Abbey
Mortgage Bank

How do you redesign a website that balances goals and user need? I took charge of redesigning the Abbey Mortgage Bank Website.

project overview

Come up with a redesign and strategy for the Abbey Mortgage Bank website.

role: strategy, research, UI/UX
duration: 7 week
company: Abbey Mortgage Bank

approach

I tackled the project focusing on 3 sections.

discovery : Competitive analysis, Heuristic Analysis, user research, and stakeholders review

ideation : persona development, brainstorming and ideating findings, strategy development

design : collaborative iteration, usefflows, wireframes, high-fidelity designs

research & discovery

The research process for this project entailed competitive research, a comparative analysis, heuristic analysis, user research, and stakeholder review.

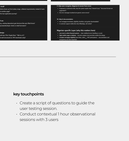
As the sole designer on this project, I developed a strategy that aligned with business goals and known approaches to practice and learn new skills. With the support of my mentor, I reached out to other persons with similar projects to conduct findings and usability testings.

goals

- Leverage findings to inform strategy and design decisions.
- Research best practices within our domain and ensure we can differentiate ourselves from others.
- Assess AMB website to identify usability issues that conflict with human best practice.
- Capture the user's view so that it can be used to inform the design process and strategy.
- Discover hidden issues or complexities and determine the stakeholders view of success.

domain research

Learning into the project I did not have much familiarity with the banking space. Therefore, my first step was familiarizing myself with the banking world, the types of mortgages, loans and investments.



competitive analysis

The competitive analysis gel us up to speed in our business space by looking at what others are doing. This was one of the main tasks for the research phase of the project.

Understanding AMB's competitors not only familiarized me with the mortgage process and terminology, it also helped me identify trends and investment market and peripheral companies

The competitive analysis performed included 3 competitors and 2 peripheral companies. In performing the analysis, I used a 3 point evaluation criteria to objectively evaluate each company individually and in comparison to AMB

heuristic analysis

The heuristic evaluation focuses on contextualizing the AMB website among our competitors. This was an important step in familiarizing myself with AMB website. In addition, the heuristic evaluation helped me ask the right questions for the usability testing interviews.

key touchpoints

- Evaluate AMB website using the same evaluation criteria as the competitor websites.
- Discover opportunities and inspiration

usability testing

User research is critical to UX design and there is no substitute for talking to real users. In addition, user testing is contextual observational research conducted to understand user's needs and behaviours

After performing the heuristic evaluation I decided to conduct a series of contextual usability testing sessions to better understand the needs, pain points, and insights from task-based and contextual probes.

key touchpoints

- Create a script of questions to guide the user testing session
- Conduct contextual 1 hour observational sessions with 3 users

stakeholders interview

User research is critical to UX design and there is no substitute for talking to real users. In addition, user testing is contextual observational research conducted to understand user's needs and behaviours

During the research, stakeholders interview is expected to help gain a holistic view of the business side of the project goals. However, I did not get interviews from the stakeholders because this project was a self-instructed job.

ideation: brainstorming & iterating

After the discovery phase I downloaded all of the findings and leveraged them to define the goals and approach for the design. The brainstorming sessions were done collaboratively and since I did not have other designers in my team, I decided to reach out to other designers across my UX community to brainstorm with me.

The goal for this part of the project was to define the target user, their needs, and the vision of the project.

key activities

- Understand who are our target users
- Understand what the target users want to do.
- Understand the current state of the experience and how it needs to change

key touchpoints

- Research current Abbey Mortgage Bank customers and target market
- Use the information collected to create a persona representative of potential candidates.

downloading findings

The discovery phase generate lots of information and insights. Downloading the findings essentially means identifying themes that emerged in the research to generate guided vision for the redesign.

The goal of downloading is to visualize all of the findings and begin designing them into themes and patterns to uncover relationships within all of the data

key touchpoints

- Create themes for emerging patterns found in the research
- Put them in front of you to better understand relationships
- Define a mission statement for the redesign backed by the research.

persona

Understanding your users is key to meeting their needs. Personas helps us understand the needs and goals of the people we are designing for and, therefore, better empathize with their needs. Persons are not a single but a representative of the entire user group.

Goals

Put ourselves in our user's shoes and keep their needs at the forefront of our design

Chinedu - Mid-level manager in an oil servicing company

Goal: Access to a long-tenor mortgage(10-15 years) to spread repayments.

Name: Chinedu
Gender: Male
Occupation: Engineer
From: Mainland
Education: Engineering
Salary: 900,000

design phase

After creating the persona and establishing the vision of the project I moved to the collaborative designing and iteration phase. The goal of this phase focused on creating usefflows, journey maps, prototypes and high fidelity screens.

At the end of the design, I turned in research report as a self-determined deliverable.

key touchpoints

- Iterate quick ideas collaboratively.
- Create usefflows and journey maps.
- Create high fidelity screen of the user interface and branding

collaborative iteration

Collaboration is key to the design process. Receiving input from colleagues is a great way to expand design ideas. In addition, integrating other designers into the design process helps are designing for a one of the essential elements of user experience design. Let the feedback of the users and stakeholders guide your design solution

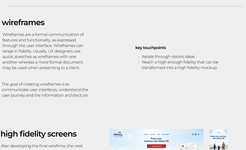
The goal of collaborative iteration is to integrate feedback from other designers and colleagues to refine your idea. Since I was the sole designer I decided to recruit other designers to collaboratively iterate.

key touchpoints

- Share insights with your team.
- Brainstorm to synthesize to your feedback.
- Sketch and build a prototype for your project.

prototype 1: quick updates

Before



After

The place of simplicity in user experience is very important, in other words, "less is more". Therefore, the goal of the redesign focused on creating a minimalistic view and also aesthetics.

wireframes

Wireframes are a formal communication of the design. Wireframes are essential to walk through the user interface. Wireframes can range in fidelity. Usually, UX designers use quick, sketches as wireframes with one another whereas a more formal document may be used when presenting to a client.

The goal of creating wireframes is to communicate user interfaces, understand the user journey and the information architecture

key touchpoints

- Iterate through visions ideas
- Reach a high-enough fidelity that can be transformed into a high fidelity mockup.

high fidelity screens

After developing the full usefflow, the next step was to ass visual design. In this stage I began to include the branding of the company to visualize the final product. During my research, I discovered a new branding style for the visual and UI approach.

The design proposal for the mobile app follows a straight-to-the-point model from the onboarding down to the order.

The design is centered around quick response of services for users, and consistent work and efficient client management for advisers

key touchpoints

- Create high fidelity mockup
- Explain the design concept for the mobile app

reflection

- Should have part of my design went into production and converted into valuable advantage to the organization

learnings & accomplishments

- I wanted to lead a project and educate other team members who may not be familiar with design

Exit my comfort zone: I learned that in order to grow as a designer I needed to complete tasks that make me uncomfortable. Every time I worked outside of my comfort zone delivered a tremendously rewarding experience

Don't be afraid to take the initiative: I learned that the brief is composed of only the minimum requirements. As you move through the design process it is vital to address tasks that were originally not listed in the brief. Sometimes you will need to take the initiative and suggest deliverables that you know will benefit the project in the long run

Reach out to colleagues throughout the company: One of the biggest challenges in working on something new is working most times alone. Reaching out to other designers not only enriched the project but also created relationships and bonds that have stayed with me and increased my confidence level.