UXD design project 3: Clickbooth Group 3

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Image Source: *https://cpaideal.com/clickbooth-review/*

Contents

Executive Summary

Here, we present the design idea for a Mobile app for use by ClickBooth affiliates to access various performance measures, reports, dashboard and comparison metrics that they use for assessing the performance of ad campaigns. ClickBooth campaigns allow business entrepreneurs and advertisers to connect and drive a customer base on cost per action basis. The affiliates currently use a desktop and mobile website to access these statistics daily. From our research we learnt that for users, features like email alerts, report comparison, dashboards and graphical representation helps provide a more holistic view of the statistics they use on an everyday basis on the go. These are some of the features that we focused on in our design**.**

Focus Setting

Research focus: *To understand the mindset of young result driven affiliates, our focus was entrepreneurs in Gainesville area. We wanted to understand what kind of information is relevant to them when they would be reviewing performance of an ad campaign which they directly benefit from*.

We spoke to our two supplemental users from ClickBooth, Amanda and Jon who helped us connect the dots with their thought process and what their frustrations with the desktop version were. With this idea in mind and the help of the existing desktop website, we went on to create a user research guide. We had to maintain the demographics as mentioned in the client brief and to have the users we researched match a typical target user of the app. We worked on what the motivations would be for a user and what frustrations could be there while trying to access a simple piece of information like money earned by click by an ad.

User Research Process

With an initial research focus prep, we conducted interviews with different people. Some of them were students pursuing different disciplines at UF. Few of the users were also self-employed professionals who fit our target demographic perfectly. We conducted two focus groups apart from the interviews with Affiliate Managers Jon and Amanda and our ClickBooth point of contact Julie.

Demographics of the focus group:

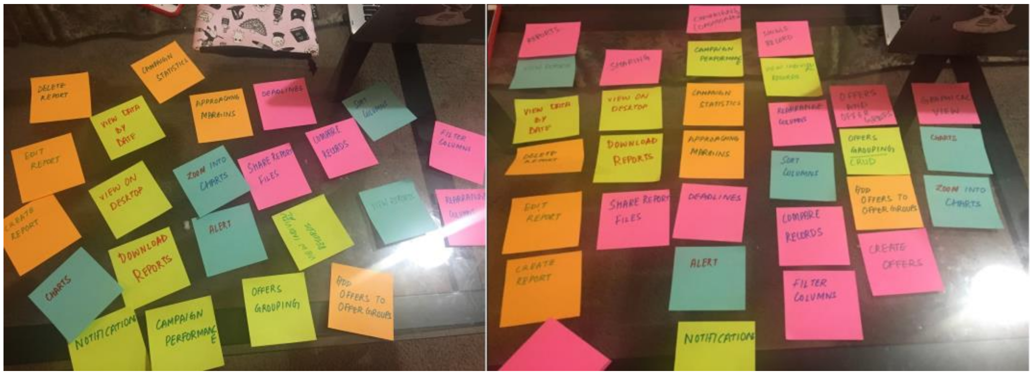
- **Group 1 :** Males 3, Females 1, 2 UF students, 2 Working professionals, Ages 18-30
- **Group 2** : Males 1, Females 2, 1 UF student, 2 Working professionals, Ages 18-30

We asked our users questions, some of which are mentioned below:

"*Imagine you are an owner of a small business and you want to connect to ClickBooth advertisers to help drive a customer base. We would like to ask you some questions about how you would assess the performance for ad campaigns hosted there which are making you money*"

1. Using ad campaigns as a business opportunity, what are some of the domains you would risk purchasing ad space for
2. Would you prefer viewing charts/graphs on a phone screen or desktop screen?
3. Do you usually work on the go?
4. What is the most important reporting feature for you

5. Would you want to have a daily drill down of the revenue statistics or would you prefer weekly updates?
6. Do you usually view spreadsheets or other documents on your phone or a big screen?
7. What are your frustrations with viewing data on a small screen?
8. What would you say are the kind of metrics that are important to you w.r.t. performance of an ad?
9. If we were to design a dashboard for you to summarize your earnings, what all would you like to see there?



Affinity Diagramming

User Needs

After conducting two focus groups and speaking with Clickbooth's affiliate managers, we organized data with affinity diagrams and identified breakdowns and opportunities. As a result, the following user needs stood out to us:

- View/share reports
- View/share individual records
- Summary of statistics in a dashboard
- Email alerts when offers are close to expiration
- Customize the reports/ columns they want to view at a time
- Ability to see as many report columns as possible simultaneously.
- Customize the dashboard information
- Compare records easily
- Quick way to access key results by filtering and sorting
- Ability to change offers from the offer groups.

