LifeBank App Design

Cory Ehrenberg
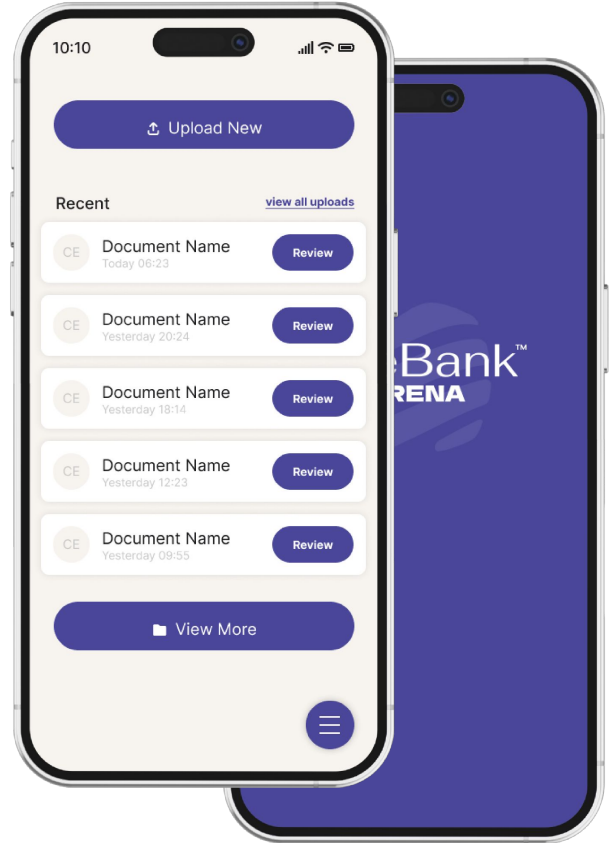
Project overview

The product:

LifeBank Arena is professional sports arena. However, a pressing challenge faced by their accounting team revolves around the timely collection of expense documents from other departments. LifeBank Arena is dedicated to setting new standards in operational efficiency within the world of professional sports.

Project duration:

August 2023 to September 2023.

Project overview

The problem:

The accounting team struggles to get expense documents on time from other departments.

The goal:

Design an app for LifeBank Arena that helps in collecting, submitting, and organizing financial documents.

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Project overview

My role:

UX designer designing an app for LifeBank Arena from conception to delivery.

Responsibilities:

Conducting interviews, paper and digital wireframing, low and high-fidelity prototyping, conducting usability studies, accounting for accessibility, and iterating on designs.

Understanding the user

- User research
- Personas
- Problem statements
- User journey maps

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User research: summary

I conducted interviews and created empathy maps to understand the users I'm designing for and their needs. A primary user group identified through research was busy accountants who don't have a centralized place to collect documents.

This user group confirmed initial assumptions about LifeBank Arena employees, but research also revealed that a centralized database to drop documents wasn't the only issue they are faced with. Other user problems included remembering to upload, having an easy way to upload different formats of documents, and an easy way to review and organize those financial documents.

User research: pain points

1

Time

Accountants are too busy to track down other departments for documents.

2

Usability

Other document storage software doesn't account for other file types such as physical paper receipts.

3

Accessibility

Other accounting apps are very busy and lead to option overload and user breakdown.

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Persona: **Yvette**

Problem statement:

Yvette is a busy seasoned accountant who needs a way to collect financial documents from coworkers because there is not a centralized place to get them from.

Yvette
Age | 45
Education | Masters
Hometown | Chicago
Family | Married, no kids
Occupation | Accountant

"Time is the scarcest resource"

Goals
• To be a team player
• To have a balance between work-time and free-time
• To be efficient and accurate

Frustrations
• Fixing mistakes that could be easily avoided
• Feeling under appreciated
• Doing other peoples jobs

Yvette is a CPA with a bustling schedule. She works at a hospital in the finance department. On her time off she spends time with her partner traveling. Yvette has vision impairment, and has tools to help her read on a screen. She receives documents in many ways, including on paper, and that can make it hard to process her work.

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User journey map

Mapping Yvette's user journey revealed how helpful it would be for users to have access to a dedicated platform for collecting information.

Yvette

Goal: Collect and process financial paperwork to run reports.

