

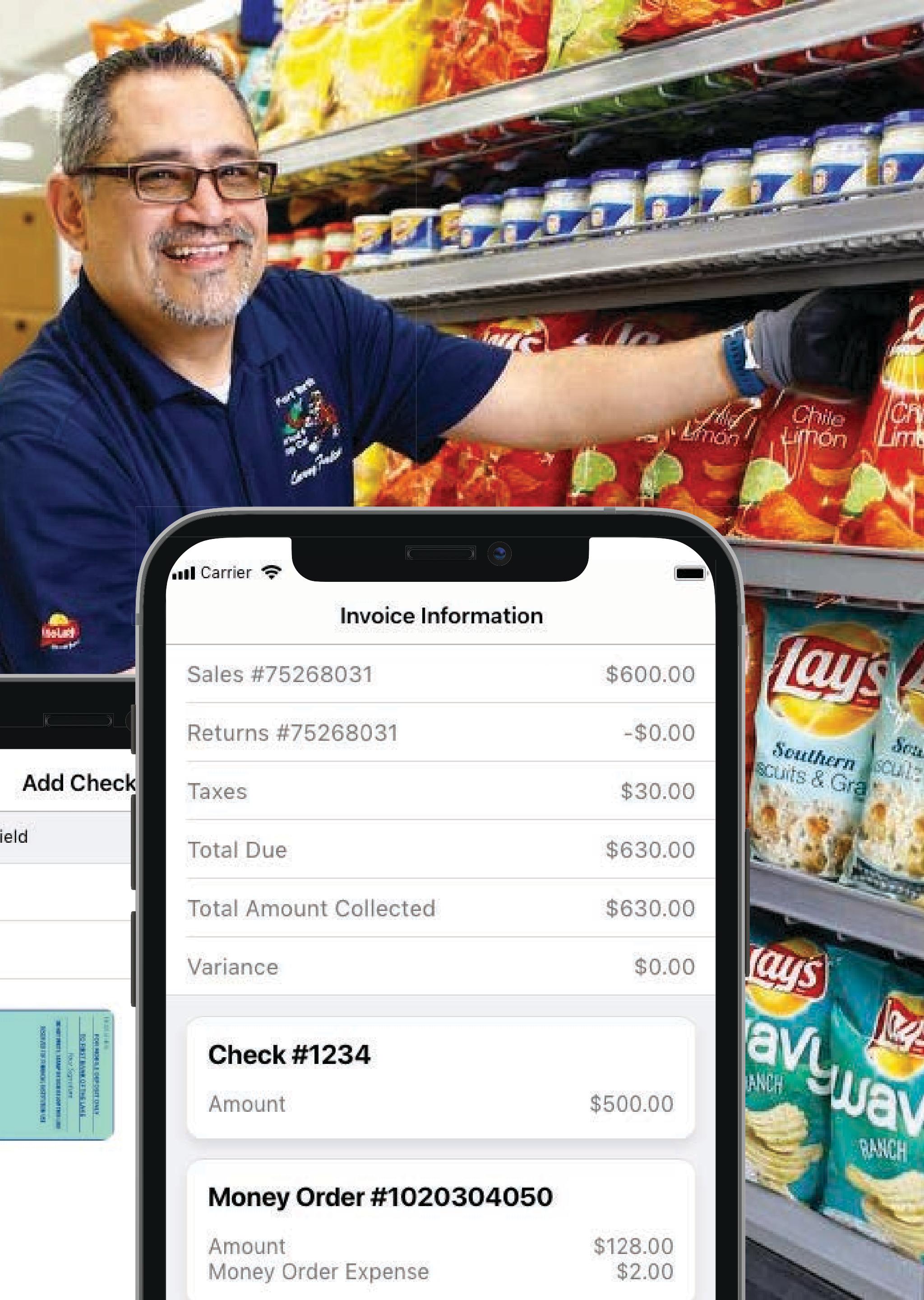


Mobile Banking

Case Study

This tool was designed to move the paper work process to a digital experience.

