

UX Research Portfolio

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2024

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Barriers and drivers for user migration from an old product version to a new one

Product: One of the largest products in the CIS market for business management and accounting automation

My role: developing research design, recruiting respondents, creating interview guide, conducting interviews, processing and analysing results

Business Objective

Identify ways to attract users of the old version to upgrade to the new version of the program

Key Research Question

What are the barriers and drivers for users to upgrade to the new version of the program?

Methods Used

In-depth interviews

Sample

18 respondents

- 12 accountants use only the old version
- 3 accountants use both versions
- 3 accountants who have already abandoned the old version and use only the new one

Research Objectives

- 1 Identify the reasons why users do not upgrade to the new version of the program
- 2 Find out how users cope with the restrictions in this version (from the point of legislation)
- 3 Identify the factors that can motivate users to upgrade to the new version

Assumptions

Users of the old version do not want to upgrade to a newer version because of the strong difference in the UI. Such users are sensitive to changes, do not want to 'retrain'.	Confirmed
Users of the old program version have a lot of extra plugins in the software, so they don't upgrade to the new one	Partially confirmed
Migrating to a new version can be time consuming and expensive for the business, may affect business processes	Partially confirmed

Users of the old version

These are users who use only the old version of the program in their work

Sample: 12 users

Users of the old version

Characteristics of users

1

These users can be categorised as inert accountants, not open to change. They have been working in this version for more than 20 years.

2

Most of them have tried to work in the new version, mostly in the boxed version. They are not very familiar with the cloud program version.

3

Users are reluctant to report on how they build their work in the program in the conditions of being non-updating (from the point of view of legislation)

4

Such users need control over operations, so they have little trust in the automated processes in the new version

Reasons for not upgrading

The interviews revealed **4 different reasons** why users do not upgrade to the new version:

1

Few tasks for the new version

Do **not see the need** for a new version **for their tasks**. Since they are **small businesses**, they keep primary documentation, do not submit or generate tax reports. Some of them use another product for this purpose.

*'It was originally made for **small business**, and the new version is more sophisticated. The old version is more familiar to me, I **don't need anything extra**. It is more convenient for small businesses'.*

*'**For the tasks we have, we don't need a new version**. There is no production, the cost of production is not counted there, there is no calculation'.*

*'Well, I don't have such a volume, a **small volume**, so it's convenient. I do all the functions like primary documents, but I **don't do any analyses**, it's manual'.*

Reasons for not upgrading

The interviews revealed **4 different reasons** why users do not upgrade to the new version:

2

Time-consuming for retraining

The new version takes a long time to retrain: it is more familiar and easier to work in the old version

*'For me the most critical thing is **time**, I can spend six months getting used to the new version, but my busy work will not allow me to do it'.*

*'I'm **so used to this version**, it's something native already, everything is mine, I know what I'm doing, where to find it, the new version has complicated navigation, something has to be added, but it's not clear what and where and how. **I can't understand it, I have to read manuals, but I don't have time to read it**'.*

How do users cope with the limitations in the old version?

The interviews revealed that users **do not have difficulties with the old version**.

This is justified by the fact that:

- They have a **small company**, a **small staff**
- They are quite **experienced accountants**, and can work under the constraints of the program (most operations are done manually)
- They **use third-party solutions**. For example, for payroll reports, tax reports use other products
- The analysis is carried out **manually**
- They may have **extensions** and **plugins** in the current program

'Well, I don't upload anything, I look at the reports myself. Reporting partly through another program (competitor's name), partly through the taxpayer of a legal entity, it's the old-fashioned way'.

'Most of it has to be done manually. According to the reporting: I just type in the taxpayer and send it through an intermediary'.

Assumption 1

Users of the old version do not want to upgrade to a newer version because of the strong difference in the UI. Such users are sensitive to changes, do not want to 'retrain'.

✓ **Confirmed**

Users note that the interface of the old version is more user-friendly, but it cannot be said definitely that a strong difference in the UI of the versions is a blocking factor for the migration. It is the complexity of the retraining process that plays a big role (another navigation in the program).

*'It's just a completely **different interface, a different approach**. It's very unusual for me, and it takes a lot of time to get used to it. I can't find this time anyway. When you get used to one thing, your hands get used to the process. I can use the old version with my eyes closed'.*

Case Study №2

Overview of the report

Usability testing of new functionality for payment reconciliation

Product: One of the largest products in the CIS market for business management and accounting automation

My role: developing research design, recruiting respondents, creating interview guide, conducting usability tests, processing and analysing results

2024

Please note: this is only a part of the project presented for quick overview, the rest slides are hidden and unavailable in this presentation

Business Objective

Increase the competitive qualities of the [Product] with new functionality

Key Research Question

How do users perceive the new functionality? What difficulties do users face in the process of payment reconciliation?