Breakdowns

- Too many hops between offer groups and offer creation
- Too much scrolling
- Confusing icons that do not look clickable

Missed Opportunities

- Email alerts for approaching targets
- Collapsible columns in reporting
- Ability to share reports
- Customizable reports and dashboard

User Personas

PERSONA I : DAVID PORTER, Entrepreneur, *"It's all about ideas"*

DEMOGRAPHIC

- Age: 24
- Company: NokoTech
- Position: CEO
- Location: Jacksonville
- Relation with ClickBooth: Affiliate

Source: ***https://www.washingtonexec.com/wp-content/uploads/2013/08/Grant-Verstandig-insert.jpg***

KEY GOALS

- Maximize his companies' ROI
- Minimize the risk of purchasing ad space from sources like Facebook and Google.
- Strike a good work-life balance

KEY CHARACTERISTICS

- He is the CEO of a small firm.
- Has access to more than a hundred ClickBooth campaigns.
- Only works on weekdays
- Uses both the mobile and desktop site of ClickBooth

KEY FRUSTRATIONS

- He finds it very hard to view the calendar on the mobile site.
- The black icons that represent web links do not stand out.
- The reports on the mobile site have a very overwhelming design.
- Must go to the 'offer groups' tab from the 'offers' report every single time just to compare different offers from different groups.

DAY IN LIFE

A regular day for David starts with him checking his phone to see his updated revenue from all his campaigns.

He leaves for office as early as eight in the morning and leaves for home by six. Because his company is still relatively new, he must keep working beyond six. To check his earnings from advertisements he mostly looks at the daily report offered by the ClickBooth account management software. More specifically, he looks at the 'revenue', 'clicks' and 'conversions' columns.

He only goes back to bed once he's done with the to-dos of the current day and has made a list of to-dos for the next day.

PERSONA II: RICHARD BROWN, Manager,*“Great Service Matters”*

DEMOGRAPHIC

- Age: 31
- Company: ClickBooth
- Position: Senior Affiliate Manager
- Location: Sarasota

Source: ***https://onmilwaukee.com/images/articles/ne/newgmstearns/newgmstearns_fullsize_story1.jpg***

KEY GOALS

- Provide best practices and insights to ClickBooth’s affiliate clients.
- Constantly work on increasing the number of available offers and verticals for the affiliates.
- Maximize the ROI of the affiliates**.**

KEY CHARACTERISTICS

- Managers more than 50 affiliates.
- Works on weekdays as well as on weekends
- Logs into ClickBooth’s account management system with an admin login.

KEY FRUSTRATIONS

- Because ads are always live, he must keep working even beyond office hours.
- The reports on ClickBooth’s mobile site require a lot scrolling to pull data.
- Everything that is horizontal on the Desktop site becomes vertical on the mobile site.
- No way to collapse the columns that he doesn’t want to see.

DAY IN LIFE
Richard’s house is an hour away from office. This means that he has to wake up as early as five in the morning in order to reach office on time.

Most of his work revolves around the reports, looking at what his affiliates’ statistics are. He needs to get very granular with respect to the statistics and hence uses all the filters that are offered by the desktop and mobile clients. One of his key roles is to provide the affiliates with information and guidance on their performance with respect to certain offers.

Because of the nature of the industry, Richard uses the mobile website very often, especially after office hours.

Design Ideas

Through our focus group interviews and further research, we had a fair understanding of how we make our design intuitive and, compact because the application was essentially a reporting app.

We knew we had to make the reporting and dashboard feature as the focus of our design. and they had to be accessible in a quick access menu, so they can be easily switched between.

The amount of data needed to be accessible and very readable to the users at all times, the access to functionalities like viewing reports should be done in least number of hops. This led us to think in terms of clubbing important functions of the app that we wanted to group. We wanted to present the data that was most perceptive. We thought of charts for pictorial representation of data that could be magnified to desired precision. This function allows a user to have a control over granularity of the information they are viewing. This also allowed customization of the graphical view according to the user.

One of the complaints from the existing desktop website was that similar functionality was not grouped well. So, we thought of how best to make the task flow more compact for most important business functions. Especially, the ability to group running offers together and manage their assessment as a group. So, we thought of adding functionality to the offers report to organize offers into offer groups.

