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Applying for User Experience Designer position with

Vendors
(B2B)

Tenants
(B2C)

MOVE OUT PROCESS

In property management, moving tenants in is a key part of the business. And on the flipside of that, moving tenants out is just as important.

Managing the move out process is a multi-faceted job, with tasks that can happen in parallel. For example, a business may want to post a unit as available even as maintenance on the unit is underway.

The move out process in AppFolio is there to help facilitate and keep track of those tasks that are happening in order to get to the final point of moving the current tenant out and moving a new tenant in.

MOVE OUT PROCESS

The shortcoming in our original move out flow was that it was sequential, resulting in users having to temporarily complete steps, just to have to come back to them in order to fill in the correct information.

This procedurality didn't match how property management teams actually executed on move outs, so it was important for us to get a better sense of that in our redesign process.

MOVE OUT PROCESS

Move outs also have variations depending on the circumstance:

- All tenants move out
- One tenant moves out
- The primary tenant responsible for rent moves out
- Transferring leases between new sets of tenants

These variations, along with others, can have an impact on how property management professional carry out accounting and schedule maintenance to prepare the unit for prospective tenancy.

In all, a move out can be defined differently across businesses, and we wanted to assure we were accommodating the variety of users' needs within the move out process.

Moving out tenants

Record notice date
make tenant "other occupant"
make one of the current tenants the "Primary tenant"
enter tenant's "End date"
hide tenant

No deposit returned [G]

(no additional steps)

Owner-held deposits [D]

Reduce deposit liability
Transfer funds from OHD account into SD clearing account for partial deposit return (ZDR)
Create payable to tenant
Pay out payable

Management-held deposits

1 bank account [E]

Reduce deposit liability
Transfer funds from MHD account into SD clearing account for partial amount (ZDR)
Create journal entry
Create payable to tenant
Pay out payable

2 bank accounts [F]

Reduce deposit liability
Transfer funds from MHD account into SD clearing account for partial amount (ZDR)
Create bill to self and pay it out to represent physical transaction between banks
Create Other Receipt to represent bill paid to self
Create payable to tenant
Pay out payable

Refund straight from SD instead of SD clearing?

(currently they have to reverse the ZDR charges and credits that are autogenerated before they can do the following steps)
Create payable to tenant from SD account (instead of transferring funds to SD clearing first)
Pay out payable

Moving out tenants

- Record notice date
- make tenant "other occupant"
- make one of the current tenants the "Primary tenant"
- enter tenant's "End date"
- hide tenant
- adjust charges

No deposit returned [G]

(no additional steps)

Owner-held deposits [D]

- Reduce deposit liability
- Transfer funds from OHD account into SD clearing account for partial deposit return (ZDR)
- Create payable to tenant
- Pay out payable

Management-held deposits

1 bank account [E]

- Reduce deposit liability
- Transfer funds from MHD account into SD clearing account for partial amount (ZDR)
- Create journal entry
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- Create payable to tenant from SD account (instead of transferring funds to SD clearing first)
- Pay out payable

Panel 1

Move out for 550 James Place

Move out all occupants

▶ Enter notice date   12/05/2016

▼ Enter scheduled move out date

Scheduled move out date: [   ] 📅

Expected vacancy date: [   ] 📅

▶ Enter charges & credits

▶ Enter Forwarding addresses

▶ Record Accounting

▶ Enter actual move out date

▶ Create disposition letter

▶ Create security deposit payable

Panel 2

Move out for 550 James Place

Move out all occupants

Enter notice date	edit
Notice date:	12/05/2016

Record Accounting

Steps to reproduce:

- Transfer funds into security deposit clearing account

- Apply deposit to charges

- Review accounting

Enter scheduled move out date

Scheduled move out date: [   ] 📅

Expected vacancy date: [   ] 📅

[Save] [Cancel]

Enter actual move out date   edit

Actual move date:

Enter charges & credits   edit

Charge amount:

Credit amount:

Create disposition letter   edit

[Generate disposition letter]

Panel 3

Move out for 550 James Place

Move out all occupants

✓ Enter notice date   12/05/2016
                                                         edit

✓ Enter scheduled move out date   01/01/2017
                                                         edit

✓ Enter charges & credits   Charges: $500.00
                                                 Credits: $0.00
                                                         edit

✓ Enter Forwarding addresses   3 addresses provided
                                                         edit

☐ Record Accounting   steps required for [tenant names]:
                           - enter deposit amount to be returned
                           - review charges and credits
                           - transfer funds to security deposit clearing account

☐ Enter actual move out date

Move out for 195 4th Avenue - BB

Address: [195 4th Avenue, Unit B, Kingland, WA 13527](#)

Property: [Ragland Properties](#)

