

# UX Design Case Study

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Mishra Mohammad

# Project overview



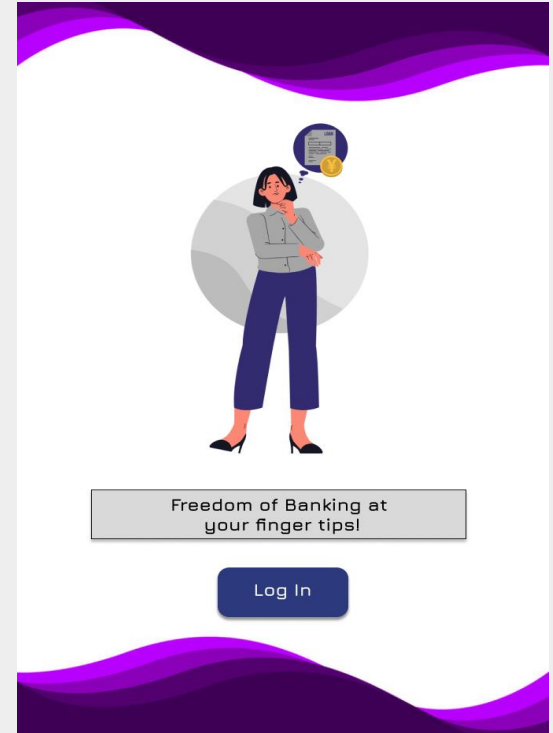
## The product:

A bookkeeping app – Fimpire - designed to record and process business transactions, while being user-friendly for local stores and individuals with little to no experience with financial records.



## Project duration:

June 2022 – September 2022



# Project overview



**The problem:** Being unable to manage finances or using sites and apps that don't completely allow you to manage finances (running into glitches, not having some features).



**The goal:** The goal of this project is to understand users who face the issue of not handling finances or unable to record everything, and to create an app that would eliminate these issues.

# Project overview



**My role:** UX researcher, UX Designer



## **Responsibilities:**

List of responsibilities included conducting user research, designing wireframes, prototypes and storyboards, using Figma and Adobe to produce high-quality results and bringing the best possible for users to use, based on the user research.

# Understanding the user

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

# User research: summary



The user research conducted enlisted a few participants that were interviewed, based on their opinions of the different bookkeeping platforms (such as an app or a company). This research provided insights on what users would prefer vs what they currently use, to manage their finances. It enabled the creation of an app that not only meets their needs, but also improves their bookkeeping experience majorly.

