for the wealth management "team" offering was poorly implemented. When browsing through it, a lot of selections have no results. This being said, User 2 liked the pages that were written for each team member.

Question the Subject answers after the tasks
- **What did you think of the on-page explanations?**
  This user reported it was good, but much too text heavy
- **What did you think of the navigation?**
  it works, but isn't the easiest to use. It's not developed enough for how relied on it is.
- **Do you prefer FirstRepublic's mobile site over what you use currently?**
  No
- **Do you like the customer reviews?**
  No, this user thought they were tacky
- **How will you remember FirstRepublic now that you have seen their site?**

Old and Outdated, catering for old people
- **Did you enjoy the articles, would you actually read them as an average user?**
They're nice, but nobody trusts advice straight from a bank.

User 3 (FD): 18 year old college freshman. Only has experience using the chase banking sites, and is not very familiar with the industry.

Top 3 usability errors: User 3

General Feedback: Overall, User 3 found the site a bit boring and convoluted.

Error #1 *(Flexibility and Efficiency of Use)***:** User 3 noticed that the site was missing a language selector/changing tool. User 3 also noticed that under "Locations'", the map view shows completely unrelated locations from the search results. User 3 also noticed that the hamburger menu disappears altogether during task 2.

Error #2 *(Aesthetic and minimalist design)***:** Like others, User 3 also felt that the site relied too much on text, especially for a mobile design. She also disliked the reviews that took a lot of space, and she didn't really feel genuine, or important. She noted that if this was a restaurant, that sort of review might make more sense.

Error #3 *(Visibility of System Status):* User 3 noted that she felt lost on the page. The hamburger menu does a bad job at indicating the scope of the site. Generally, she found the site could do a better job of communicating their site layout and where things are. She also disliked the hamburger menu being only 2/3rds of the screen, especially since its the main navigational element.

Question the Subject answers after the tasks
- **What did you think of the on-page explanations?**
Good!
- **What did you think of the navigation?**
Without much banking experience, its "okay"
- **Do you prefer FirstRepublic's mobile site over what you use currently?**
No
- **Do you like the customer reviews?**
No. It's like the company giving themselves an award. Doesn't feel genuine.
- **How will you remember FirstRepublic now that you have seen their site?**
It's very average. Not very exciting but it works.

- **Did you enjoy the articles, would you actually read them as an average user?**
  They're nice to have to get started and learn, but that's about it

User 4 (MD): 24 year old recent college graduate working for a recruitment firm. Has some experience using baking sites, and is generally aware of different kinds of banking products.

Top 3 usability errors: User 4

General Feedback: User 4 generally liked the site, but had a few issues here and there

Error #1 *(Consistency and Standards):* User 4 found that the site was inconsistent. It was clear some parts of the site were much newer than others. Jumping back and forth between older and newer content made the older stuff feel a lot less interesting.

Error #2 *(Aesthetic and minimalist design):* User 4 thought the 6 different sign in options were confusing and poorly presented.

Error #3 *(Match between system and the real world):* This user liked the customer centered feel, but felt it compromised other portions of the site too much and put too much burden on the hamburger menu. Instead of trying to drive sales, promote a brand message, or add easier functionality, Customer reviews and *Articles and Insights* take priority over functional elements or new company promotions.

Question the Subject answers after the tasks
- **What did you think of the on-page explanations?**
  Good but could be made simpler
- **What did you think of the navigation?**
  It's not great. The hamburger is cluttered and you need to know a lot of banking terms to navigate around
- **Do you prefer FirstRepublic's mobile site over what you use currently?**
  No
- **Do you like the customer reviews?**
  It's okay but it takes a lot away from them telling us about what they do.
- **How will you remember FirstRepublic now that you have seen their site?**
  A solid bank that needs to revamp parts of their site a bit for mobile
- **Did you enjoy the articles, would you actually read them as an average user?**

No, they just take up space. I'd rather see company news or something else

What Didn't Work well
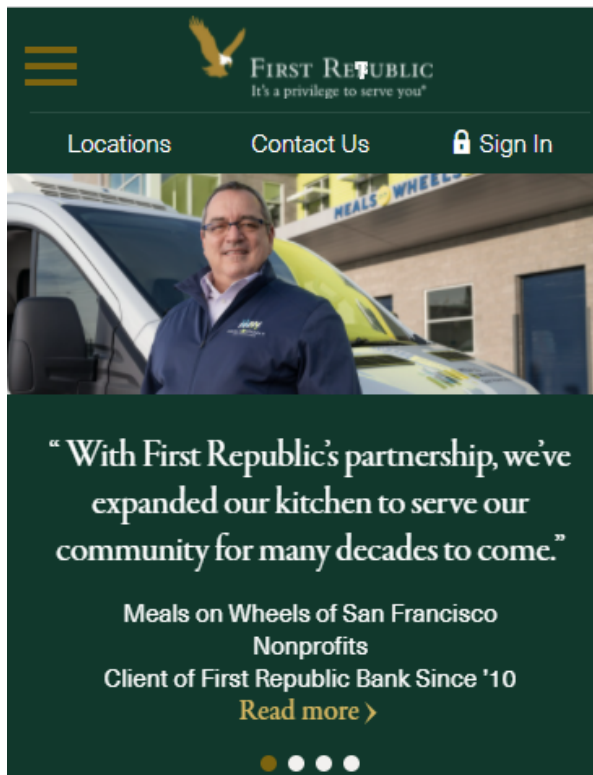
Chelsea Factory in New York City

