**HA-Walk**

Case Study

Streamlined customer checkout experience

UX Research and Design - Neil Ranada

Time: 3 months

**SUMMARY**

I conducted a design study to streamline the customer checkout process for the Hydrocephalus Association (HA) Walk website. The goal was to create a design that encourages continued donation support for hydrocephalus research.

**Problem**

Tests of the existing HA Walk website, at the time of this study, revealed points where people became frustrated and nearly abandoned the donation process. The checkout process was either too long, confusing, or asked for too much information.

It also frustrated people with unexpected outcomes such as forcing people to subscribe to an email subscription, and double-charging a credit card after clicking the “Back” button.

**Solution**

I simplified and streamlined the checkout process, asking for the minimum required personal data and credit card information. People were given two donation options: make a general donation to the association or give a personalized donation for a specific person living with hydrocephalus.

**Discovery**

I have a friend who has a young daughter born with hydrocephalus. Each year she participates in the Hydrocephalus Walk held in her city. The event is a combination of online fundraising culminating in a walk event led by the Hydrocephalus Association, a well-respected non-profit organization dedicated to hydrocephalus education and research.

Hydrocephalus is the build-up of fluid in the brain. The build-up can potentially result in an over pressure in the brain that can be life threatening. 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.

I think this a wonderful cause and decided to conduct a design study of the HA Walk website to see if there were areas that could use improvement.

**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 the help people
* “Donation process” is one of the top issues people felt could use improvement
* 83% said they used laptops to browse fundraising websites

When asked to describe their experience, these comments caught my attention:

“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**

Based on the results, it wasn't clear if there was a need for a tool to make walking paths easier to plan. However, if there was a need, it was clear that I needed to use a "mobile first" design approach. It was also clear that I needed to learn how people used Google Search and TripAdvisor for travel research.

Social media played less of a role in travel research than I expected. I think there may be an opportunity to discover a greater connection between maps and social media, especially since Instagram is full of photo feeds for travel inspiration. I decided it was beyond the scope of this project but may be worth researching another time.

**Finding an opportunity to solve a problem**

I made an assumption: people need a travel app that makes it easier for them to plan walking paths. To validate this assumption, I needed to answer three questions:

1. Is there a need for a tool to make it easier to plan walking paths?
2. Who needs it?
3. What features do they need?

I conducted two surveys and two rounds of interviews to find answers. I asked questions focused on past experiences and behaviors. I also wanted to know any frustrations people had with travel planning tools.

**Interviews**

During this project, I took a two-week trip to the Philippines to attend a wedding on Boracay Island. Many of my friends were also attending. Different groups had separate plans for sightseeing before and after the wedding. It was the perfect opportunity to make observations and conduct interviews.

Here are my key findings from interviewing 12 people:

* People used Google Search or TripAdvisor to find and compare lists of top things to see and do.
* Planning tended to stop at the city level in their search. Once in Manila, people weren't sure of what places they wanted to see. If they did have an idea, they weren't sure of the best order to see everything in a short period.
* Everyone's definition of sightseeing varied. Some people wanted to walk around historical places like the Intramuros, an old walled city. Others wanted to see street markets or the giant Mall of Asia.
* People on this trip relied on Google Maps to walk from point to point. They didn't have a walking path in mind.

**What I learned from interviews and observations**

People on this trip said they could use a tool to make it easier to plan walking paths. But the evidence wasn't strong enough. They are what I call "point-to-point" navigators. Content with navigating to one place at a time using Google Maps. They didn’t necessarily need a walking path with all their stops planned out.

Who I needed to find and interview were “planners.” People who liked to have itineraries. I needed to see if they needed a tool to plan walking paths.

**Second survey**

Before conducting another set of interviews, I posted another survey (link to survey). This time, I asked specific questions about what tools people used to plan walking paths. I provided both digital and paper options. I also needed to know what they liked most about these tools, and what they liked least.