We discussed the key features in further detail by projecting scenarios and noting down what all possibilities the user would be looking for. We decided to focus on the following most important functionalities as supported by user research:

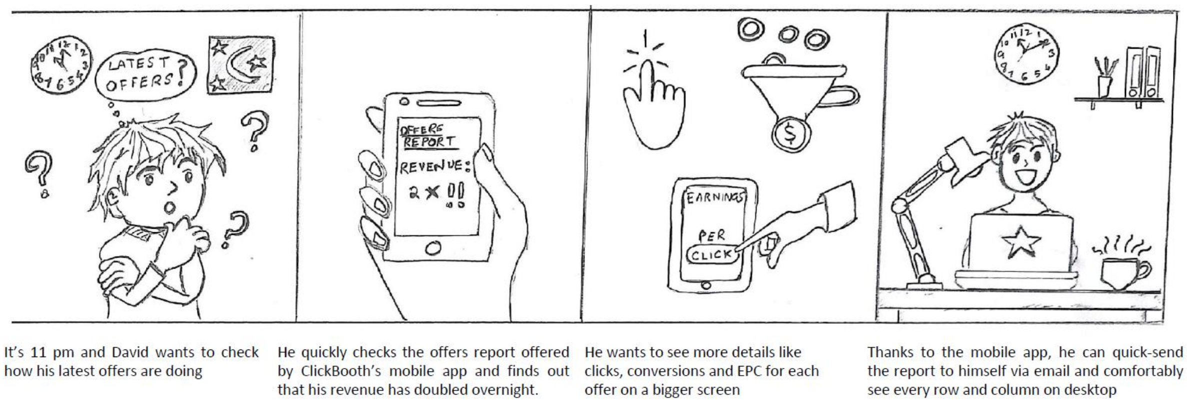
1. View reports on ad campaigns
2. View/ Edit offer groups
3. Assess the performance of an affiliate with their dashboard feature
4. Alerts for approaching deadlines or budget limits
5. Comparison of records in any given report to see how well they are performing

With these functions in mind, we wanted to create an app that was user friendly, intuitive and addressed the user needs very well.

Design scenarios and storyboards

Scenario I:

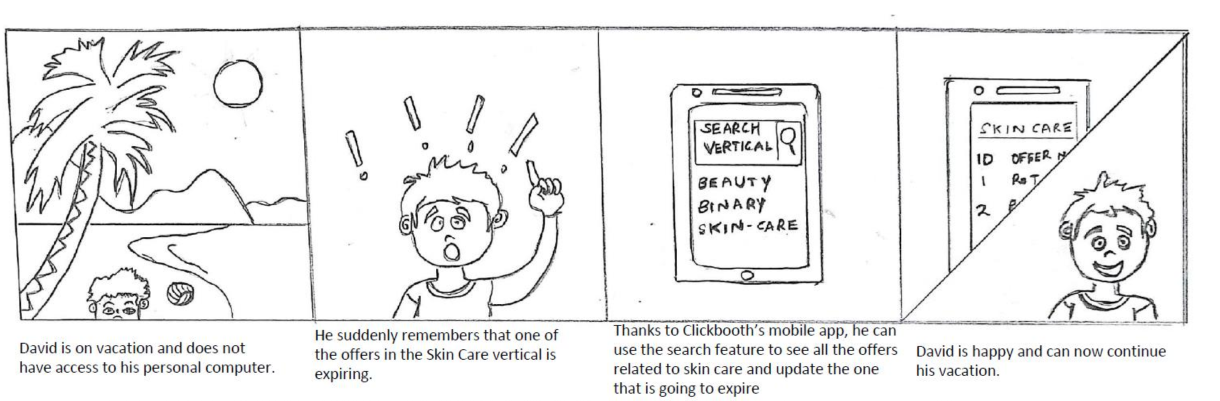
David, an affiliate, works hard and sometimes he needs to access the latest data about an ad campaign that he runs. It is after hours and he wants to check updates. He logs in to the mobile app. Notices that one of the ad campaigns has shown a marked revenue increase. He wants to see more information on the report for the offer on his laptop. So, he goes to the offer reports, taps the export button and sends an email to himself using the Email option on the share/export screen. He is happy to have a microscopic view of how an offer performed at the tips of his fingers**.**



Storyboard I

Scenario II

David is on a vacation and doesn't have access to his work computer. He receives an alert on one of the offers he's holding is about to expire. He quickly logs in to the app, searches the skin care vertical on the app, to which the expiring offer belongs, and quickly filters to the offer. He updates the offer details and goes back to enjoy his day in the sun.