Action	Determine who to get documents from	Organize Documents	Review Compiled documents	File Paperwork	Run Reports
Task List	**Tasks** A. Talk with department heads B. Email vendors	**Tasks** A. Stack paper files in a pile B. Place digital files in folders	**Tasks** A. Determine if paper documents are relevant B. Review PDFs	**Tasks** A. Scan papers B. Sort papers into categories C. Add to software	**Tasks** A. Review imported categories B. Compose financial reports
Feeling Adjective	• Overwhelmed • Insecure	• Hopeful • Satisfied	• Intimidated • Hopeful	• Alert • Intimidated	• Hopeful • Excited • Relieved
Improvement Opportunities	• Checklist • Automation	• 1 collection point • Automation	• Checklist	• Automations	• Automation • Optimization

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Starting the design

- Paper wireframes
- Digital wireframes
- Low-fidelity prototype
- Usability studies

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Paper wireframes

Taking the time to draft iterations of each screen of the app on paper ensured that the elements that made it to digital wireframes would be well-suited to address user pain points. For the home screen, I prioritized a **upload link** to help users save time.
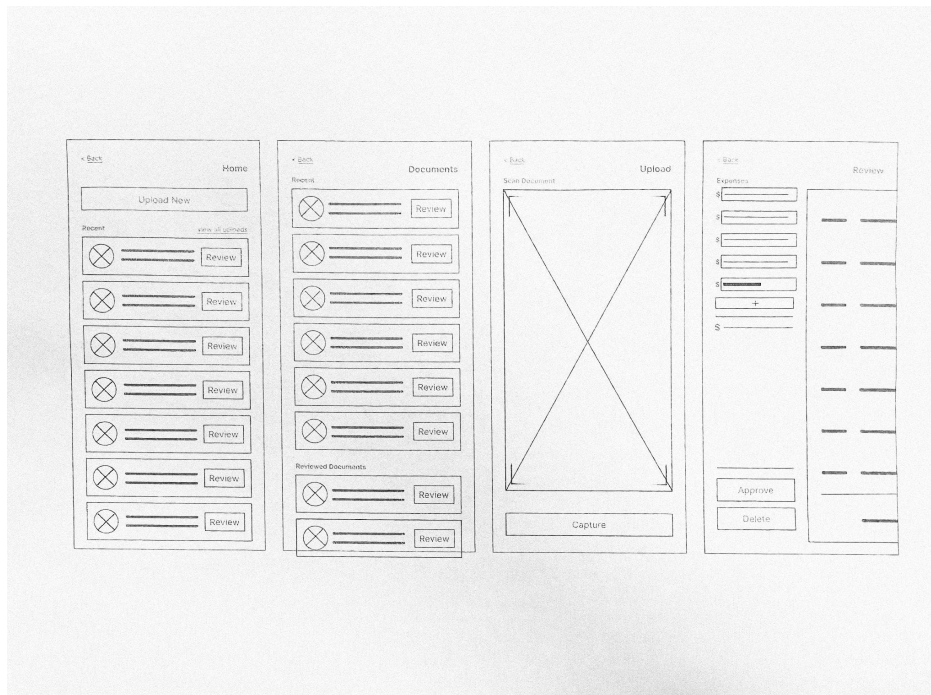
Digital wireframes

As the initial design phase continued, I made sure to base screen designs on feedback and findings from the user research.

These fields are available at the top of the screen to review and edit amounts.

This overlay shows the originally uploaded document to review.

< Back

Review
{Upload Date}

Expenses

$

$

$

$

$

+

$

Approve

Delete

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Digital wireframes

Easy navigation was a key user need to address in the designs in addition to equipping the app to work with assistive technologies.

Navigation access at the bottom of the screen to make it easy to reach

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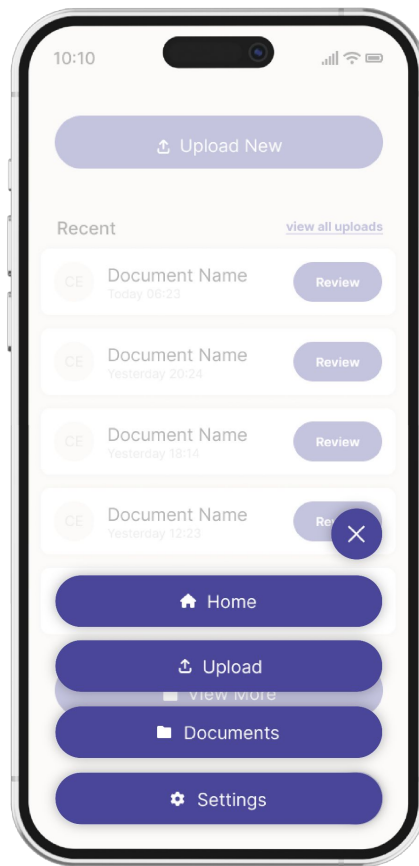
Low-fidelity prototype

Using the completed set of digital wireframes, I created a low-fidelity prototype. The primary user flow I connected was uploading, viewing, and editing documents, so it could be used in a usability study.

