Final Portfolio

Mihir Shah

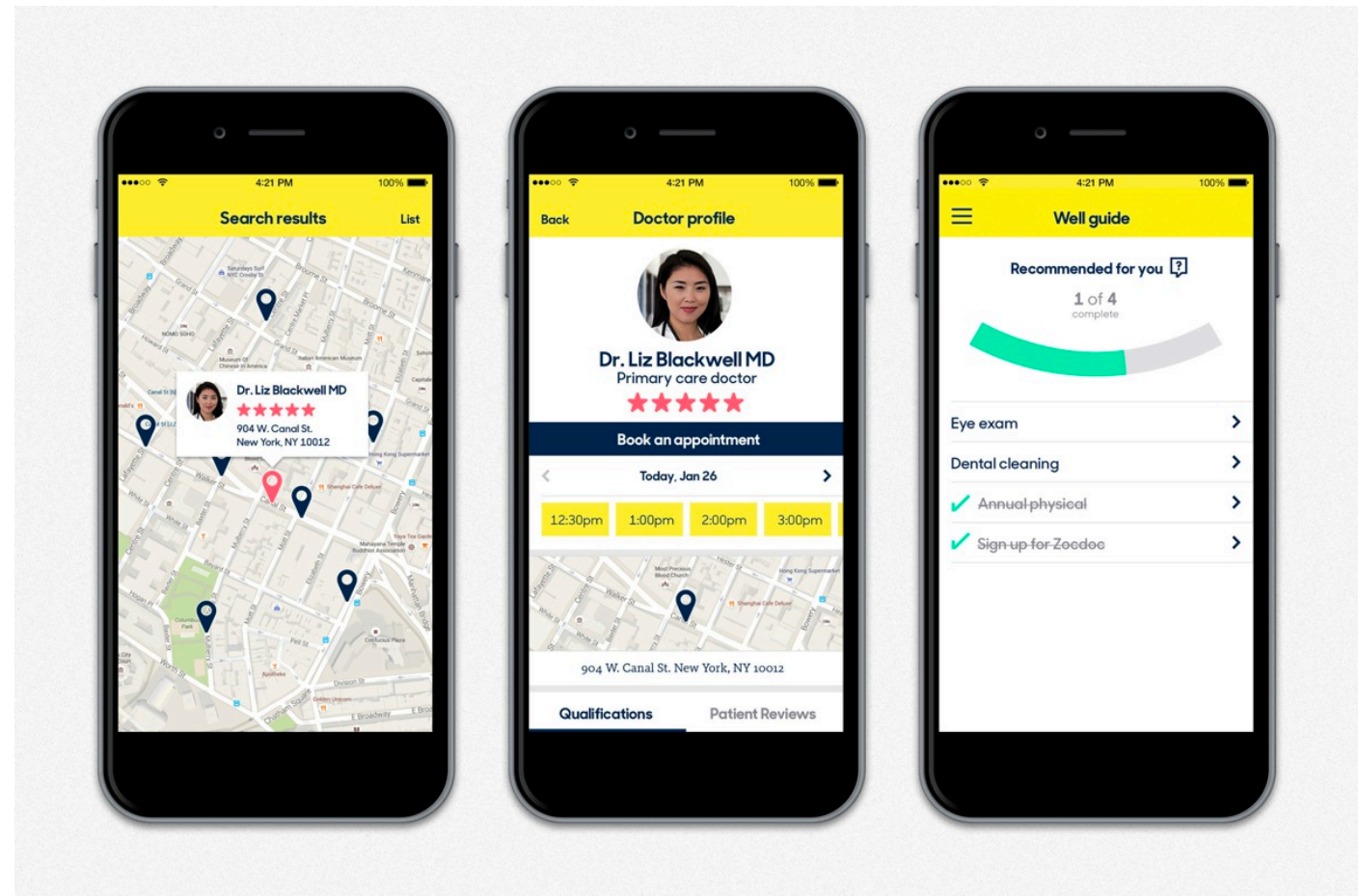# COMPETITIVE ANALYSIS

ZOCDOC

JINNITO

Zocdoc

The first competitor I analyzed is *Zocdoc.*

Zocdoc is an online medical care appointment booking service, providing free of charge medical care search facility for end users by integrating information about medical practices and doctors' individual schedules in a central location.

Zocdoc

Strengths

- Allows users to compare multiple doctors/physicians

- Gives users the option to filter results based on availability, location, health insurance, etc.

- Excellent UI

Weaknesses

- Doesn't allow user to filter based on symptoms

- Lack of social media presence

- Physician profiles do not have links to their social media page

Opportunities

- Physician profiles could see more improvements

- Option for users to review and provide patient feedback

- Option to see estimated cost

Threats

- Too many negative reviews online on *Trustpilot*

- There are better navigation tools online to help patients find the right physician

Jinitto

The second competitor I analyzed is *Jinitto*. It is an all-purpose expert app that helps a user find a trusted expert online for professional advice.

Jinitto

Strengths

- Broad categories of experts

- Professionals are vetted and users can instantly connect via video, audio or chat

- Users can get immediate expert assistance from browsing profiles

Weaknesses

- No reviews on Apple or Google store yet

- Lack of social media presence

- Little over a 1000 downloads as the platform is still new

Opportunities

- *Jinitto* could do more marketing to gain a social media presence and offer incentives to customers who write reviews

- *Jinnito* could also advertise on career websites to find professionals seeking income

Threats

- The app is not available for USA customers and is limited to European markets

- There are many competitors in the market and it has not met it's funding target of £400,000 on InvestorConnected

Overview

INSTA-Expert is a smartphone app that enables a user to instantly find a local expert based on the following categories:

- Health Expert
- Relationship Expert
- Career Expert
- Life Expert
- Legal Expert
- Finance Expert

Instant Expert's goal is to help users instantly connect with a verified expert based on location, in-network pricing, availability and customer reviews.

User Personas

Creating user personas was a fun task and kept my creative juices flowing on what a typical user for my expert app might be.

I ended up creating four characters in different settings and at different stages of life. Each character has a different reason why they want to see an expert to help solve the problems they are facing in their lives. It also explains the different types of experts that will be available on my expert app and how it will cater to a wide audience across different demographics and geographies.

MICHAEL | 26 YEARS OLD

Occupation: Seeking Employment
Location: New York
Relationship Status: Single
Education: Business Accounting Graduate from NYU

◉ **Goals and Needs** | Micheal is a recent NYU graduate and is seeking a career opportunity at a financial firm in NYC. He is seeking an expert who can prepare him to be more confident at interviews and land a job of his dreams. He would like to get coaching from a certified expert who has a track record of successfully landing people in his background at reputable financial firms through intensive one-on-one coaching.

◉ **Motivations** | Michael is a driven individual who enjoys the city life and would like to continue living in New York rather than moving back to New Jersey where his family is from. He knows that the only way to afford living in a city is to find a job in his field of education and do immense preparation to get a job within the next three months.

◉ **Frustrations** | Michael doesn't have enough of money to live in the city for more than three months. He doesn't have time to waste because he needs to find a job or move to a city where the cost of living is cheaper. He has no family in New York to support him and lives by himself in a shared apartment with roommates who all landed a job at successful firms. He has no idea how to get help from a mentor.

◉ **Lifestyle** | Micheal typically spends his day looking at opportunities online and attempts to network with his LinkedIn connections. He also attends career fairs and meetups to build new connections. During his down time, Michael spends time with his roommates and friends at a bar or in a coffee shop.

◉ **Device and Internet Usage** | Michael spends majority of his time working on his smartphone and laptop. He uses his phone to apply for jobs on apps such as LinkedIn or Indeed as well as registers for events on the Meetup app. On his laptop, Michael typically works on his resume and portfolio.

◉ **Quotes** | "I need to get a job faster and would like to see an experienced career coach who can help me prepare for interviews, improve my portfolio and land a job a successful financial firm in NYC."

CATELYN | 54 YEARS OLD

Occupation: Teacher
Location: Seattle
Relationship Status: Widow
Education: English Major from UW

- **Goals and Needs** | Catelyn recently lost her spouse over a terminal illness and is looking to stay healthy in order to live a longer life. She is on the lookout for a health expert and is finding a hard time maintaining a healthy lifestyle due to stress. Because her schedule is busy with teaching and grading papers, she won't have time to see an expert in person, but would like to see one via video call.

- **Motivations** | Catelyn is motivated to stay healthy because she has newly born grandkids and would like to stay active and healthy in order to see them as they grow older. She is motivated to improve her happiness and stay more active.

- **Frustrations** | Catelyn lives by herself at her house and finds it difficult to socialize and connect with health experts. She has to manage the house herself and gets less exercise and time to focus on her health. She can feel her health declining daily and would like to become more healthy.

- **Lifestyle** | Catelyn's lifestyle is sedentary and she spends most of her day grading papers and preparing for her lectures. She cooks dinner for her kids on the weekends as well as spends time with her newly born grandchildren.

- **Device and Internet Usage** | Catelyn spends majority of her time using her iPad to take notes, play games, explore the web and FaceTime her family. She also uses a smartphone.

- **Quotes** | "I can feel my health declining and I would like to do something about it now before it is too late. I don't have time to visit a health expert during the week so I would like to see one virtually and get health advice during my off hours."

SARAH | 35 YEARS OLD

Occupation: Executive Assistant
Location: Miami
Relationship Status: Married with two kids
Education: Communication Major at Miami University

- **Goals and Needs** | Sarah is a hard-working executive who is having relationship problems with her husband. She spends a large chunk of her time working and taking care of her children. She feels like she has less time to spend with her husband and her stressful life is causing hardships in her marriage and they argue more as a couple. She would like to see a relationship expert before it is too late.

- **Motivations** | Sarah is goal-oriented and effectively gets her job done, both professionally as well as her personal life. She is facing martial difficulties but loves her husband very much so she is willing to do what it takes to get help and seek couples counseling.

- **Frustrations** | Sarah is frustrated because she feels like she is doing more for the household than her husband. She is the breadwinner of the family so she feels the pressure and wishes that her husband is more involved in their domestic life. She would like to have free time for herself but her busy schedule is makes it hard for her to be alone and in peace.

- **Lifestyle** | Sarah works 60 to 70 hours a week in addition to doing some of the house chores such as cleaning, taking care of her kids, and ensuring her kids do their homework after school. On the weekends, Sarah is caught up with errands and spends time with her family when she has the free time.

- **Device and Internet Usage** | Sarah uses a laptop to do most of her work but also uses her smartphone to connect with friends and family.

- **Quotes** | "My relationship is falling apart and my husband and I have increased arguments each day. I would like us to visit a an experienced relationship expert who can save our marriage through effective couple's counseling."