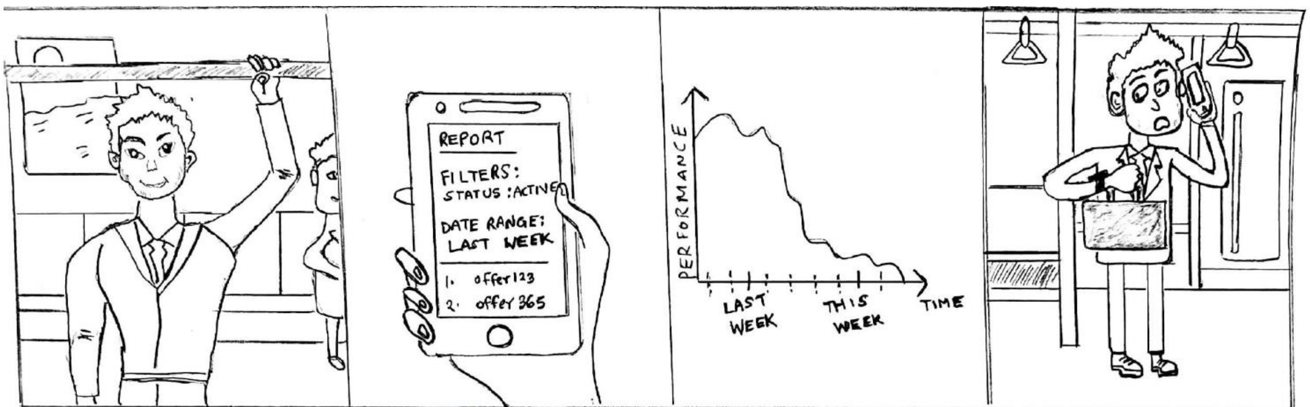


Storyboard II

Scenario III

Richard, an affiliate manager, is traveling back from work. He is casually browsing at the day's details on the app dashboard for the past week using date range and status filters. He notices that one of the offer has underperformed in the past week. He calls up the corresponding affiliate to understand the reason behind it.

