



PREPARED BY
BRITTANY BELLANCA

USER EXPERIENCE THEORY **FINAL PRESENTATION**

What if every person had

EXACTLY THE RIGHT PLANNER

to meet their needs?

THE PERFECT PLANNER

Business Concept

We want to create a new way to build customized planners for people who need a unique system to manage their busy lives.

Customer Segment

Any busy person who uses or wants to use a planner or scheduler type product including students, parents, families, goal-setters, etc.

Value Proposition

So, basically, it's a **SUBWAY SUB SHOP** for **PLANNERS**! You tell us what you want and we'll build it for you!

THE COMPETITION

<p>GoodNotes App [Link]</p> <p>Customers create or import pages they like and create a digital Bullet Journal. Because they can import, this experience is highly customizable.</p>	<p>EverNote [Link]</p> <p>This app focuses on note-taking, but can be used to import images which can make it feel much like a journal. Often used in business world.</p>	<p>Bullet Journaling [Link]</p> <p>A paper & pen experience that is incredibly customized because it is an empty notebook for the customer to create in. Very time consuming.</p>
<p>Erin Condren [Link]</p> <p>A fairly traditional paper planner & very pretty. Company gives illusion of "choice;" however, customer can really only customize cover & weekly spread.</p>	<p>Agendio [Link]</p> <p>Very customizable planners - customers choose which type of spreads & and modules. However, they're all quite plain and the paper quality is mediocre.</p>	<p>Passion Planner [Link]</p> <p>A feel-good planner with no customization opportunities, but plenty of flexible space within planner. Very professional feeling.</p>
<p>Consumer-Made Planners Etsy [Link]</p> <p>There are a huge variety, but often no ability to further customize or rearrange pages. Sometimes, these planners lack professional quality because they are simply printouts from a home printer.</p>	<p>Retail planners</p> <p>Often sold by companies like Target, Office Depot, or Amazon, these planners are typically much less expensive compared to name brand planners and schedulers. However, they also have no opportunities for customization.</p>	

UX INFLUENCERS

Agendio [\[Link\]](#)

- User can select dailies, weeklies, or monthlies, but not all at once
- User can add and customize modules per user needs
- Choice between spiral-bound and journal bound

Passion Planner [\[Link\]](#)

- Offers a 6am-11pm daily time slots on weekly spread and provides free printouts on website so users can add more time if needed
- Has lots of open space and positivity (quotes) throughout

GoodNotes App [\[Link\]](#)

- User can select dailies, weeklies, or monthlies, but not all at once
- User can add and customize modules per user needs
- Choice between spiral-bound and journal bound

Erin Condren [\[Link\]](#)

- Very pretty planners with customizable covers
- Fosters community of users, mostly women, who love to plan.
- Provide plenty of coordinated accessories for users to add on

Bullet Journaling [\[Link\]](#)

- A total blank slate that can be completely customized
- Very professional look
- Lots of user made web content - like tutorial videos, printable content, and walkthroughs

Papa John's Pizza [\[Link\]](#)

- Pizza Builder walks customers through a step-by-step process to build their perfect pizza.
- Great user-control with buttons that let user navigate freely within builder

PERSONAS & REQUIREMENTS

Josh Baxter



"It's really important to set goals in order to make my dreams a reality."

PERSONA Primary

AGE/GENDER 25 / Male

STATUS Single

LOCATION Outskirts of Orlando, FL

OCCUPATION Student

ARCHETYPE The Industrious Student

Artistic

Goal-Orientated

Kind

Busy

About

Josh is a college student enrolled in computer science courses. He enjoys the struggle and rewarding feeling that come from problem solving during programming. He also works in the afternoons as a mathematics tutor for a local tutoring company. His days are quite busy, so Josh sets goals and daily focuses to help keep him on track. On the weekends, Josh is part of a study group that is working to build a new mobile application. He'll graduate in about two years. Josh is also a really talented artist; he frequently earns money from selling his art online. Josh has a small group of friends, but he does not get to see them often due to his busy schedule.

Goals

- Successfully (and quickly) schedule and manage various responsibilities to achieve school-work-life balance
- Track progress toward goals - daily, weekly, and monthly
- Easy to carry with other supplies, but has enough space for creativity

Behaviors

- Purchases food from restaurants often because he doesn't like shopping and loses his grocery list because it's on a random piece of paper
- Spends a lot of time studying and completing projects for school
- Sets goals to last for three months; checks in & documents progress often

Frustrations

- Feels stressed because it doesn't seem like there is enough time in the day to get everything done
- Planners that seem to "have it all" are too large & don't actually have it all
- Occasionally, wants to talk to people & get advice on time management

Jen Collins



"I want to live my best life with my family while staying on top of my many responsibilities."

PERSONA Secondary

AGE/GENDER 43 / Female

STATUS Married with 2 children

LOCATION Suburbs of Orlando, FL

OCCUPATION Work from home mom

ARCHETYPE The Untiring Mother

Organized

Supportive

Friendly

Dependable

About

Jen lives for her family. Her husband, Michael, and two children, Jack and Maggie, are her whole world. With every action she takes, with every decision she makes, she considers her family first. So, Jen works from home as a medical transcriptionist so she is available for her family whenever they need her. During the daytime, Jen balances her job responsibilities with tidying her home and completing chore. Jen doesn't get a lot of time to herself, but when she does, she meets up with a friend or two to chat; they occasionally go to "paint night" events.

Goals

- Keep track of her changing schedule each day to ensure everything is completed on time
- Manage family members' schedules in a single day
- Schedule weekly "me" time - possibly with friends or for a fun event

Behaviors

- Schedules day to day activities (for herself & family members)
- Creates several different to-do lists & shopping lists
- Sets reminders on cell phone for events and reminders

Frustrations

- Between herself, husband, and children there are too many events to keep track of; activities get forgotten until last minute, then there's chaos
- Not having enough "me" time to relax with family or friends
- Difficult to schedule/arrange gatherings with extended family

REQUIREMENTS

Josh & Jen share many of the same needs that are met with The Perfect Planner's design system.

Jen does have some additional requirements that are met through alternative paths on The Perfect Planner website (and on the future mobile application).