## UX Research Study —Plan

Google UX Design Certificate

Introduction	<ul style="list-style-type: none"><li>• <b>Title:</b> Creating a bookkeeping app</li><li>• <b>Author:</b> Mishra Mohammad, UX Researcher, mishra.mohammad@gmail.com</li><li>• <b>Stakeholders:</b> Fimpre's users, Fimpre's CEO (Priya Singh)</li><li>• <b>Date:</b> 13 July 2022</li><li>• <b>Project background:</b> We're creating a bookkeeping app for local stores and individuals to use, to manage their finances, without the hassle of opening many financial accounts or handling tiring banking statements. Our competitors have various financial service options, yet we intend to keep all of that in one powerful app. We wish to eliminate the stress of managing finances by enabling users to easily record income, expenses, provide financial advice and more.</li><li>• <b>Research goals:</b> We'd like to determine the precise difficulties users face when using financial services/apps and how we can better their experience. The results of this research will decide which of our assumptions was accurate and what else we should include.</li></ul>	Participants	<ul style="list-style-type: none"><li>• Participants should be between ages 18 - 60</li><li>• Participants in South Africa will reside in suburban areas and comment on the use of financial services from a company.</li><li>• Participants will be of a diverse culture, including all races and genders.</li><li>• Participants with learning disabilities (such as dyslexia) will be aided by a UX researcher, to comment on the use of a bookkeeping app. This is to understand the needs and wants of people with different abilities and learning styles.</li><li>• Incentives include recognition in the creation of the app Fimpre and a R1000 takealot voucher.</li></ul>
Research questions	<ul style="list-style-type: none"><li>• Which current financial service (physical or virtual/app) suits your current needs?</li><li>• What feature would you like to see on a financial app?</li><li>• Are you aware of the categories of your transactions (debit/credit)?</li><li>• Are users able to record all transactions successfully as they occur or can scan a receipt to update their financial database?</li><li>• Do users wish to gain professional advice about their finances?</li></ul>	Script	<ul style="list-style-type: none"><li>• Step 1: Create a personal profile with the required information, on the log in/register screen.<ul style="list-style-type: none"><li>- Follow-up: How easy or difficult was it to create a profile? Is there anything you would change about the process?</li></ul></li><li>• Step 2: Start physically recording transactions according to the relevant screen (Revenue/Expenses) OR scan a receipt at each category screen (Revenue/Expenses), so the app may automatically upload data.<ul style="list-style-type: none"><li>- Follow-up: How easy or difficult was this task to complete? Is there anything you would change about the process of recording transactions?</li></ul></li><li>• Step 3: View Savings plan automatically generated after recording, and choose to save data or edit.<ul style="list-style-type: none"><li>- Follow-up: Would you be okay with the app generating a savings plan, based on the previous data entered? Is there anything you would change?</li></ul></li><li>• Step 4: Confirm recording of transactions, print/save receipts or exit app.<ul style="list-style-type: none"><li>- Follow-up: How easy or difficult was it to complete your order? Is there anything you would change?</li></ul></li><li>• Conduct System Usability Scale and participants are required to rate experience out of 10, and provide constructive criticism. Participants need to rate following questions:<ul style="list-style-type: none"><li>- I enjoyed the experience the app provided.</li><li>- Navigation was simple.</li><li>- I liked the added features and think it's unique.</li><li>- I would recommend this to a friend.</li><li>- I was able to save data easily.</li><li>- App crashed or had a lot of ads.</li><li>- I felt less stressed after using the app for managing my finances.</li></ul></li></ul>
Key Performance Indicators (KPIs)	<ul style="list-style-type: none"><li>• Time on task: how long do users require to record transactions</li><li>• Use of navigation: are users able to navigate content they need</li><li>• Conversion rates: can the app generate a good savings plan, based on user income and expenses</li><li>• System usability scale: how often is the app used and is it simple</li></ul>		
Methodology	<ul style="list-style-type: none"><li>• Unmoderated surveys and usability studies</li><li>• Location: South Africa (for South African citizens) or virtual meetings using Google Meet (for international citizens).</li><li>• Date: Between 7 August 2022 - 14 August 2022.</li><li>• 5 participants will make use of 2 different bookkeeping apps, whereas another 5 participants will comment on their experience using a financial services company.</li><li>• Each participant will have 30 minutes to give feedback.</li></ul>		

*Snippets of the UX Research Plan  
conducted and summarized*

# User research: pain points

1

## Pain point

Movement of data can be difficult, from one app to another. This will allow for an easy transfer of personal details, should the user need it.

2

## Pain point

Some apps don't include the option to handle all accounts. Fimpire will allow accounts (such as clothing, overdue, etc) to be included.

3

## Pain point

The easy navigation from one stage to another can be difficult for a beginner. Fimpire has made this easy by allowing navigation between many tabs, with an easy access.

4

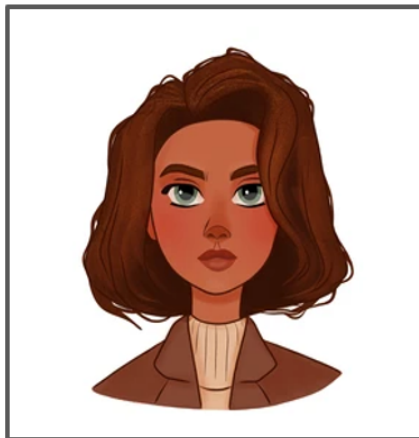
## Pain point

Users may wish to print receipts of transactions. This has been easy to do by allowing users to print to PDF or to a local printer.

# Persona: Priya Singh

## Problem statement:

Priya Singh is an ambitious and carefree individual that requires an easy aid to record her finances, so she may focus on other aspects of her life easily.



**Priya Singh**

**Age:** 24

**Education:** Bachelor of Commerce

**Hometown:** Durban, South Africa

**Family:** Single, lives with family

**Occupation:** Accounting freelancer

*"With work and family, I don't find the time to calculate my own yearly income and expenses. I wish there was something that could do it for me."*

## Goals

- To maintain yearly income, expenses and savings.
- To balance work and personal life.
- To study further and achieve a Master's degree

## Frustrations

- "It's annoying when an accounting software does not allow data to be transferred to another app."
- "Some apps have limited reporting features which makes it hard to record transactions."