Storyboard III



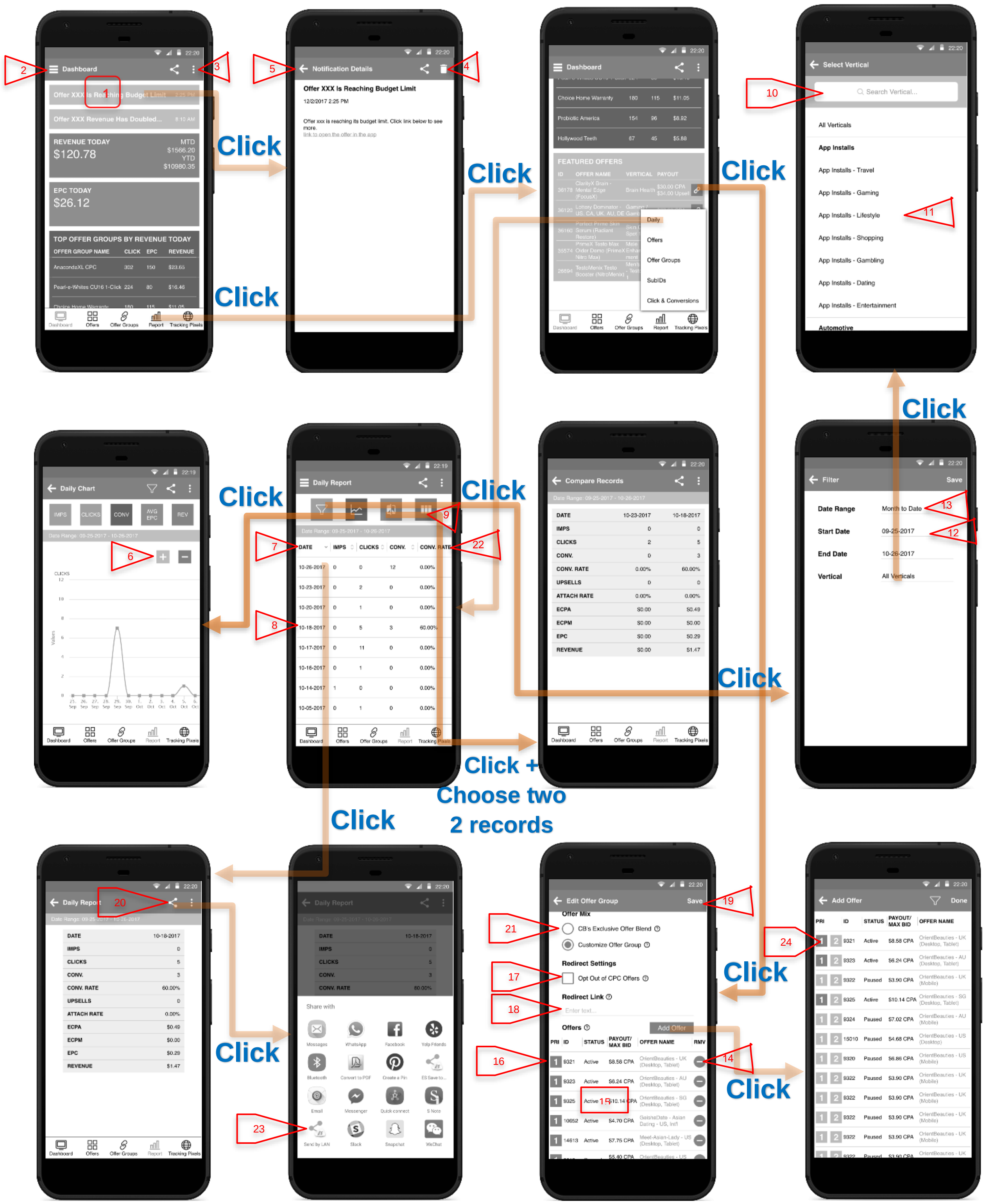
Richard is traveling back from office

He is browsing all the active offers that were taken up by the affiliates in the previous week using the 'Status' and 'Date Range' filters.

He notices a certain offer has unexpectedly underperformed this week

He calls up the corresponding affiliate to understand the decrease in performance.

Wireframes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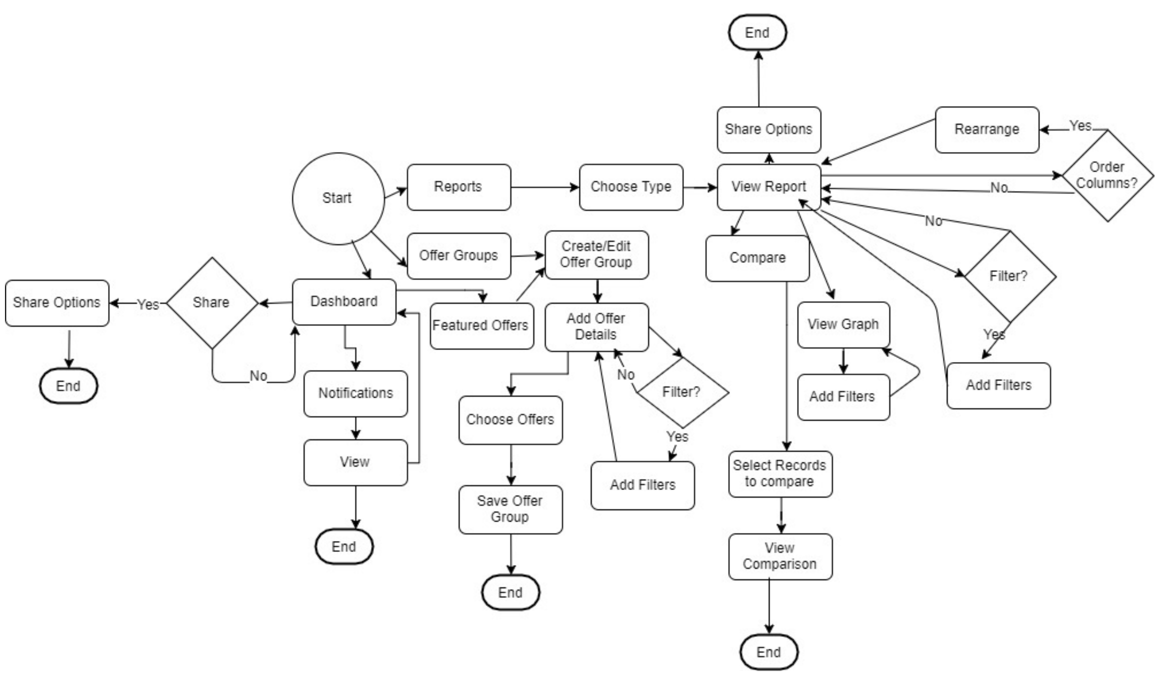
1	Shows Notifications	9	Enables Column Reordering	17	Check box by clicking once
2	Opens user profile sliding window	10	Textual Filter Search	18	Type in desired redirect link
3	Gives reload and Download options	11	Click to select filter	19	Saves offer group settings
4	Deletes notification	12	Opens Calendar	20	Shares report
5	Goes back to the previous screen	13	Date Range Selector	21	Select one of the two options
6	Widen graph	14	Removes Offer from Offer Group	22	Double click on column name to sort with respect to that column
7	Horizontally scrollable row	15	View offer details by clicking on row	23	Selects where to share
8	Horizontally and Vertically Scrollable Rows	16	Shows priority of offer	24	Click to choose priority