Project duration: 6 Months
2022



The mobile banking application interface is shown in two overlapping screens. The top screen displays "Invoice Information" with the following details:

Sales #75268031	\$600.00
Returns #75268031	-\$0.00
Taxes	\$30.00
Total Due	\$630.00
Total Amount Collected	\$630.00
Variance	\$0.00

The bottom screen shows the "Add Check" screen with fields for "Check Amount*" and "Check Number*". Below these fields are two images of checks: one from "FIRST BANK OF THE LAKE" for \$500.00 and another for a money order. The bottom right corner of the screen shows a summary: "Check #1234" with an amount of "\$500.00" and "Money Order #1020304050" with an amount of "\$128.00" and a note "Money Order Expense \$2.00".

About my Journey

My responsibility is to create designs for iPhones that follow HFI (Human Interface Guidelines) and iPads that follow the Lighting design system (Saleshub). My duties involve developing user-friendly mobile/tablet applications for frontline staff, drivers, and supervisors. A few devices did function, like as the HHN SH+, which currently includes 40+ modules for iPhone designs. The LM is meant for managers and sometimes makes an appearance as a guest.



Problem Statement

Frito-Lay works to centralise and update its tools using Salesforce in order to maximise productivity across its platforms and better serve retailers of all kinds. The organisation decided to develop a new tool to simplify frontline personnel operations in order to secure user acceptance. It enlisted the help of user-focused professionals from IBM Garage and IBM's Salesforce practice.

My Role

UI/UX Designer

My Responsibilities

- User Research
- User Personas and Journey Mapping
- Wireframing and Prototyping
- Visual Design
- Information Architecture
- Usability Testing
- Design Documentation
- Design System

Tools

- Adobe XD
- Mural/Miro
- Azure/Airtable



Objective

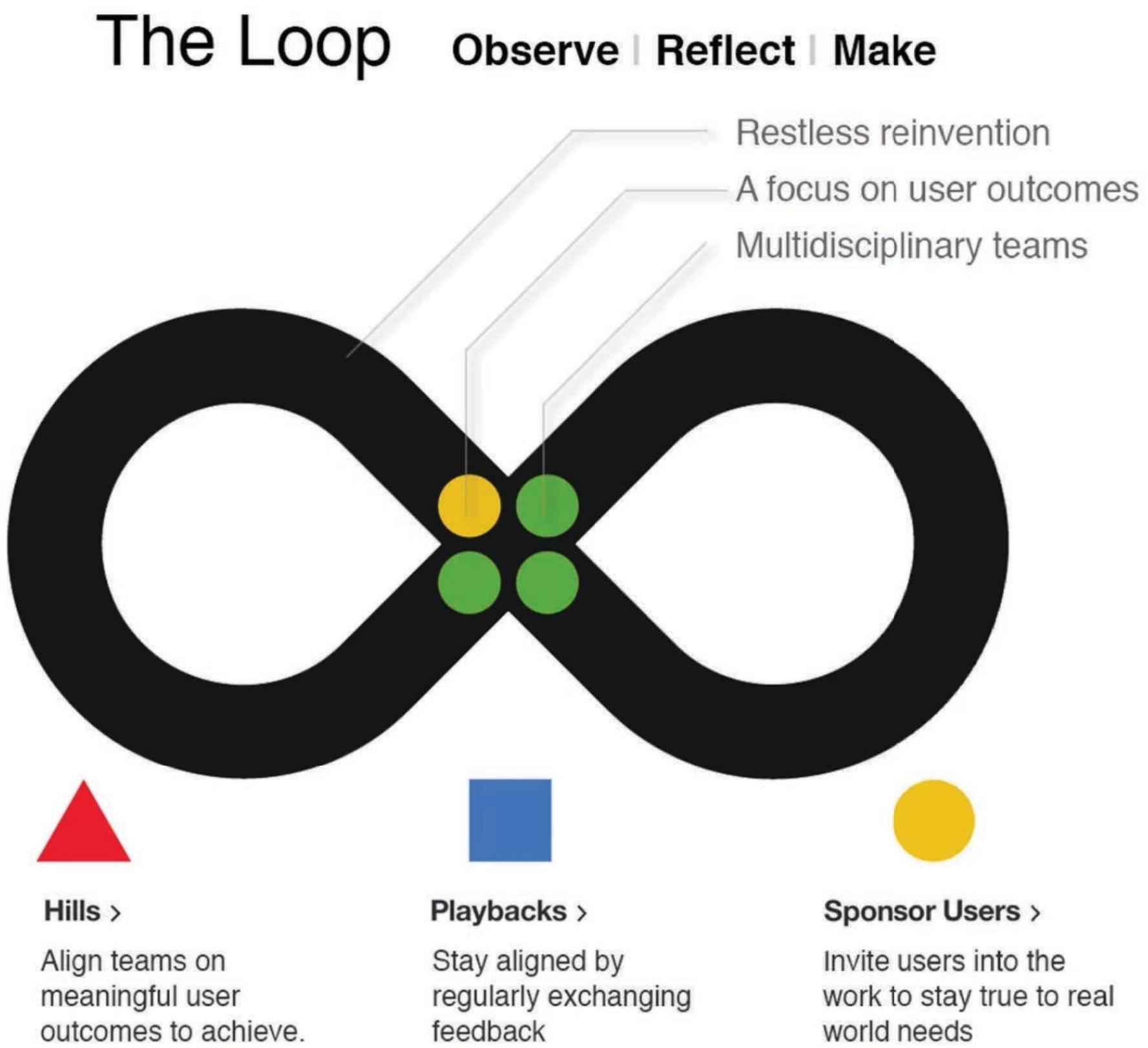
To create user-centered designs that optimise the usability, desirability, and accessibility of digital products or services, resulting in enhanced user satisfaction, engagement, and business success.