Priya recently graduated with a Bachelor of Commerce and started working as an Accounting freelancer. Priya suffers from dyslexia and often needs help completing client tasks with the help of her sister, as she cannot fully comprehend the app she currently uses for work. Priya wants a service that would adhere to her needs, as well as make life a bit easier for her.



# User journey map

Many potential tasks, user feelings and interactions and how the app may be improved were noted and taken into consideration, when building a user journey map.

## Persona: Priya Singh

Goal: To record and maintain personal finances

ACTION	Determine Income and Expenses	Determine Savings	Record	Update	Track
TASK LIST	Tasks A. Collect revenues B. Observe and track expenses C. Ensure expenses is less than income	Tasks A. Subtract expenses from income B. Use some disposable income as savings	Tasks A. Record each transaction as debit or credit B. Calculate balance	Tasks A. Update records for any new transaction	Tasks A. Update balance B. Add to savings C. Track and maintain finances
FEELING ADJECTIVE	<ul style="list-style-type: none"><li>Confused</li><li>Intimidated</li></ul>	<ul style="list-style-type: none"><li>Hesitant</li><li>Better</li></ul>	<ul style="list-style-type: none"><li>Busy</li><li>Hopeful</li></ul>	<ul style="list-style-type: none"><li>Worried</li><li>Wary</li></ul>	<ul style="list-style-type: none"><li>Confident</li><li>Relieved</li></ul>
IMPROVEMENT OPPORTUNITIES	<ul style="list-style-type: none"><li>Make a note of income and expenses</li></ul>	<ul style="list-style-type: none"><li>Dedicate more disposable income to savings</li></ul>	<ul style="list-style-type: none"><li>Use educational accounting background</li></ul>	<ul style="list-style-type: none"><li>Research on certain finance recording updates</li></ul>	<ul style="list-style-type: none"><li>Perform bookkeeping task</li><li>Use an app to help</li></ul>

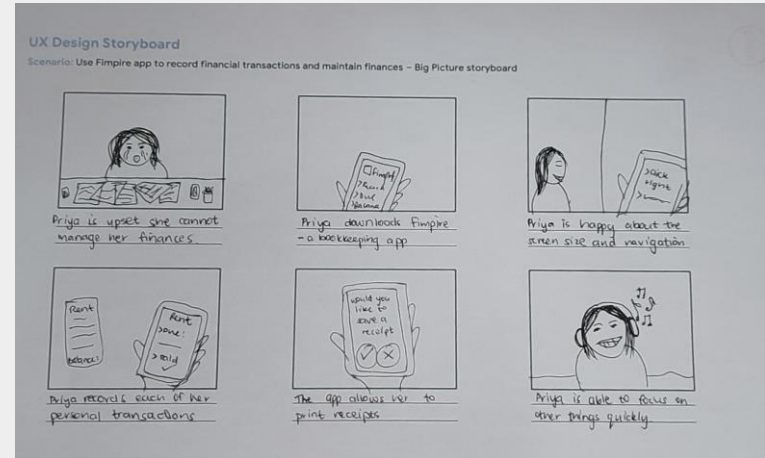
*User Journey Map*

# Starting the design

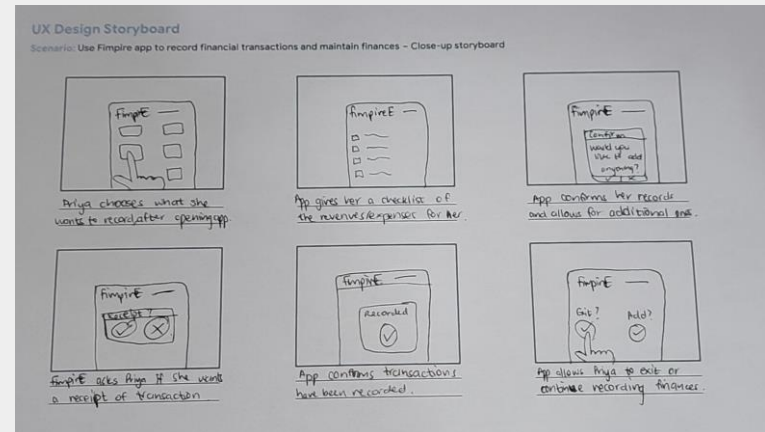
- ❖ Paper wireframes
- ❖ Digital wireframes
- ❖ Low-fidelity prototype
- ❖ Usability studies

# Paper wireframes

Two storyboards were created on paper. The Big Picture storyboard depicts the entire idea of how Fimpire would solve our user persona – Priya's – problems, whereas the Close-Up storyboard gives a more detailed perspective of the use of each screen.