***Highlighted in Orange are items that were changed/introduced after mid-point.**

Taskflow



Task Flows

Flows:

1. From the landing page, you can choose to go to Reports module, Offer groups module or the Dashboard module
2. In the reports,we have different kinds of reports that you can choose to view.
    a. On the report page, you can, select a record to see its details.
    b. You can also, choose to sort, compare or filter records.
    c. Within reports, you have the option to view the charts corresponding to the report.
    d. You can also rearrange columns by dragging them to suit your view.
    e. You can also share a report using the share options
3. On the Dashboard:
    a. you get a view of notifications, which you can see details of.
    b. You can also look at featured offers. Here, if you select an offer, you can edit the offer group by following the link icon.
    c. You can also choose to share the dashboard summary to any recipient.
4. On the offer groups page, you can create/edit offergroups. You can select the filters to apply to filter offers. You add offer group details and select offers to add.

Client feedback at midpoint

We presented our user research and wireframes to our point of contact at ClickBooth, Julie. She provided us with valuable feedback that we could use and reiterate our design. Some of the things that she expected us to work more are:

1. Visual cues to let the users know of the ability to horizontally scroll that our application design provides.
2. Ordering of columns to be made easier
3. Ability to change out what offers exist in the offer group
4. work on the dashboard
5. Notifications that the app would provide.

Apart from letting us know about the above items to work on, she pointed out the features that she liked like the comparison of records, ability to export/share records and the option of reordering of columns. We took her feedback very seriously and tweaked our wireframes accordingly**.**

Design Iteration

User Testing Round I:

Participant demographics: 2 males, 2 females. All in age group 18-30

We used the prototype from the first wireframes we created and gave our users the following tasks:

1. Go to daily reports and email the report.
2. Go to the Offer report and choose records to compare.
3. Find the offer with the most earning in the travel vertical with their status as active

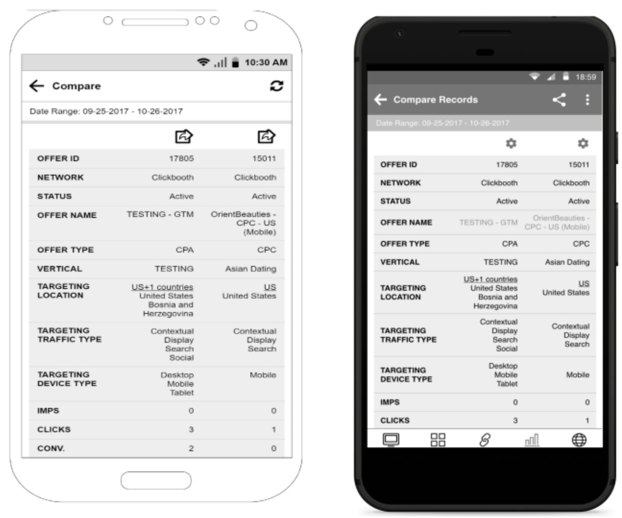
4. Look up the charts for daily report and record the point at which the offer had the lowest click rate.

Failures:

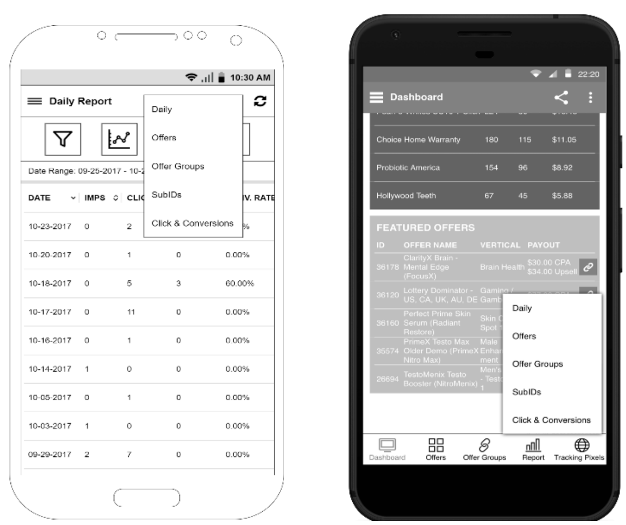
1. User could not identify the sharing icon and the comparison icon
2. The user clicked the daily report instead of offer report for the offer
3. The user reported the incorrect rate as they did not think the graphs were vertically and horizontally scrollable.