PRIMARY



Josh Baxter
"The Industrious Student"

1. Choice of spreads
2. Layout customization
3. Schedule each day
4. Prioritize responsibilities
5. On-the-go size
6. Low to Medium maintenance
7. Goal-setting/time-managment advice
8. Blank/flexible pages

SECONDARY

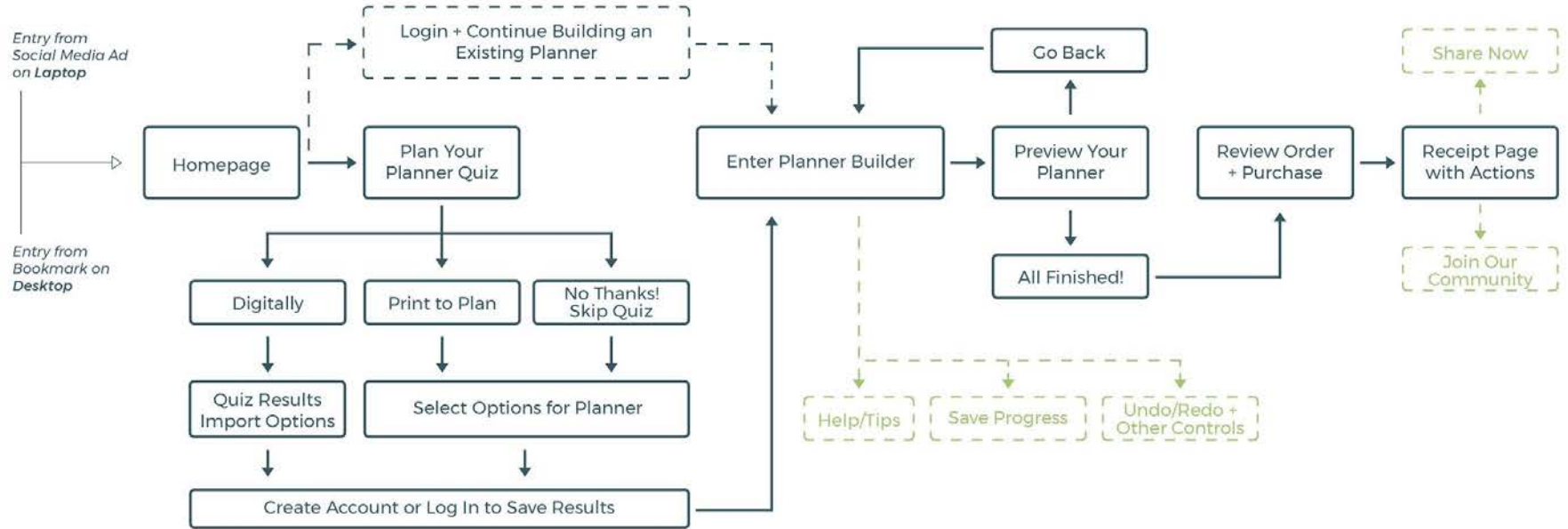


Jen Collins
"The Untiring Mother"

1. Choice of spreads
2. Layout customization
3. Schedule each day
4. Family members' schedules
5. Paper to smartphone (app)
6. Low maintenance
7. Time-management advice
8. Affordable Price

