**Kollect**

Case Study

Simple user onboarding and content management

UX Research and Design - Neil Ranada

Time: 3 months

**SUMMARY**

Kollect is a website design for easily managing notes, images, and links. Sometimes people forget where they saved an awesome meme they wanted to share…

(image of t-rex)

https://www.pinterest.com/jennihansonrn/natalie-loves-t-rex/?lp=true

Or scramble to find their notes from the other day…

(notes meme)

https://me.me/i/5022939

People struggle to remember where they save things. Was it on a post-it? In your note-book? Note app on your phone? Note app on your laptop?!

<http://www.quickmeme.com/Batman-where-are-they>

The goal was to create website design for meeting people’s needs while also fulfilling business requirements (link) set out for this design study.

**Problem**

People have a difficult time remembering where they save note images and links.

**Solution**

All content saved in one place and synced across multiple devices so people can access it anywhere.

**Discovery**

There are many ways to save and organize content, both material and digital. There are also numerous Software as a Service (SaaS) web applications available designed to meet those needs. So why are people still struggling to organize and find what they saved?

**RESEARCH**

I started my research with a feeler survey (link to survey) posted online to various social media platforms and public forums. I asked questions focusing on people’s past behaviors for saving and organizing items.

Here are my key findings from 31 responses:

* 96% said they used a smartphone to browse online.
* Over half said that when they find an interesting image or link online they save it
* When asked how they save content: 46.7% use a browser bookmark, 40% download it, 23.3% used other options, while 10% used a bookmarking application
* The top three tools for bookmarking were: browser (67.7%), Pinterest (35.5%), and Facebook (35.5%) (bar graph)

When asked what they liked MOST about tools they used for saving items, some said:

“Saving it in the browser is quick and easy. Saving it in Google Keep allows me to be more organized than just bookmarking in the browser.”

“Streamlined design, everything needed is on your screen, functions without fault.”

“Screenshots I save in a photo album on my smartphone, bookmarks will take you directly to what you want to pull up at another time.”

When asked what they liked LEAST about tools they used for saving items, some said:

“Sometimes I can’t find what I saved.”

“Browsers just show title and no preview for what is on the site. It would save time from having to open different links if you could preview it in when you mouse over the link.”

“I bookmark too many things, and they are hard to organize or I forget about them.”

When asked about their note taking behaviors:

* 41.9% wrote notes often, 48.4% wrote notes sometimes, while 9.7% never wrote notes

(pie graph)

When asked what applications they used to write and keep notes:

* 80% used smartphones
* Other tools were note as widely used: Other (26.7%), Evernote (16.7%), Microsoft Word (16.7%), Desktop applications (13.3%), and None (10%)

What some said they liked MOST about note taking tools they used:

“Syncs to my cloud.”

“I like the notes option on my iPhone the best because it’s easy to access, save and delete.”

“Google Keep – can add as many notes as needed, can check things off your list, can color code, can access from home or phone, east to stay organized.”

What some said the like LEAST about note taking tools they used:

“Some require Internet connection.”

“Sometimes I forget my planner.”

“Too much trouble to search for particular notes.”

Other findings:

* 72.2% said they work in a collaborative environment
* They often (47.1%) or sometime (41.2%) share resources (files, images, links, etc) with their co-workers
* 94.4% said they have a Facebook or Twitter account
* Only 50% said they use Facebook or Twitter to sign up for other accounts

**What I learned from survey results**

Most people save images and links by either downloading them or using a browser bookmark. With regards to notes, most people say take down notes with whatever tool they are using. They say that the tools they are simple, user-friendly, and intuitive.

There is one common problem. Despite the ease of use saving content, their files eventually become disorganized, and difficult to find and sort later.

**Finding an opportunity to solve a problem**

I began with an assumption: people need a website that allows them to easily save, share, and collaborate with content from any device. To validate this assumption, I needed to answer three questions:

1. Do people need a single point for saving, sharing, and collaborating on content?
2. Who is experiencing frustration?
3. What do they need to improve their content management experience?

**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 saving and organizing things that interests them most.

Stephen is the primary persona and the focus for the design. Out of the three personas, meeting his goals and addressing his frustrations would also meet the needs of the secondary and tertiary personas.

(Stephen) (Primary)

(Chris David) (Secondary)

(Bryan Tilos) (Secondary)

The User Personas have different interests for managing content: fitness, photography, and business. However, they share three common goals:

1. Centralized way of organizing content
2. Easily save notes, images, and links
3. Ability to easily share content with a community

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/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...”

**Usability Test #4 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…”

**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/)>