NICHOLAS | 30 YEARS OLD

Occupation: Software Engineer
Location: SF Bay Area
Relationship Status: Single
Education: Computer Engineering graduate from UCSF

- **Goals and Needs** | Nicholas is having issues with his landlord and would like to get help from a legal expert who can help him avoid paying a sharp rent increase by 25% or moving out. Nicholas needs to understand the law and find out why his landlord is trying to capitalize on him knowing that he got a new job. Nicholas would like to consult with an experienced attorney who has handled landlord-tenant cases.

- **Motivations** | Nicholas is a hard-working self starter who just landed a job at Apple three months ago. His goal is to save money and continue renting a one bedroom apartment for a few years until he saves enough money to buy a house.

- **Frustrations** | Nicholas lived in the same apartment community for two years but and never had to pay a rent increase more than 6% until recently when he landed a new job. His landlord is aware of his job so he decided to raise the rent on Nicholas. Nicholas knows how competitive the housing market in the Bay Area is and he is unhappy how landlords have the upper hand in the Bay Area over tenants.

- **Lifestyle** | Nicholas spends 60 to 70 hours a week working as an Engineer at Apple. During his free time, he spends time with his girlfriend and meets his parents during the weekends who live in San Jose.

- **Device and Internet Usage** | Nicholas uses an iMac desktop computer at home as well as his iPhone and MacBook. He enjoys downloading new apps from the App Store to test them out.

- **Quotes** | "I need to urgently see a legal expert before my landlord becomes successful in taking advantage of me and increases my rent by 25%. By all means, I cannot afford this since I just started my new job few months ago. I need help fighting back and using the law to my advantage."

User Journey Map

Building user journey maps involved creating a scenario for the user personas which would trigger them to get the help of an expert by using my app.

The journey map for each persona involves different **phases** the user will go through, the list of **tasks** they will accomplish at each phase, they **thoughts** the user might have upon completing these tasks, and the **emotions** the user might have at each phase of the process. Finally, I listed a few potential **opportunities** that I could add to each phase while the user is going through each phase so that the overall process of getting from point A to point B is seamless and frictionless.

MICHAEL | 26 YEARS OLD

Scenario: Micheal has never consulted with a career expert before but it has crossed his mind recently after graduating from college. He is looking to use our app to enable him to find a seasoned expert in his field of experience so that he can get the right advice on job hunting tactics, acing interviews with potential employers and negotiating a salary.

Occupation: Seeking Employment
Location: New York
Relationship Status: Single
Education: Business Accounting Graduate from NYU

Phases			
Tasks	**Browse for career experts**	**Filter experts based on criteria**	**Book an appointment**
Thoughts	• Pick 'Career Exerts' from the search categories • Favorite experts based on search criteria	• Filter favorited experts based on price, availability and years of experience • Select profile of the most seasoned expert based on years of experience	• Look for the most suitable date and time • Book an appointment via video call • Make a payment deposit to confirm appointment
Emotions	"Alright, let's see if I can actually get help"	"There's a huge list. Let's narrow it down a bit based on my budget and schedule"	"Alright, let's nail this down. I'm hopeful"
	Determined 🤔	Overwhelmed 😖	Optimistic 🙂
	• Having 'Career' as an option for one of 6 main expert categories • Add a board where the user can save favorite experts	• Add features to filter experts based on price, years of expertise • Add detailed bios on expert profiles for the user to see	• Include a calendar for the user to select their desired appointment date and time • Give the user an option to book via phone, video, or in-person call. • Allow user to pay deposit via Face ID

CATELYN | 54 YEARS OLD

Scenario: Catelyn has not seen a doctor in five years since her husband left the world. She believes that seeing a specialist will suck up her live savings and so she has been resistant. However, she has been experiencing fatigue and declining health so she would like to use our app to find a provider in network with her insurance.

Occupation: Teacher
Location: Seattle
Relationship Status: Widow
Education: English Major from UW

Phases

Enter insurance information	Browse experts in-network	Schedule a visit

Tasks

Enter insurance information
- Enter insurance provider name and code on her profile billing page
- Enter her HSA card information

Browse experts in-network
- Browse for experts based on location
- Toggle switch to filter experts based on her insurance provider
- Type in her symptoms to narrow search

Schedule a visit
- Select profile of the most relevant expert
- Browse calendar to select date and time
- Schedule a consultation appointment

Thoughts

"I refuse to see a provider out of my network coverage"

"It's good to hear I can find an in-network provider in my area"

"Alright, let's nail this down. I'm hopeful"

Emotions

Anxious 😕

Hopefull 🙏

Determined 😏

Opportunities

Enter insurance information
- Allow the user to browse their insurance provider under the 'Billing' page
- Allow the user to enter their HSA card details as their primary payment option

Browse experts in-network
- Allow users to explore experts based on their network provider and location
- Allow users to filter experts based on their health symptoms

Schedule a visit
- Allow user to book an in-person consultation without a deposit
- Make the user aware of billing codes for the insurance as well as any out-of-pocket expenses if any

Illustration of User Flows

Illustrating user flows was an engaging process for me because it allowed me to think in a strategic manner on what actions need to be accomplished in order to achieve the end result of accomplishing a milestone.

For each persona, I created a **user story** that describes the motive behind the user for using my expert app. Then I created an **entry point** and **success criteria** for the overall process of getting from point A to point B. This allowed me to build a logical pathway for a user flow for each of my personas.

CATELYN | 54 YEARS OLD

Occupation: Teacher
Location: Seattle
Relationship Status: Widow
Education: English Major from UW

User Story: As a person who has a hard time maintaining a healthy lifestyle due to stress and my busy work life, I would like see an expert in network with my medical provider so that I can reverse my fatigue and declining health and at the same time not rack up medical debt by paying out of pocket.

Entry Point: Open app
Success Criteria: Browse experts covered by insurance

Open App

New User: Create Account

Login and watch optional tutorial

Watch or skip tutorial after setting account

Existing User: Sign Into App

Dashboard

Settings

Update insurance details under the billing settings and add HSA card for payment

Billing Information: Add Insurance Provider and HSA Card Details

Return to Dashboard

Search Experts

Toggle On Switch to Filter Experts by Provider

Browse Experts

Toggling the 'ON' switch on the search page next to 'filter by insurance provider' ensures that the user only see experts who are covered by their insurance

Search Experts by selecting 'Health Experts' under categories or manually search for health providers on the search bar

SARAH | 35 YEARS OLD

Occupation: Executive Assistant
Location: Miami
Relationship Status: Married with two kids
Education: Communication Major at UM

User Story: As a breadwinner wife and mother of two who is currently facing martial difficulties in my personal life, I would like to see a relationship expert to resolve conflict with my husband so that we get couples counseling and save our marriage.

Entry Point: Open app
Success Criteria: Book a video consultation with a relationship expert

Open App

New User: Create Account → Login and watch optional tutorial

Watch or skip tutorial after setting account

Existing User: Sign Into App → Dashboard → Search Experts → Filter Experts → Select Expert Profile

Select 'Relationship Experts' under expert categories or manually search for experts using the search bar

Filter experts based on availability, location, price, etc.

Pick profile of the desired expert by clicking on their profile

Select Expert Profile → Pick a Date and Time → Schedule Appointment → Phone Call / Video Call

Choose a consultation appointment via video or phone call

Phone Call / Video Call → Add to Calendar

Select option to add appointment to Apple, Google or Outlook calendar

NICHOLAS | 30 YEARS OLD

Occupation: Software Engineer
Location: SF Bay Area
Relationship Status: Single
Education: Computer Engineering graduate from UCSF

User Story: As someone who is having issues with my landlord who increased my rent upon finding out about my new job, I would like to find the right legal expert profile so I can avoid paying a 25% increase in rent to renew my lease.

Entry Point: Open app
Success Criteria: Add legal experts to 'Favorites List'

Open App

New User: Create Account → Login and watch optional tutorial

Watch or skip tutorial after setting account

Existing User: Sign Into App → Dashboard → Search Experts → Filter Experts → Browse Expert Profiles

Select 'Legal Experts' under expert categories or manually search for experts using keywords on the search bar

Filter experts based on availability, location, price, years of practice, etc.

Click on the back arrow to go back and repeat process if needed

Click on back arrow to continue browsing

Open Profile

Browse Expert Profiles → Open Profile → Click on 'Heart' icon to favorite

The heart icon on the expert's profile allows a user to add them to favorites list

View list of favorited experts ← Access 'Favorites' icon from the tab bar ← Click on 'Heart' icon to favorite

User now has the freedom to pick the expert profile they like the most

Click on the 'heart' icon on the bottom navigation bar to access favorites menu

Initial Sitemap

Splash Screen

Register → Onboarding/Optional Tutorial

Login ↔ Forgot Password

Home/Dashboard

Profile/Settings
- Profile Photo/Bio
- Account and Billing
- Insurance Provider
- Language
- Location
- Reminder Settings
- Support/Help

Messages/Notifications
- Inbox

Search
- Keyword Search ↔ Category Search
  - Expert Profile
    - Favorite
    - Schedule Appointment
      - Video/Phone/In-person
        - Add to Calendar
    - Message

Favorites

Appointment Calendar
- View Upcoming/Past Schedule

Revised Sitemap

```
                                    Home Page
        ┌──────────┬──────────┬────────┼──────────────┬────────────┐
        ▼          ▼          ▼        ▼              ▼            ▼
 Account/Settings  Search    Profile  Expert Profile  Calendar    Messages
        │          │           │           │              │
        ▼      ┌───┴───┐       ▼           ▼              ▼
 Account Billing Keyword  Category  Change Bio    Send Message  My Appointments
        │      Search    Search        │              │
        ▼          │                   ▼              ▼              ▼
 Change Payment   ▼               Change Photo   Schedule       Notifications
      Info     Favorites                        Appointment
        │                                           │              ▼
        ▼                                           ▼         Upcoming/Past
 Change Insurance                            Video/Phone/In-person  Appointments
    Provider                                       │
        │                                          ▼              ▼
        ▼                                    Add to Calendar   Reminders
 Change Phone
    Number                                         │
        │                                          ▼
        ▼                                    Add to Favorites
 Chanfe Passowed
        │
        ▼
 Change Language
        │
        ▼
 Help/Support
```

Navigation for Mobile & Desktop

User Flow 1

User Flow 2

User Flow 3

New User: Create Account → Login and watch optional tutorial

Watch or skip tutorial after setting account

Existing User: Sign Into App → Dashboard → Search Experts → Filter Experts → Browse Expert Profiles

Select 'Legal Experts' under expert categories or manually search for experts using keywords on the search bar

Filter experts based on availability, location, price, years of practice, etc.