*Big Picture Wireframe*

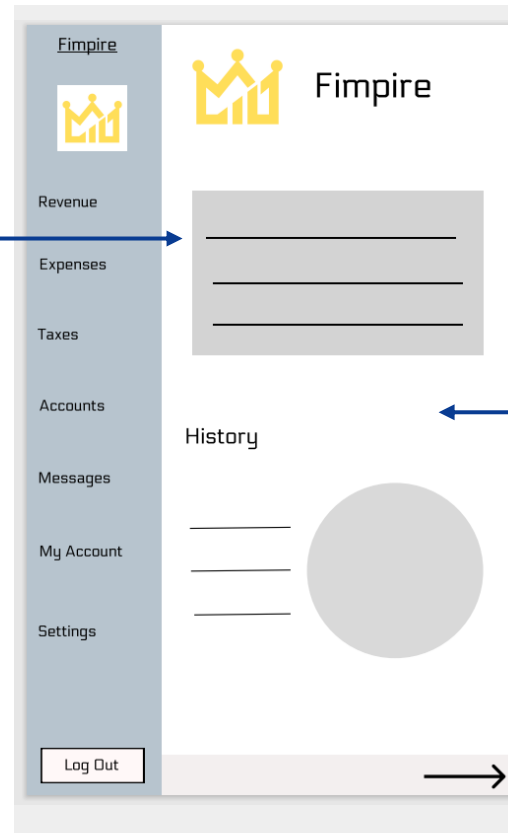


*Close-Up Wireframe*

# Digital wireframes

Digital wireframes were created for each screen of the app, using Figma.

Welcomes user to Home page and informs them when last they recorded a transaction.

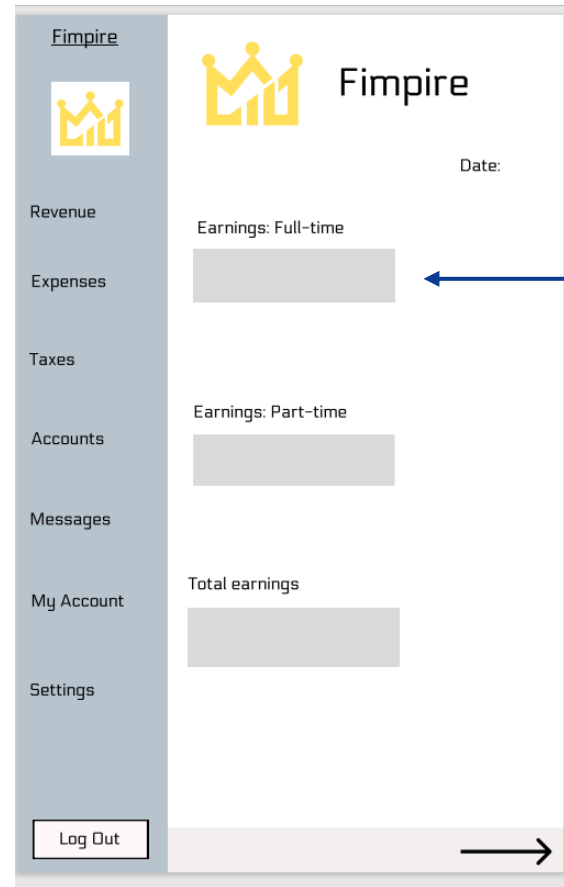


Displays the history of the user's records, using the app.

# Digital wireframes

The second digital wireframe created is of a Revenue page for the user to fill out their income for the month. Therafter, several other wireframes were created, considering the various financial information that a user would want to record.

Each tab contains the relevant data that should be filled in for the user.