View the LifeBank Arena App

[low-fidelity prototype](low-fidelity%20prototype)
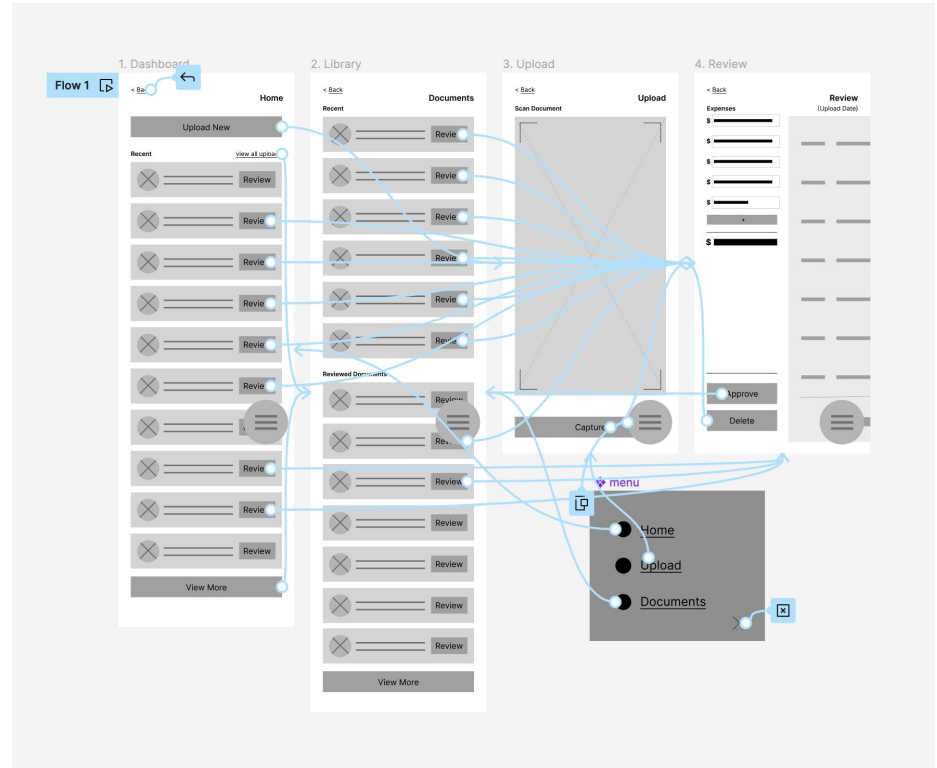
Usability study: findings

I conducted two rounds of usability studies. Findings from the first study helped guide the designs from wireframes to mockups. The second study used a high-fidelity prototype and revealed what aspects of the mockups needed refining.