The site Makes the bold choice of using customer reviews in the foreground. Although this was effective for some customers, other thought it was a bit tacky

The homepage gives very little information about system status, and doesn't indicate anything about the scope of the site, or even that its a bank

Although the menu slides, none of the pages are used for usability in any way.

The front page makes very little use of icons, with there being only 1.

There is no search feature visible on the home screen, which some users really like, especially on sites like this that are content heavy

The 'contact us' screen is very light, and could offer more online resources to the user. For younger people, calling is a bit of a last resort.

A lot of the users reported they would not care to read the articles, and that they felt biased since they are written by the company themselves

What Didn't Work well
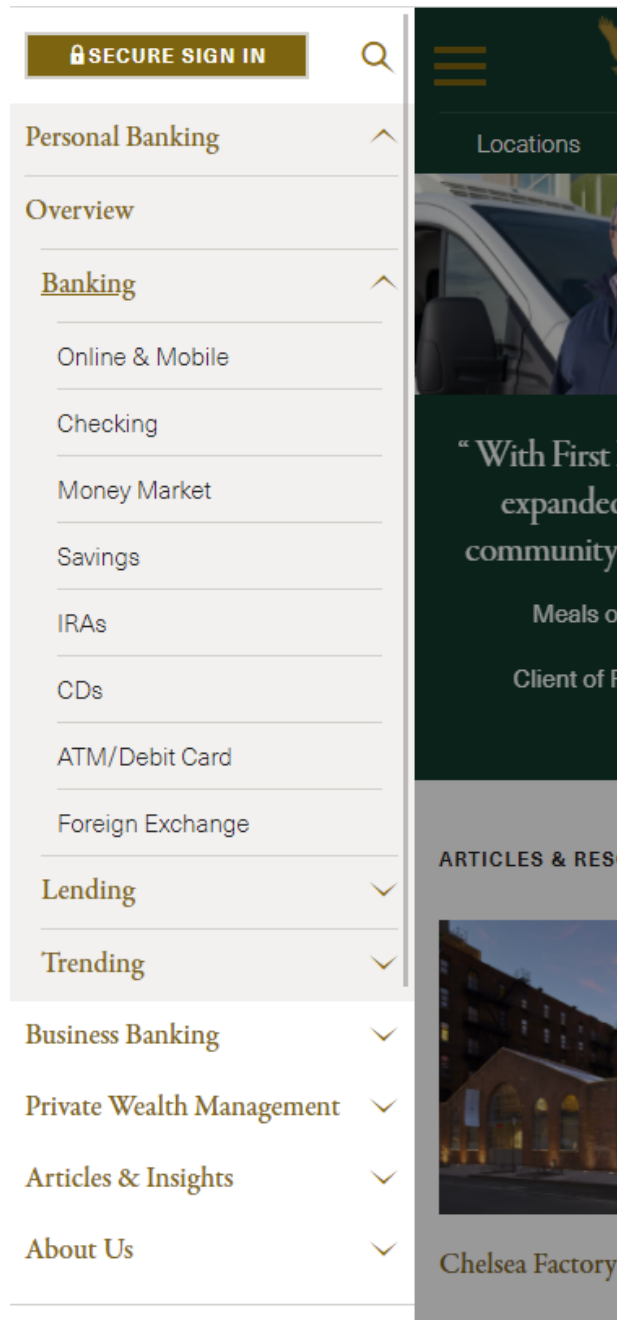
The sites entire navigation lies in the hamburger menu, which takes up only 2/3rds of the screen

The Hamburger menu gets cluttered quickly, and doens't give the user an accurate display of the offerings. When you click 'overview', there are in fact many more. It feels cluttered and disconnected.