Methods Used

Moderated usability testing on a test version of the [Product]

Sample Achieved

6 respondents

- 3 accountants, product users, face the process of payment reconciliation in the company
- 3 entrepreneurs, product users, face the process of payment reconciliation in the company

User scenarios

Consider how the users acted in the tasks, what problems were identified in the course of completing the tasks

Sample: respondents did not participate in all tasks: the user's involvement in the scenario depends on their role in the organisation

Find the path to the functional

6/6

All respondents successfully coped with the task of searching for the payment reconciliation functionality. Users associated this functionality with the 'Bank and Cash' section. One entrepreneur initially started to look for this functionality in the 'Manager' section, but because he did not find it there, he turned to the 'Bank and Cash' section.

Change the payment amount

6/6

All respondents successfully changed the payment amount.

Accountants changed the payment amount mainly within the payment order itself.

- Entrepreneurs made the comment that changing the amount of a payment was not the intention to immediately reconcile the payment.
- One accountant lost a payment after changing the amount. The respondent lacked a notice warning that when the amount is changed, the payment goes to "Agreed" status.

Identified issues

In general, entrepreneurs and accountants successfully managed to go through the whole scenario of payment reconciliation. However, there are certain stages that caused difficulties for the respondents. The table below shows the 13 identified problems by criticality for further development.

Criticality criteria of the problem

High – a problem that causes a lot of irritation , does not allow to cope with the task, causes leaving the script

Medium – a problem that slows down the work and causes difficulty in completing the task

Low – a problem that can be categorised as cosmetic, causing mild irritation or confusion

Nº	Issues / Challenges	Frequency	Criticality	Recommendations
1	The respondents noted that the current purpose of the payment makes it difficult to understand the details of this payment. <i>'Introduce a cash item, for communication, for internet, for stationery'.</i>	5/6	Medium	Make a comment history, but in the form itself the user will see the last comment
2	Without prompting, respondents do not independently associate the 'Print' button with the fact that a text register will be generated	3/3 <i>*This scenario is only for accountants</i>	High	Add a 'Send by email' button. Add a printer icon for the 'Print' button and rename it to 'Payment Register'
3	Respondents lost a payment order after changing the amount. It is not obvious to the respondents that when the amount is changed, the payment order changes from the 'Prepared' status to the 'Approved' status	4/6	Medium	Refuse the scenario with automatic status change when editing the payment amount. Add 'edited' icon (pencil) when the amount is changed.
4	Respondents do not notice the 'Agree All' button. It is likely that accountants associate this button with 'Record and Close' (in terms of location and colour).	2/4 <i>*This scenario is only for entrepreneurs and accountants whose managers do not work in the product</i>	Low	Remove the 'Agree all' button. Realise checkboxes near each payment in order to select several payments for their further processing

Evaluation of the usefulness of the functional

- Entrepreneurs see the new payment reconciliation functionality as relevant for processes within their organisations.
- However, among accountants, the need depends on the **size of the organisation** and the involvement of the manager in terms of working in the software. That is, in small organisations or if the manager does not work in the [Product] this functionality may be redundant for the reconciliation process in such organisations.
- The accountants also commented that this functionality would be useful, especially when **working in a mobile app**.

'We can do it in the regular accounting department without this functionality: send the register to the head, his hand agrees, and we correct the payments accordingly. I do not see anything that is not there. Yes, this register is a little bit expanded, but not essentially'.

'I would use it, plus I would put the management to work in the programme, if it would be possible to work from a mobile device, so that it would not be necessary to reconcile in Whatsapp. So that the manager could put in the reconciliation himself and the accountant would already further send the reconciled ones'.

