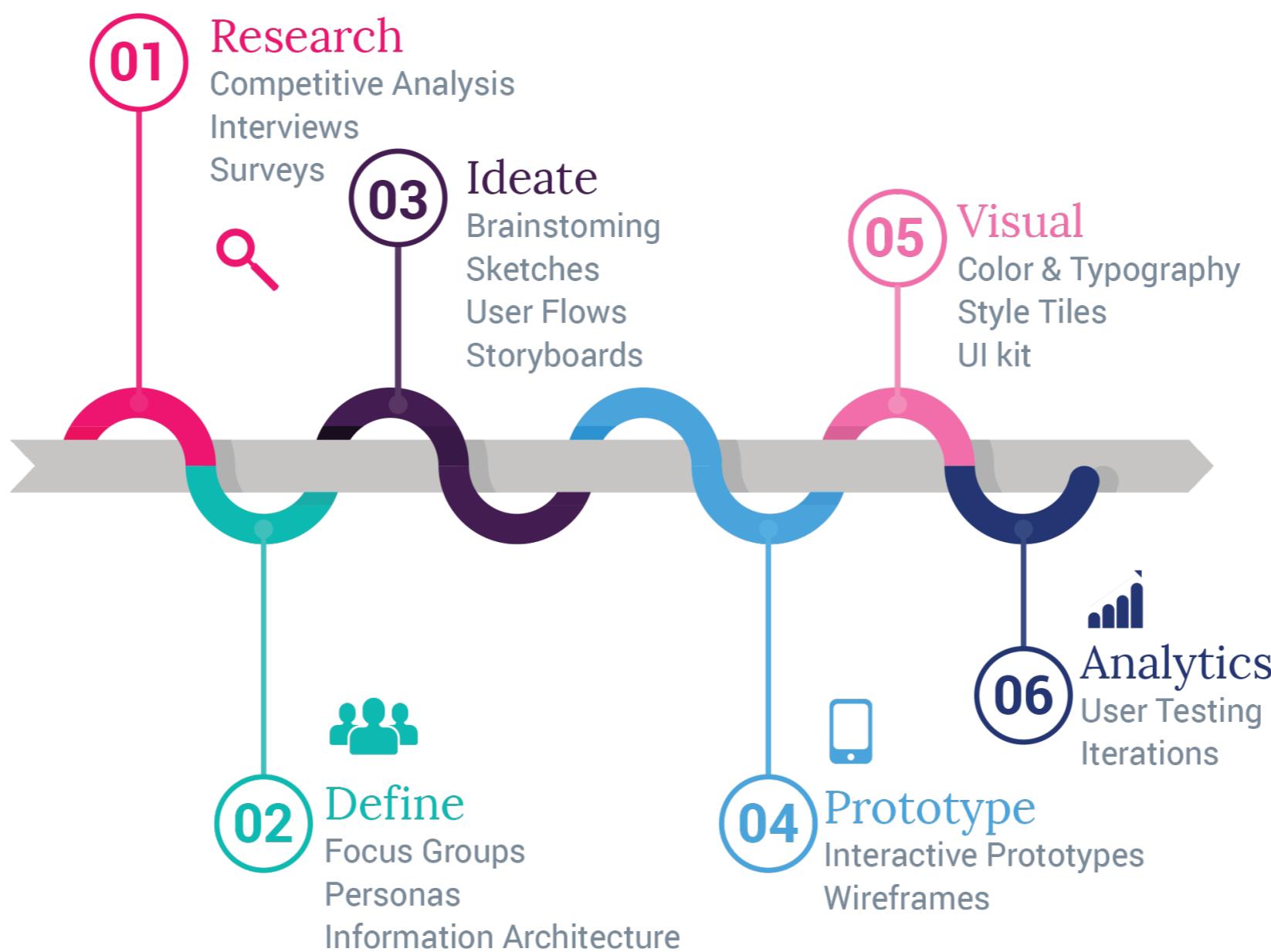




Twinfield-Case

by Sofia Kasimi

Design thinking process



Project:

The brief for this task was to optimize the processing of invoices and receipts as well as to improve the collaborations between the accountant (Lucy) and her customers (Ben).