Some categories on the hamburger menu are in unexpected places, like where things related to business are located on other pages, like "Client resources" under "articles and insights" instead of under "business" where you would think they are

There are 6 sign in options that vary based on the type of banking you are doing. Some users disliked the way this was presented

One component to redesign

What the users didn't like:

Visibility of system status: The navigation doesn't do the best job at conveying the scope of Firstrepublic's website and their offerings. The hamburger menu only contains a fraction of the pages on the site and is a bit convoluted and confusing.

Aesthetic and minimalist design:
Firstrepublic's navigation element is cluttered and text heavy. Segmenting it into more pages and making the hamburger menu a more prominent part of the site would make it more functional. Moreover, the site feels text heavy and could do a better job at minimalism. Areas could be better designed with images and intuitive elements.

Flexibility and Efficiency of use:
Firstrepublic's site misses the mark in terms of efficiency and flexibility. The lack of any usable elements on the homepage feels a bit wasted, the UI is hidden in a hamburger that could be more prominent, and the site lacks language selectors. A few of the users relied more on the search function than on the hamburger menu itself.

The Redesign Component

Based on the first user test, FirstRepublic's mobile site does a great job with its content, but navigating around that content is not always smooth and easy. The reliance on the hamburger menu is fine in itself, but the menu could be implemented in a better way. Fundamentally, my redesigns will address the site's **navigation**. I will create a prototype redesigned hamburger menu and a bolder design that uses different navigation.

Redesign Goals

1. Redesign the site's navigation, while maintaining all the product lines on a single site
2. Keep the same color scheme, it's important to the brand
3. Decrease the site's text load, develop a greater reliance on icons and images
4. Declutter or replace the hamburger menu with a more mobile friendly solution.
5. Decrease the reliance on customer feedback, as it impedes too much on the site's usability, especially on mobile.
6. Make the system status more visible. Making it easier to understand the scope of the offerings without relying entirely on a hamburger menu.
7. Make it easier to browse online support before having to call

Competitive Analysis of 3 Sites

The problem with banking sites

 Banking sites have to cover a very diverse range of topics that are each very deep and complicated using a UI that is very limited in space. They have to bridge the balance between commercial business with consumer's basic needs of replacing lost credit cards or opening a new checking account. Banking sites require flexible UI's, and smart decisions about what information to prioritize.

The Sites I choose to Analyze

For my competitive analysis, I chose to stay within the realm of banking to see the types of solutions other companies have for this somewhat niche problem. I also wanted to stay in the realm of banking sites to see the different terms, and ways each product is sold, to better understand each company's priorities.

The sites I analyzed are as follows:
1. Chase Bank USA
2. Scotia Bank Canada
3. Bank of America USA

How these sites tackle the problem and use the space

- All of the sites used a hamburger menu.
- Other sites relied more on icons that first republic
- Some sites chose to sell something on the very front page, or have some kind of call to action
- Sites had different ways of differentiating their product lines. Some sites have entirely different sites for their commercial and business offerings versus consumer ones. Some sites are more, and less obvious about their business offerings
- None of the other sites incorporated customer reviews as an important part of the mobile experience

1. Chase Bank: www.chase.com

1: Chase uses the most important space, the thing you see first, to sell a promotion

2: Smart use of icons make it more intuitive to use

3: The hamburger menu doesn't have drop downs, but instead it slides over to show options. Looks more minimalistic and is better for mobile

4: They do a good job of separating their business and commercial business from their consumer ones. They make it easy, separating things by category normal people would look for