Case Study Nº3

Overview of the report

Evaluating 6 advertising storyboards for the [Product]

Product: One of the largest brand of laundry detergent in Europe

My role: processing and analysing focus group results









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Please note: this is only a part of the project presented for quick overview, the rest slides are hidden and unavailable in this presentation

01

Evaluating 'The Husband' Ad Storyboard

Performance snapshot

Parameter	Performance	
Overall		Shows unique situation of support, evokes overall pleasant emotions, but role of husband in laundry activities is not relevant for some.
Ease of Understanding		The ad's storyline is generally well understood , but some younger viewers find certain scenes , like the husband calling his mother for laundry advice, to be outdated and confusing .
Message Delivery		Husband's care for his wife
Engagement		Consumers are engaged by the unique portrayal of a man taking on traditionally female-associated chores
Uniqueness		The involvement of a man in the laundry task sets the ad apart from others in the detergent market, making it stand out to viewers
Branding		Consumers perceive a alignment between the Brand and the story, reinforcing Brand's identity as a reliable laundry detergent. Brand makes life easier for a woman, he gives her an assistant in the role of a husband
Relevance		Relevance is polarizing among different age groups, with younger consumers finding the ad resonant due to its emphasis on shared responsibilities and modern gender roles, while older consumers may find it less relevant due to traditional gender expectations.
Persuasion / Call to Action		Due to modern branding the ad may resonate with target audience, young consumers, who are ready to step over traditional roles.



Mostly positive spontaneous responses: sparks appreciation and care

- Spontaneous responses on the ad reveals a diverse range of emotions, **mostly positive**.
- Few consumers **find the husband seeking help from his mother to be weird and humorous**, but most **appreciate the caring partner** willing to assist.
- The perception of gender roles within the household varies on age, with younger respondents expressing **skepticism regarding the reliance on stereotypical roles**, whereas experienced housewives see it as a **warm portrayal of marital affection and care**.
- Overall, the ad evokes feelings of **amusement and appreciation for acts of love and support** in relationships.

*'That's so cute! There's a sense of love and harmony in that young family. It's really common for young people to want to make their partners feel good, and I loved that about this ad'.
(Group 4, 40-55 y.o.)*

*'The ad was attractive until the moment of the mother's call, because it is an outdated topic, showing men as household invalids. In the modern world, it seems to me that men are already more adapted to life'.
(Group 1, 25-39 y.o.)*

Key message understanding: care & support from husband

- **On emotional level**, consumers mostly receive **positive emotions**:
 - Consumers are **pleasantly surprised** by the **husband's involvement** in the laundry, the fact that husband is ready to take care of his wife.
 - However, some viewers **feel confusion** about his call to mother for advice.
- **On functional level**, the ad **show Brand as something special**:
 - The gel **can struggle with strong stains** of coffee. However, **few** feel **doubts** about it.

*'The dissonance here is that the topic itself is pleasant, that a man does something nice to his wife, but at the same time it is annoying that he cannot do it himself, the situation itself is stupid, that he calls his mother. Okay, if he had called, maybe another friend, they had some kind of male call
(Group 1, 25-39 y.o.)*

*'Because I've been washing [Brand] for a long time, and it can't handle such a stain at once'.
(Group 2, 40-55 y.o.)*

Suitable modern branding

- Consumers perceive a **strong alignment** between the Brand image and the story portrayed in the ad.
 - They believe the story **effectively reflects Brand's reputation for quality stain removal** and care for clothing, reinforcing the brand's identity as a reliable laundry detergent.
 - Consumers **associate brand with reliability and efficiency**, considering its ability to quickly eliminate coffee stains.
 - The main theme associated with the Brand persona is **family care**.
- 'The story matches the brand 100%. The white dress, the spot is huge and the [Brand] naturally fits everything'.
(Group 3, 25-39 y.o.)*
- Consumers **feel a close connection with brand** that understands their laundry care needs and effectively satisfies them. However, few people feel **doubts about how well the gel will cope with such a stain**.

Successfully drives purchase intentions

- The storyboard **successfully attracts consumers to try** the [Brand] gel product through its compelling narrative and relatable scenario.
- Positive factors driving this tendency include the **cozy and innovative atmosphere** portrayed in the ad, which **appeals to consumers' emotions and preferences for modern** cleaning solutions.

*'I would buy this washing powder purely because of this advertisement, it is so cozy, beautiful and innovative'.
(Group 3, 25-39 y.o.)*

What recommendations do we have for improvements

- **Remove the call to husband's mother** and show the man washing the dress himself, which **would highlight his independence and more self-reliant** by not involving any unnecessary person in the ad.
- Clearly **depict the woman's gratitude for his support** to emphasize the positive impact of his actions. For example, **add** a scene where the **woman hugs** the man to show appreciation for his efforts, increasing emotional connection and motivation.

Thank you!

If you have any questions, please feel free to contact me:

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