I have been asked to develop one of the following scenario:

1. Enable more effective processing of receipts and invoices.
2. Improving direct communication with Ben.
3. Show added value of renewed proposition of accounting firm Lighthouse Accounting to customer Ben

Challenge:

The challenge for this task was to create a product for accounting solutions that I was not familiar with.

So, I focused in the scenario of how I could effectively improve the process of receipts and invoices that simultaneously lead to better communication between Ben and Lucy .

Research:

I started out by focusing on Twinfield User personas more specifically their goals, motivations and behaviors.

I followed with a competitor research to understand the product, the current market, who the competitors are, what strategies they are using and how intuitive is their navigation.

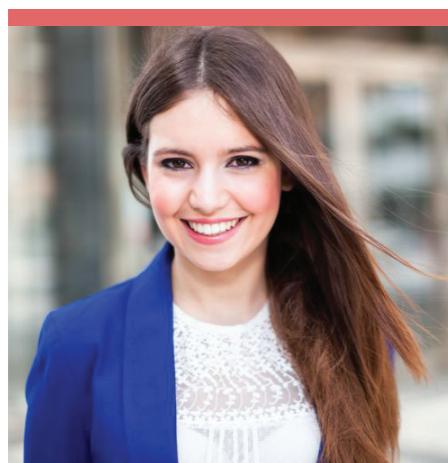
Competitor accountant applications:

- QuickBooks
- Xero
- FreshBooks

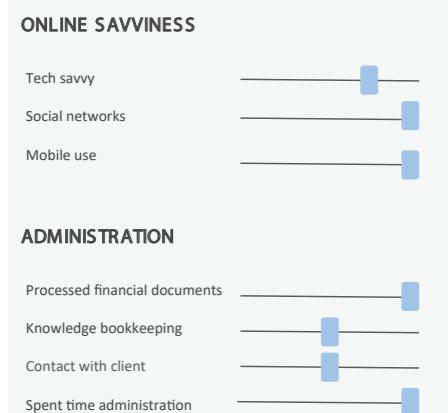
Customer needs:

Based on the User personas you have sent me I have also been able to determine Twinfield customer needs:

- Potential customers: Accountants working effectively with other people, from freelancers to small and large company teams.
- Customer needs: Easy and intuitive to use application, enabling direct collaboration, management and tracking wherever they are and whatever device they use.



"Learn as much as possible, be helpful and instigate change!"



Lucy 21, Intern

Works as an intern at Lighthouse Accounting. Cultivates her knowledge of accounting there and processes a lot of companies for clients. Manages both the data entry and quality of the financial transactions. She processes a lot of invoices.

Lucy studies at college and lives in a shared apartment with other students. She plays hockey on a high level and is very active on social media. Likes hanging out with friends.

GOALS

- Graduate cum laude from college.
- Process multiple companies efficiently for customers.
- Build her business network.
- Increase her knowledge in business and finance (be a champion).
- Be a game-changer!

BEHAVIOURS

- Has an app for everything (shopping, sleeping, driving, running, etc.).
- Wants to win and stand out among her peers.
- Diligent in her work.
- Plugs into communities to access knowledge and people/mentors.

WE MUST

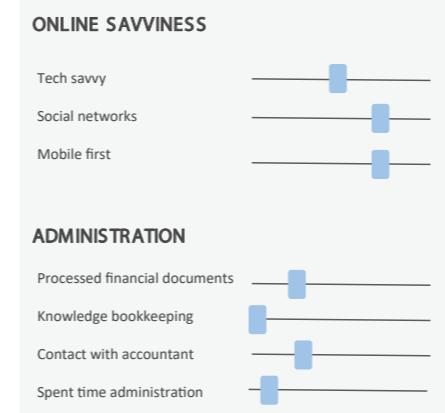
- + Give Lucy efficiency.
- + Offer a software experience she can relate to (e.g. Twitter, Facebook, Instagram).
- + Make the resources to master accounting solutions very accessible.
- + Help manage her workload.
- + Provide easy interaction with clients (e.g. chats, reminders).

WE MUST NEVER

- Treat her as a mediocre user.
- Make mistakes a big issue.
- Render her 'anonymous' in the activities she performs for customers – keep it personal.
- Ignore the possibilities of gamification for motivation.