The wireframe shows a user interface for 'Fimpire'. It features a vertical sidebar on the left with a blue background and white text for navigation tabs: Revenue, Expenses, Taxes, Accounts, Messages, My Account, and Settings. At the bottom of the sidebar is a 'Log Out' button. The main content area has a white background and includes the 'Fimpire' logo (a yellow crown over a bar chart) and the word 'Fimpire' in a large, bold font. Below the logo is a 'Date:' label. The main area contains three sections: 'Earnings: Full-time' with a gray input box, 'Earnings: Part-time' with a gray input box, and 'Total earnings' with a gray input box. A blue arrow points from the 'Revenue' tab in the sidebar to the 'Earnings: Full-time' input box. Another blue arrow points from the text 'The "Revenue" page allows the user to add data about their earnings.' to the same input box. A black arrow points from the 'Log Out' button to the right edge of the wireframe.

The "Revenue" page allows the user to add data about their earnings.

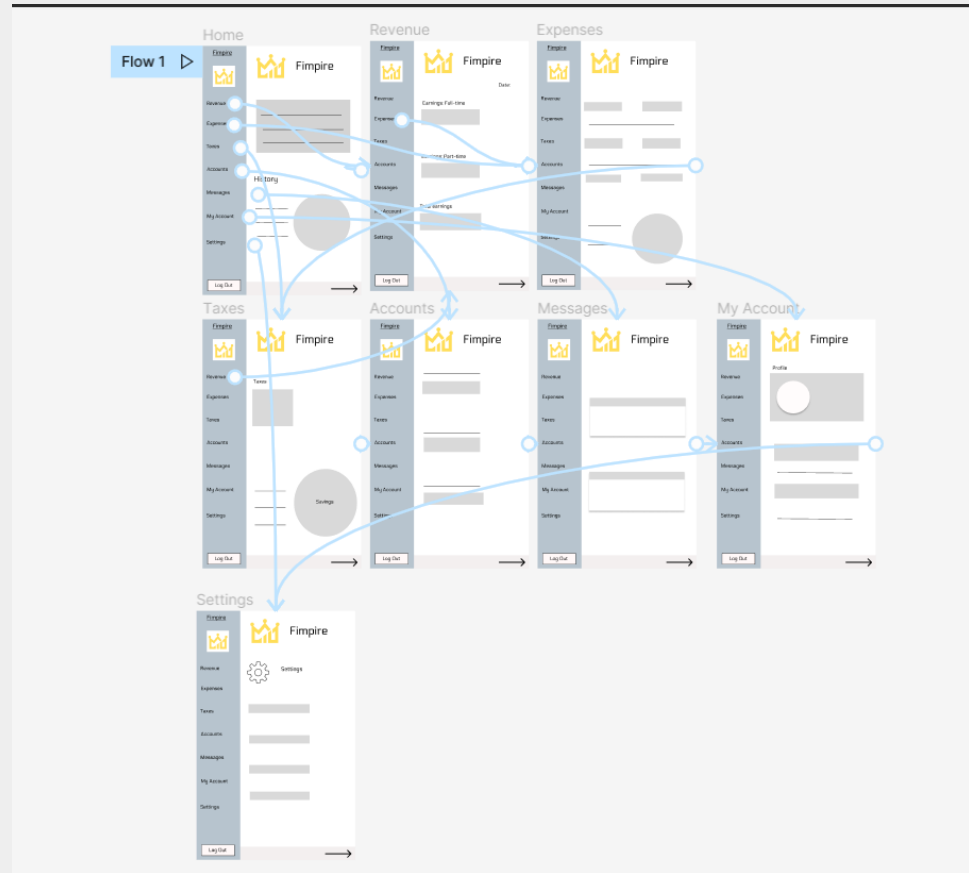
# Low-fidelity prototype

The low-fidelity prototype connects the primary user flow to the other screens. Each tab option on Home connects to its relevant screen/page. Other interactions have been included.

For example: “Revenue” navigates you to the Revenue page.

Link to Fimpire:

<https://www.figma.com/proto/dYXPTvoswavNt7U5cpahIT/Fimpire?node-id=15%3A63&scaling=min-zoom&page-id=15%3A4&starting-point-node-id=15%3A63>



# Usability study: findings

The usability study conducted included the types of items a user would appreciate, in a bookkeeping app. These included, but not limited to, the addition of handling many accounts, notifications of due payments and the printing/saving of transactions. Post-usability studying, it's been found that users can navigate to each tab using Home page quite easily and would prefer a separate screen for Settings, to make changes to their profile/account.