Currently, small format RSRs and RSAs handle customer payments (checks, money orders and cash) through a highly manual, paper-intensive process. This tool was designed to move that process to a digital experience.

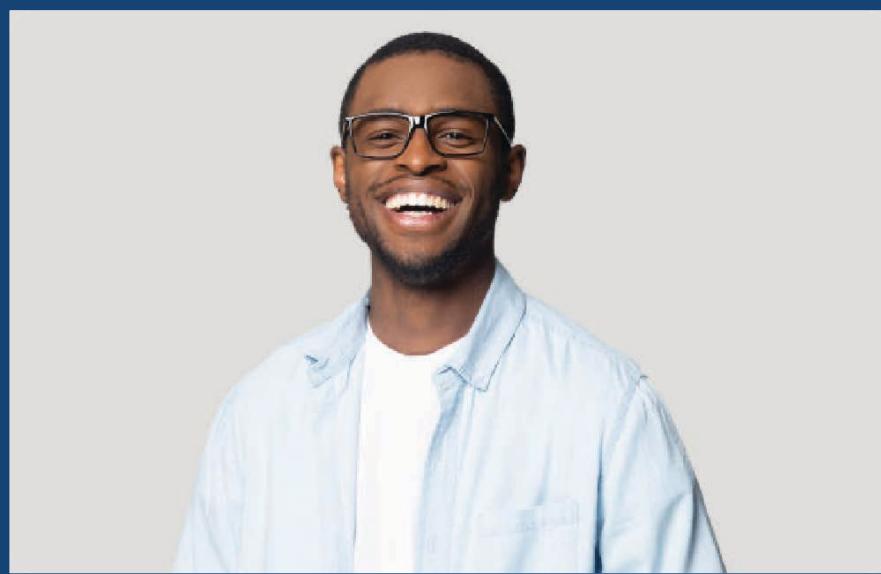


IBM Design Thinking Process

IBM Design Thinking is a scalable framework to help teams understand and deliver continuously. You begin by making a conscious commitment, as a team, to prioritise your users over other, sometimes competing, business concerns.



User Personas



Name: Daniel

Age: 25

Location: New York

Occupation: RSR

"It's not like there's a start and stop to this transformation. It's a process. We're on this journey and will continue as we evolve with our workforce."

Pain points

Employees in the snack sector must maintain a current level of ability and knowledge due to changes in production methods and technology.

Goals

Seeking opportunities for continuous improvement in production methods, packaging techniques.

Frustrations

Snack production often operates on shift schedules, including night shifts and weekends. This can impact work-life balance, disrupt sleep patterns, and pose challenges for employees in terms of personal commitments.



Name: Samuel

Age: 39

Location: Texas

Occupation: RSA

The happiest people don't have the best of everything, they make the best of everything.

Pain points

In charge of customer service and day-to-day operations do several activities at once, such as processing papers and performing administrative responsibilities.