Click on the back arrow to go back and repeat process if needed

Click on back arrow to continue browsing ← Open Profile

The heart icon on the expert's profile allows a user to add them to favorites list

View list of favorited experts ← Access 'Favorites' icon from the tab bar ← Click on 'Heart' icon to favorite

User now has the freedom to pick the expert profile they like the most

Click on the 'heart' icon on the bottom navigation bar to access favorites menu

Hand Sketches

Wireframe 1: Register/Sign In and Dashboard

Wireframe 2: Browsing Experts & Expert Profile

Browsing Expert Profiles

- Top Navigation
- Date

Expert Profiles List View

< Thu, Jan 23 >

★★★★★ (24)

★★★★★ (45)

★★★★★ (119)

- Bottom Navigation

Expert Profile Page

switch profile

message

Pick date

Phone, video or in-person meeting

switch profile

- favourite

★★★★★ (65)

- reviews

< Thu, Jan 23 >

1 PM   4 PM

- select time for appointment

Add to Calendar

- Schedule Appointment

Wireframe 3: Settings Menu & Calendar

Wireframe 4: Messages, Profile Menu, Favorites

Wireframe 5: Desktop Version

Digital Sketches

Step 1: Register/Sign in

Mobile Version

INSTA-Expert

09:52 AM

Sign In

Register

Forgot Password

Step 2: Find an expert in the dashboard

Mobile Version

Filter by Provider

gynecologist

Or Pick from the below categories...

Health Expert

Relationship Expert

Life Expert

Career Expert

Finance Expert

Legal Expert

Or swipe right to browse by expert profiles...
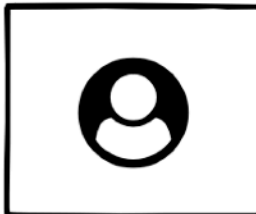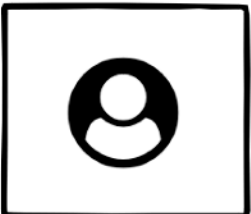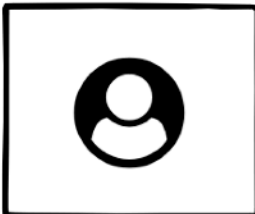
Step 3: Browse experts and book appointment

Mobile Version

09:52 AM

Filter by Provider

gynecologist

★ ★ ★ ★ ⯨

(65 reviews)

Thu, Jan 23

1 pm	4 pm	6 pm
Phone	Video	In-person

Schedule

Step 4: View past/upcoming appointments

Mobile Version

⚙ 📅 📍 Filter by Provider ⬤—

🔍 **gynecologist**

Past	Upcoming

Thursday, January 23rd at 1 pm

Dr. Smith - Gynecologist
Directions: 1040 4th St. NE,
Washington DC, 20011
Go to 'Messages' to fill in paperwork.

★★★★⯪
(65 reviews)

ⓧ   ↻

Monday, February 3rd at 4 pm

Dr. Han - M.D.
Directions: 777 13th St. NW,
Washington DC, 20005
Go to 'Messages' to fill in paperwork.

★★★★★
(34 reviews)

ⓧ   ↻

Wednesday, February 12th at 10 am

S. Goodman - Law Expert
Directions: 850 Quincy St. SW,
Washington DC, 20010
Go to 'Messages' to fill in paperwork.

★★★★
(119 reviews)

ⓧ   ↻

🔍   📅   ✉   👤   ♡

Step 1: Browse experts on the home screen

Desktop Version

Step 2: Book appointment

Desktop Version

Desktop

Filter by Provider

gynecologist | Thu, Jan 23
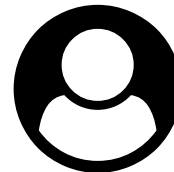
★★★★⯪
(65 reviews)

| 1 pm | 4 pm | 6 pm |

Phone Video In-person

Schedule

Step 3: View past/upcoming appointments

Desktop Version

Filter by Provider

gynecologist

Thu, Jan 23

Thursday, January 23rd at 1 pm

★★★★⯪
(65 reviews)

Dr. Smith - Gynecologist
Directions: 1040 4th St. NE,
Washington DC, 20011
Go to 'Messages' to fill in
paperwork.

Monday, February 3rd at 4 pm

★★★★★
(34 reviews)

Dr. Han - M.D.
Directions: 777 13th St. NW,
Washington DC, 20005
Go to 'Messages' to fill in
paperwork.

Past

Upcoming

Low Fidelity Prototyping: Paper & Sketches

Mobile Version

Function 1: Onboarding
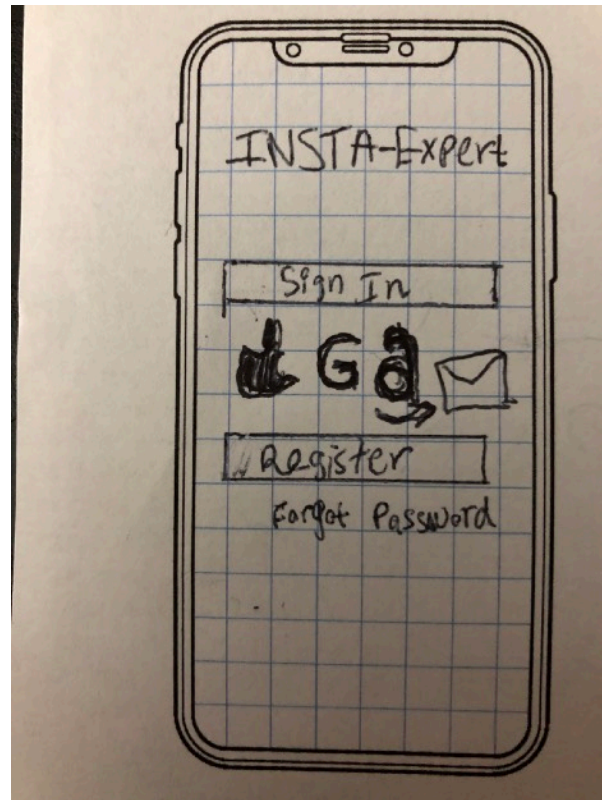
Splash Screen
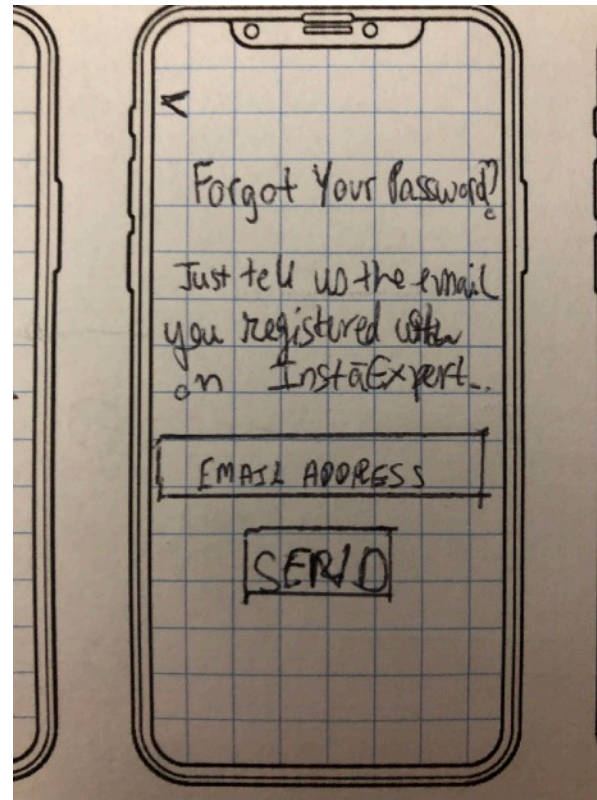
When user clicks 'Forgot Password'
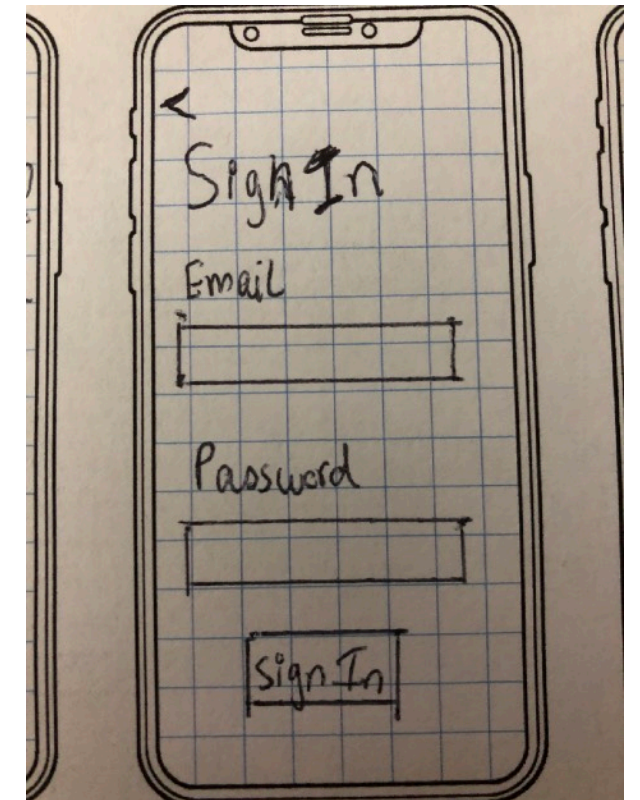
When user signs in via email