USER FLOWS

PRIMARY USER FLOW



First time user, or
User beginning a brand new planner

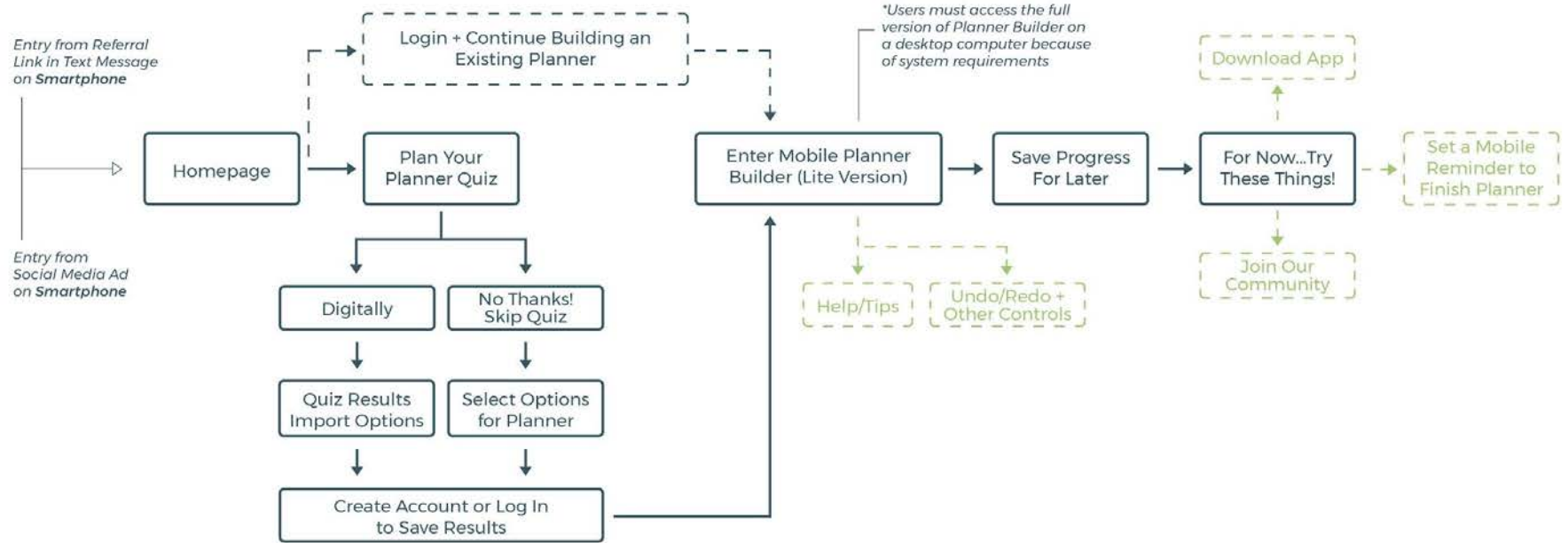


Optional + User can cancel out of to
return to previous screen



Returning user login optional path

SECONDARY USER FLOW



First time user, or
User beginning a brand new planner

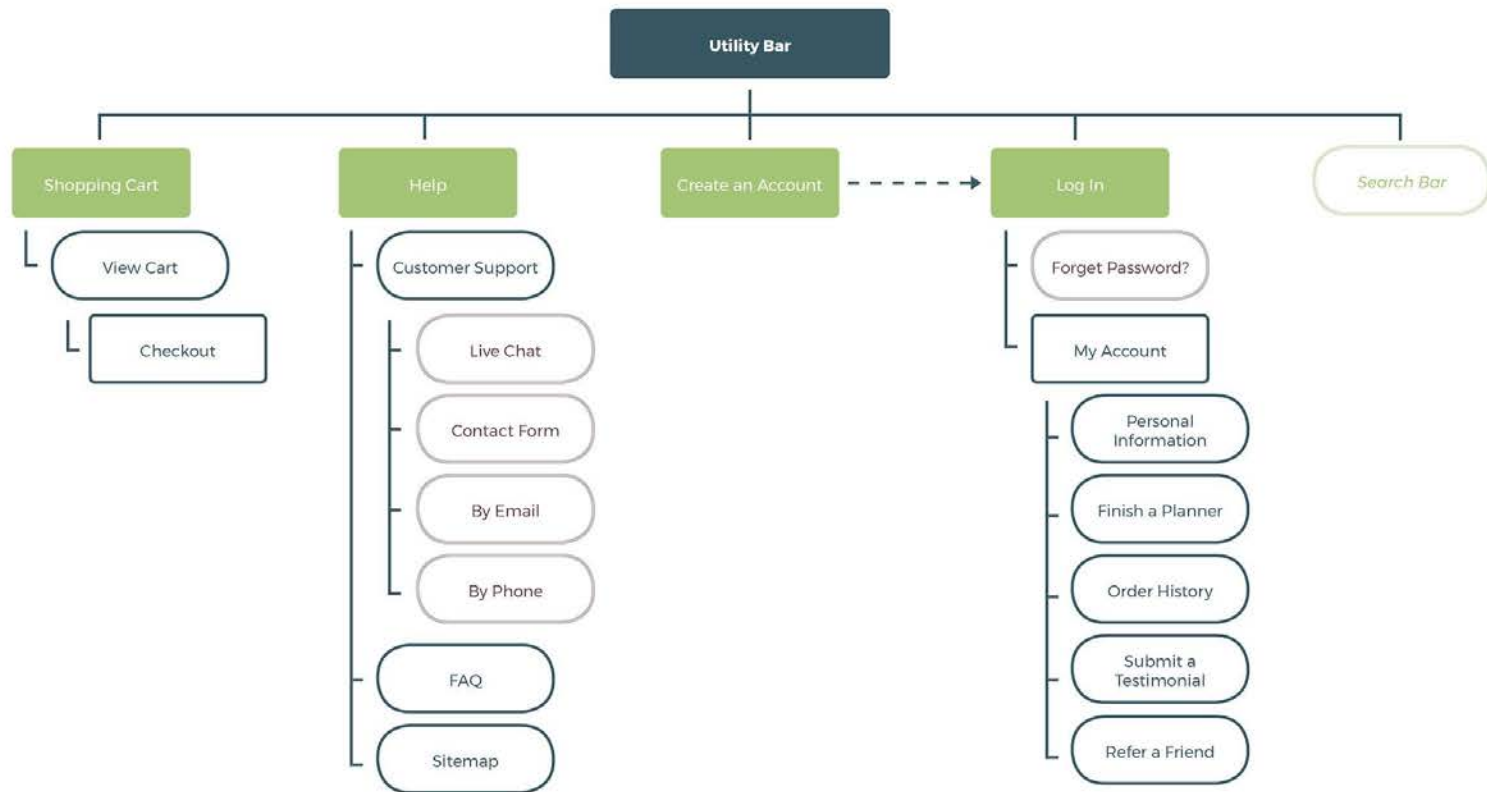


Optional + User can cancel out of to
return to previous screen



Returning user login optional path

WEBSITE NAVIGATION STRUCTURE



KEY

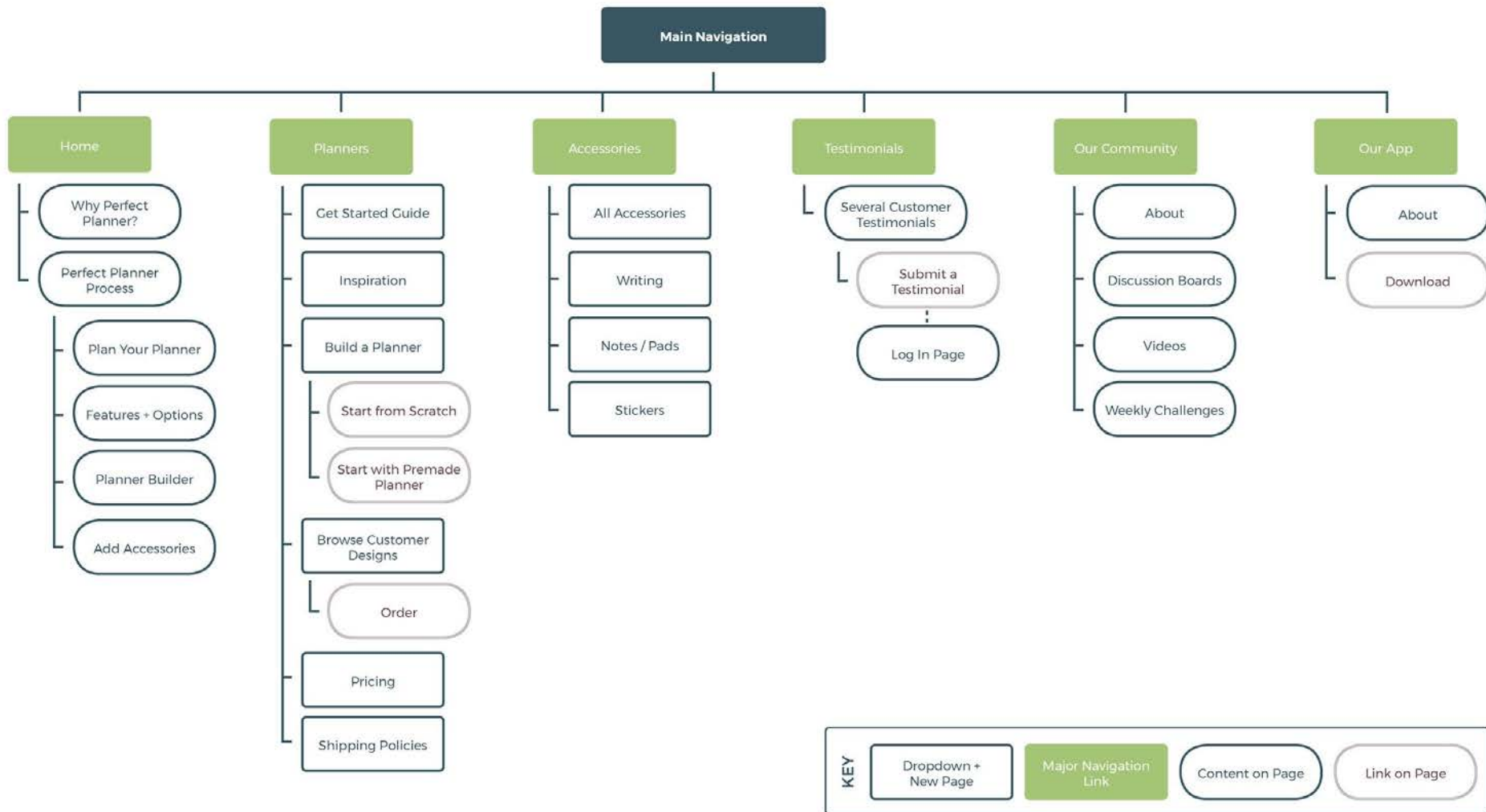
New Page

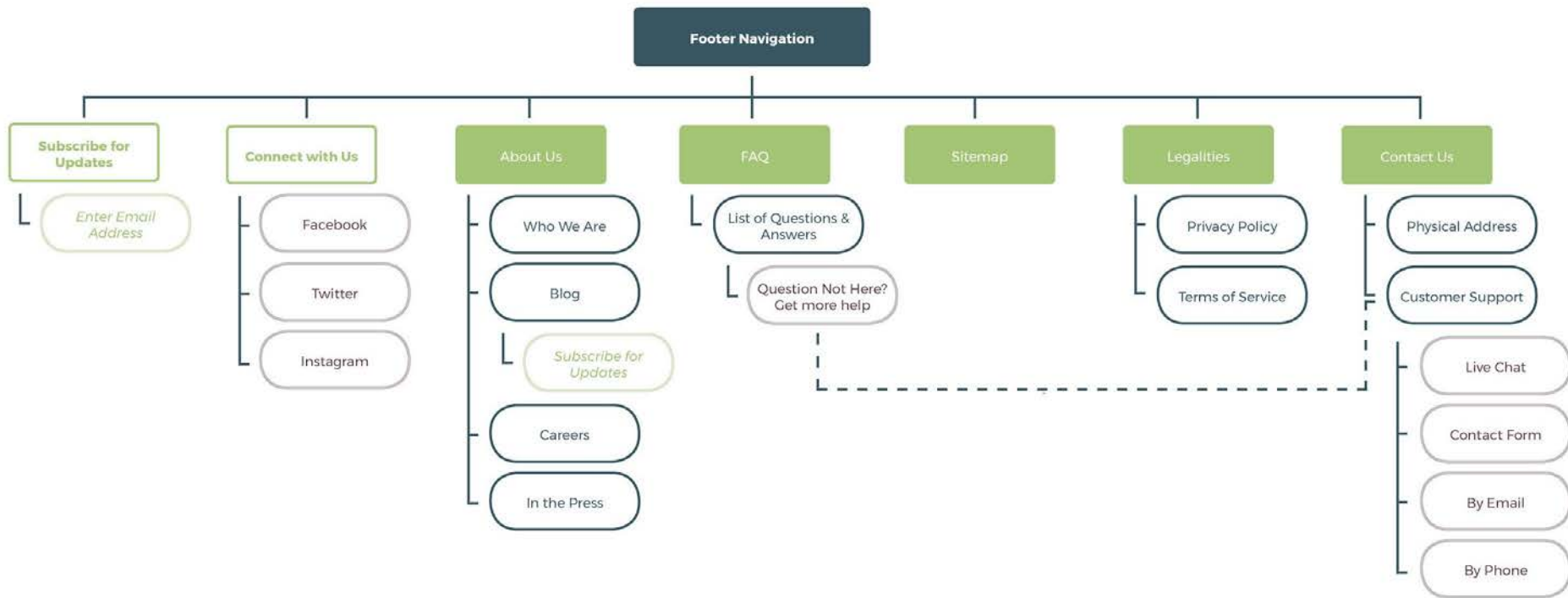
Click-able Link

Content on Page

Link

User Action
on Page





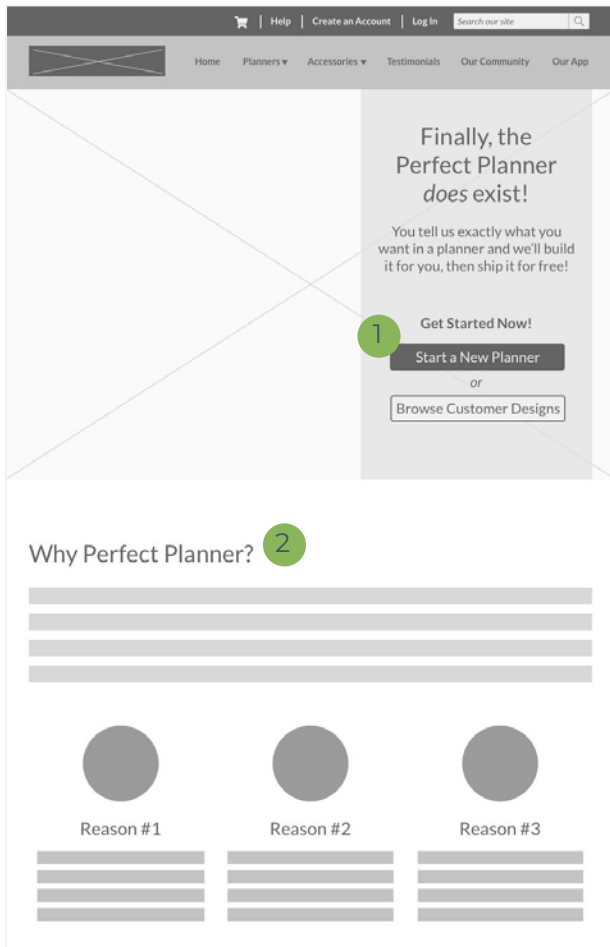
WIREFRAMES

Homepage

When users land on the homepage, they see a large banner image with options to start building a new planner or browse customers designs (1).

If they scroll down, users can learn more about the Perfect Planner system and process (2).

If they make it to the end of the screen, there is another Call to Action button for them to start building a planner (3).



Plan Your Planner

When the user begins building a new planner, they enter the four-step process (1).

The first step is planning out their planner. Here they can choose from three options: a digital quiz, printable planning sheets, or they can skip planning and just choose their features and options. As soon as they make a choice, they are taken to that new page (2).

There are opportunities to leave the system if they landed where they did not intend to:

- Quicker design options (3),
- An exit button (4) that opens a confirmation prompt before exiting.

The screenshot shows the 'Plan Your Planner' page. At the top is a navigation bar with links for Home, Planners, Accessories, Testimonials, Our Community, and Our App. A search bar is also present. The main heading is 'Plan Your Planner'. Below it is a paragraph explaining the importance of planning and offering options: a digital quiz, printable planning sheets, or skipping planning. There are three large buttons: 'Digital Quiz', 'Print to Plan', and 'Skip Planning'. Below these buttons is a link for users looking for a quicker experience. At the bottom, there is a footer with a subscription form, social media links, and contact information.

1

2

3

4

Exit

Plan Your Planner

We believe that it's important to take a moment and think about what you really want and need in a planner. Essentially, you're planning your planner! We've got an online quiz to help you figure out what you need. We also have a printable planning sheet, if you prefer pen and paper. Or, you can skip the planning step and go right into selecting your Features and Options! The choice is yours!