Tenants: [Brent Barry, Chloe Gonzalez, Jerome McFarlin](#)

Move out information

▶ Enter notice and move out date

▶ Enter forwarding address(es)   *0/3 addresses saved*

Move out accounting

▶ Enter credits and charges

☐ Generate and download disposition letter upon completion of move out

| Complete Move Out | Save for later | Cancel move out |

| History |

Move out

Property: Wild Orchard Apartments - 505 Main Lane, Mars, CA 90210

Unit: 108

Address: 505 Main Lane - 108, Mars, CA 90210

Tenants moving out: Antonio Chambers

Move out information

▶ Enter notice and move out date

▶ Enter forwarding addresses

Move out accounting

▼ Enter credits and charges

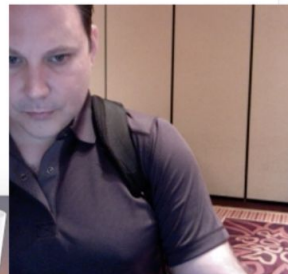Add Prorated Credits and Charges

Charges:

[Add Charge]

Credits:

[Add Credit]

Outstanding credits and charges

Occurred on	Description	Amount
03/01/2017	March 2017	1000
03/01/2017	March 2017	30
03/01/2017	March 2017	75

Move out summary:

Move out charges	$0.00

Move Out

Property: Olympic Park - 1007 5th Ave, San Diego, CA 92101

Unit: 018

Address: 1007 5th Ave, San Diego, CA 92101

Tenant(s) moving out: Artemus Ballard

▶ Dates	✔ SAVED

▶ Move Out Work Orders	✔ 4 / 4 POSTED

▶ Forwarding Addresses

▶ Charges and Credits

ℹ You can download the final disposition letter after the move out has been completed.

☐ Automatically send the move out survey email upon completion of move out
Note: Move out surveys will not be sent to tenants without email addresses on file.
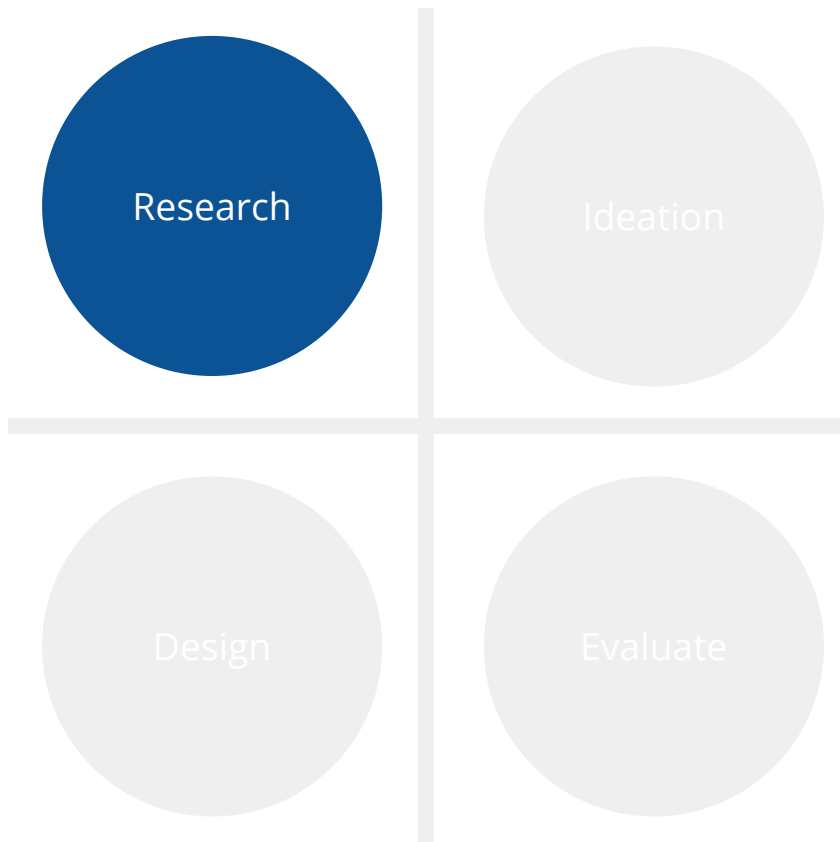
[Finish Move Out] [Cancel Move Out]

Attachments

Drag Files Here   or   [Choose Files to Add]