When user registers account
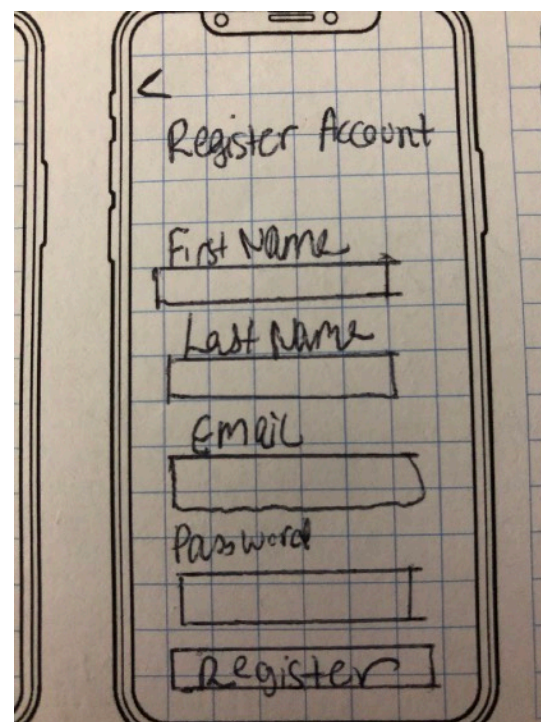
When user successfully signs in to access dashboard
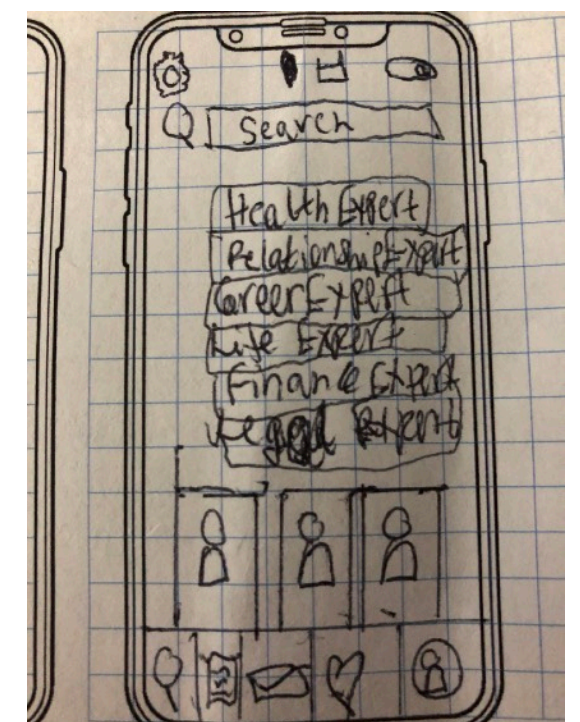
Function 2: Scheduling Appointment
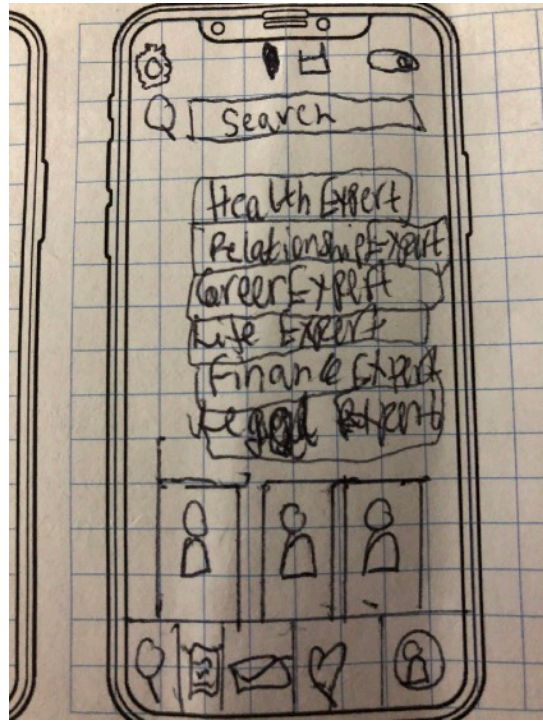
Dashboard Menu
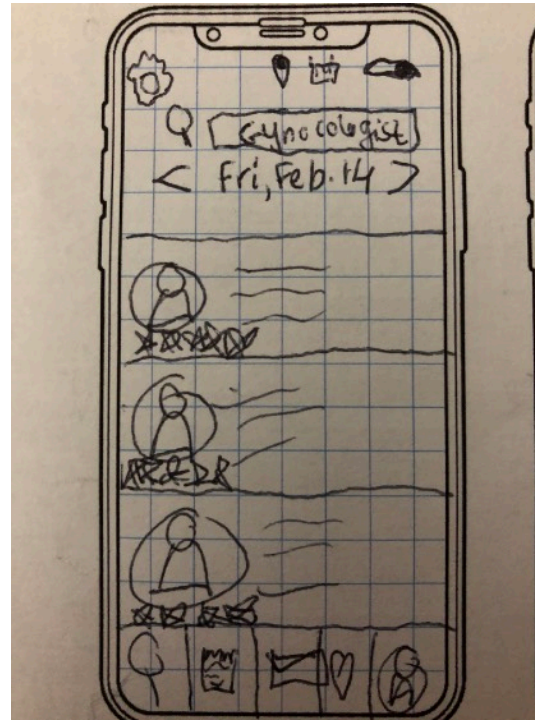
User Searches for 'Gynecologist'
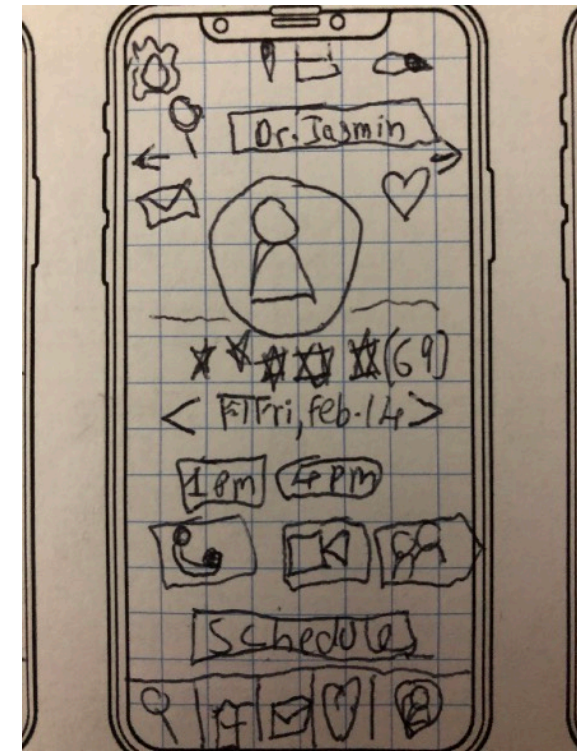
User Clicks on Doctor's Profile to Schedule Appointment

User's Appointment is Scheduled on Calendar
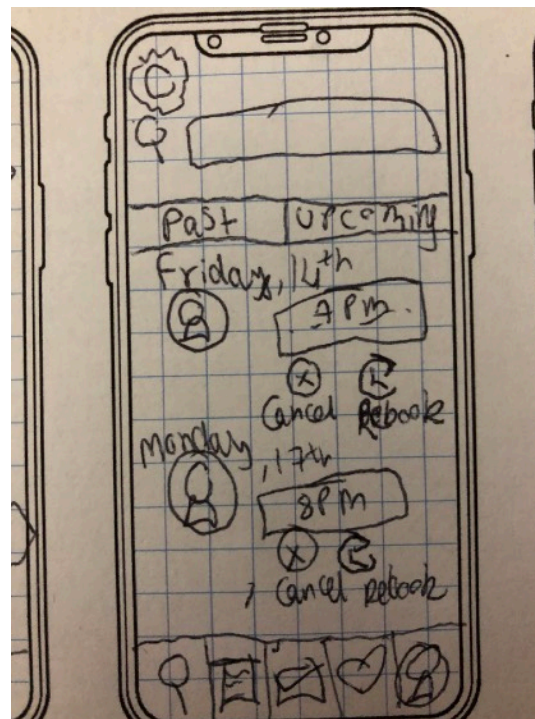
Function 3 : Accessing Inbox and Favorites
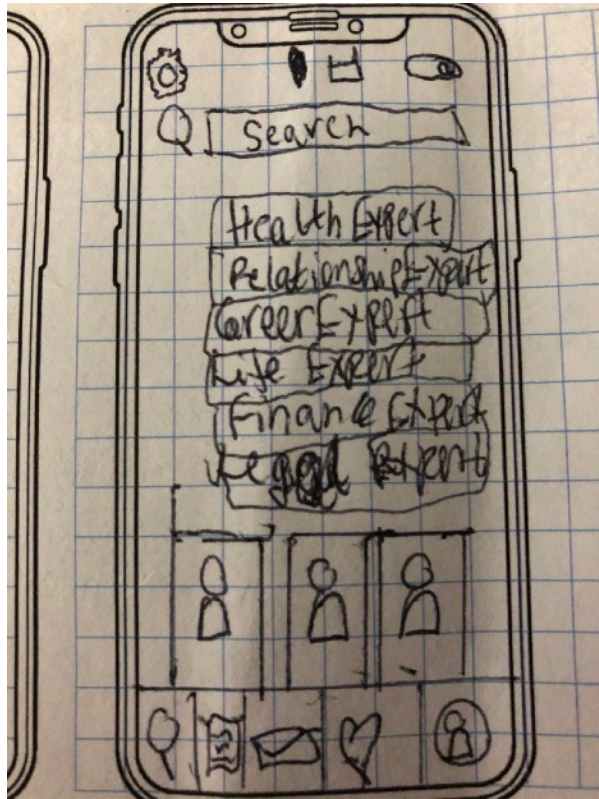
Dashboard Menu
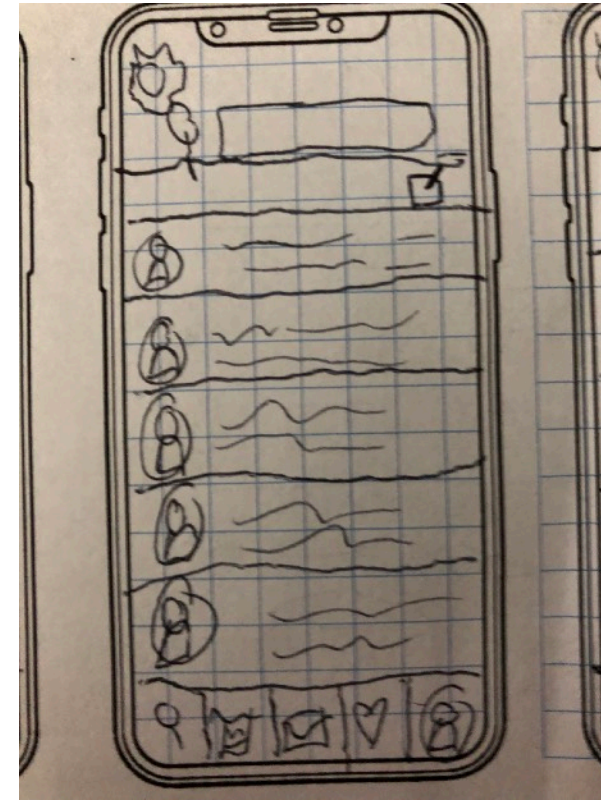
User Clicks on 'Mail' Icon to Access Inbox