2

Digital Quiz

Print to Plan

Skip Planning

3 Looking for a quicker experience? [Browse Customer Designs](#) or [Build a New Planner from a Premade Design!](#)

Subscribe for updates
Enter email address →

Connect with Us
Instagram Facebook Twitter

About Us | FAQ | Sitemap | Legalities | Contact Us

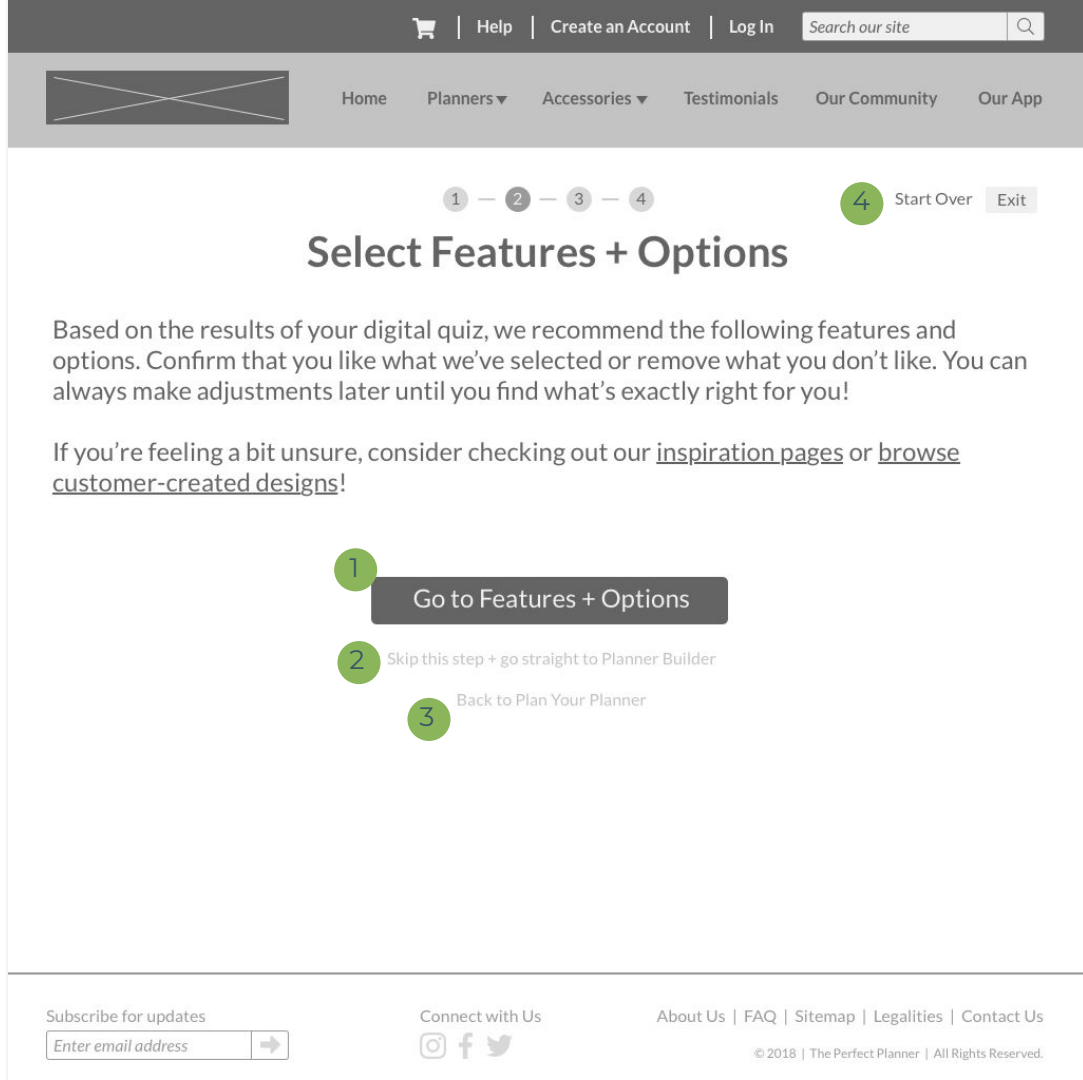
© 2018 | The Perfect Planner | All Rights Reserved.

Select Features + Options Pages

Once a user completes the planning step (digital quiz), they'll land here for directions. They have several choices at this point:

- review the recommendations based on their quiz, or, if they did not take a quiz, select options based on their preference (1),
- For speed, go straight to the Planner Builder without viewing recommendations (2),
- Return to Plan Your Planner page to make a different selection (3).

In addition to the four-step nav and the exit button, there is now a Start Over button (with confirmation prompt) to restart the entire process (4).



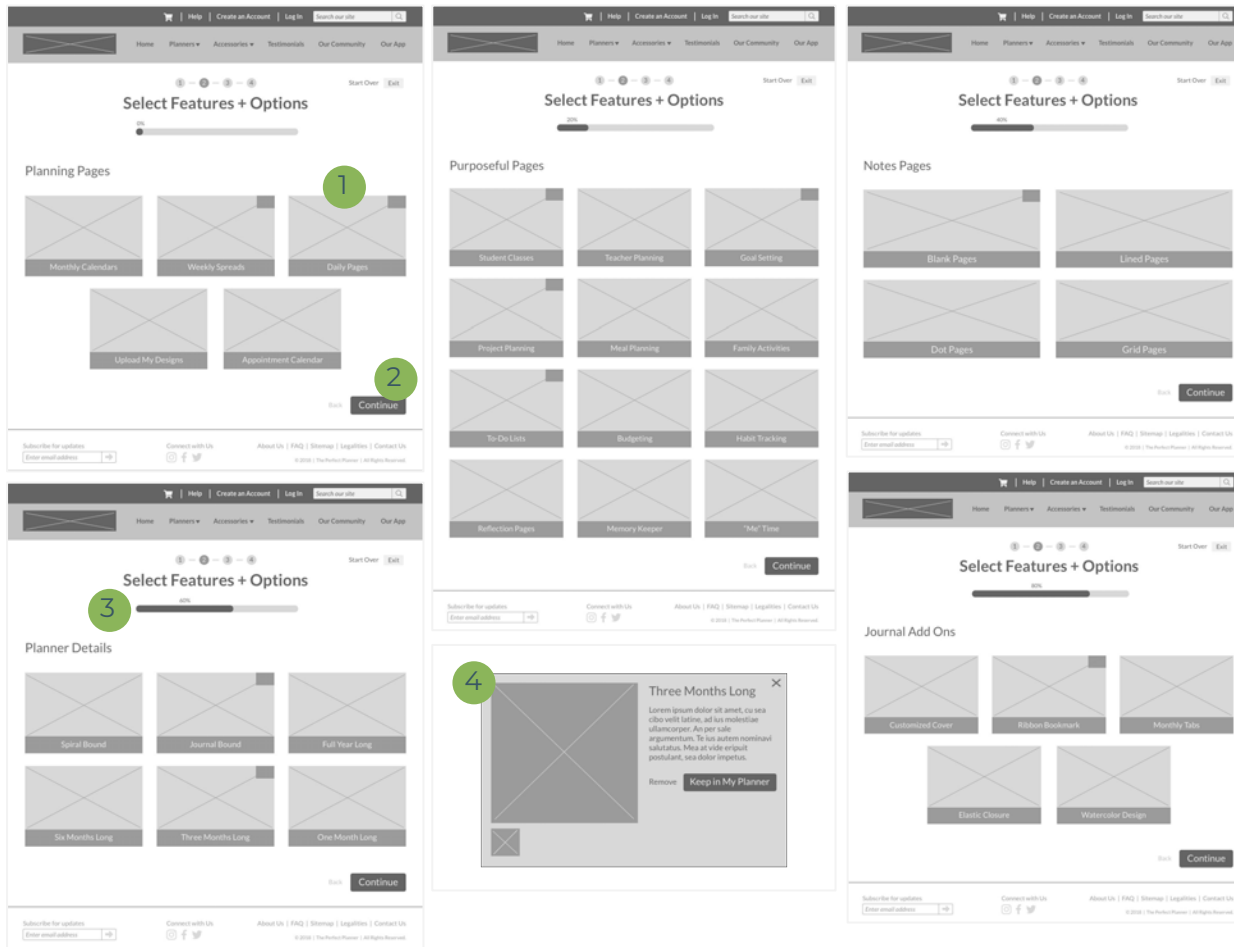
Select Features + Options

On these pages, the user can meet most of their goals by selecting the various spreads and pages to meet their unique needs (1).