MOVE OUT PROCESS - Recap

Research

Ideation

Design

Evaluate

MOVE OUT PROCESS - Recap
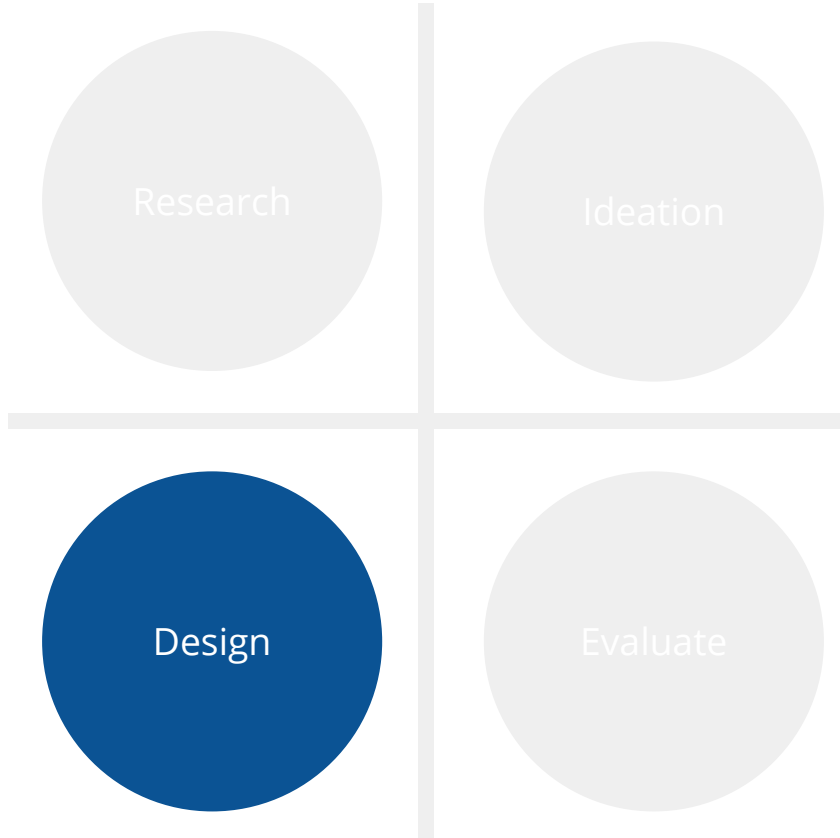
Research

Ideation

Design

Evaluate
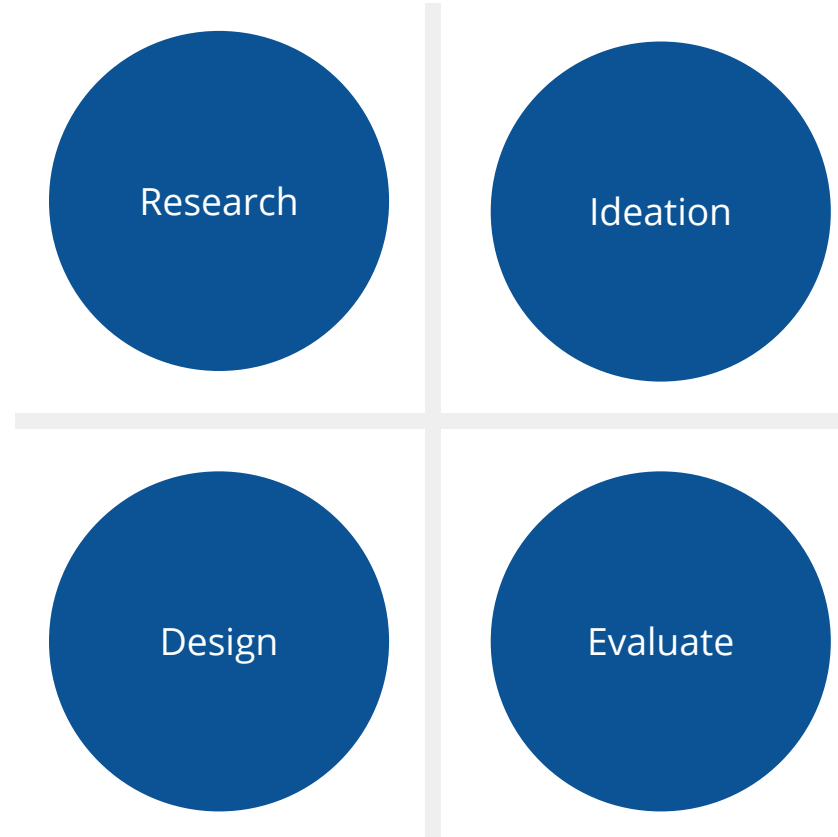
- Gathered better understanding of what customers were suggesting we fix based on their support cases and product feedback

- Reached out to those customers, and others, to learn more about their end-to-end move out processes, to understand detail that may not have been in case data and feedback

- Audited the current workflows users perform to identify what was similar and different

