**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 web applications. I identified three: Evernote, Google Keep, and Ember.

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. Feature for easily adding content such as notes, images, and links
2. Shallow learning curve
3. Synced across devices so content can be accessed anywhere

Top three weaknesses to avoid in my design:

1. Having too many features that overwhelm people
2. Not being too restrictive on how people share items
3. Not intuitive to use

**Meeting research goals**

1. Do people need a single point for saving, sharing, and collaborating on content?

Yes.

1. Who is experiencing frustration?

People who want to add and organize content like the three User Personas.

1. What do they need to improve their content management experience?

**A** single place where they can easily add, organize, and share notes, images, and links. They also must be able to access it from any device.

**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)

**Digital Wireframes**

I created digital wireframes through Balsamiq.com to focus on the functionality of the web app.

(Big picture early whiteboard wireframes)

**Visual Design**

I began by brainstorming a number of brand names and logo designs. I looked to well-known brands that I admired such as Uniqlo for inspiration. Companies that I admire tended to use carefully selected typography and simple logos that are scalable and recognizable.

(blocbox japan design)

(blocbox hipster design)

(crate collection)

(blocbox orange gestalt)

I eventually settled with the name Kollect. It is a slight spin on the word “collect” which is essentially what you are using the app for. I then used gestalt-ism with a group of small triangles to form a simple, clean, modern looking box that scales well to small sizes.

**Typography**

I used PT Serif for the body text to give Kollect a trustworthy feel. I complemented it with Karla, a san serif typeface similar in structure to PT Serif, but with a softer style meant to draw the eyes to headers and buttons.

**Style Guide**

Lastly, I chose a light blue to give the app a light cool feel. I used the Adobe wheel to build a monochromatic palette to complete the style guide.

(Style Guide)

**Mockups**

I used Sketch app to create high fidelity mockups to give the website a look and feel which would eventually be used to build the prototype.

**TESTING**

I used a combination of in-person and remote testing with my family and relatives. I also used in-person guerilla testing in a food court.

**Usability Testing with Prototype**

I used a combination of in-person and remote testing with my family and relatives. I also used in-person guerilla testing in a food court. I used a modified version of Steve Krug’s usability testing script (link). Questions and tasks included:

1. What is your first impression of this website page?
2. What do you think this page is for?
3. Sign up for Kollect
4. Add a new note, picture, or link
5. Change your account settings and upgrade to a professional account

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

**User Impressions of the Homepage**

* Despite text describing features of the app, users tended to quickly scan and skip around reading the text, and asked "what is this thing supposed to look like?" Recommendation: include actual pictures of different app features on the homepage.
* Overall, users liked the simple design.
* Users were turned off by the black and grey color scheme. Recommendation: use color palette that is interesting and provides contrast.
* User questioned the 2GB limit: "Does limit apply to each box or the whole account?". Recommendation: clarify data limit requirement with client.
* User questioned collaboration feature: "Can I share with non-Kollect users?", "Can I change whether or not a collaborator can view and change my stuff?" Recommendation: these feature are not essential to MVP but should be discussed with client to include in later versions.
* Remote users had different viewing experiences depending on the monitor they used (laptop vs. external TV monitor) and zoom setting of their browser. Recommendation: this is a limitation of using Invision as a test platform, however, the app must be responsive to different devices and display screens.
* During guerilla testing, user used my MacBook. User typically uses PC and phone to browse. Not used to Apple products and took extra time working through website. Lesson learned: this is a test environment limitation. As long as the app is responsive, the user should have a better experience using the app in their own devices.

**Users asked to Sign-up for Kollect**

* Users were hesitant to click on buttons. I had to explain that the website is not live and entering personal information is not required. Recommendation: design homepage to better showcase the product so that users are more willing to try it out.
* One user asked, "Can I try Kollect without creating an account?". (I'm not sure if this is possible. I don't think it would make sense from a business and cyber security perspective).
* Users easily signed up using social buttons.

**Users asked to add a Note, Image, or Link**

* All users were distracted by the unfinished wireframe items on the dashboard. Lesson learned: limitation of this version of wireframes. In higher fidelity wireframes, the hover icons in item boxes will not be visible and shouldn't confuse users.
* One user confused about the function of the left side menu bar and attempted to add an item by clicking there. Recommendation: consider relocating and/or redesigning menu to make it's purpose clear.
* All users used the "Add" button in the top right corner. Some users were faster than others. Recommendation: design "add button" to highlight it as a call to action and minimize other distractions on the dashboard.

**Users asked to go to Account Settings and upgrade to Professional Account**

* **All users** struggled to find the avatar and gear symbol in the button left hand corner. Most users did not scroll down to find it. Recommendation: Have the avatar and symbol float so that it's always visible in the bottom left-hand corner, or relocate it somewhere at the top of the page. Also, consider a design for floating the top horizontal menu to keep it visible at all times.
* Clicking on "Professional" button was easy task for users.

**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**