After confirming selections (or making selections, if selecting skip planning), users hit continue to move to next set of options (2).

A growing bar tracks user's progress toward completion (3).

Users can click on the different options to see a preview and read more information about that particular option or feature (4).



Select Features + Options Pages

This is the final page in the series of features and options. Users are prompted to log into their accounts (1) or create a new account (2) to save their progress.

Users can also go back through the various Features + Options pages (3).

Many of the components from previous pages continue into this page (4), like

- The four-step navigation,
- The start over button (with prompt),
- The exit button (with prompt), and
- The progress bar.

The screenshot shows the 'Select Features + Options' page. At the top is a navigation bar with links: Home, Planners, Accessories, Testimonials, Our Community, and Our App. Below this is a progress indicator with four steps: 1, 2, 3, and 4. Step 4 is highlighted with a green circle. The main heading is 'Select Features + Options' with a 100% progress bar. The text below reads: 'Woohoo! You did it! You've got some awesome features and options. You can always change them later, but for now, it's time to login and then head into our Planner Builder! You'll be able to completely customize the layout of your planner and organize the spreads you've already picked out!'. There are two input fields: 'Email Address' and 'Password'. Below these is a button labeled 'Login + Go to Planner Builder' with a green circle and the number 1 next to it. To the right of the button is a link 'Don't have an account? Create one now!' with a green circle and the number 2 next to it. Below the button is a link 'Back to Features + Options' with a green circle and the number 3 next to it. At the bottom left is a 'Subscribe for updates' section with an input field 'Enter email address' and a button. At the bottom right is a 'Connect with Us' section with social media icons for Instagram, Facebook, and Twitter. The footer contains links: About Us, FAQ, Sitemap, Legalities, and Contact Us, along with the copyright notice: © 2018 | The Perfect Planner | All Rights Reserved.

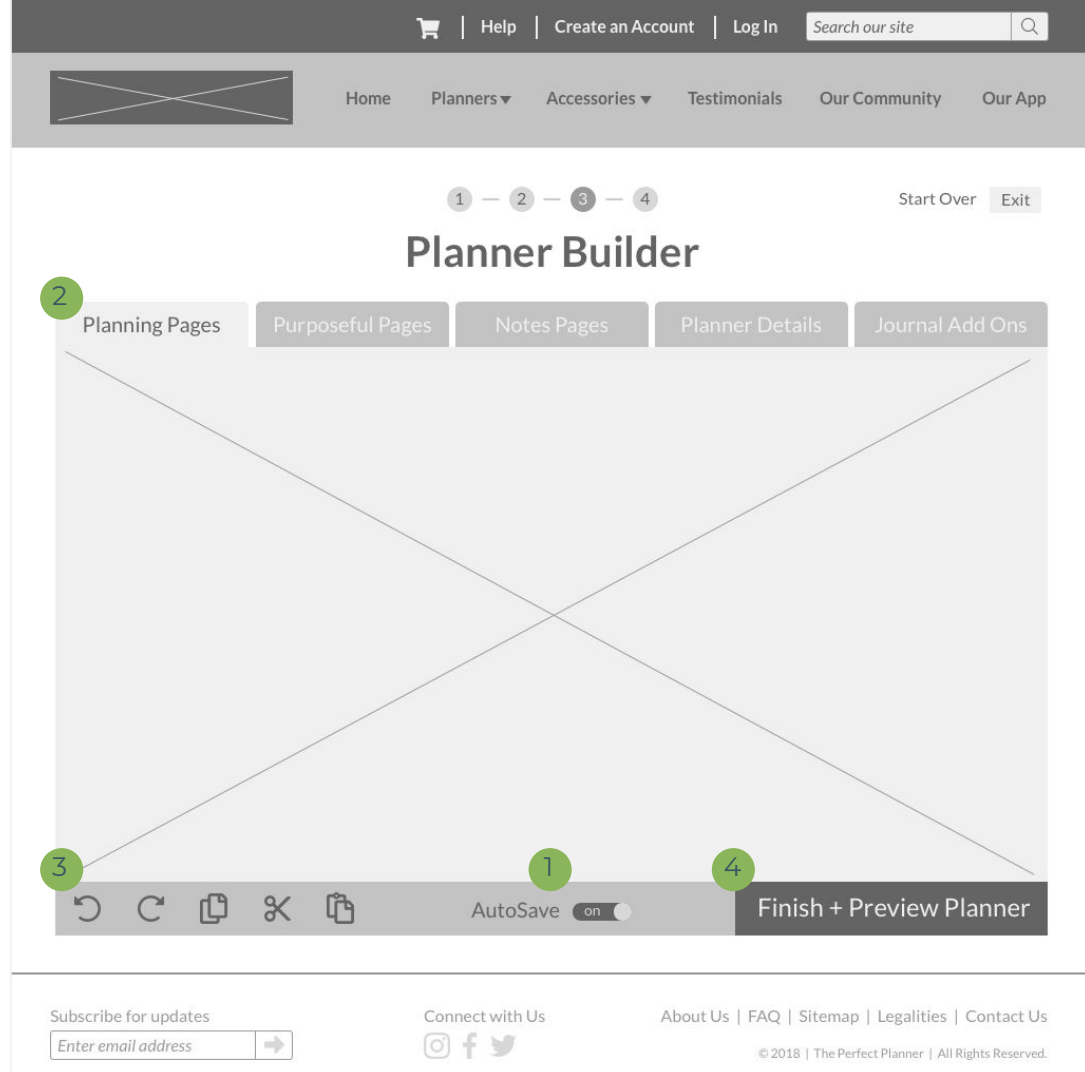
Planner Builder

This page also helps users reach their goal because they can organize their pages and spreads in order that fits their needs. This build features an autosave option that is automatically “on” when users arrive (1). It can be toggled “off.”

They can use the tabs to alter features or options they had chosen earlier (2).

Users can use the toolbar to help make their design experience easier (3).