## Round 1 findings

- 1 Better registration process
- 2 More colour, easier navigation
- 3 Better exit feature

## Round 2 findings

- 1 Navigation is simple
- 2 Settings screen added
- 3 My Account page added, for personal details

## Refining the design

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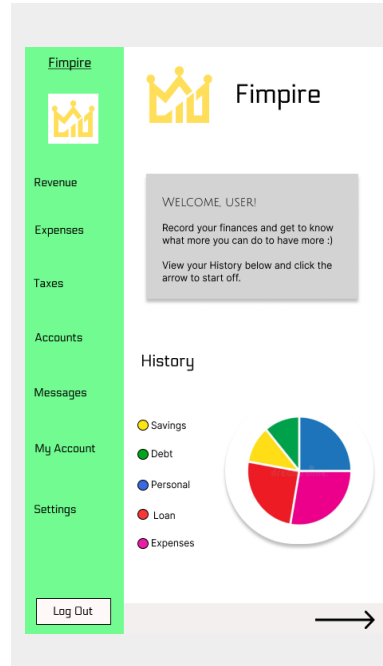
- ❖ Mockups
- ❖ High-fidelity prototype
- ❖ Accessibility



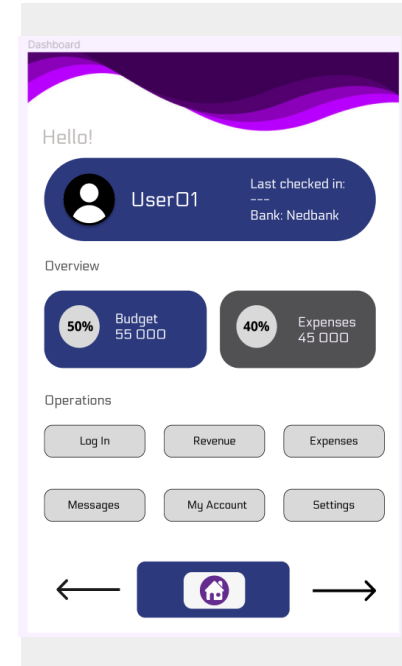
# Mockups

The usability study provided excellent insights about user preferences and the type of banking app they would like.

Before usability study



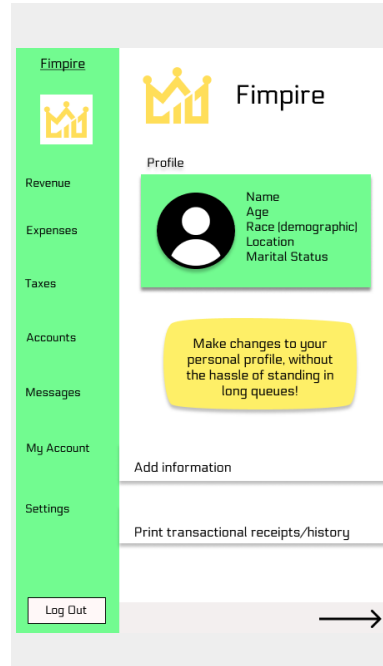
After usability study



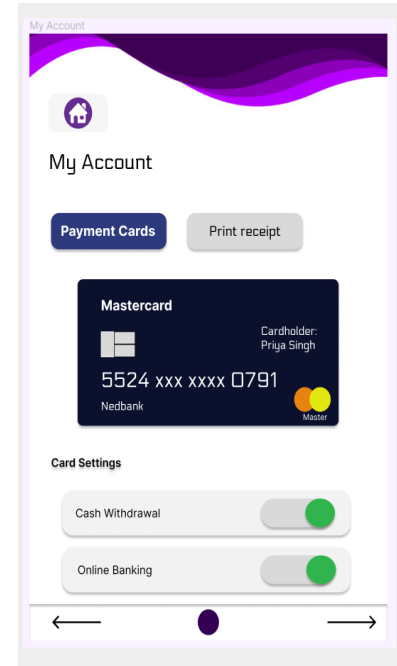
# Mockups

The usability study provided an opportunity for a better-looking, as well as easy to use, interface.