5: They have a language selector. Firstrepublic doesn't have one at all.
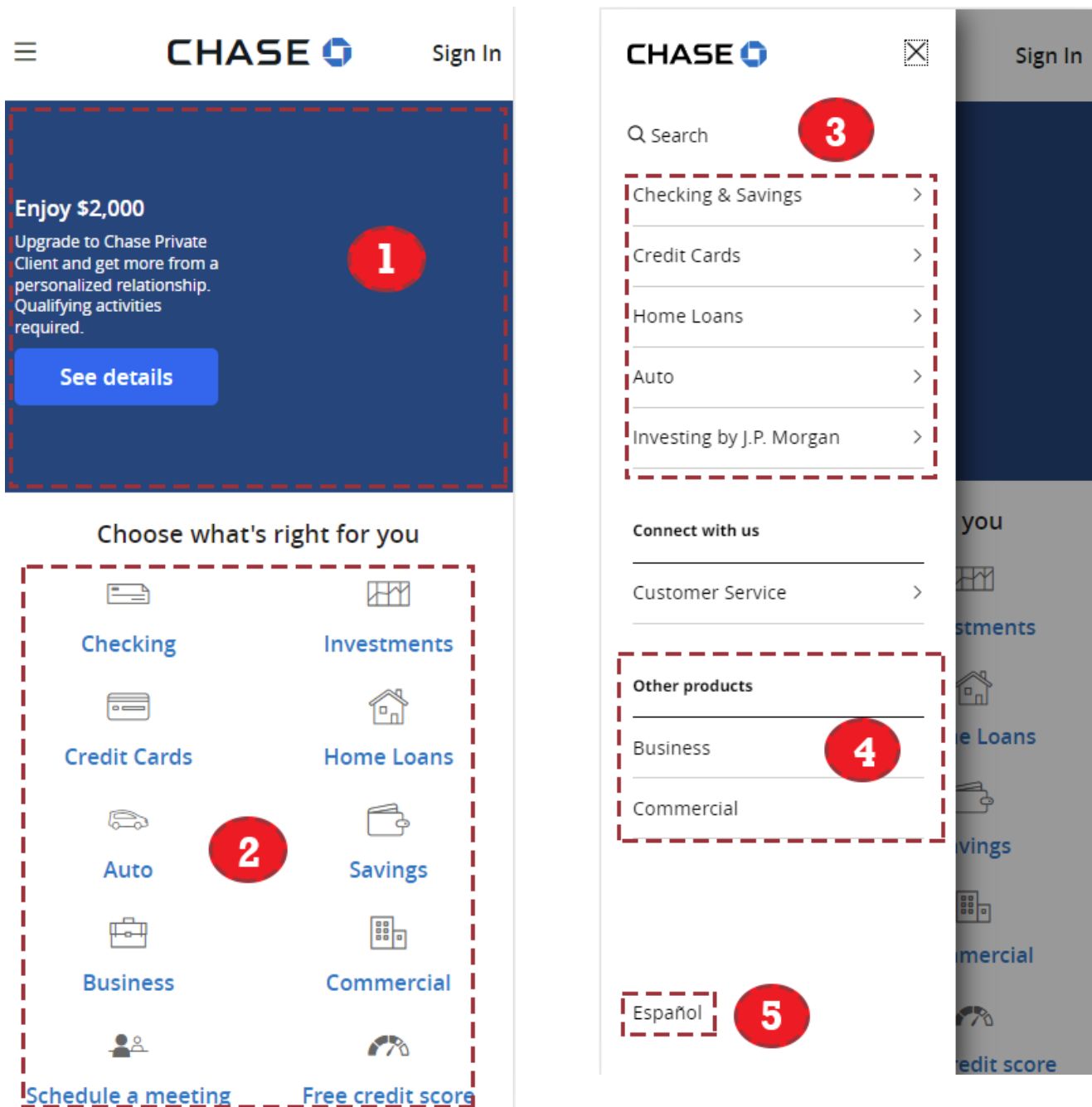
2. Scotia Bank

1: Like Chase, Scotia uses the most important space to sell a promotion, with a big bright link to special offers

2: This site uses a unique horizon tal scroll wheel with different categories to solve part of the navigation problem.

3: The page allows you to compare products, and links to various things

4: The search bar is better implemented and easier to see. Its more confident inspiring than the search button on first republic.

5: Like chase, when clicked, these buttons clear the entire side bar with new information instead of opening drop downs and forcing the user to scroll