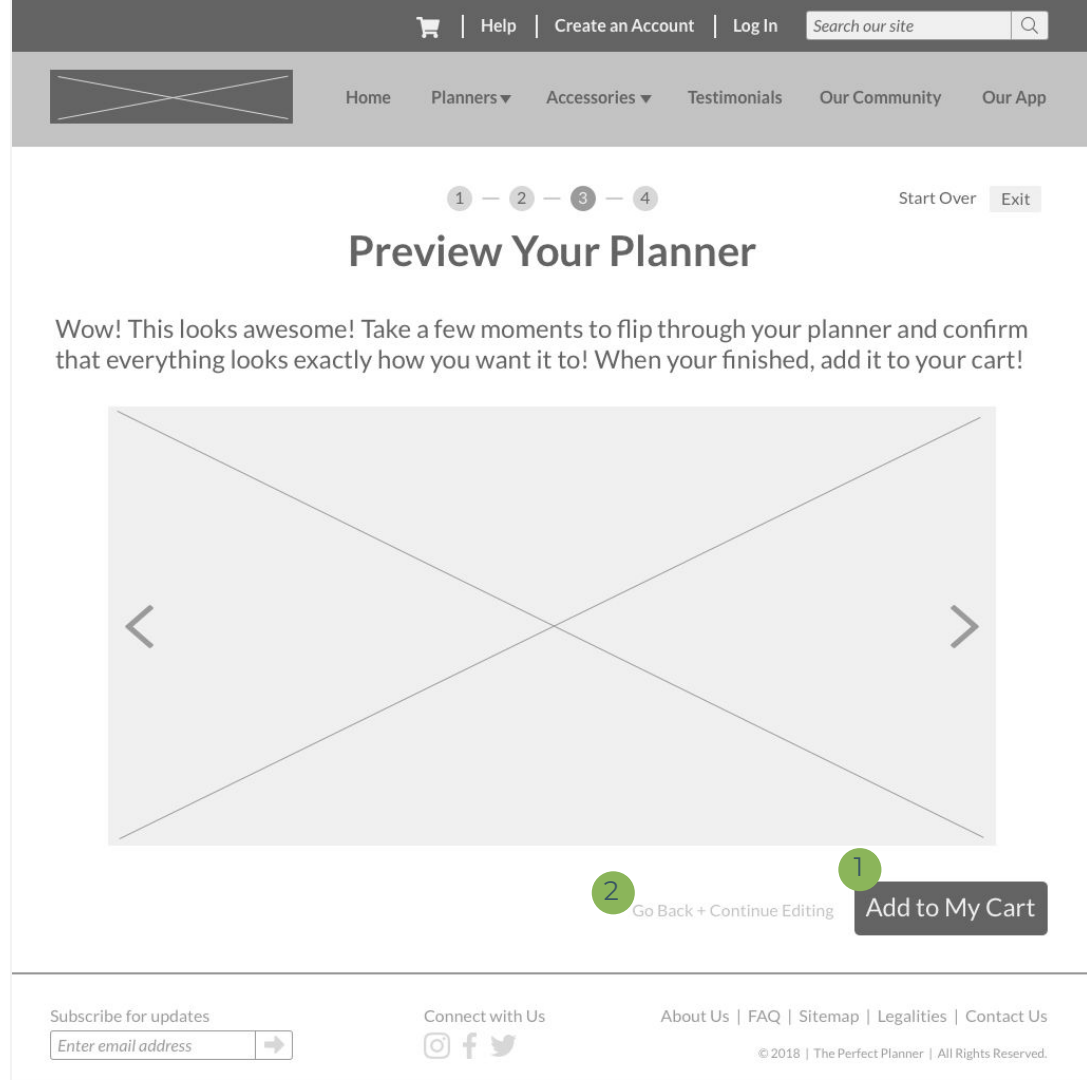
When users are finished, they’ll preview hit the Finish and Preview Button (4).



Planner Preview

At this point, the user will have created their ideal planner, but will still need to complete the purchasing process. They can flip through pages of their planner and confirm that everything looks the way they'd like it to, before adding it to their cart (1).

However, if they'd like to go back to editing, they are easily able to (2).



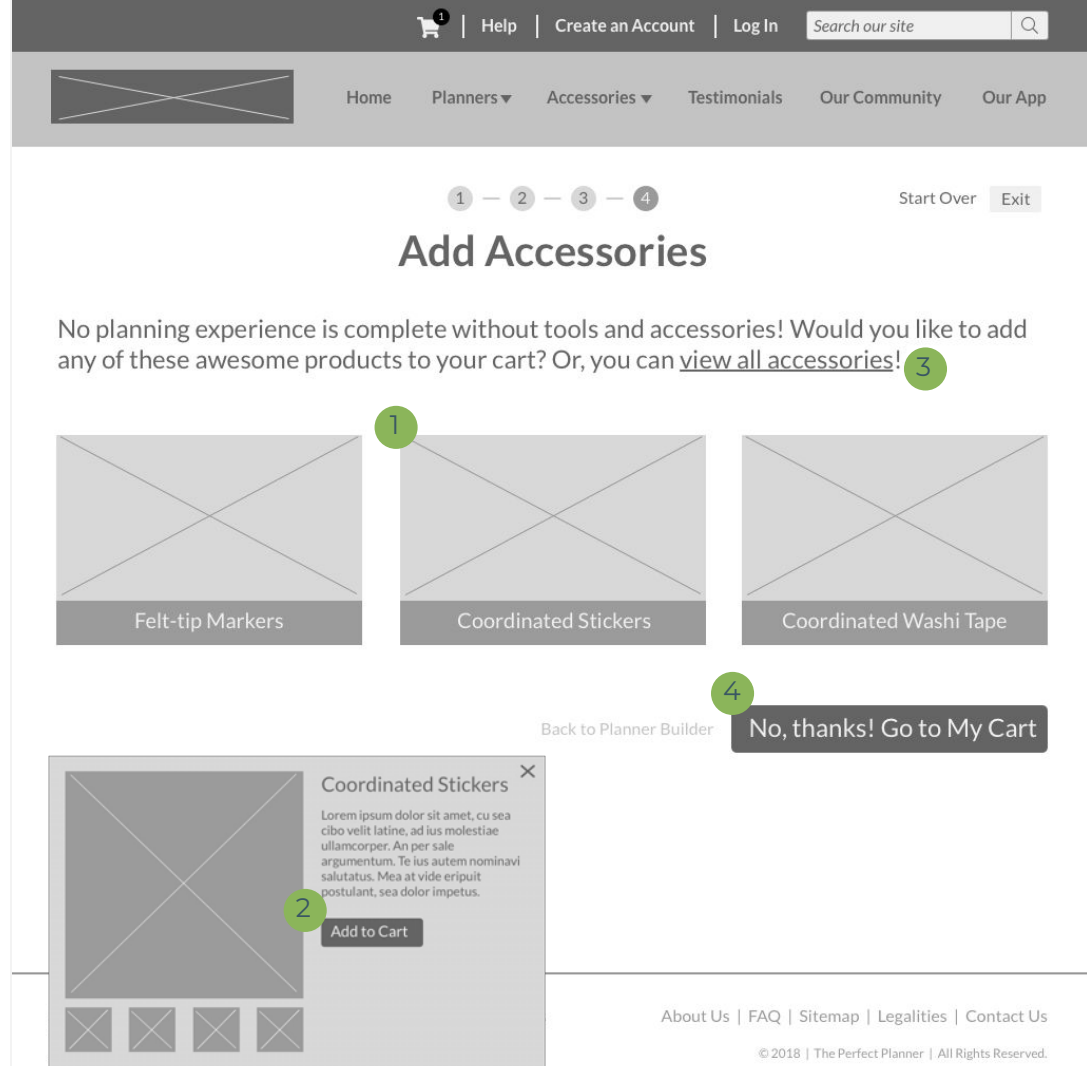
Add Accessories

During the last step of the Perfect Planner process, users can elect to add accessories to use with their planner. Three options are proposed on the page based on the features and options selected earlier (1).

