An UX/UI Case Study

# CorpDeck

Corporate card & Expense management (SaaS)

**Project Duration**
Five (5) Weeks

**Tools Used**
Figma, Miro, Zoom

## Overview

CorpDeck is a B2B SaaS helping business with corporate card and expense management. Its vision is to the next biggest expense management platform.

The aim of this project was to determine the essential features required by current and future users for the upcoming iteration of the product.

## Role

User Research, Interaction, Visual design, Prototyping & Testing.

## The Process

The key phases of my design process are Empathise, Define, Ideate, Prototype and Test. This project was focused on outcomes rather rather than output.

## Understanding the problem

The research and ideation for CorpDeck was primarily done by the founders with the help of a consultancy, and a beta release was made without any usability testing and little consideration for the technical and product limitations.

The purpose of this project is to uncover the pain points experienced by the users with the existing release of the product and develop solutions to address these pain points. Also to determine if any essential features are required by users for the upcoming iteration of the product.

My research encompassed:

- Understanding the user goals and needs
- Uncovering pain points with the existing user journey
- Determining the success & severity of the tasks measured

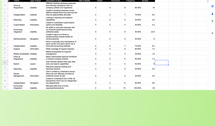
## Gathering insights

After collecting the recordings from the user interviews, I contacted a few designers from different design communities and requested them to help with affinity mapping and synthesizing the identified pain points. We collaborated to group the issues based on common themes.

To inform my process and prioritise the list of user needs and pain points, I utilised a data-driven approach called the severity framework. This framework enables the identification of the severity score of a user goal based on the following three variables:

**Task criticality x Impact x frequency = severity**

- **Task criticality** - how important is the task to the user? (1 = low, 5 = critical)
- **Impact** - how much of an impact does this issue have on the user's task? (1 = suggestion, 5 = blocker)
- **Frequency (%)** - how many times does this come up out of total participants?



## Prioritisation of issues

To prioritise usability issues, we used a combination of severity and the significance of the use case. The severity framework helped us to identify the most critical problems by considering the frequency, impact, and persistence of the issue. In addition, we also considered whether the issue impacted a major use case for our users. By taking into account both severity and use case importance, we were able to focus our efforts on the most significant problems that had the greatest impact on the user experience.

| # | Theme | Total severity score | UX effect |
|---|---|---|---|
| | Policy & Regulations | 21.2 | High |
| | Categorisation | 20.4 | Low |
| | Reporting | 10.5 | High |
| | Customisation | 6.4 | Mid |
| | Accounting Integration | 4.8 | High |
| | Reimbursement | 8 | Low |
| | Support | 5.6 | Low |
| | Mobile Accessibility | 3.6 | High |
| | Search | 5 | Low |
| | Vendor Management | 4.8 | Low |

## Defining the scope of work

After conducting user interviews with 10 individuals regarding the need for Accounting Integration, we identified the following major issues:

- **85%**, expressed that **manually entering every transaction** of the same type or from the same vendor into the accounting software was a **burdensome and time-consuming task**.
- Out of all the users, **40%** desired the **ability to filter transactions by specific vendors & dates**, allowing them to determine the total amount spent on each vendor.
- A notable **60%** of users expressed their desire for all expenses recorded in CorpDeck to be **automatically synchronised with the relevant categories in the accounting software**.

## Wireframing the solution

After recognising the aforementioned issues, I worked on addressing these concerns by formulating potential solutions:

- Selecting all **transactions by a particular vendor and code it to specific expense category**.
- Addition of a **search field and filter options** to further narrow down the search
- Feature allowing users to **match expense categories across CorpDeck with popular accounting software**.

After ideation and brainstorming, it was concluded that expense category mapping of CorpDeck with major accounting software can achieve the above goals. I started wire-framing the solution to achieve the above solutions along with involving stakeholders and development team through out the process.

## Testing and Designing the solution

During the usability testing, participants were shown wireframe designs and were asked to complete tasks to help us understand how well the designs help them achieve their goals. I observed their interactions with the designs and asked follow-up questions to understand their thought process and experience. Through this process, we found that users were able to successfully navigate through the screens and map transactions to relevant categories of popular accounting software.

I also noted feedback on the designs presented, which will be reviewed in future iterations to improve the overall usability of the software.

## Key learnings

- **Strategically approach while planning to design an MVP** - It helps prioritising pain points and user goals which in turn helps to define the scope while designing an MVP, particularly when faced with multiple issues.
- **Testing continues even after developing** - Continuous testing after launch is essential for improving usability and ensuring a positive user experience by identifying and addressing issues and areas for optimization

Thank you for your time.