6: It has a language selector, unlike firstrepublic

7: Scotia, like Chase, does a very good job of separates their offerings by having entirely different sites. Firstrepublic lags by having the same site for normal customers as well as commercial ones
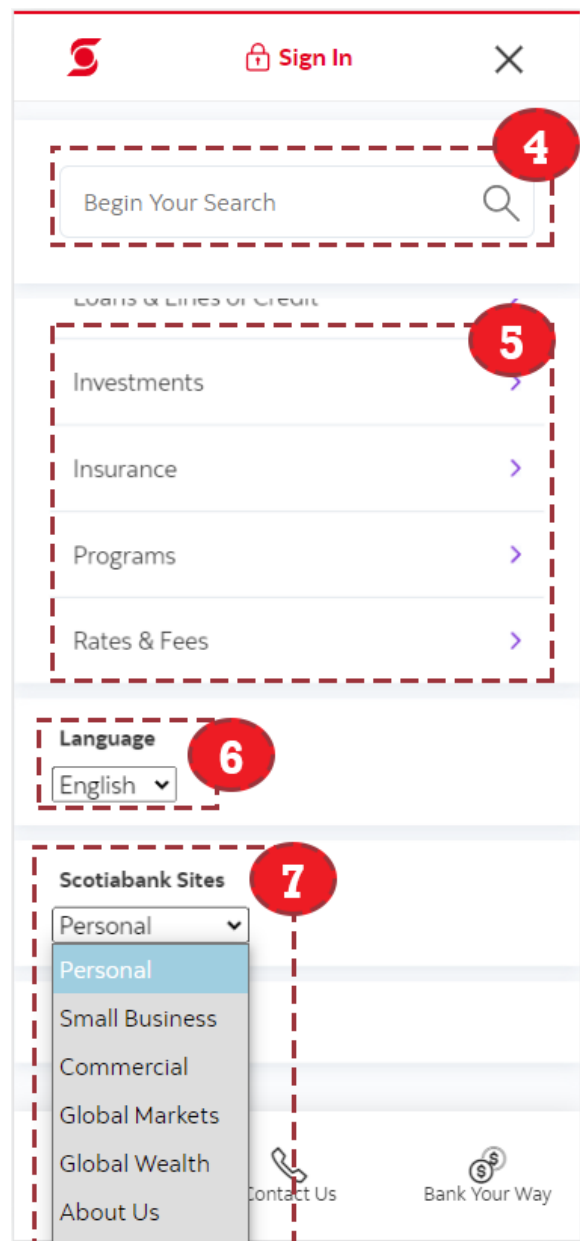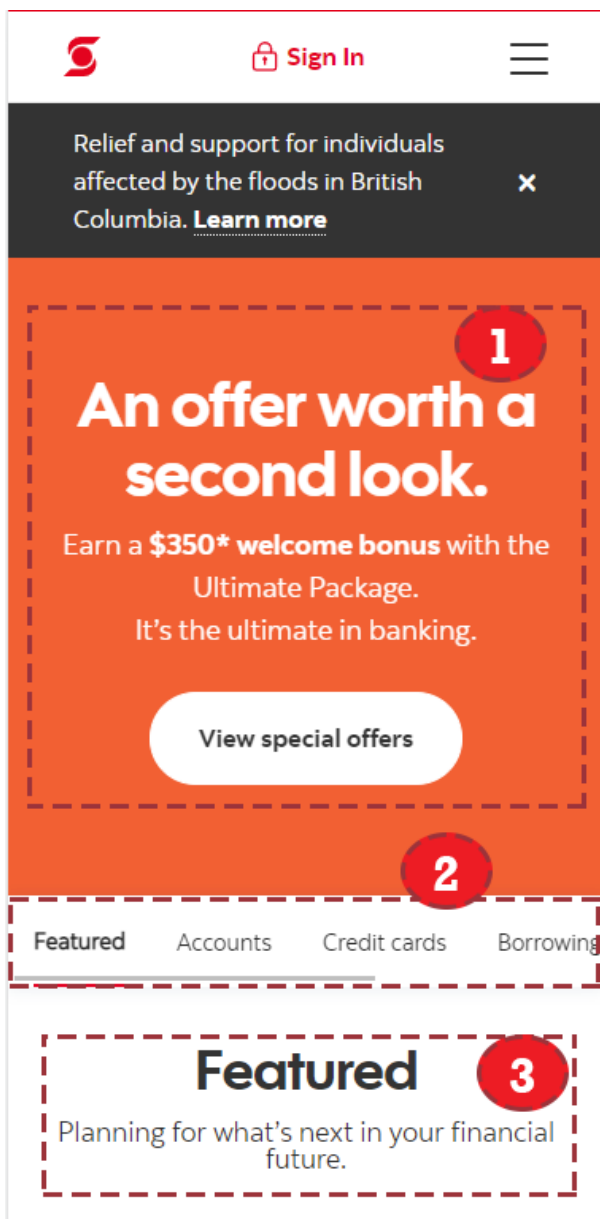
3. Bank of America

1: Like the others, Bank of America uses a hamburger menu with a sign in button

2: The front space is used to sell a promotion

3: Icon are used to show the different product offerings, right there on the home page

4: A unique scroller menu gives you direct links to various products

5: Full sized search bar is easy to see in the hamburger menu

6: Bank of America separates their businesses using the Hamburger menu

7: Language selector link in the hamburger menu on the bottom

BANK OF AMERICA — LOGIN

Celebrate the season

Unlimited 1.5% cash back on all purchases >

3% cash back in the category of your choice >

Unlimited 1.5 points for every $1 spent >

0% intro APR offer >

BANK OF AMERICA — LOGIN | X

Search

Enroll

Schedule an appointment

Get the app

Help

Find a Location

Contact Us

Privacy & Security

Small Business

Wealth Management

Businesses & Institutions

Need help with home loan payments?

About Us

En español

Checking   Auto Loans

Savings   Small Business

Credit Cards   Investing

Home Loans   Student Banking

Get the free app   Schedule an appointment

That Made A the Differenc

Sketches

My sketches looked to creatively solve the problem of navigation. Only one of the four uses a hamburger menu. Firstrepublic chooses to have their personal, business, and wealth management products all on one site, so I kept this consistent in my sketches and prototype

4 Sketches

Sketch 1 - Icons

First republic Banner Logo

Check out our Promo!

image

Button

Contact

Login

Our Services

Personal

Icon **Thing**   Icon **Thing**   Icon **Thing**

Icon **Thing**   Icon **Thing**   Icon **Thing**

Business

Icon **Thing**   Icon **Thing**   Icon **Thing**

Wealth Management

Icon **Thing**   Icon **Thing**   Icon **Thing**

Check Out the App!