A popup appears with more information and the option to add the accessory to the user's cart (2). If item is added, the popup will close and the button will change to say "Go to My Cart."

Users can also take the written link to view all of the accessories offered (3).

If the user does not want to add accessories, they can simply continue to their cart (4).



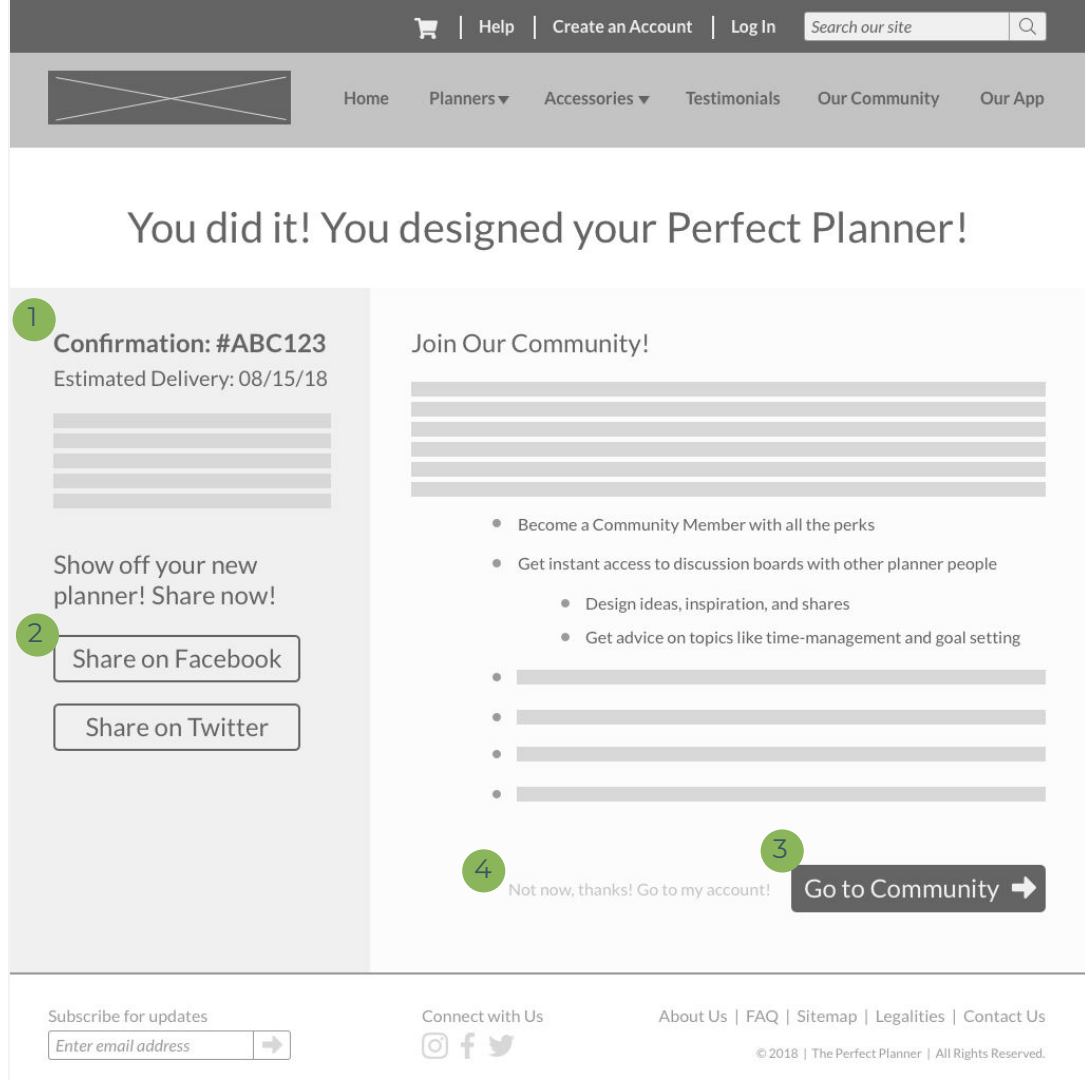
Confirmation Page

After entering relevant shipping and billing information, the user will land on the confirmation page with important information like confirmation number and estimated delivery of product (1).

Users can share their purchase on social media platforms (2).

Users can also join the Perfect Planner Community of planner people. They can access discussion boards full of ideas and inspiration, or seek advice from others (3).

If users are not interested, they can simply return to their account (4) or use any of the navigation bars to leave the page.



USER RESEARCH

USER INTERVIEWS

Evidence #1

We heard that each user has specific physical journal wants. The solution should provide a variety of options to allow users to customize the size, binding, and the style of planning page (monthly, weekly, or daily), the number of actual pages, and order of pages.

Evidence #2

Our Community came from the idea discovered during interviews. When users are feeling empowered while succeeding by using their planners, we should provide a place to celebrate. User-generated content, discussion boards, etc. can help build a brand culture and inspire users to become brand ambassadors.

CARD SORTING

Evidence #1

The navigation has undergone several adjustments; however the foundation comes from this activity. A user suggested that everything comes down to three basics groups on this site: Building a Planner, Research on the Process, and all other “website stuff.” After getting her to sort out that “website stuff,” she helped me see that a utility bar was needed.

Evidence #2

Users seemed to feel very comfortable with terminology. They easily grouped cards related to building a planner together. They also had an easy time grouping the cards related to signing in quickly.

RAPID PROTOTYPING

Evidence #1

Users reported that some of the headings & details did not seem to make sense together; the final design removes these headings and implements a progress bar and a four-step process that is consistently showed from the homepage and through the Perfect Planner system.

Evidence #2

During this phase, a consistent look was developed for the Perfect Planner website. We heard feedback that buttons, placement, images, etc. were a bit too inconsistent and needed to look like more traditional website elements.

WIREFRAMING

Evidence #1

Users provided feedback saying there should be additional elements of interactivity - such as popups with more details and information when they click on individual items in the features section.

Evidence #2

What is now the “Preview Planner” page has undergone several iterations after feedback. It began as a page called “Wasted Pages?” however, users said this felt bizarre and unnecessary. Eventually, we decided on a “Preview” option because it did what users wanted - told them they were nearly done and let them see their planner.

PROTOTYPE

[Link to Prototype →](#)