User Clicks on 'Heart' Icon to Access Favorites
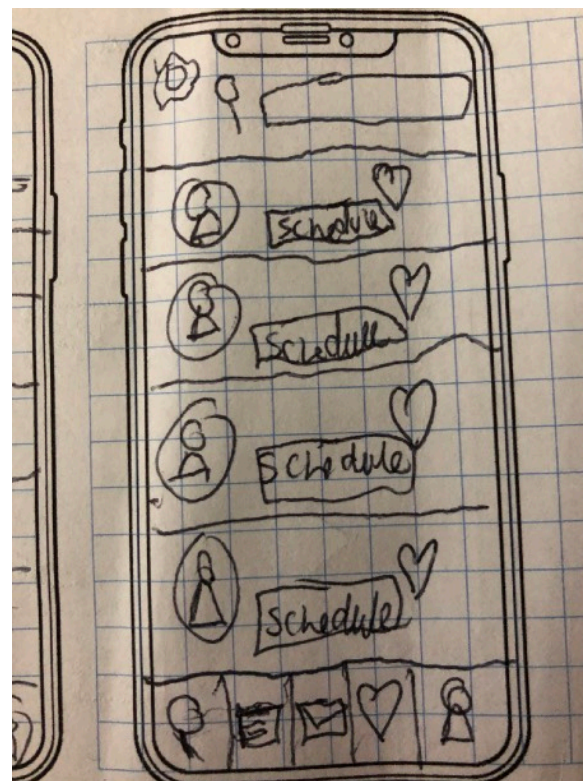
Desktop Version

Function 1: Browsing Providers and Scheduling
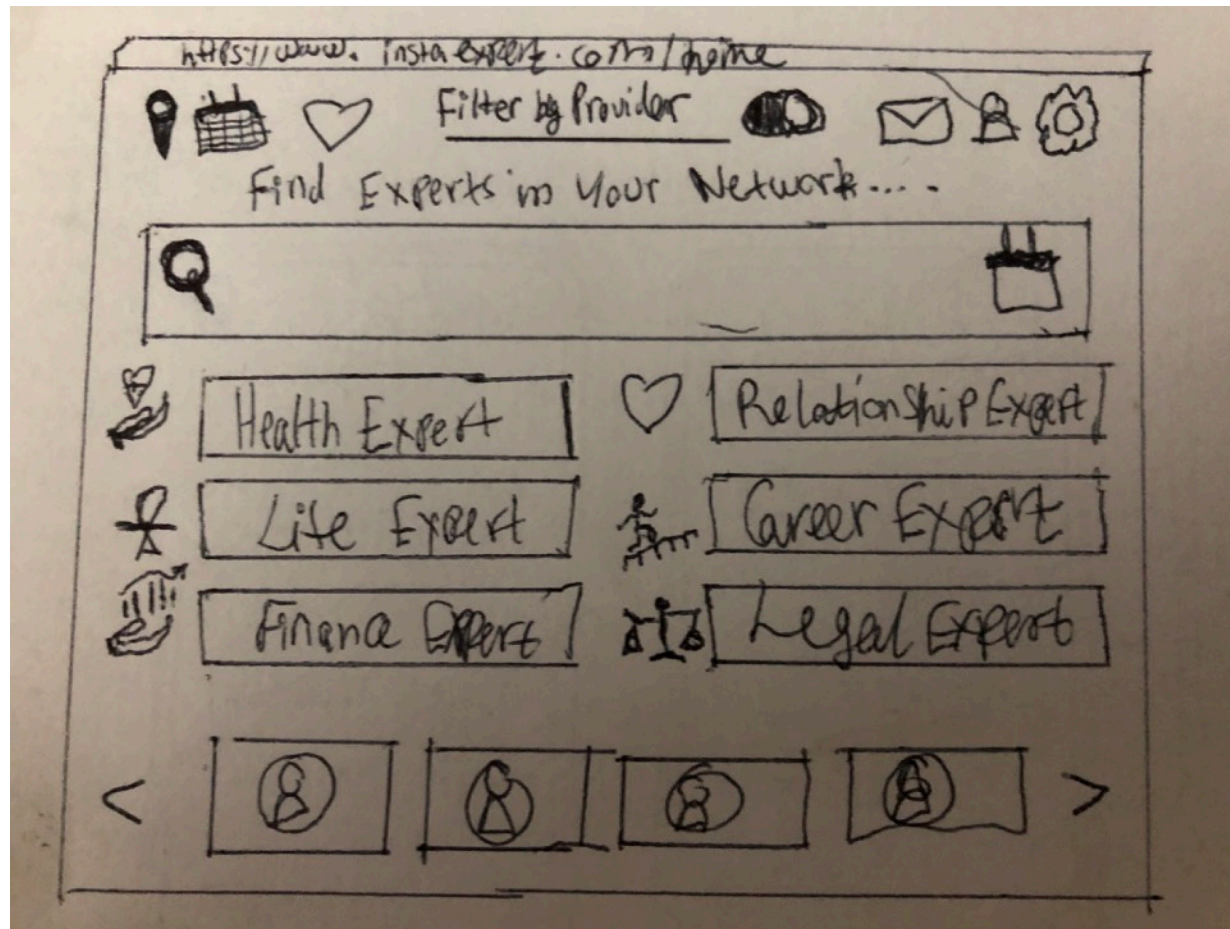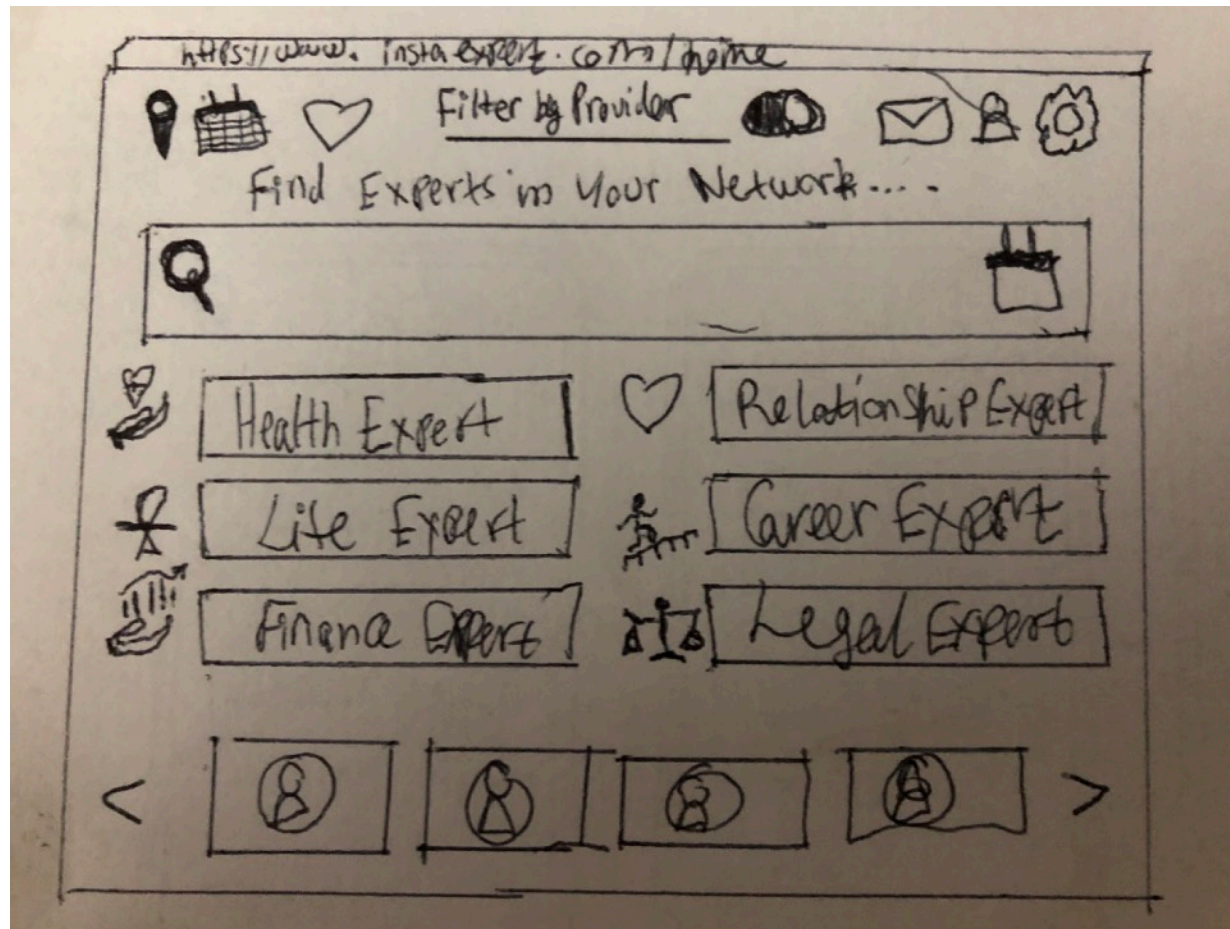
User Visits Website to Browse Experts in the Homepage
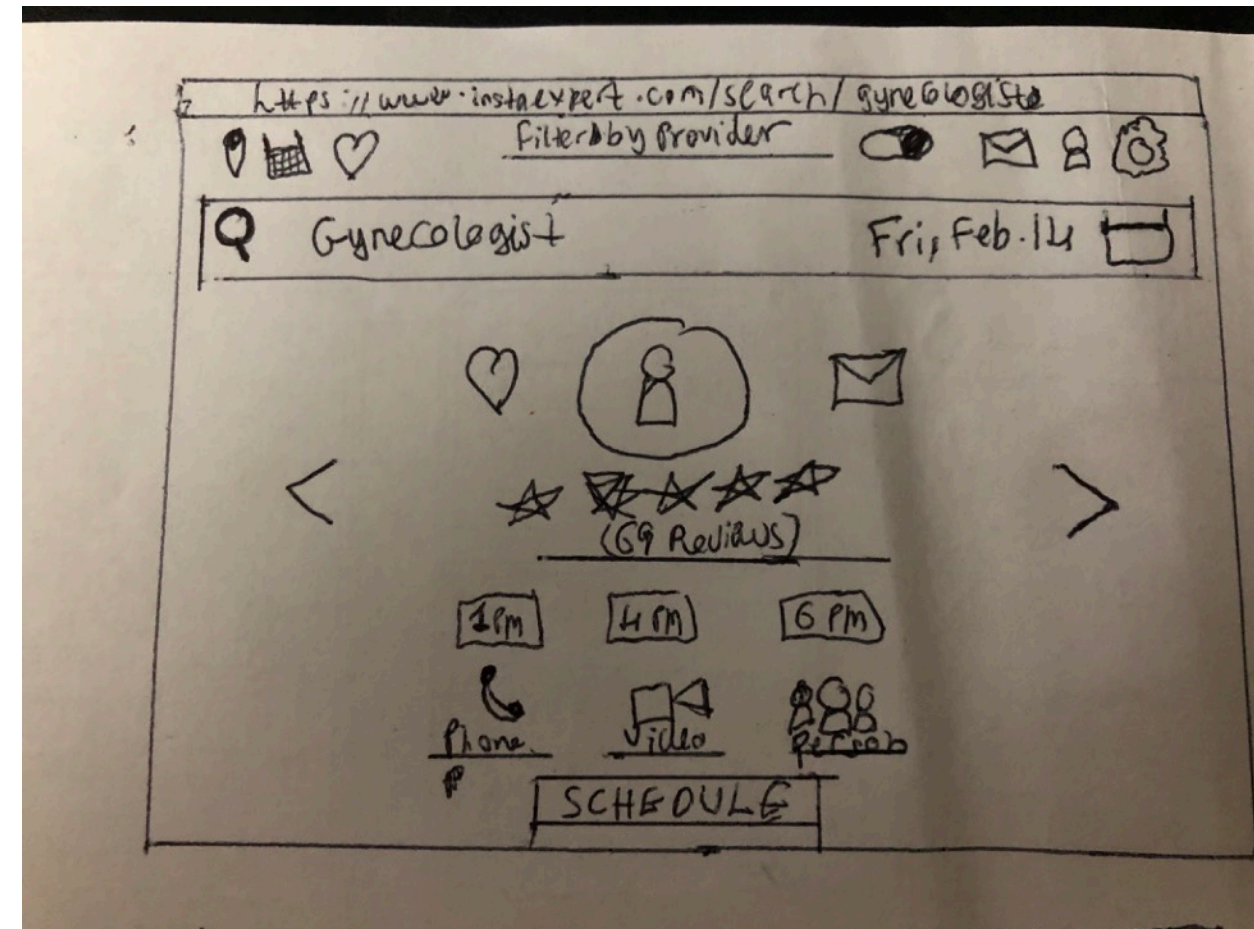
User Searches for 'Gynecologist' to find the right provider and schedule an appointment