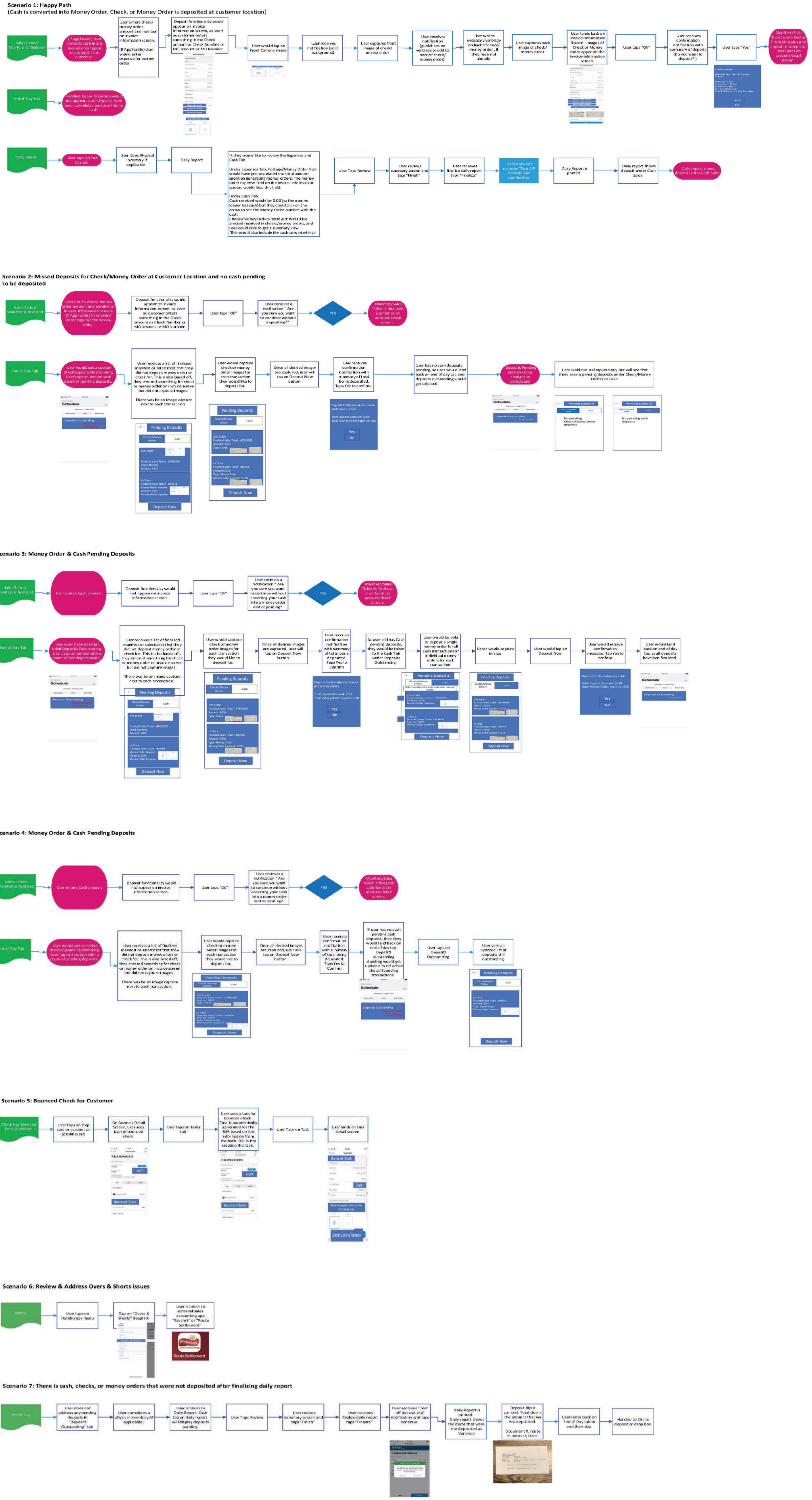
Goals

Handling administrative activities like document processing and keeping effectively. Managing time effectively, prioritizing activities, and meeting deadlines.

Frustrations

To ensure productivity, we need to be good at multitasking, dealing with distractions, maintaining order.