Changes made to wireframes:

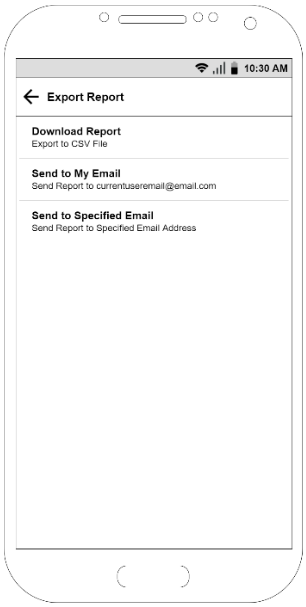
1. We decided to change the icons for share and compare records. Additionally, we added more export options instead of just emailing and download.
2. We introduced new icons like the dashboard, offers, offergroups and report icons and shifted the report selection to the bottom of the screen for ergonomic reasons.

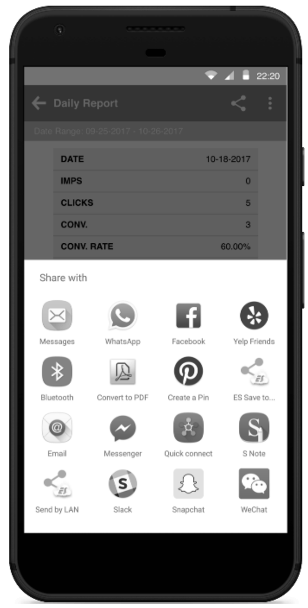


Compare Screen updated with Share icon.



Choice of report shifted to the bottom part of the screen





Sharing Options Updated

User Testing Round II:

Participant demographics: 2 males, 3 females. All in age group 18-30

We gave the users the following tasks:

1. Go to daily reports and compare records and share the comparison.
2. Go to dashboard, among the featured offers, edit the offer with ID 36178.
3. Go to the Daily report, search the entry for 27th January 2016 and find the offer with the highest EPC

Findings:

1. While comparing records, the user did not click the compare button first to select records
2. The user was not able to identify the button for compare and distinguish it from button to rearrange columns
3. While viewing the offer groups, the user clicked on the link image to get a shareable link to the report, instead of using it to create/edit a new offer group
4. On the chart page, user double clicked, pinched to zoom the chart. The user did not use the "+" button to zoom in.

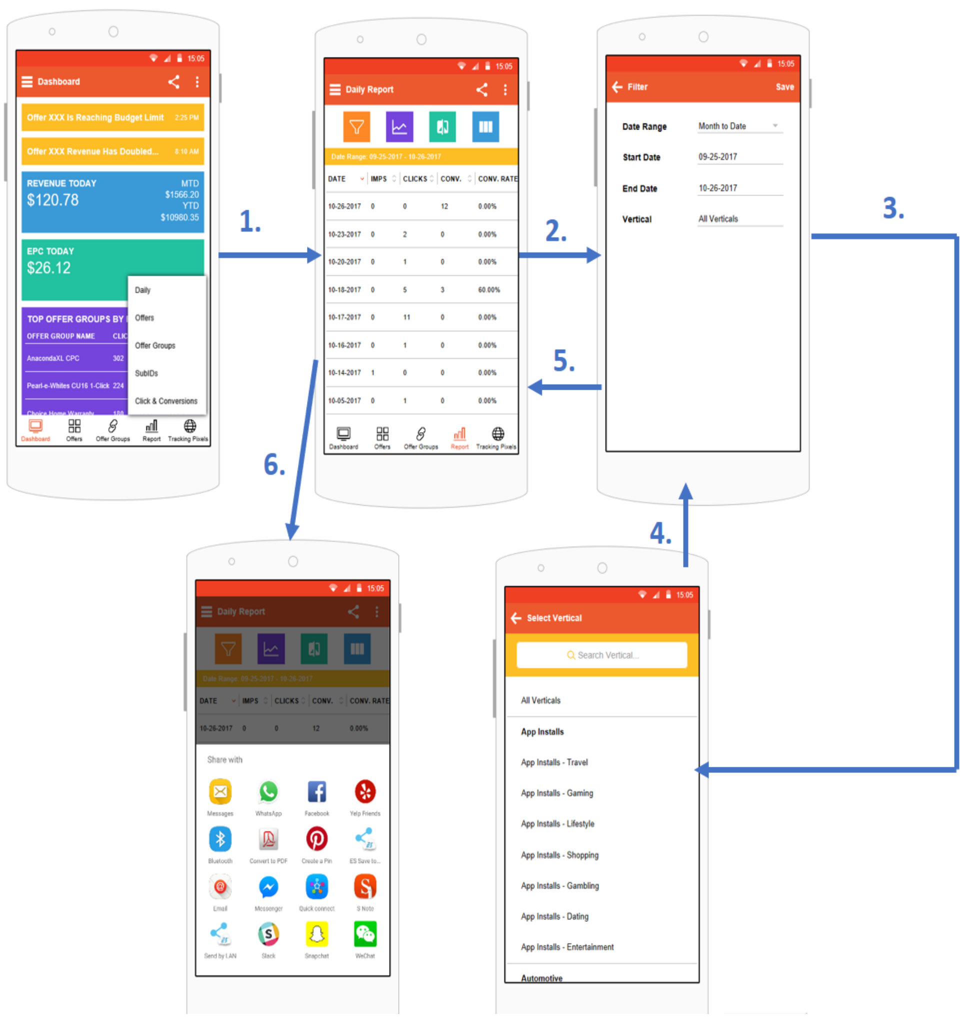
Changes proposed to the app design:

1. Attach labels to the buttons on all the pages for report options like filtering, comparing and customizing column order. There is no intuitive icon for comparison or rearranging, that will work without a signifier.

2. Have the records in a report have a checkbox in each row, so they can be selected and compared. Users didn't think that clicking the icon first would be intuitive.
3. Update to add the zoom gesture as pinch to zoom has been a more recognized gesture across touchscreen mobile users.
4. Update the icon for editing Offer groups instead of a link icon.

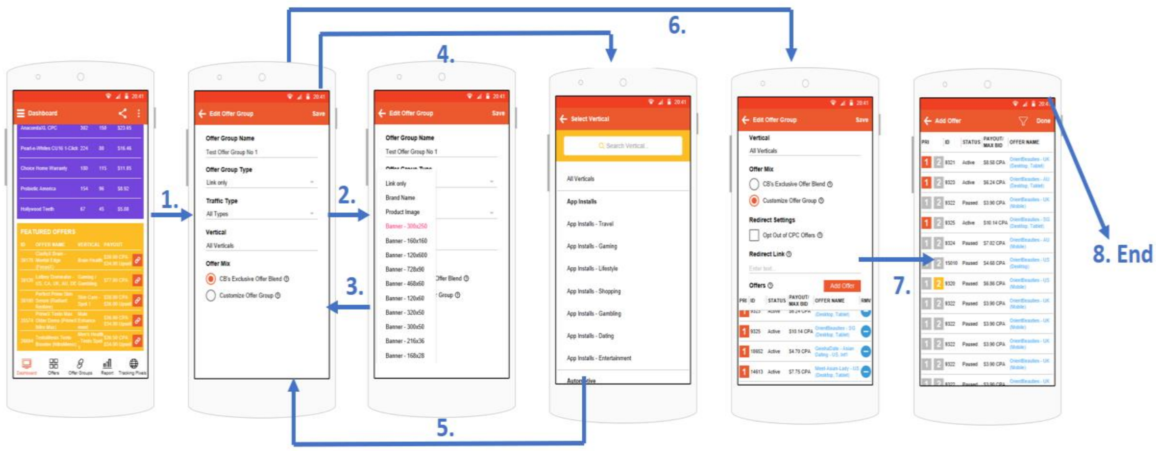
Interactive prototype screenshots and description of demo

Walkthrough for viewing a report and emailing it:



1. On the dashboard, click on report icon in the navigation menu. Choose Daily report
2. Click on the filter icon(like a funnel) on the report page
3. Tap the verticals input list. Choose vertical.
4. You will go back to the third screen. Click save icon on the third screen(filters) You will go back to the second screen.
5. Click the share icon on the top right corner. You will go to the fifth screen
6. Choose sharing app

Walkthrough for adding offer groups



1. Scroll down to featured offers on the dashboard. Click the link icon for an offer row(Orange icon on the rightmost in a row). You get to screen 2
2. Now write the offer group name. Tap on offer group type. You go to screen 3
3. Choose offer group. You go back to screen 2
4. Now tap vertical. You go to screen 4
5. Select vertical. You go back to screen 2.
6. Here, choose customize offer group option in offer mix, you go to screen 5
7. Click on add offer button in the orange, you will get to screen 6. Here select buttons 1 or 2 for each offer you want to add.
8. Click done to create offer group

Walkthrough for record comparison

1. On dashboard, click on the report icon at the navigation bar. Select daily report from the pop-up menu. You will go to screen 2.
2. On the report page, click on the compare record icon(third icon in green). This takes you to screen 3 where header of the page changes to Compare records.
3. Now on screen 3, first select one record and then the second. You go to screen 4.
4. Click on the share icon to see share options on screen 5.