Function 2: Accessing the Appointments Page

User Visits Website to Access the Homepage
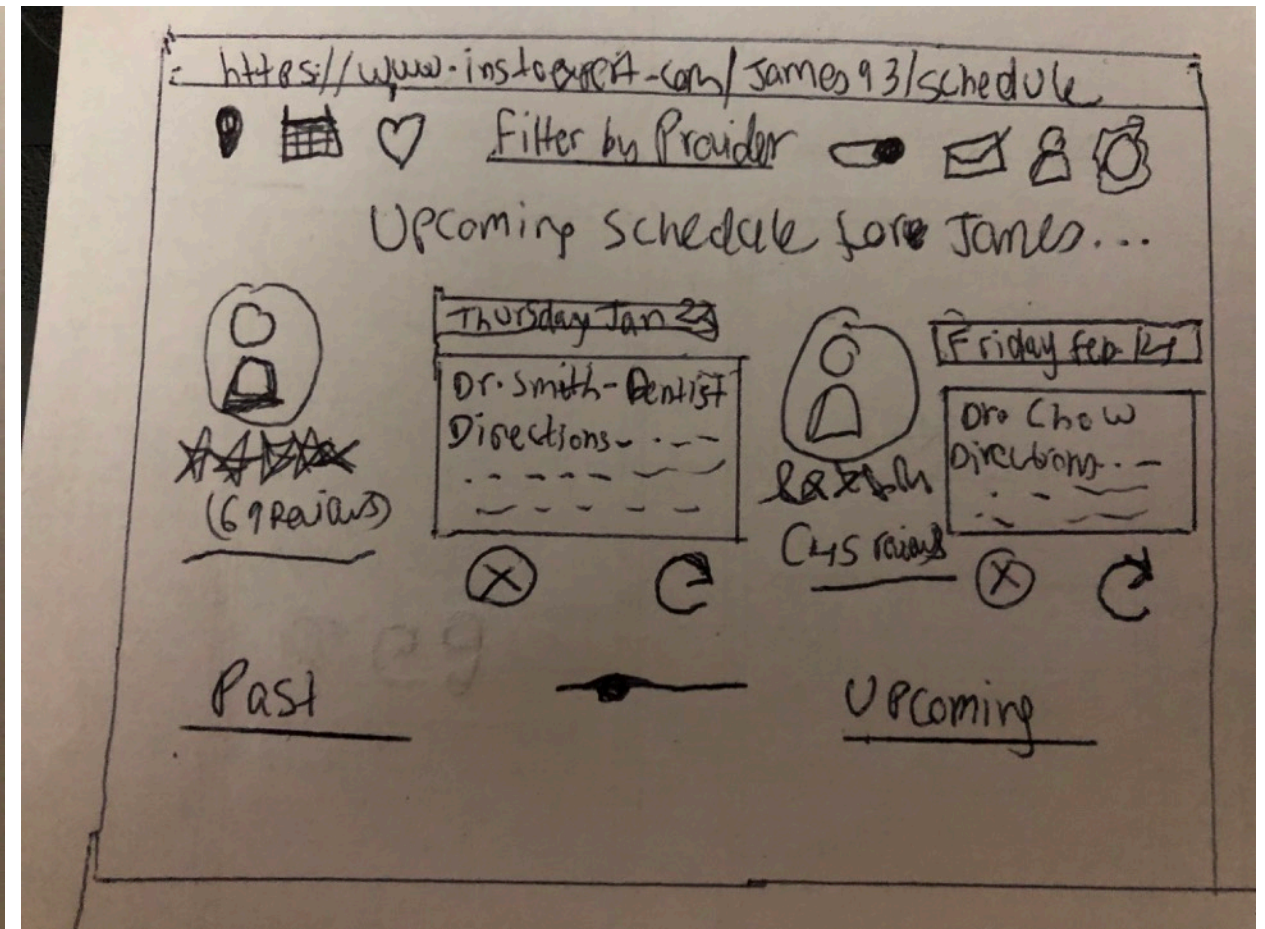
User Clicks on the 'Calendar' Icon to See Past/Upcoming Appointments

Function 3: Accessing Settings Page to Sign Out

User Visits Website to Access the Homepage
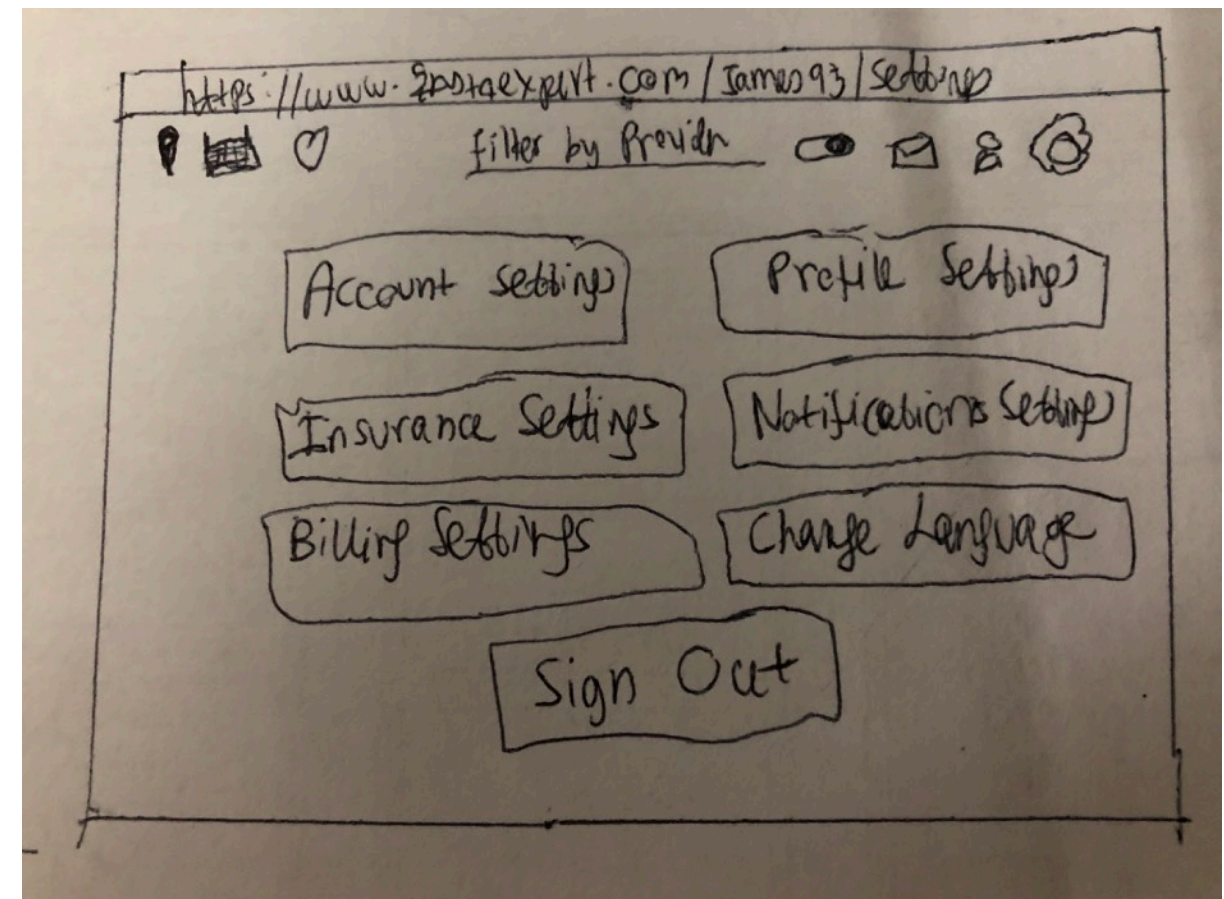
User Clicks on the 'Settings' Icon to Access the Settings Menu and Sign Out

Hand Sketches - Mobile Version

Progressive Onboarding

Test Plan

- **Introduction**

INSTA-Expert Moderated Usability Test (Mobile Version)

By Mihir Shah

Stakeholders: CareerFoundry

- **Background**

INSTA-Expert is a mobile expert app that allows users from all backgrounds and demographics instantly connect with an expert in the range of: Health Experts, Relationship Experts, Life Experts, Career Experts, Finance Experts and Legal Experts. The app is insurance-friendly and allows the user to filter experts by their provider to ensure they save on costs while scheduling.

- **Goal**

The overall goal fo the usability test is to understand the learnability of *INSTA-Expert* as well as gather contrastive feedback from participants to fix errors and make further improvement to the app's overall design before it is handed to the developers.

- **Test Objectives**

The first objective is to see if participants are able to perform the tasks at hand with ease.

The second objective is to understand the number of areas where the app design can be improved.

The third objective is to study the time it takes a user to get from point A to point B successfully.

- **Methodology**

The study will be moderated in-person as well as remotely and users will be asked to test my interactive prototype.

- **Participants**

I will ask 6 participants to participate in my study.

- **Schedule**

Usability tests will be conducted at my place in Seattle or remotely from 10 am until 3 pm PST between March 11th-17th, 2020.

- **Sessions**

The overall length of the usability test will be approximately 10-15 minutes.