Process Overflow



MVP Wireframes

Invoice Information

Sales #75268031	\$600.00
Returns #75268031	-\$0.00
Taxes	\$30.00
Total Due	\$630.00
Total Amount Collected	\$0.00
Variance	- \$630.00

Add Payment **Deposit**

Invoice Information

Sales #75268031	\$600.00
Returns #75268031	-\$0.00
Taxes	\$30.00
Total Due	\$630.00
Total Amount Collected	\$630.00
Variance	\$0.00

Check #1234

Amount	\$500.00
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Money Order #1020304050

Amount	\$98.00
Money Order Expense	\$2.00

Money Order #5040302010

Amount	\$28.00
Money Order Expense	\$2.00

Add Payment **Deposit**

Deposit Status

- STORE ON THE CORNER**
Check #1134 !
Error - Check Amount Invalid
- 1015 SUPERMARKT**
Check #1134 !
Error - Check Images Invalid
- LA BODEGA**
Check #1134 A
Error - Unknown
- LIZ S DRIVE IN #3**
Check #678910 C
Processing Deposit
- LA BODEGA**
Check #75268101 !
Error - Money Order Amount Invalid
- LIZ S DRIVE IN** G

Invoice Information

Sales #75268031	\$600.00
Returns #75268031	-\$0.00
Taxes	\$30.00
Total Due	\$630.00
Total Amount Collected	\$630.00
Variance	\$0.00

#1234

\$500.00	Delete
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Money Order #1020304050

Amount	\$128.00
Money Order Expense	\$2.00

Add Payment **Deposit**

Pending Deposits

Deposit Status

Checks/M.O. **Cash** **Manual Deposit**

Select Multiple

LIZ S DRIVE IN

Check (1)

Invoice Doc #	75268101
Total Due	\$700.00
Variance	- \$200.00

LIZ S DRIVE IN #2

Check (1), Money Order (1)

Invoice Doc #	75268031
Total Due	\$630.00
Variance	\$0.00

LIZ S DRIVE IN #3

Money Order (1)

Invoice Doc #	75268113
Total Due	\$300.00
Variance	- \$150.00

Pending Deposits

Deposit Status

Checks/M.O. **Cash** **Manual Deposit**

Select Multiple

DRIVE IN

1)

Doc #	75268031
Total Due	\$691.89
Variance	- \$191.89

LA BODEGA

Check (1), Money Order (1)

Invoice Doc #	75268054
Total Due	\$691.89
Variance	+ \$8.11

1015 SUPERMARKT

Money Order (2)

Sales Number	75268054
Total Due	\$691.89
Variance	+ \$8.11

Deposit Detail

Status - Deposit Successful

ORIGINALLY SUBMITTED DETAILS

Check Amount

Check Number

CUSTOMER

LIZ DRIVE IN

Deposit Detail

Status - Deposit Failed

Please re-enter the amount and ensure the amount matches the check or money order amount.