"I am always looking for the next best picture."



Ben 33, freelance photographer

Self employed at 2BCONNECT, although for major assignments he attracts other photographers to work together. Ben has no 9 to 5 work ethic and works approximately 6 days a week. Every day is different as he needs to look for potential clients (B2B and B2C). He loves the freedom, follows his long life passion.

Married and has 2 kids Lisa 3 and Jason 5. Enjoys healthy food, spending time at the gym and visiting the barber shop. Loves to travel and hang out with friends for dinner or just a beer.

GOALS

- Save time running his business from home, on the road, abroad, at a client at anytime.
- Be the best and well-known photographer in his workfield.
- Primarily follow his passion, the money will follow.
- He wants to keep his involvement with the administration to the bare minimum.

BEHAVIOURS

- Always busy looking for the next project.
- Tries to know his regular customers thoroughly.
- Gets bored of accounting .
- Easily influenced by his accountant when it comes to finances.
- Bad at organizing his finances.
- Simplicity and great design matter.

WE MUST

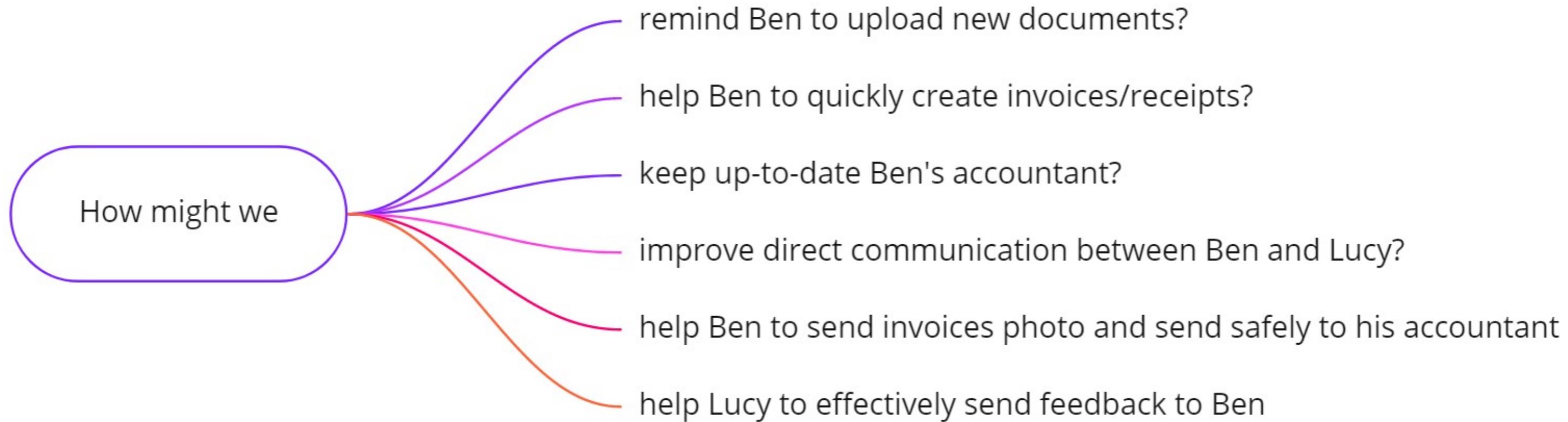
- + Make it as easy as taking a picture. Push the button and done.
- + Make completing tasks easy/little time.
- + Remind Ben if something needs to be done.
- + Make same information available anytime/anywhere on any device.
- + Assist Ben in managing his business network.

WE MUST NEVER

- Make Ben feel he's doing the accountant's job.
- Don't overwhelm him with choices.
- Let Ben feel like he has to organize his finances.
- Make it difficult to find what he is looking for. Adhoc.
- Use complex and accounting terms.