This first sketch focuses more on the use of icons, showing off all the product offerings a bit like Chase and Bank of America

Its a bit text heavy and a lot to look at, but its a bit more functional than FirstRepublic's current design

Sketch 2 - Single Scroll selector

First republic Banner Logo

Contact Us

Login

Check out our Promo!

Button

image
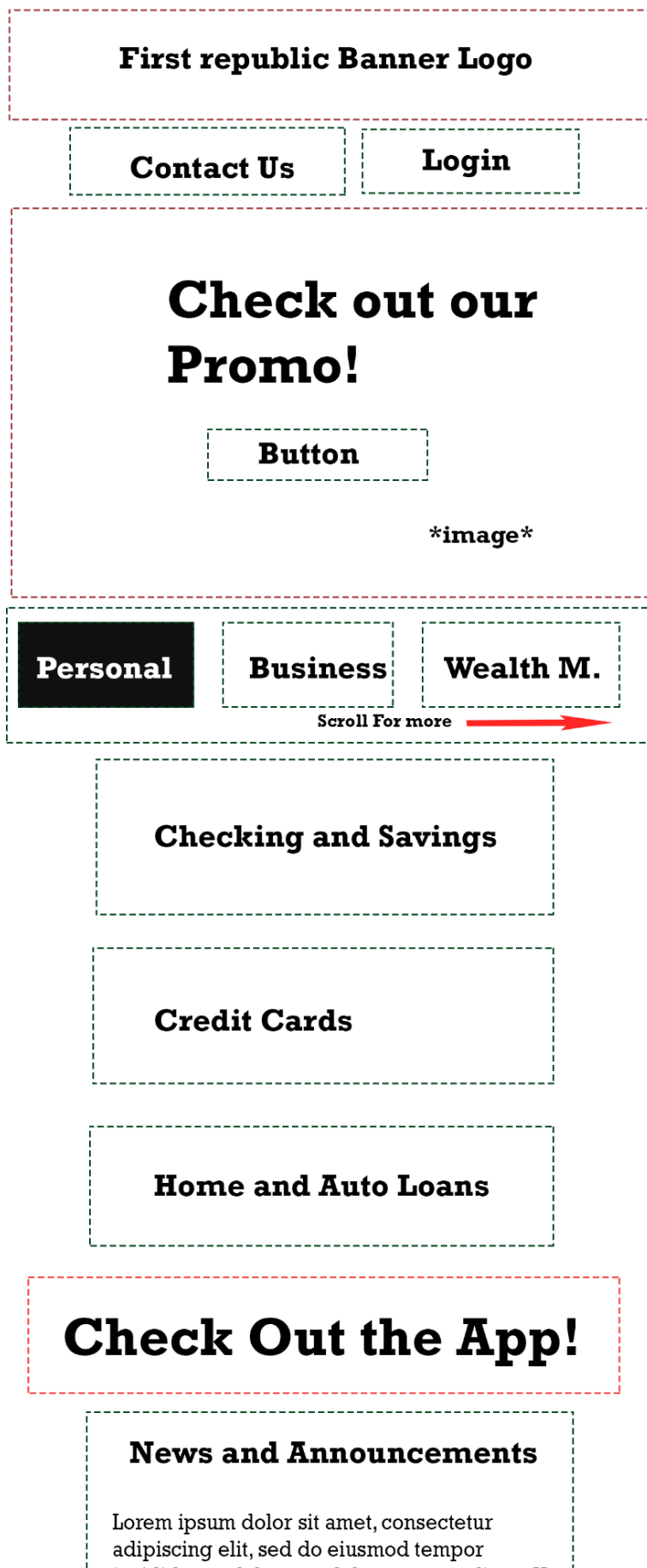
I moved the contact and login buttons to the top for this design.

Personal

Business

Wealth M.

Scroll For more

This sketch uses no hamburger menu, instead using a horizontal scrolling menu with various options

Checking and Savings

Credit Cards

This part of the menu changes depending which option you have selected.

Home and Auto Loans

Check Out the App!

News and Announcements

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor

Sketch 3 - Double Sliders

First republic Banner Logo

Personal

[Icon] **Thing**   [Icon] **Thing**   [Icon] **Thing**

←   *tap for more pages*   →

[Icon] **Thing**   [Icon] **Thing**   [Icon] **Thing**

Contact   **Login**

Interactive menu, can swipe between "personal", "business" and wealth management

Check Out the App!