Round 1 findings

1. Users want to upload quickly

2. Users want easier streamlined navigation

3. Users a way to mobile-scan

Round 2 findings

1. Page names were confusing and misleading

2. Reviewing and editing documents was difficult

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Refining the design

- Mockups
- High-fidelity prototype
- Accessibility

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Mockups

Early designs allowed for some customization, but after the usability studies, I added additional options to **quick upload documents**. I also revised the design so users see **only relevant information** when they first open the app.
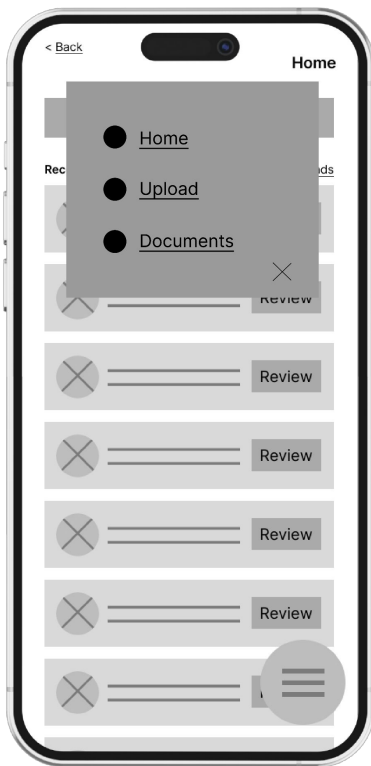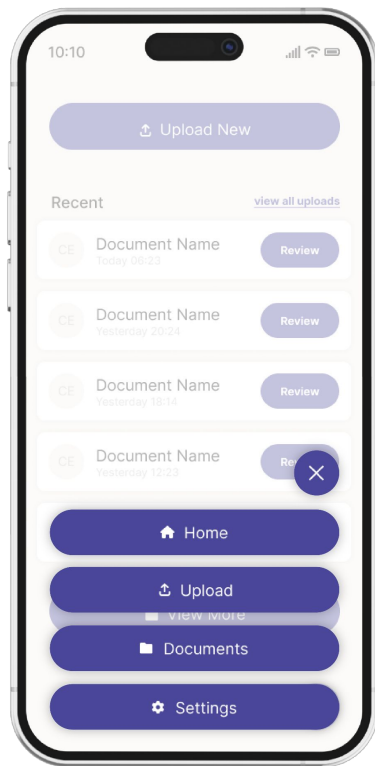
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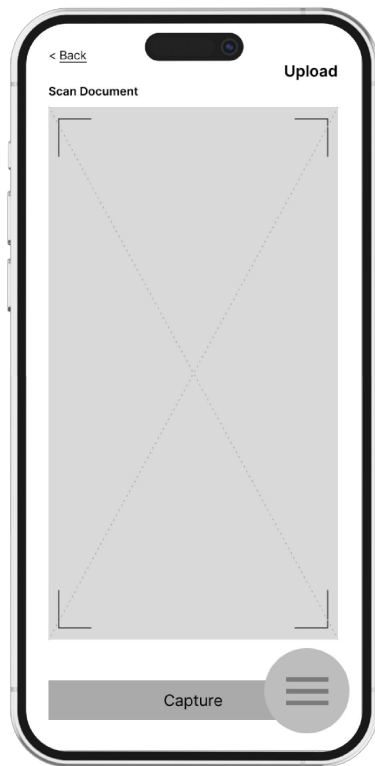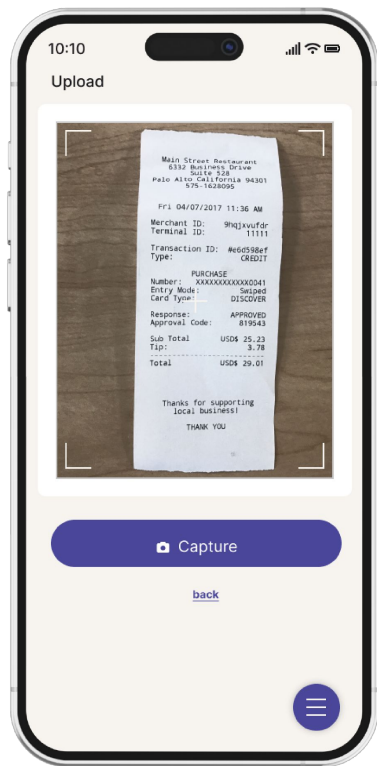
Mockups