- **Equipment**

The test will be conducted and recorded on my *iPhone X* or *Macbook Pro* via *Skype/Zoom*.

- **Metrics**

  0 = I don't agree that this is a usability problem at all

  1 = Cosmetic problem only: need not be fixed unless extra time is available on project

  2 = Minor usability problem: fixing this should be given low priority

  3 = Major usability problem: important to fix and should be given high priority

  4 = Usability catastrophe: imperative to fix before product can be released

- **Script**

TBD

- **Tasks**

TBD

Test Script

Introduction

Hello, my name is Mihir Shah and I thank you for taking the time to participate in the usability test study that I am conducting on my expert app: INSTA-Expert.

Before we get started, I would like to brief you over the study being conducted today so you know what the expectations are. Additionally, I will provide you more information about what I am testing and why.

Today, I will be asking you to try out my brand new expert app, INSTA-Expert and test some of it's functions by performing a few activities. Our goal is to understand what works seamlessly in my app and what can be improved. I would like to emphasize that we will be testing the app and not you. There are no right or wrong answers - I simply want to hear your honest thoughts and feedback. So please don't worry about saying it as it is because I value constructive feedback because your opinions can help me improve my app design.

I will start by asking you a few general questions about expert apps and then explain the concept behind my innovative expert app. As you are interacting with my prototype I encourage you to "think out loud" - to your fullest extent. Understanding your thoughts and feelings as a user is crucial for me as a tester to study my app better and make improvements at future stages. For instance, you can give me your expectations as a user after testing a certain function, and how the outcome of testing it was something in contrast to what you were expecting.

If you find this study confusing and not intellectually stimulating that is entirely okay. Please let me know and I will guide you along the way. Should you need a break at any point or would like to end the session early let me know as well. Finally, before we start I need you consent to record our conversation. Would that be okay with you? Recording this will help me understand where I need to improve the app and will not be shared with anyone outside the realm of my study.

If you have any questions or would like to proceed please let me know. Let's get started!

Demographics

Please select your age range from the following: -
• 18-25
• 26-35
• 36-45
• 46-55
• 55+

What is your current occupation?

Background

Before we get started I would like to ask you a few background questions.
1. When was the last time you used an expert app?
2. Why did you you the expert app?
3. What was your overall experience using an expert app?
4. What are some of the limitations you faced if any?
5. What would you envision in an ideal expert app?

Open-ended Questions

Thank you for providing me your background information. Next, I would like to get your feedback on the splash screen of my expert app.
• Without clicking on anything, can you tell me what your first impressions are?
• What is it that you like about this screen and what thoughts are running in your head?
• Now that you've taken a look, can you tell me what the general purpose of this app is?

Tasks

Now I'm going to give you a few task based actions to perform and will describe a scenario for each function. Again, I encourage you to think out as loud as possible and provide feedback.

1. **Tutorial** - You just downloaded the INSTA-Expert app from the app store and would like to learn how to use it, so you decide to take a sneak-peak to see what is app is about before you log in. How would you go about this?
2. **Sign/In** - Now that you know a little bit about this app, I would like you to access the dashboard and before you do, please take a look at the different options that will allow you to get to the dashboard.
3. **Accessing an Expert Profile** - Great work! Now that you are in the dashboard, I want you to search for an expert and get to their profile page.
4. **Scheduling a Visit** - Awesome! Now that you are on this expert's page, I would like you to schedule an in-person visit with this expert early afternoon. How would you go about this?
5. **Calendar** - You've scheduled your first appointment. Good job! Now can you access your schedule to see when the upcoming visit is to get more details?
6. **Messages** - Congratulations on making it this far. Next, I would like you to access your inbox.
7. **Favorites** - Good job. Accessing messages is a great way to chat with your expert. Finally, I want you to access your list of saved experts.

Excellent job. Thank you so much for participating in my study. Now I would like to save some time to get any valuable feedback you have as well as answer any questions you might have. What did you think?

Usability Tests

Overview

- **Methodology** - 1 participant was moderated in person and 5 were moderated remotely.

- **Participants** - There was a total of 6 participants: 3 females and 3 males. The average age range of the participants was between 26 to 35 and the locations were USA, India, Pakistan and Philippines.

- **Schedule** - The sessions were conducted on March 3rd, March 11th and March 12th.

- **Equipment** - The equipment used to record the conversation and take notes was a MacBook Pro and an iPhone X.

- **Apps** - The apps used were Skype, Zoom, Voice Memos, Chrome and Notes.

Interview 1: Nevena

- **Age Range**: 36-45

- **Location**: Seattle, USA

- Recorded remotely via Skype

- Nevena used Yelp before to find experts.

- Liked the 'Saved' experts feature

- The final page the of the tutorial was confusing because it said 'Skip' even though it was the last page.

- The 'Sign In' button didn't make sense because it couldn't be clicked and the user had to click on email icon to sign in.

- The search icon at the bottom was questionable to her, I told her it was the home page.

- 'Filter by provider' was a good option to have with the ON and OFF feature.

- She liked the the order of the expert profile search page and the consistency of the search bar in every page.

- She noticed a 'compose a new message pencil' icon which shouldn't have been on the favorite page.

Interview 2: Sofia

- **Age Range**: 36-45

- **Nationality**: Seattle, WA - USA

- Recorded in-person via Voice Memos

- Sofia used Yelp and Muse in the past to find experts.

- She liked the splash screen on the app and described the look as 'spartan'.

- She didn't look like the tutorial got confused. She said it was not visually appealing and missing additional text.

- She thought the sign in page, calendar, messages and favorites feature was self-explanatory and seemed impressed by the expert profile page.

- For the 'Schedule Appointment' task, she wished the number of steps was reduced and the button would activate as soon as one picked the time and clicked on the 'Next' icon.

- She didn't understand the 'in-person' icon for scheduling the appointment.

- Overall, she described the app as great except for the tutorial and appointment scheduler.

Interview 3: Glorybelle

- **Age Range**: 26-35

- **Nationality**: Quezon City, Philippines

- Recorded remotely via Skype.

- Glorybelle hasn't used any expert apps in the past.

- She described the splash screen on the app as minimal as there there is not a lot of text. She loved the lightbulb and it indicated that there is going to be something good behind the splash screen.

- She liked the tutorial and like Nevena, noticed an error at the end of the tutorial where it said 'Skip' instead of 'Finish'.

- She the was able to sign in easily as well as access the expert's profile page on the dashboard.

- Like Sofia, she also thought scheduling the appointment was a bit daunting but she really liked the change in color from black to gray when the in-person button was clicked.

- She described the schedule menu as easy to understand.

Interview 4: Nithesh

- **Age Range**: 26-35

- **Location**: Hyderabad, India

- Recorded remotely via Skype.

- Nithesh used an expert app 2 months ago to find a cleaner for his apartment. He elaborated on his experience mentioning how he did not get help right away and many non-responses.

- Upon testing my app, Nithesh said that it took him too many tabs to go through the tutorial and he wanted to skip it. He pointed out that the last screen said 'Skip' even when the tutorial ended.

- He described the dashboard as "immediate" and elaborated on how he saw usual categories of experts one would typically look for.

- He was able to complete the rest of the tasks with ease and didn't have much feedback.

- Overall, he said the app was intuitive and easy to navigate.

Interview 5: Jayneil

- **Age Range**: 26-35

- **Location**: Dallas, Texas

- Recorded remotely via Skype.

- Jayneil used Thumbtack in the past to find an expert to fix his standing desk. His experience wasn't the best because even though he hired a highly rated guy, there was a lot of back and forth texting outside the app and the person wanted payment in the form of cash. Basically, the app didn't do much to take care of the whole process and there was communication outside the app.

- Jayneil's provided feedback about the lightbulb on the splash screen, and guessed the lightbulb logo indicates it's an idea app or an IT related app - not expert app.

- Jayneil skipped the tutorial on the app and then signed in by registering as a new user to the dashboard. He mentioned it could have been guided better.

- Accessing the expert profile page was straightforward for him, but he found the scheduling process not clear enough. It could have been improved.

Interview 5: Kevin

- **Age Range**: 26-35

- **Location**: Lahore, Pakistan

- Recorded remotely via Skype.

- Kevin hand't used any experts apps in the past but he used a similar app like Yelp during his time in the UK for rating doctors. He had difficulty verifying reviews and wasn't able to effectively compare as information was all over the place.

- He thought the splash screen was nice and didn't fully understand it first at first until I explained it better.

- The tutorial was slightly confusing to Kevin. He asked me questions about how to go to the next screen and figured it out. Like the others, he also pointed out the 'Skip' button on the last screen of the tutorial was not clear.

- He was able to successfully sign in and navigate the app. Overall, he thought the process was straightforward and intuitive. He mentioned the step of scheduling an expert appointment was confusing.

Conclusions

Conducting the usability tests gave me a more clear idea about the bigger picture. Before conducting the tests, I thought I perfected everything but from the feedback of my participants there was still a lot more work to do.

For example, a lot of my participants found the tutorial a bit confusing at first and there was an unnecessary 'Skip' button at the end of the tutorial which should have been named as 'Finish' instead. Other than that, the participants also struggled a little bit to schedule an appointment because it wasn't clear to them due to my poor instructions and also because it involved an unnecessary extra step that could have been removed.

Other than that, asking participants background questions really immersed me and got me thinking in their shoes. Some of them described what their ideal expert app would be and how they wanted a frictionless experience. It gave me more ideas as to how I can redesign my app and make it better. More importantly, after having a discussion with my mentor I realized that it would be best to take this project to a direction that benefits my personal career as a whole based on existing ideas I have for my own business goals.

Usability Test Results

Affinity Mapping

Obeservations

P1

Noticed a 'compose a new message pencil' icon which shouldn't have been on the favorite page.

P1

There is a 'sign in' button but the button itself is unclickable

P2

Looks like a place to find an insta-expert that can shine a light on their specific expertise

P2

Calendar: Love it, self-explanatory, calendar icon made it easier to understand, well organized

P3

She described the schedule menu as easy to understand.

P4

Accessing dashboard: I see usual categories of experts you will look for and it is immediate.

P5

Feedback on the on the splash screen: guessed the lightbulb logo indicates it's an idea app or an IT related app - not expert app.

P5

Accessing the expert profile page was straightforward but scheduling process not clear enough. It could have been improved.

P5

Verbiage and bulb in splash screen don't go hand in hand, confusing

P6

Thought the splash screen was nice and didn't understand at first until I explained it better.

Positive Quotes

P1

Liked the 'Saved' experts feature

P1

'Filter by provider' was a good option to have with the ON and OFF feature.

P1

Liked the the order of the expert profile page, next availability and the consistency of the search bar in every page.