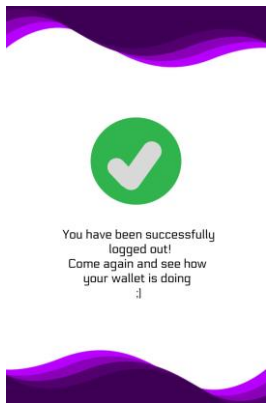
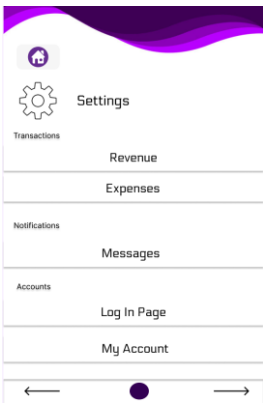
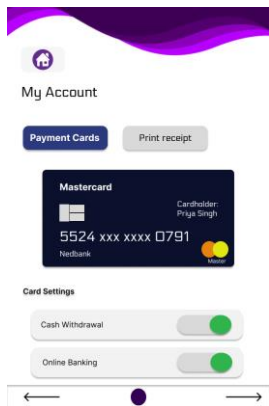
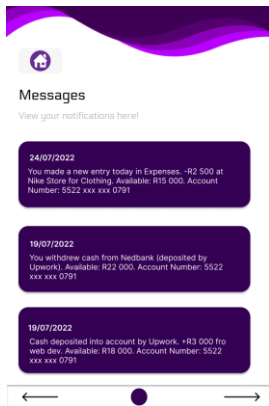
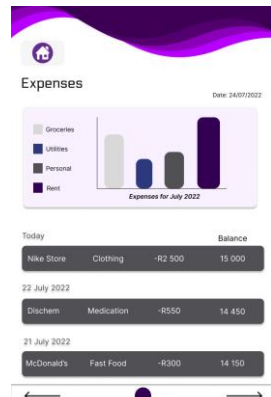
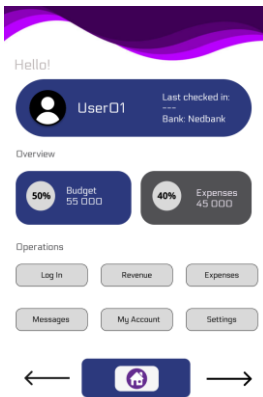
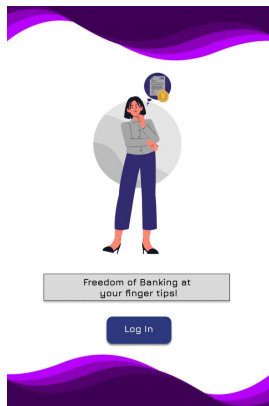
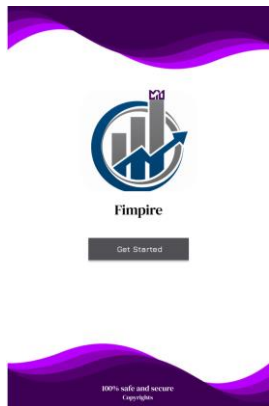
Before usability study



After usability study



# Mockups



# High-fidelity prototype

Link to high-fidelity prototype:

<https://www.figma.com/proto/ytLkMYfNRxRTraH3RLkX9u/Fimpire?node-id=0%3A1&scaling=scale-down&page-id=0%3A1>



# Accessibility considerations

1

Provided icons to their matching tabs so users may easily spot them and navigate to the tab they want to.

2

Used a high contrast colour palette to ensure app features stand out, as well as added effects and strokes, such as shadows and outlines.

3

Provided easy user flow by letting each feature navigate to its relevant tab.



# Takeaways



## Impact:

The app provides users a sense of professionalism and post-usability study conducted, introduces reliability on the app.

*"Love the work done and designs improved!"*

- Peer participant



## What I learned:

Throughout this project, I learnt about the many different perspectives that exist in the world and have a newfound interest in UX/UI Design.

# Next steps

1

Conduct another usability study to ensure all pain points have been addressed.

2

Iterate and improve designs.

3

Reflect on user research and studies that took place and apply them to current, as well as future projects.



# Let's connect!



Thank you for your time and reviewing my work on Fimpire! If you'd like to see more or get in touch, my contact information is provided below.

Email: [mishra.mohammad@gmail.com](mailto:mishra.mohammad@gmail.com)

LinkedIn: <https://www.linkedin.com/in/mishra-mohammad>

Thank you!