The login options change according to the tab you are on, to reduce the number of logins

News and Accouncements

←   *tap for more pages*   →

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum

Second swiping menu, can swipe between "news", "articles" and "FAQ"

Sketch 4 - Redesigned Hamburger

 I wanted one of my sketches to feature a redesigned hamburger menu. The menu in this screen takes up the full space of the page, and segments each product category into several others. I also imagine this hamburger menu being used on the login screen to differentiate login options.

First republic Banner Logo ≡   **First republic Banner Logo** ✕

Contact   Login

Personal

Check out our Promo!

Business

Wealth Management

Button

About Us

Our Brand

Help

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum

What our customers say

image

Footer

2 prototype designs

Design 1: Redesigned Hamburger

Design Goal

My competitive analysis showed that an overwhelming majority of banking sites used hamburger menus. For this reason, I wanted at least one of my designs to focus on a new implementation of the hamburger menu. Design 1 is a redesigned hamburger menu that is developed with more pages and that is a more pronounced part of the site.

What This design changed

- Sleeker hamburger menu that takes up the entire page, and contains several screens within itself to better organize the content. Makes it more official, easier to see, and the inclusion of icons makes the experience more enjoyable
- A language selector and a search button added on the center screen
- Redesigned login pages categorize logins based on the type of business, making it easier to login where you want.
- A center screen with a promotion as a stronger call to action than a customer review
- Redesigned Personal banking page is brighter and less text heavy
- Contact page has been redesigned to match the hamburger menu

Design 2: Creative swipe menu

Design Goal

I wanted one of the designs to explore UI options beyond the hamburger menu. Design 2 explores a bolder and more unique way of presenting Firstrepublic's various product segments. This design focuses around a slider menu, and the design feel is all around swiping.

What This design changed

- A new swipeable UI easily takes you between home, personal, business, and commercial offerings.
- An updated home page with quick links
- Swiping also functions as a back button when inside the contact or login menus, creating a very smooth feeling UI flow
- A redesigned contact us menu makes it easier to browse online support information instead of only giving a phone number.
- A language selector and a search button added on the center screen
- Redesigned Personal banking page is brighter and less text heavy

2nd User Test Users

The 4 Users:

User 1 (CM): 24 year old recent graduate working in the medical field.

- Is not the most tech savvy. Has a degree in sociology. Works as an account specialist. His work focuses mostly on sales and customer relations in the medical device sales realm.
- Banks with Chase on Mobile
- Has heard of First Republic

User 2 (AB): 27 year old engineering product manager

- Not familiar with the finance industry, but has used a few different banking apps. Works in technology, most of his work focuses on technical things, not much UI or design.
- Banks with Chase on Mobile
- Has *never* heard of First Republic

User 3 (AL): 45 year old marketing executive at bank

- 20+ years of working in the banking sector. Is marketing savvy and has the most experience catering to private wealth clients. No experience with UI design specifically but has experience running marketing campaigns.
- Banks with Wells Fargo on Mobile
- Has heard of First Republic

User 4 (AO): 20 year old college student studying marketing

- Has little experience using banking sites. Is a freshman studying marketing. Has a good eye for visual appeal but may not necessarily have experience designing for this particular audience.
- Banks with Bank of the West on mobile
- Has *never* heard of First Republic

2nd User testing plan

The Order of the Test
- The First two users will be presented with Redesign 1 first
- The Second two users will be presented with Redesign 2 first
- All the users will spend an equal amount of time browsing both redesigns
- The users will all see the current firstrepublic website at the end

The tasks that the Users are presented with, and that they compare between designs:
- Navigate the menu
- Check out the login tab
- Brose the contact us/help page
- Browse the personal banking page
- Interact with the home page
- Find the news and announcements tab

Question the Subject answers after the tasks
- Which design does a better job of conveying the scope of Firstrepublic's offerings, and what they do?
- Which design *felt* better to useCheck out the appendix:
- Which did you have an easier time interacting with?
- What parts of each design did you prefer
- Did you prefer either of these designs to Firstrepublic's current design

Method for observing users while working:
- Make sure the user is in a comfortable environment, and make sure they have been briefed on the importance of thinking aloud as much as possible.
- The user will interact with the mobile site while on a zoom call with the notetaker that times the task, and notes it in the spreadsheet
- The notetaker will also jot down any general observations or things of interest including the challenges the subject faces, their reactions, and how the steps they take in their approach to each task.