Research

Ideation

Design

Evaluate
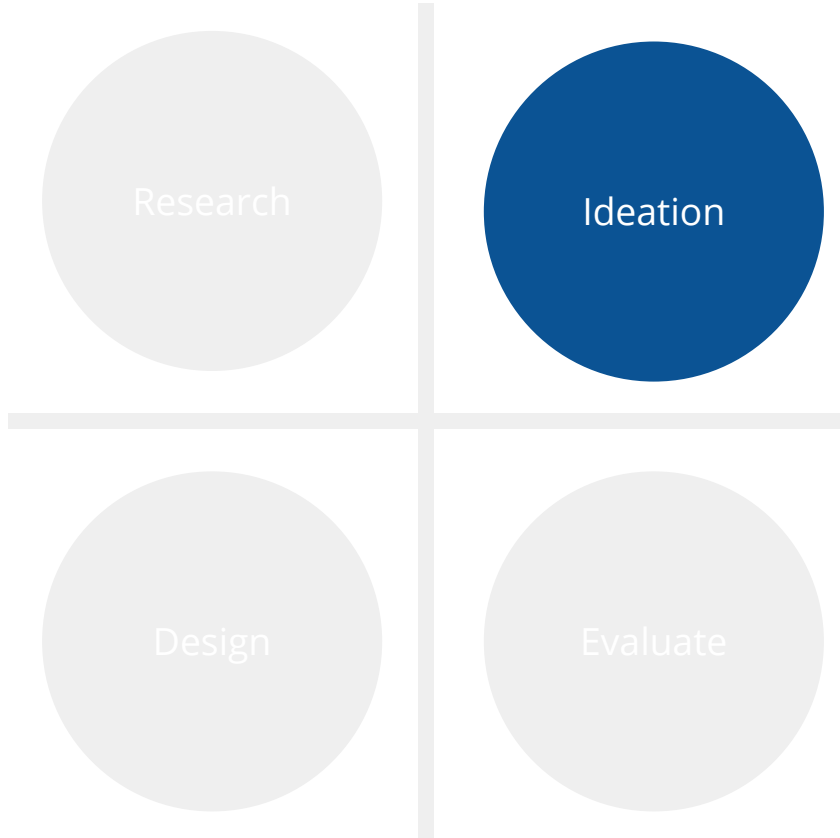
- Developed variants of what could be the move out process based on our current design patterns and potential extensions to our design system

- Did a design studio with the engineers on the team to assess additional functionality to support the new move out process, thinking beyond strictly what we were being told by customers

- Teamed up with our customer support team to understand more about what we should prioritize based on cases they handle

Research

Ideation

Design

Evaluate

- Synthesized ideas from design studio and information collected during research & ideation

- Evaluated variants with the design team and development team to assure standards were being upheld

- Tested prototype with users who suggested we make changes to assure we were addressing their feedback and not going off-scope

Research

Ideation

Design

Evaluate
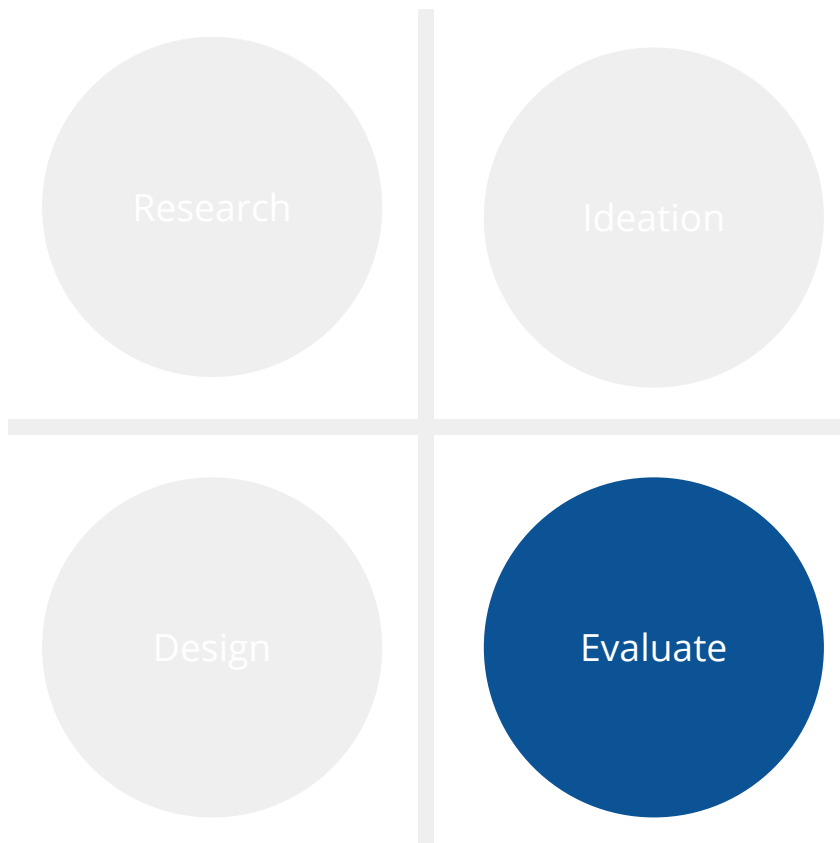
- Performed remote moderated & unmoderated usability tests to assure the common situational tasks could still be completed