Here are my key findings from the 32 responses:

* Travel apps like Google Trips (6%), Cool Cousin (3%), and FieldTrip (1%) are not popular tools for planning walking paths.
* Here is a selection of informative comments:
  + “I don't think there is an obvious way to customize my route. I think I can create a route but it seems complicated.”
  + “It can take me to shady places...”
  + “Lack of suggested routes/plans to cover various sight-seeing points.”
  + “When I'm abroad and don't have mobile internet access, or I'm in a heavily pedestrian urban area (like Marrakech) where the maps may not be detailed enough, then Google Maps fails me. That's when I turn to paper maps of some sort, or maybe an offline map intended for travelers if I don't need to worry about having my phone out.”

**What I learned from the survey**

There is a need for a tool for planning walking paths. And the people who are most likely to use it are travelers who like to use route suggestions to cover various sight-seeing points. It also identified two pain points:

1. Feeling unsafe
2. Inability to easily create and edit a path.

At this point, there was enough information to move forward. Next, I needed to figure out the target user group for my design.

**Personas**

I identified three people to interview who plan their travels in advance. These are people who I assessed would benefit most from a tool for planning walking paths.

(Persona #1 - Mom – Local Traveler)

(Persona #2 World Traveler – Romantic)

(Persona #3 Ambitious Explorer – Adventurer)

The personas have three goals in common:

1. Discover itineraries that match their interests and schedule
2. Easily edit their path and points of interest
3. Follow a route but also have the freedom to explore

I based my future design decisions primarily on the goals of these personas.

Next, I needed to learn from my competition.

**Competitive Analysis**

I needed to learn from the strengths and weaknesses of travel app competitors. I identified six travel apps: TripAdvisor, Google Trips, Walc, FieldTrip, Cool Cousin, and Triposo. I conducted a SWOT analysis (link to SWOT analysis) to assess the strengths and weaknesses of each app.

(image stack of SWOT analysis – Use analysis of Triposo on front)

I also downloaded Triposo. Out of the list of travel apps I analyzed, Triposo had the most advanced tool for planning a walking route to multiple sightseeing points.

(Screenshot of Triposo walking path)

**What I learned from the competitive analysis**

Top three strengths to include in my design:

1. Crowd-sourcing to provide self-sustaining content production
2. Voting system to let people decide what is most helpful
3. Integration with Google Maps because its database is extensive and trustworthy

Top three weaknesses to avoid in my design:

1. Overwhelming number of features and information
2. Computer generated routes that are unsafe or do not make sense
3. Making it difficult for people to edit a path and change points of interest

**Other opportunities for research**

I also took advantage of the fact that I live in San Diego, a major tourist destination. I spent several mornings and afternoons at Balboa Park. I hung out next to maps posted throughout the park. I casually interviewed people to find out what they were searching. I also wanted to see what they thought was helpful, and what was frustrating.

**What I learned at Balboa Park**

People still rely on friends, or even strangers, to find directions. This reinforced the crowd-sourcing and social approach in the design of my travel app.

(image of me interviewing people and giving directions)

Sometimes the best way to find where you’re going is to ask directions from someone with local knowledge and draw on a paper map. I needed to design a digital version of this time-tested method of getting directions.

(image of paper map drawing directions)

It also occurred to me that not everyone walks on paths. Sometimes people move around on wheels: wheelchairs, scooters, bikes, skates. I needed to push for inclusive design.

(Picture at Balboa Park with cart)

**Meeting research goals**

1. Is there a need for a tool to make it easier to plan walking paths?

Yes

1. Who needs it?

People who plan travel itineraries like the three user personas.

1. What features do they need?

**A platform that allows people to create, select, edit, vote, and share walking paths.**

**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)

**Wireframes**

I used wireframes to focus on the functionality of the travel app. I sketched using pen and paper which let me put my design ideas down quickly. I wrote the tasks in the top left corner of each wireframe to concentrate on the specific problem I needed to solve.

Here is an example using TripAdvisor’s mobile app as inspiration for the list view.

