**HA-Walk**

Case Study

Streamlined customer checkout experience

UX Research and Design - Neil Ranada

Time: 3 months

**SUMMARY**

Have you ever nearly quit or abandoned an online checkout because things didn’t go as smoothly as you’d like? I conducted a study of a website for the Hydrocephalus Association, a well-respected non-profit organization dedicated to hydrocephalus education and research. The goal was to create a streamlined flow that encourages continued donations to support medical research.

**Problem**

Tests of the Hydrocephalus Association (HA) Walk website revealed points where the checkout process was either too long, confusing, or asked too much information.

**Solution**

Make it clear where someone can initiate a donation and make the checkout process smooth for them.

**Discovery**

I’m doing this for my friend’s daughter, Amiyah, who was born with hydrocephalus. Each year Amiyah’s mom leads a team to participate in the Hydrocephalus Walk held in her city. The event is a combination of online fundraising culminating in a walk event organized by the Hydrocephalus Association.

Hydrocephalus is the build-up of fluid around the brain resulting in an increased pressure in the head. It affects a wide range of people. For every 1,000 babies born in the U.S, one to two will have hydrocephalus. Hydrocephalus is the most common reason for brain surgery in children.

(Picture of Amiyah)

The thought of someone nearly abandoning the donation process because they didn’t have a smooth checkout experience bothered me. I wanted to investigate ways User Experience design could improve the HA Walk website.

**RESEARCH**

I started my research with a survey (link to survey) posted online to various social media platforms and public forums. I asked general questions about their last donation experience and

Here are my key findings from the 18 responses:

* 83% said the **one** main reason for donating was to help people
* When asked to select one issue from a list of options people felt could use improvement, “donation process” was one of the top issues
* 83% said they used laptops to browse fundraising websites

Here is a selection of comments from the survey:

“Often times, the amount of time it takes to log into a website/type in credit card info takes long enough that I get discouraged from donating.”

“The donation form asked for too much information.”

“The different types of donation options they offered were confusing and poorly-worded.”

**What I learned from survey results**

People like to give money to help other people. But unfortunately, some people encounter friction points that leads them to nearly abandoning the donation process.

**Finding an opportunity to solve a problem**

I began with an assumption: the HA Walk website needs to improve their donation process. To validate this assumption, I needed to answer three questions:

1. Do people experience frustrations when trying to donate on the HA Walk website?
2. Who is experiencing frustration?
3. What do they need to improve their customer checkout experience?

**User Testing**

I began with a click test using Usability Hub giving people the following scenario:

Your friend’s daughter, Mary, has a medical condition. How would you donate to her fundraiser?

(image of heatmap)

View the full Usability Hub test results in another tab (link)

Of the 15 responses, most people were able to identify the buttons to start some kind of donation process: “Donate to a Walker” and “Give.” However, both of these buttons are misleading. The “Donate to a Walker” button leads to a page that lets you search for a person who is raising funds on behalf of a person with hydrocephalus and is registered on a Walk team. The “Give” button leads to a page for making a general donation.

Neither button allows you to search for the person who has hydrocephalus, whom you are ultimately trying to support with the given scenario.

**Usability Testing**

I created a fundraising account on the HA Walk website to test the search and donation process, with the added bonus of making actual contributions.

I conducted a usability test with one person who was interested in making a donation. I asked the tester to search and donate to a particular person with hydrocephalus.

Here are key observations of the tester:

* Unable to search for a fundraising campaign using the name of a person with hydrocephalus
* She felt filling out the payment information form lengthy
* Frustrated when she realized that she accidently subscribed to email notifications after completing the checkout process
* Surprised that clicking the “continue” button on the payment information page resulted in her credit card being charged.
* Credit card was double charged after jumping too quickly back to the payment information form after clicking “continue” despite a warning not to do so

With this single tester, it was apparent that there were areas of the customer checkout process that needed improvement. It also reinforced the point found in the Usability Hub test earlier that there needs to be a way to search for campaign using the name of a person with hydrocephalus.

**User Personas**

I identified three people to interview and used them as models to create the User Personas. I focused on learning about their past experiences with donating.

I created the User Personas to have varying degrees of connection with a person with hydrocephalus. Often times when people donate, it’s because they know someone who will be impacted, whether they are a close family member or an acquaintance.

Bryan is the primary persona and the focus for the re-design. Out of the three personas, he is least close in relationship to the person with hydrocephalus, yet, he is willing to give money to show his support. His first donation needs to be smooth so that he can easily complete it and hopefully encourage him to continue his support in the future.

(Bryan) (Primary)

(Jacque) (Secondary)

(Jessica) (Secondary)

The User Personas have three goals in common:

1. Be able to choose how they donate (general donation vs. specific person)
2. Easily donate with minimal information required from them
3. Not being confused on the difference between how to make a donation versus joining a team for the annual walk event

I used these three goals as the focus for my design decisions.