- Iterated to further improve initial release (move out surveys, preview move out letter, additional status messages for tasks)

DESIGN CHALLENGE

DESIGN CHALLENGE OVERVIEW

- Value proposition
- Product overview
- User base
- What Yelp does well
- Ways Yelp can improve

VALUE PROPOSITION

Discover restaurants and other merchants without having to go far to gather context about their reputability from real people who have patronized the restaurant or have used the merchant.

PRODUCT OVERVIEW

Yelp provides a platform for users to learn about a merchant's offering by way of other people.

Yelp keeps the perspective of a merchant's offering fresh by sourcing user reviews about merchants. Users can view other users' recent and historical reviews.

Users can view & post photos and gather logistical information about merchants such as the merchant's hours of operation, the merchant's address and phone number, if they have free parking nearby, and even details like if they have wifi available in their store.

yelp USER BASE

REFINERS

Users looking for a recent recommendation on a merchant they have already identified come across via other sources.

BROWSERS

Users browsing the various options for food or service listed on Yelp without having a preconceived thought of which offering to go with.

REVIEWERS

The more active participants in Yelp's user base; reviewers provide the content "refiners" and "browsers" read to learn more about a merchant by way of reviews.

MERCHANTS

On the other side of the user base are the businesses that are posted on Yelp. Although Yelp has the ability to add merchants themselves, merchants can also come in and "claim" their Yelp profile to engage with reviewers and provide additional detail about the products and services they provide.

Merchants can also capitalize on Yelp's features such as delivery/takeoff ordering, waitlisting, providing quotes for service, and advertising through premium placement.

This relationship between merchant and Yelp is B2B, and is different from the relationship Yelp has with refiners, browsers, and reviewers.
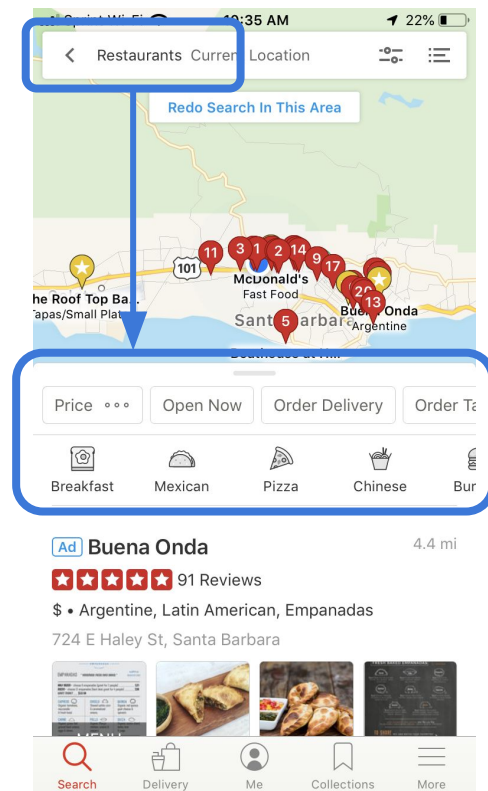
WHAT YELP DOES WELL

Filtering

Searching within reviews

WHAT YELP DOES WELL - Filtering

Yelp supports a user's refinement process in the primary use case of identifying a merchant through filters.

Yelp does well to progressively disclose the filter they feel are most-pertinent to the initially selected merchant category.