(Trip advisor screen shot) (list view wireframe)

I also utilized patterns from Airbnb’s mobile app as inspiration for the map view.

(Screenshot of Airbnb map view screen shot) (map view wireframe)

**Branding**

I started by sketching and brainstorming to come up with a brand name.

(brainstorm sketch)

The contenders were Paths, Walk, and Wander. I eliminated Walk because not everyone can walk. And sometimes people move on paths using wheelchairs, scooters, strollers, and skates.

I always explore opportunities for an inclusive design approach. Appealing to a wider market of consumers is good for business. More importantly, inclusive design is an approach to help everyone.

When surveyed, people preferred the name Wander. It conveyed walking as a sense of adventure.

**Logo**

Next, I brainstormed logo ideas for Wander.

(brainstorm sketch)

I analyzed logos from well-known companies like Facebook, Instagram, and Airbnb for inspiration. The logos tended to be flat, simple, and scalable to small sizes. Initially, I thought of incorporating a foot in the logo but remembered that not everyone walks on a path.

I also tried a map themed logo but that didn’t seem to appeal to people.

(picture of map logo)

Then I went back to capturing the essence of what it felt like to wander. I turned the location marker on the map themed logo into a hot air balloon. Then I remembered my pilot friend who once told me how he flew a helicopter around the pyramids in Egypt. I imagined how adventurous that flight would have felt and the sense of wonder. So, I decided to add pyramids with my hot air balloon.

(picture of logo)

**Color**

I used nostalgic travel posters for color inspiration and created a mood board using Pinterest.

(three Pinterest posters)

I used Dribble to pick a color for the pyramids in the logo. I chose orange (#D4610E) to match the desert theme in the logo and to highlight buttons throughout the app.

(Picture of color picker)

I utilized Dribble further to create a monochromatic palette and applied it as a gradient in the pyramids.

(color palette inspiration)

I picked a blue color to complement the orange to give the app a vibrant feel.

(complementary color picker)

**Typography**

I chose Courgette for the brand name and titles throughout the app. The typeface designer, Karolina Lach, describes Courgette as a medium-contrast, brushy, italic-script typeface which evokes a loose, wispy feel to the Wander brand.

Lastly, I used Google's Material Design guidelines for typography details to complete the style guide.

(Style Guide)

**Mockups**

I created 71 pages of high-fidelity mockups using Adobe XD and Google’s Material Design guidelines (link to Material Design).

I designed Wander to be highly interactive especially in the path editing mode. I needed users to be able to distinguish what was clickable and to create icons that looked like physical buttons. Material Design's 3D approach was better suited for those goals than a flat design approach.

(List view mockup) (map view mockup)

**Prototype**

I used Adobe XD for rapid prototyping. Adobe XD was particularly useful for creating flows for the many combinations of actions a person can make in the map view.

(Screenshot of map view progression)

**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.

The most challenging problem I tried to resolve was the task: "As a registered user, I want to change the path on my map."

Initially, I used Material Design’s Floating Action Button (FAB) to allow people to edit their path. However, test results showed that the FAB was not clear in its function.

**Testing Wireframes**

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

(Wireframes click test results Edit Path FAB)

**Testing Mockups**

I tested mockups to see if more colors and context would help.

(Mockup click test results for Edit Path FAB)

Then I looked to apps like Airbnb for patterns of inspiration.

(Airbnb snapshot of filter/ map button)

I redesigned the Floating Action Button and labeled it "Edit Path," which yielded better results.

(Mockup click test results with “Edit Path” button)

The test results proved the need to break away from Material Design's guidelines. The pencil icon is widely understood to mean edit. But it wasn't clear what the Floating Action Button could change since Material Design doesn't use labels.

Material Design does give the option for the Floating Action Button to expand into a submenu with labeled options.

(floating action button submenu) (expanded floating action button with labels)

However, I decided that anything more than one click was too many. I couldn't delay users from reaching their goals by favoring aesthetics over functionality. As a new design, I have a small window of opportunity to show testers what my travel app can do for them.