ORIGINALLY SUBMITTED DETAILS

Money Order Amount

Money Order Number 10

Money Order Expense

CUSTOMER

La Bodega

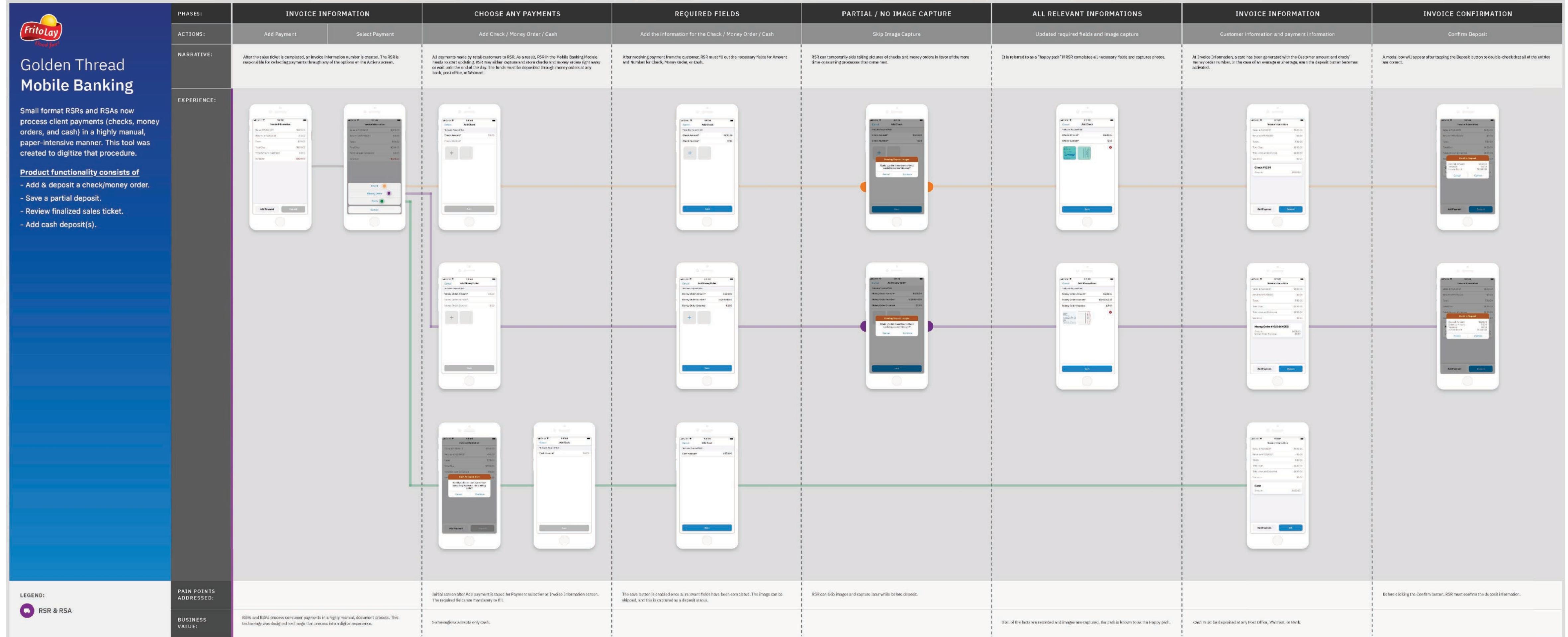
Market Place

Cash & Carry

Resubmit

Design Systems

Golden Thread



Conclusion

Frito-Lay focused to organize and upgrade its tools using Salesforce in order to improve productivity across its systems and better serve retailers of all sizes. The tools were really being used by the staff, and there were recorded problems that the new technology would have to address.



Lessons Learned

As a UX designer, there are several valuable lessons that can be learned throughout the career.

- **User-Centered Design:** Putting the user at the center of the design process is crucial. Understanding user needs, conducting user research, and involving users in testing and feedback loops help create products and experiences that truly meet their needs.
- **Iterative Design:** Design is an iterative process, and it's essential to embrace feedback and iterate on designs based on user insights. Testing early and often allows for continuous improvement and avoids costly design changes later in the process.
- **Collaboration & Communication:** Collaboration with stakeholders, developers, and other team members is key to successful design outcomes. Clear and effective communication helps align expectations, share ideas, and ensure everyone is working towards the same goals.
- **Empathy and Advocacy:** Developing empathy for users and advocating for their needs is crucial. Understanding their pain points, frustrations, and motivations helps create designs that address their specific challenges and provide meaningful solutions.
- **Flexibility and Adaptability:** Being open to change and adaptable in the face of new information or evolving requirements is essential. Designers must be willing to pivot, adjust, and explore alternative solutions based on user feedback and project constraints.
- **Design Documentation:** Creating clear and comprehensive design documentation is important for effective collaboration and handoff with development teams. Documenting design decisions, user flows, and interactions helps ensure a shared understanding and smooth implementation.
- **Continuous Learning:** The field of UX design is ever-evolving, and staying updated with the latest trends, tools, and methodologies is crucial. Continuous learning through reading, attending conferences, participating in workshops, and engaging with the design community helps grow as a designer.
- **Balancing User Needs & Business Goals:** Striking a balance between user needs and business goals is a challenge. Understanding business objectives and finding creative solutions that meet both user and business requirements is a valuable skill for UX designers.
- **Embracing Constraints:** Design often operates within constraints such as budget, time, and technological limitations. Embracing these constraints as opportunities for creativity and innovation can lead to more effective and realistic design solutions.

Let's Connect

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