Here, I selected "Restaurants" and the proceeding view showed context-specific filters.
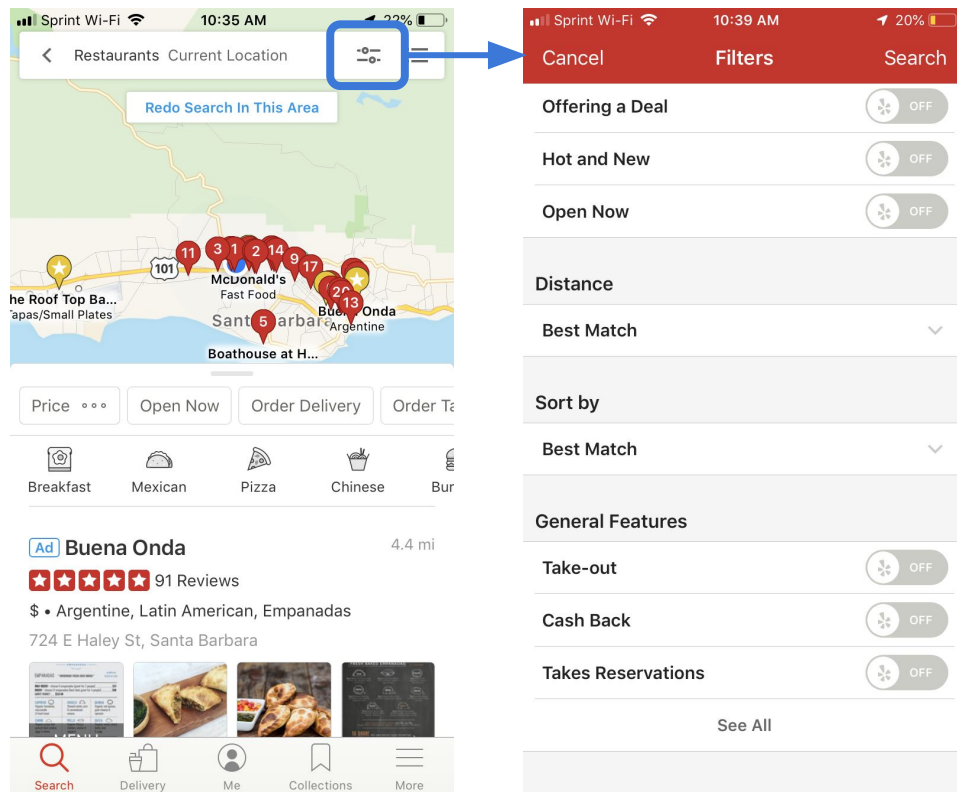
Yelp continues the progressive disclosure of filters with filter icon in the search bar.

Upon clicking their filter icon, you'll continue to see what Yelp feels are the most-important binary options.

The option simplicity keeps the user's cognitive load light when compared to having filter options with multiple options or ranges.

WHAT YELP DOES WELL - Filtering

The "See All" option also exposes additional options to users that may be on-top of mind, but not in the set of features Yelp makes available at the outset, again being mindful of a user's cognitive load through progressive disclosure.
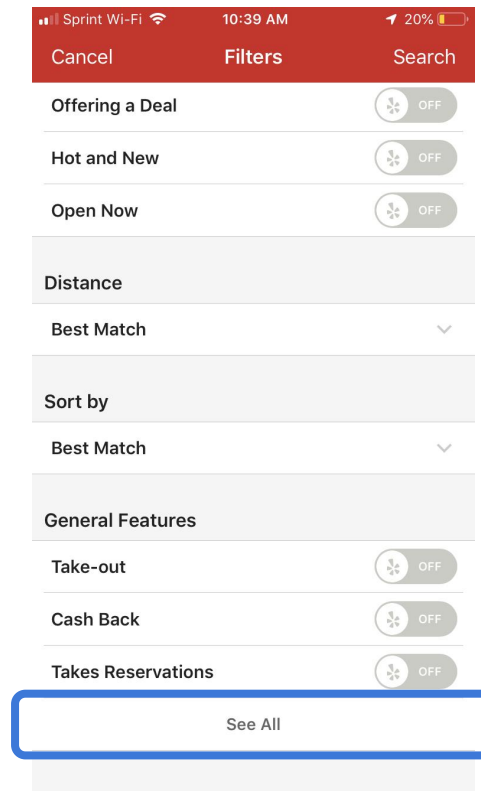
WHAT YELP DOES WELL - Filtering

These filters provide most specifically the "refiner" user type a bevy of options to sift through to get better understanding of if they want to patronize to this merchant or not.