Brainstorming ideas & hypothesis

“How might we” technique from IDEO



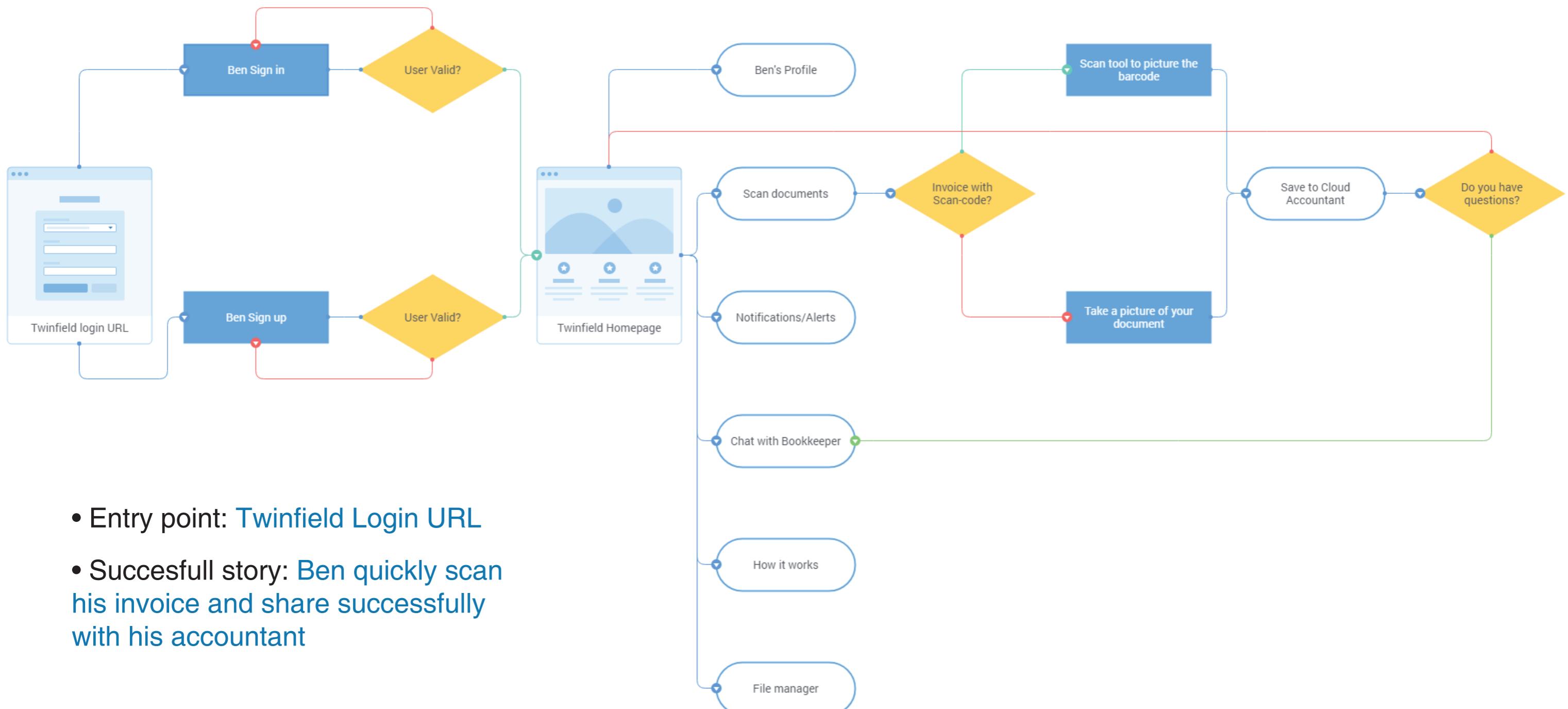
Hypothesis:

“I believe adding the “Scan QR code” button will be a useful feature for busy users who can scan,take photo or upload their documents and share them via cloud with their accountants, it will save their time. This will increase the collaboration of our users (Ben and Lucy)”

User Flow:

To help me visualize our customer's (Ben and Lucy) navigation with our services and how those journeys are connected I created a customer experience map which helped me to identify problem areas.