**Other lessons learned: touch target size matters**

A lesson that I learned in the early stages of the prototype is that touch target size matters for phones. One person I randomly tested struggled to see anything happen when they tried to click on icons. In this case, the 24 x 24 dp icons were too small to register a response.

Material Design says touch targets should be at least 48 x 48 dp to ensure a physical size of about 9mm regardless of screen size. There should also be at least 8 dp separation between them. I made changes to include the minimum suggested touch zone size and spacing. I immediately saw testers move more fluidly through the app.

**Usability Testing with Prototype**

I conducted four usability tests. Two in-person and two remotely. I used Lookback.io, Quicktime, or a digital camera to record people’s faces and where they clicked on the prototype screens. Each session was approximately 10 minutes long.

I gave testers the following tasks:

1. Find a path using your current GPS location on your phone.
2. Filter the list for half-day plans made for photographers.
3. Select a path that will show the best photo spots at Balboa Park.
4. Sign-up using your email.
5. Create your profile. Upload a profile photo. Then add your profile name and story.
6. "Like" the current path to save it for later.
7. You decide to make some changes to the path. You're no longer interested in the Sculpture Garden. Remove its location marker.
8. You think the Spreckels Organ Pavilion on the left side of the map is more interesting than the Sculpture Garden. Add its gray location marker.
9. Erase the top portion of the path and re-draw it going to the new location marker you just added.
10. You think the path you created is awesome. Share it with family and friends.

**Usability Test #1 Results**

**(link to video recording)**

* In-person recording with a digital camera while the user tested the prototype on a phone.
* She had trouble figuring out what to do next after adding her profile photo and bio.
* She said the sequence of re-drawing the path before adding the new location marker felt unnatural.

**Usability Test #2 Results**

**(link to video recording)**

* Remote video recording using Lookback.io with user testing the prototype on a phone.
* She also wasn't sure what to do next after uploading her profile photo and bio. At the end of the test, she mentioned she was looking for a "Save" or "Back" button.

**Usability Test #3 Results**

**(link to video recording)**

* Remote video recording using Lookback.io with user testing the prototype on a phone.
* He had trouble figuring out which button to click on to update his profile settings.
* He tried to click "Edit Path" when asked to remove location marker for the Sculpture Garden.
* In the map view, he attempted to zoom in and see the names of locations. He said, "I can't see the Sculpture Garden."

**Usability Test #4 Results**

**(link to video recording)**

* In-person video recording using Quicktime with user testing the prototype on a laptop.
* She hesitated to click on the button for “Use current GPS location”.
* She took a moment to realize she needed to click on the form field to enter her email address.
* She tried to click "Edit Path" when asked to remove the location marker for the Sculpture Garden.

**What I changed base on usability testing results**

I made three key changes based on the usability test results:

1. I added name labels to the location markers.

(Screenshot of map with location names added)

1. I allowed people to remove location markers from the edit path view.
2. I added save buttons to allow people to confirm their edits, rather than use an auto-save feature.

("Save changes" button on profile page) ("Save changes" button in path editing view)

**CONCLUSION**

I created a travel app that gives people more control in planning walking paths.

My biggest doubt was whether people would find Wander valuable. Testing showed that my app can benefit people in planning their travels.

What surprised me most was the amount of research, design, and testing required to solve for a relatively small list of tasks. There are so many other design features to add to make the app more complete and fully functioning.

If given more time, I would create a coded prototype to test how a person would navigate at Balboa Park. A proven navigation feature would add greater value to the app.

I would also collaborate with experts in design, engineering, and business. They could offer valuable perspectives from their respective fields that I may not have considered. Their fresh ideas and teamwork would result in better solutions.

This project was challenging and helped me grow as a designer, more than any other project up to this point. I learned the value of discovering problems early and making smaller more manageable changes. I also learned the importance of being able to validate and defend my design decisions. I'll take these lessons learned and continue to improve my design process for the future.