**Competitive Analysis**

I needed to learn from the donation patterns of more well-known websites. I identified three crowdfunding apps: GoFundMe, Givingforward, and JustGiving.

I created matrixes such as the one below to assess the strengths, weaknesses, opportunities, and threats of each website (SWOT analysis).

(image stack of SWOT analysis – Using GoFundMe)

**What I learned from the competitive analysis**

Top three strengths to include in my design:

1. Clear steps on how to make a donation
2. Simple interface showing donation goal, amount raised, and percentage reached.
3. Asking minimal information to complete the checkout process

Top three weaknesses to avoid in my design:

1. Improperly labeled buttons with unclear functions
2. Not giving people a sense of where they are in the donation process
3. Overwhelming people with the amount of information required of them to fill out a form

**Meeting research goals**

1. Do people experience frustrations when trying to donate on the HA Walk website?

Yes.

1. Who are the people that need help?

People who want a smooth checkout process like the User Personas.

1. What do they need to improve their customer checkout experience?

**A website that allows people to easily make a donation with minimal information required.**

**DESIGN**

**User Stories**  
I created a spreadsheet with a list of tasks to match the goals of my user personas.

"As a \_\_\_\_\_\_, I want to\_\_\_\_\_\_ so that I can \_\_\_\_\_\_."

(Final user stories)

**User flows**

I created User Flows to visually depict how people complete each task listed in the User Stories.

(Final flow chart)

**Whiteboard Wireframes**

I created whiteboard wireframes to focus on the functionality of the website. I describe how I refined the search and customer checkout flows under the Testing section.

(Big picture early whiteboard wireframes)

**Maintaining Branding Consistency**

The HA Walk website is actually one of the many part of the main Hydrocephalus Association website. I had three people compare the HA Walk website with the main website. I then asked them if they thought they were related. All said that they were not. The colors schemes were slightly different which confused people.

The solution was to reuse the exact same colors and logo from the main website to reinforce the branding of the Hydrocephalus Association.

**Typography**

I used the same exact body and header fonts used on the main website: Droid Serif and Oswald.

**Style Guide**

Lastly, I transferred the logo from the main website to complete the style guide.

**Mockups**

With the style guide, I used Sketch app to create high fidelity mockups to give the website a look and feel consistent with the main website. I also used color contrast to re-inforce the functions for making a donation.

**TESTING**

**Test iteration process**

I tested early and often during every phase of the design process: wireframes, mockups, and prototype. I took every opportunity to test in person or remotely online to refine my design solutions.

**Low-Fidelity Tests**

I tested wireframes using click tests and navigation tests on UsabilityHub.com.

The first User Story I needed to solve for was:

“As a donor…I want to search the name of a person with hydrocephalus…so that I can view their fundraising campaign.”

The first version of the layout showed that 62.5% successfully click the “Donate” button. However, 37.5% were distracted by either the “Sign In” button or the content in the Walk section.

(picture of heatmap)

View the full Usability Hub test results in another tab. (link to Usability Hub)

With these results, I knew that I needed to minimize distractions from getting people to donate. As you will see later in the high-fidelity mockup, I tucked the “Sign In” button away in the navigation menu. I also made the Walk section look less prominent relative to the Donation section, while eliminating the “Join Walk” button.

The next part of this flow was the customer checkout process which covers the User Story:

“As a donor, I want to donate to a hydrocephalus person’s campaign so that I can support medical research.”

The layout for the customer checkout was successful with an 81% completion rate for the first step and 100% completion rate for subsequent steps.

(picture of wire frames)

Open Usability Hub test results in another tab. (link to Usability Hub)

**High-Fidelity Tests**

I saw high success rates while testing high-fidelity mockups which was carried over from the success of the wireframes during the low-fidelity tests.

Again, I tested people’s ability to search for a campaign to solve for the User Story:

“As a donor…I want to search the name of a person with hydrocephalus…so that I can view their fundraising campaign.”

(Carousel of mockups)

Open Usability Hub test results in another tab

Success rate was 82% for the first step and greater than 90% for subsequent steps.

Next, I tested the customer checkout process to solve for the User Story:

“As a donor, I want to donate to a hydrocephalus person’s campaign so that I can support medical research.”

(Carousel of mockups)

Open Usability Hub test results in another tab

These success rate of completing each step was greater than 90%. The success rate for the payment information step was only 40%. Testers said they did not go through the motions of filling out the form because they didn’t think it was required. They jumped ahead and clicked the “Payment Confirmation” button. With this, I still deemed these results a success.

**Usability Testing with Prototype**

I conducted four usability tests by posting the InVision prototype on UserTesting.com. I came up with three test objectives:

1. Can people search for a specific donation campaign?
2. Can people easily make a donation?
3. Are people satisfied with the donation process?