“Ben scan-photo-upload invoices & share via cloud with his accountant”



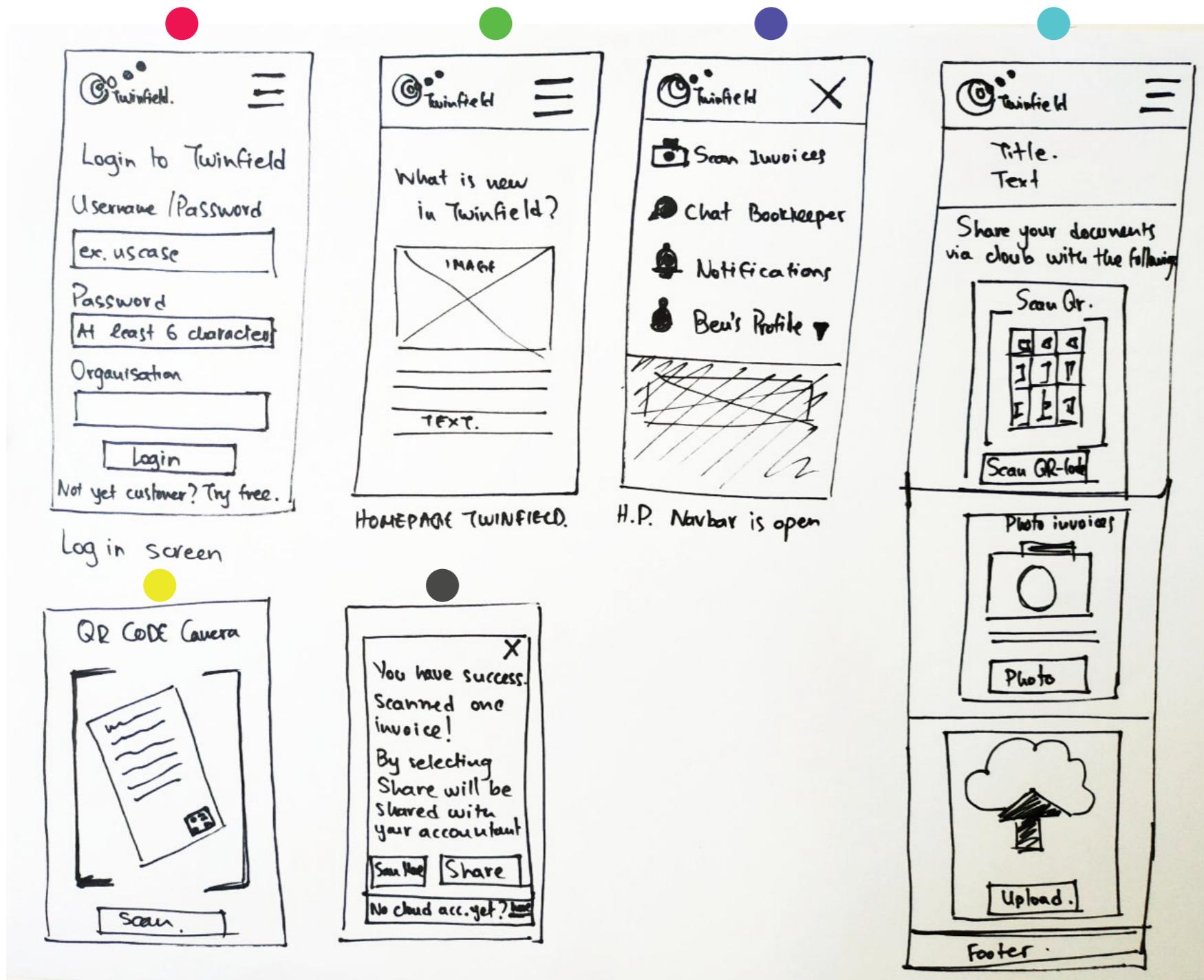
- Entry point: [Twinfield Login URL](#)
- Success story: Ben quickly scan his invoice and share successfully with his accountant

Ideate:



Sketching Low fidelity wireframes

During this phase I started sketching out to be able to quickly see which idea would work best, using mobile first approach.



- Ben Login to his profile
- Ben is logged in and our app shows our new feature “Scan invoices”
- Navbar is open and the Scan invoices feature is selected.
- Scan invoices screen that allows Ben to Scan-Photo-Upload new invoices and send through Cloud to his accountant
- Ben selects to scan the QR-code from his invoice by using the mobile camera
- A pop up screen informs Ben that has successfully scanned one invoice. By tapping the Share button he allows ----sharing the document with his accountant via Cloud.