2nd User Test Results

Check out the appendix:

User 1: **(CM):** 24 year old recent graduate working in the medical field.
- Which design does a better job of conveying the scope of Firstrepublic's offerings, and what they do?
  Design 2
- Which design *felt* better to use
  Design 2
- Which did you have an easier time interacting with?
  Design 1
- What parts of each design did you prefer
  Design 2's home and contact with design 1's login menu
- Did you prefer either of these designs to Firstrepublic's current design
  Yes

User 3: **User 3 (AB):** 27 year old engineering product manager
- Which design does a better job of conveying the scope of Firstrepublic's offerings, and what they do?
  Design 1
- Which design *felt* better to use
  Design 1
- Which did you have an easier time interacting with?
  Design 1
- What parts of each design did you prefer
  Design 1's menu with design 2's contact and icons
- Did you prefer either of these designs to Firstrepublic's current design
  Yes

User 3: **(AL):** 45 year old marketing executive at bank
- Which design does a better job of conveying the scope of Firstrepublic's offerings, and what they do?
  Design 1
- Which design *felt* better to use
  Design 2
- Which did you have an easier time interacting with?
  Design 1

- What parts of each design did you prefer
  Design 1's home and login menu with design 2's contact page
- Did you prefer either of these designs to Firstrepublic's current design
  If it was fully built out, yes

User 4: **(AO):** 20 year old college student studying marketing

- Which design does a better job of conveying the scope of Firstrepublic's offerings, and what they do?
  Design 2
- Which design *felt* better to use
  Design 2
- Which did you have an easier time interacting with?
  Design 2
- What parts of each design did you prefer
  Design 1's page felt a bit better, but the others were better on design 2
- Did you prefer either of these designs to Firstrepublic's current design
  Yes

Analysis of 2nd user testing on the 2 redesigns

Looking at the feedback above, this is generally what went well, and what didn't:

What worked in Design 1:

- A lot of the users reported that this site was easier to use because it matched the current expectations and design aesthetic of banking sites. Design 1 featured a bit more recognition rather than recall.
- A few of the users also reported Design 1 felt a bit more classy, which would appeal more to the audience.
- Users like Login 1's login menu better than Design 2
- Users liked the implementation of the articles and news on design 1, saying it was a bit sleeker and less text heavy

What didn't work in Design 1

- The user test showed that Design 1's contact menu was harder to use than design 2's. Users preferred having icons
- Users didn't like having the search icon in the hamburger menu, it was too hard to find

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What Worked in Design 2:

- Some users really liked the swiping menu, and thought it felt the best to use. It was more interesting and it better leveraged the mobile format. One noted it would be better for a younger audience however
- One user reported really liking having the contact menu on top of every page
- Users liked the icon directory for the news, announcements, and articles. It was a good match to system status

What didn't work in Design 2

- Users reported that the swipe function in Design 2 might be bad for the target audience, which may struggle to coordinate swiping movements, or who may not be used to that sort of thing.
- The login page being compartmentalized based on the page you are on was a bit confusing to some users
- Some users thought the use of icons was overwhelming, and that this design ended up being too icon heavy

Recommendation and Reflection

Recommendation:

I recommend design 1. Overall, the users liked it a bit more, and It's generally a bit more intuitive for the type of customer who would be using FirstRepublic. I think the better solution would be to prototype a third design with a combination of the features of both.

What Worked Well

I think my sketches and figma prototypes are well done. I think my write up is well planned and shows I spent a lot of time on the project. Although I chose to stick with banking sites instead of looking for solutions outside of banking, I think my competitor analysis was well done, as I looked at many more sites than before settling for the 3 above. I also think the incorporation of gifs into the project is a nice touch (if it displays properly). I also took the extra step of turning my paper sketches into wire frames to make them easier to see.

What I could do better next time

I think I could generally have made better use of research and have compiled more statistics and information on my user test. The fact I was soloing this project made it a bit hard for me to find users to test with, and I was limited in the time I had with each user given the holidays, and the last-minuteness of my project. If I were to redo it, I would want to test many more users and to have a much more thorough and detailed analysis of each test. I could also have done a much better job of testing with people who are in the ages of Firstrepublic's users and who have similar incomes. Most of my users were younger men, which I'm sure skewed the results of my trials in one way or another. If I was to do this again in a more serious setting, the age range, income, and gender mix would have to be taken much more seriously.

Additionally, I could have used customer reviews more creatively in my prototypes. Firstrepublic tries to set itself apart with its customer centered approach. Most of the users didn't really like them, and neither did I, but I think I could have done a better job at implementing a few in my redesigns just to keep the branding there.

What I learned

I learned a lot doing this project, one of the big ones being that user testing is a lot of work and patience! I also used figma for the first time, which I'm happy about, because it's actually very easy. I learned how to manage my schedule, and how to keep my stress level low by working on this project a little bit everyday, instead of rushing it at the last minute. I'm happy with how it turned out!