These options include categories, seating options, and context about the merchant in regards to your needs and potentially the needs of others you may be going with.
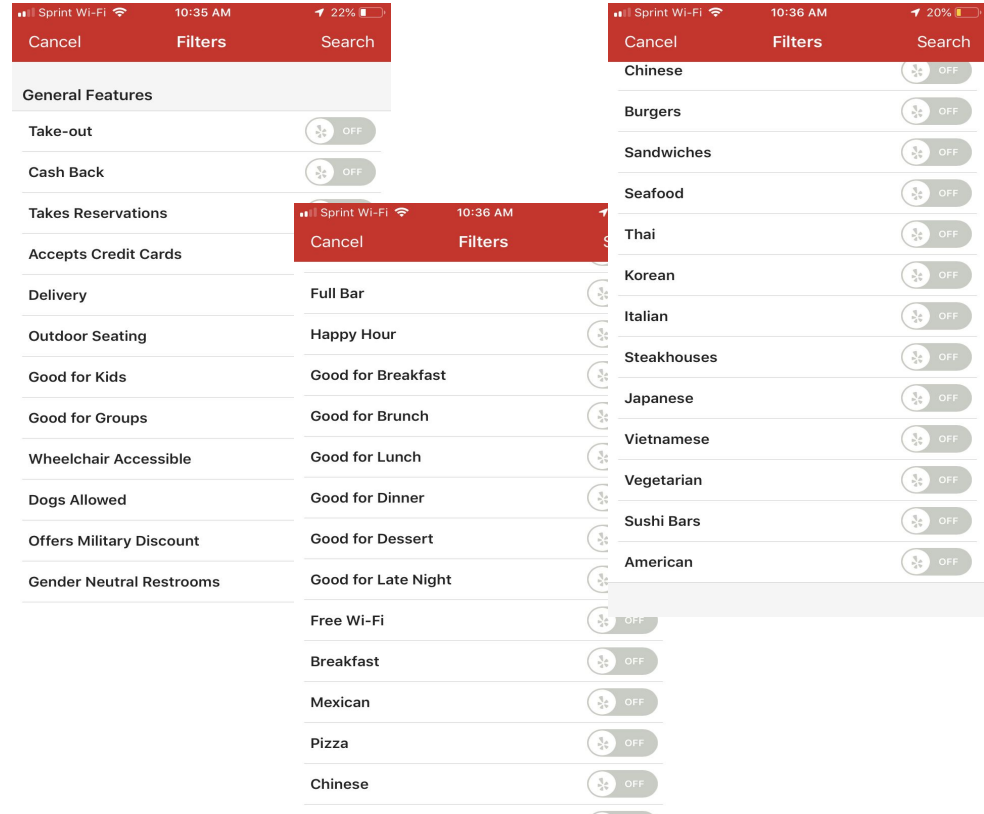
WHAT YELP DOES WELL - Searching within reviews

Yelp allows users to search not only for merchants, but allows for searches through reviews left by their users.

Allowing a user to search within the reviews for keywords important to them helps them refine their decision making process more acutely without having to perform advanced search logic like quotation marks.

Recommended Reviews for Zacatecas Restaurant

722 reviews mentioning "burrito" | Clear results ✕ | burrito 🔍

⭐⭐⭐⭐⭐

Start your review of **Zacatecas Restaurant**.

Ernesto D.
Paramount, CA
0 friends
3 reviews

⭐⭐⭐⭐⭐ 10/1/2018

Stopped by a couple of times and they don't disappoint. The toms **burrito** is no joke, good proportion/size **burrito** enough for 2. **Burrito** it self I give 5 stars

Was this review …?

👍 Useful   😊 Funny   😎 Cool

WHAT YELP DOES WELL

Yelp does a bunch of other things well too:

- Providing empty and loading states that give the user content to anticipate.
- Minimal clutter to distract the user from the primary use case of finding.
- Ad placement within their design system to additionally avoid clutter.
- Finding room for scalability, like introducing a waitlist and ordering set of features within the context of their primary use case.
- Consistent UI design between device form factors and platforms.
- Use plain language and signifiers (ex. highlighting) to describe what filters are in place.

Yelp's pretty great at keeping it simple and user-centric.

The "browsers" of Yelp are their to consume information. They have skepticism about the experience of providing reviews due to the transparency of their profile, when compared to anonymous options.

That said, it may be of great value for Yelp to learn more about the "browser" user type while their in-app to learn more about what their needs are and how they can become more engaged with the review features.

DESIGN SUGGESTION - Profile engagement for the "browsers"

One potential option Yelp could take to gather feedback from their "browsers" is providing a digest of their Yelp usage.

Using personal informatics like this can engage the user in the app and outcomes of using the app.

Providing them a search history over the course of a month, along with a simpler rating system gives the "browser" low-cost interaction, all-the-while providing feedback that Yelp and merchants can learn from.
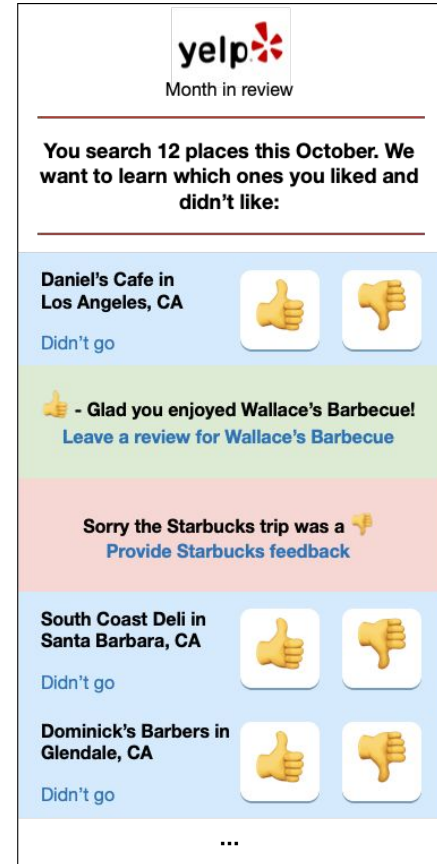
PAIN POINT - Showcasing the value of being a "reviewer"

Having observed friends, family, and colleagues use Yelp to refine and browse, rarely have I observed them leave a review about a merchant they recently or previously went to.