I gave testers the scenario and tasks below. I refined the scenario and tasks based on observations and tester feedback to better align them with the test objectives.

Scenario: You friend created a fundraiser. She is trying to get donations for medical research for her daughter Mary and others like her.

Tasks:

1. Take a minute to look at the homepage. What do you think this website is about?
2. Donate to the fundraising campaign for a little girl named Mary. Give a $5 one-time donation. (your real information is not required for filling out forms)
3. How do you feel about the smoothness of the checkout process? Do you feel the checkout process was trustworthy?

**Usability Test #1 Results**

**http://www.usertesting.com/v/90dcf8dd-7ddf-4fb0-b681-f0748428c080?encrypted\_video\_handle=6IKdzEj-TDuz93FL2QTyvA&shared=hwzCJTUz**

* Felt the prototype was trustworthy in general
* Took a few seconds to discover clicking the “Donate” button would lead him down the path of finding a fundraising campaign for a specific person
* Completed the checkout process with ease
* “Clean looking design of a website…the biggest thing was donating. It was painless to look for the character Mary and donate to her.”

**Usability Test #2 Results**

**http://www.usertesting.com/v/adb1243c-2acd-4f86-85d3-536877848432?encrypted\_video\_handle=GqqkLO59leX9hpDmIhARcQ&shared=v1f2cR7f**

* Unsure of how legitimate the homepage looks
* “If you’re having a walk on a website, you want to make sure there’s information about the organization itself…I’d want to make sure their focusing on the kind of credibility and making sure their money is going to the right place.”
* Easily searched and found fundraising campaign for the little girl in the scenario
* Expected to be able to donate to the little girl immediately after the search results and not be redirected to another page asking the tester to donate again.
* Easily completed the checkout process with no issues.

**Usability Test #3 Results**

**http://www.usertesting.com/v/55b5861a-e443-461d-b70c-1b69bc1b4da8?encrypted\_video\_handle=NOSCbkBAiHgQVqPKeO4OYQ&shared=grXMr8gV**

* No issues searching and selecting the fundraising campaign for the little girl in the scenario
* Easily navigated the customer checkout modal and at one point jumped back a step to check that one of the form fields was used to enter CVC
* “Generally, if a website is not accepting PayPal I don’t really consider it trustworthy…I exclusively go through PayPal because it adds another layer of protection.”
* “…the payment process was extremely smooth. I didn’t have to go through any unnecessary steps.”
* No issues on the smoothness of the payment process.
* Mentioned the process might be too simplistic “which is good, but also kind of psychologically when looking into putting actual money into might be nice to have a little bit extra there to give people some confidence…”

**Usability Test #4 Results**

**http://www.usertesting.com/v/759463be-0c2b-4654-b01a-617cbf55f25f?encrypted\_video\_handle=cL7svTH-z4CKLAQD56ymHA&shared=5JCcUN0k**

* Did not use the search bar to find the campaign for the little girl in the scenario. Opted to click around and browse. Initially tried to select the campaign for a different girl but eventually found the right one.
* Easily completed the checkout process.
* “I think this is pretty smooth and also it’s very trustworthy...”

**What I learned from the usability testing results**

Going back to answering the test objects

1. Can people search for a specific donation campaign?

Yes, once clicking the “Donate” button testers were able to search and select the campaign specifically for the girl in the scenario.

1. Can people easily make a donation?

Yes, all testers were able to smooth complete the customer checkout process.

1. Are people satisfied with the donation process?

In general, testers were satisfied with how easy it was to donate. However, one tester men

Based on user feedback, I also added PayPal as another option for making a payment.

(mockup with PayPal)

**Prototype**

I used InVision to create a prototype with mockups imported from Sketch app. You can open it another tab and try the scenario and tasks found in the Usability testing section above.

Open the prototype in another tab (link)

(snapshot of homepage)

**CONCLUSION**

I was able to create a streamlined checkout process for people to donate to a specific campaign.

What surprised me the most was the varying views on how trustworthy the prototype looked overall. Continuing to improve the trustworthiness of the site is always worth considering.

If given more time, I would have loved to work with the business, design, and development teams of the Hydrocephalus Association website. I focused my study on the customer checkout process for making donations. However, there are many other aspects of the Walk event that could be examined under the lens of User Experience design, such as: joining a Walk Team, integrating campaign drives by walkers, incentive prizes, and much more.

The Hydrocephalus Association is doing incredible research to end hydrocephalus. You can learn more about hydrocephalus at the main website: <http://www.hydroassoc.org/>

You also donate and find a walk event in city near you through Walk Schedule. (<http://www.hydroassoc.org/walk/walks-and-special-events/walk-schedule/)>