The second usability study revealed frustration navigation and review functionality. To fix this, I changed the link sizes and page names like "Library" to "Documents". I also updated the review page to only be accessible from a **document page or after upload**. To guide users.
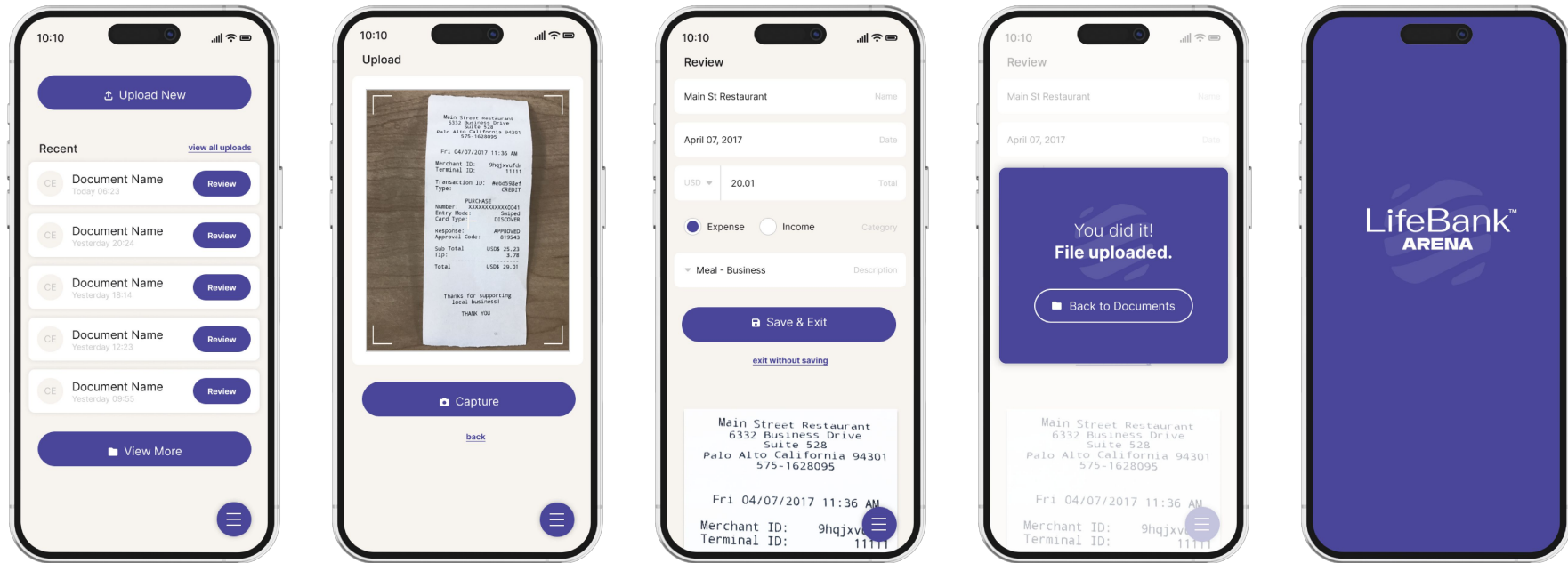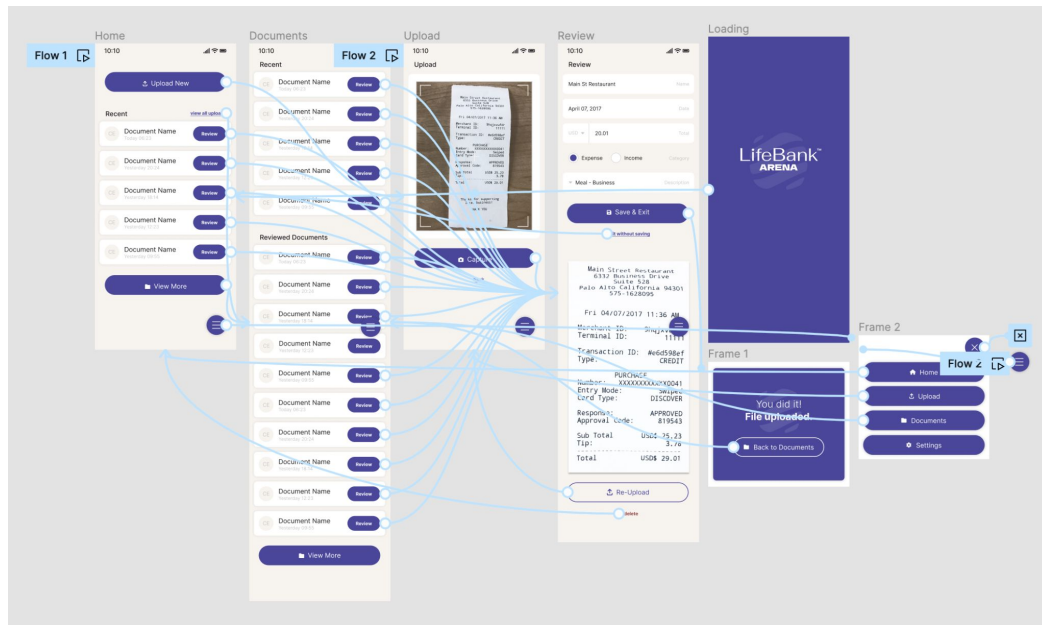
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Key mockups

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High-fidelity prototype

The final high-fidelity prototype presented cleaner user flows for uploading and reviewing. It also reached users accessibility needs for navigating.

View the Life-Bank App

high-fidelity prototype

Accessibility considerations

1

Used larger buttons for easier clicking for users with limited motor functions.

2

Used icons and simplistic page names to help make navigation easier.

3

Simplified the homepage to only highlight relevant data to help with focus.

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Going forward

- Takeaways
- Next steps

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Takeaways

Impact:

The app allows accountants to easily collect documents which makes their jobs cleaner and easier.

One quote from peer feedback:

"I think anyone could figure this out"

What I learned:

While designing the LifeBank Arena app, I learned that the first ideas for the app are only the beginning of the process. After research, usability studies, and peer feedback each design step got progressively better and more useful.

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Next steps

1

Conduct another round of usability studies to validate whether the pain points users experienced have been effectively addressed.

2

Conduct more user research to determine any new areas of need.

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Let's connect!

Thank you for your time reviewing my work on the LifeBank Accounting app.
Check out my Dribbble and my Website to learn more about me and my work!

Dribbble: https://dribbble.com/thecoryjohn
Website: https://coryjohnisme.com/

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