The backbone of Yelp is their reviewer user base and the reviews they leave. Some users may feel the duty to leave a review, but the opinions of other users could further fortify a merchant's reputation.

Even merchants will drop the phrase "give us 5 stars on Yelp!" after people go to their store, further emphasizing the value of a review itself, but what's in it for the user at the end of the day to leave a review? -- it's not completely clear.

Yelp can consider a middle ground between just being a user that leaves a review and being an "Elite" status user (which is a nomination/invite only feature).

Advertising Elite features may not be the best idea, since it is an invite only situation, and they may not have explicit features that all Elite members can capitalize on.

An experiment they could carry out this is one where they can gradually introduce explicit features, that can work at scale, as an intermediary between being a casual reviewer and "Elite" status reviewer.

One part of the experiment could be as simple as gamifying the experience into an explicit outcome of value to the user.

They have gamified in some regards with the "Compliments" section, but these icons are actually context-less (no hover effect or click to see what each of the icons mean)

In all, Yelp has a lot of "gamify-able" information at-hand displayed on a user's profile page. They have an opportunity to make this information more engaging to the user while at the same time providing them value in form of swag or discounts.
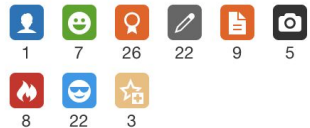
Rating Distribution

5 stars	100
4 stars	137
3 stars	60
2 stars	43
1 star	8
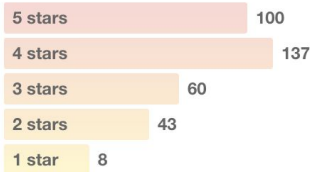
View more graphs

Review Votes
Useful **1107**
Funny **582**
Cool **649**

Stats
Tips **103**
Review Updates **8**
Firsts **8**
Followers **13**
Lists **3**

103 Compliments

1	7	26	22	9	5

8	22	3

To the right is an example of potential gamification where information available on a user profile can be used to celebrate their success:

A fine-line needs to be balanced here, where Yelp would not want to over-incentivize getting reviews to be voted on.

Yelp also would want to make the goal attainable by the potential "reviewer" user base to further reel them into the experience of reviewing.

The process requires some experimentation, but a high-value engagement feature could be introduced at the end of the project.
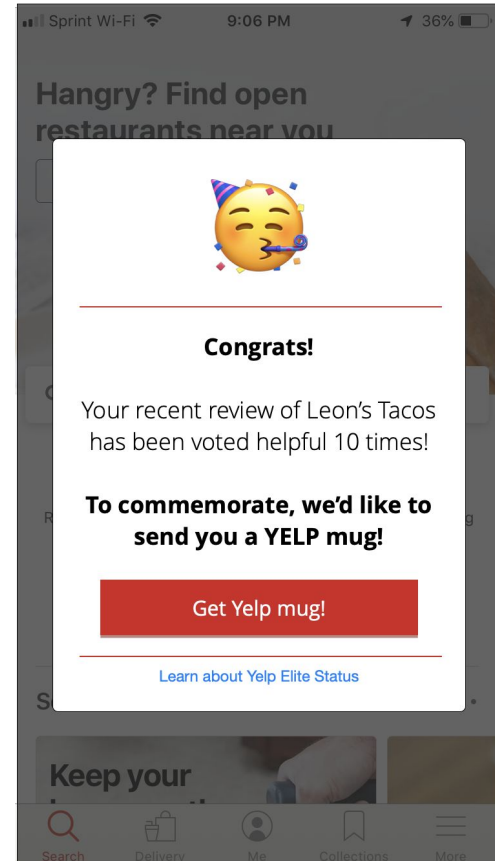
OVERALL...

Yelp does well at supporting all types of users within a simple interface concisely. Most use cases are well-considered in their design.

Yelp's main areas for improvement are around engaging "browsers" and "refiners" further. Taking chances with this user base may reveal more business opportunity that may have not been obvious based on the current app.

Keeping focus on their bread-and-butter search & review features allows them to design cleanly and with scale, while introducing enough complementary features to support users with their needs.