P1

Liked the placement of the back button

P2

The app screen looks bare, plain, simple and 'spartan'

P3

Liked that there isn't a lot of text on the splash screen, love lightbulb, it lets me know that there's going to be something good behind the splash screen

P3

Sign In Page: Self explanatory, like that it lets you sign in an existing account so I don't have to create new one

P4

Described the dashboard as "immediate" and elaborated on how he saw usual categories of experts one would typically look for

P4

Overall the app was intuitive and easy to navigate.

P5

Calendar feature has a good foundation.

P6

Was able to successfully sign in and navigate the app. Overall, the process was straightforward and intuitive.

Negative Quotes

P1

The placement of the search icons at the bottom and top was questionable to her and uncertain.

P2

Onboarding doesn't look like a tutorial, confused, not good, it was visual, sometimes people need text. It would be better to have additional text.

P2

'Schedule Appointment' task, wished the number of steps was reduced and the button would activate as soon as one picked the time and clicked on the 'Next' icon.

P2

Didn't understand the 'in-person' icon for scheduling the appointment.

P3

Thought scheduling the appointment was a bit daunting but liked the change in color from black to gray for the 'in-person' button.

P5

Tutorial could have been guided better.

P6

Mentioned the step of scheduling an expert appointment was confusing.

Errors

P1

The final page the of the tutorial was confusing because it said 'Skip' even though it was the last page.

P1

The 'Sign In' button didn't make sense because it couldn't be clicked and the user had to click on email icon to sign in.

P3

Noticed an error at the end of the tutorial where it said 'Skip' instead of 'Finish'.

P4

Said that it took too many tabs to go through the tutorial and wanted to skip it. Pointed out that the last screen said 'Skip' even when the tutorial ended.

P6

The tutorial was confusing. Asked questions about how to go to the next screen and figured it out. Like the others, also pointed out the 'Skip' button on the last screen of the tutorial was not clear.

Rainbow Spreadsheet, Possible Solutions and Next Steps

https://docs.google.com/spreadsheets/d/1BRv8mON9e7rM9_tu_74LzBn4hL2Iq2pFHUuKNZ-tByw/edit#gid=4

Test Findings & Recommendations

Test Plan Summary

Introduction: The INSTA-Expert mobile app prototype was moderated on six participants for usability testing by Mihir Shah and CareerFoundry as the stakeholder.

Background: The INSTA-Expert mobile app allows users across all backgrounds and demographies to find experts in the field of health, relationship, life, career, finance and legal.

Goals: The goal of the usability test was to record participant behavior on the interactive prototype, get their feedback and identify errors on the design.

Objectives: After collecting background information and getting user feedback of on splash screen, users were asked to perform tasks related to interacting with the tutorial, sign-in page, expert profile page, scheduling a visit, accessing the calendar, inbox and favorites.

Methodology: 1 participant was moderated in person and 5 were moderated remotely.

Participants and Schedule: There was a total of 6 participants: 3 females and 3 males. The average age range of the participants was between 26 to 35 and the locations were USA, India, Pakistan and Philippines. The sessions were conducted on March 3rd, March 11th and March 12th. More information can be found here.

Script: The script can be found here.

Usability Test Report

Issue 1: The final page the of the tutorial was confusing because it said 'Skip' even though it was the last page.
- **Severity Rating**: 3
- **Suggested Change**: Change the word 'Skip' to 'Finish' in the last page of the tutorial.
- **Evidence**: Four out of the six participants noticed this and it is clear that the wording needs to be changed.

Issue 2: It takes too many steps to go complete the tutorial.
- **Severity Rating**: 2
- **Suggested Change**: Reduce the number of steps on the onboarding screen.
- **Evidence**: Two participants frustratingly skipped the 3-page tutorial and wanted it to be shorter.

Issue 3: The entire tutorial was confusing.
- **Severity Rating**: 4
- **Suggested Change**: Redesign the tutorial since nearly every participant seemed confused about it.
- **Evidence**: Nearly all participants had difficulty and asked a lot of questions about the tutorial task.

Issue 4: The 'Sign In' button didn't make sense because it couldn't be clicked but the icons below could.
- **Severity Rating**: 3
- **Suggested Change**: Re-design the 'Sign in' page to avoid confusion.
- **Evidence**: Some participants thought it was a button but didn't realize t   he icons below it were clickable.

Issue 5: Noticed a 'compose a new message pencil' icon which shouldn't have been on the favorites page.
- **Severity Rating**: 2
- **Suggested Change**: This is a minor design error which needs to be corrected.
- **Evidence**: Only one participant noticed this design flaw but it was sufficient enough to identify this flaw.

Issue 1 Revision: 'Skip' to 'Finish' on Last Page of Tutorial
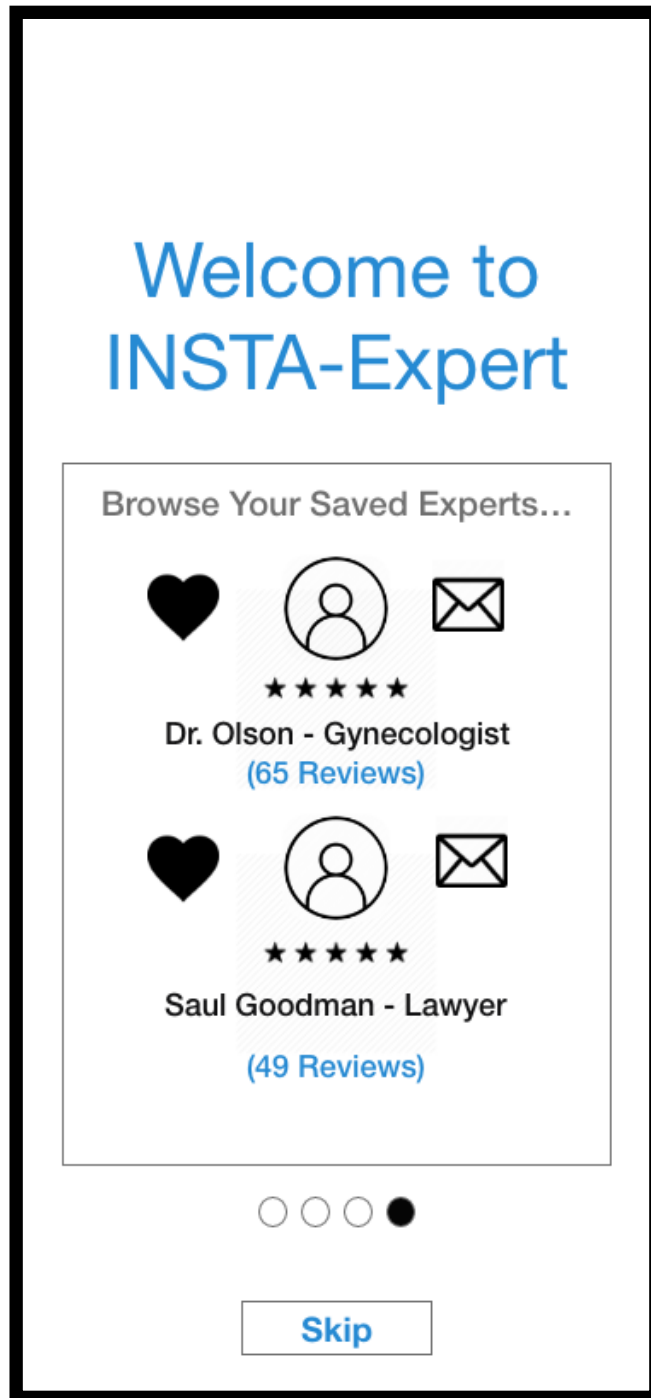
Before
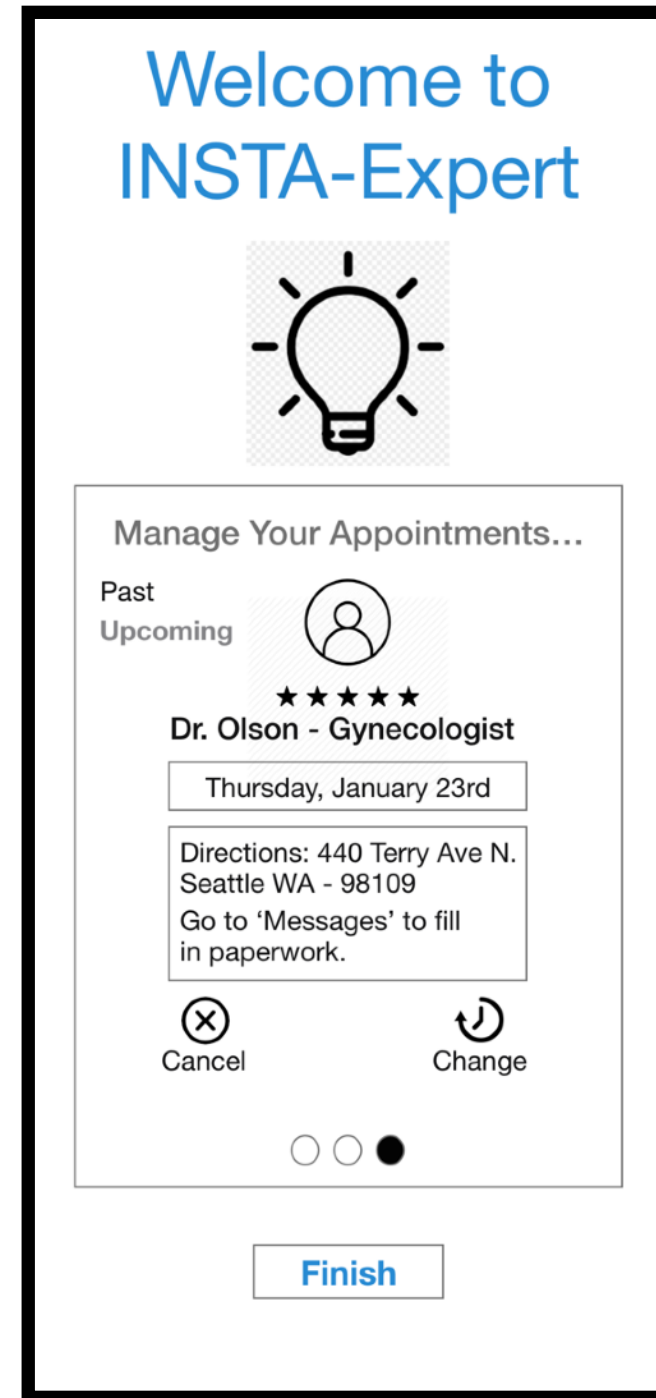
After

Issues 2 & 3 Revision: Redesigned and Reduced Steps in Tutorial

Before
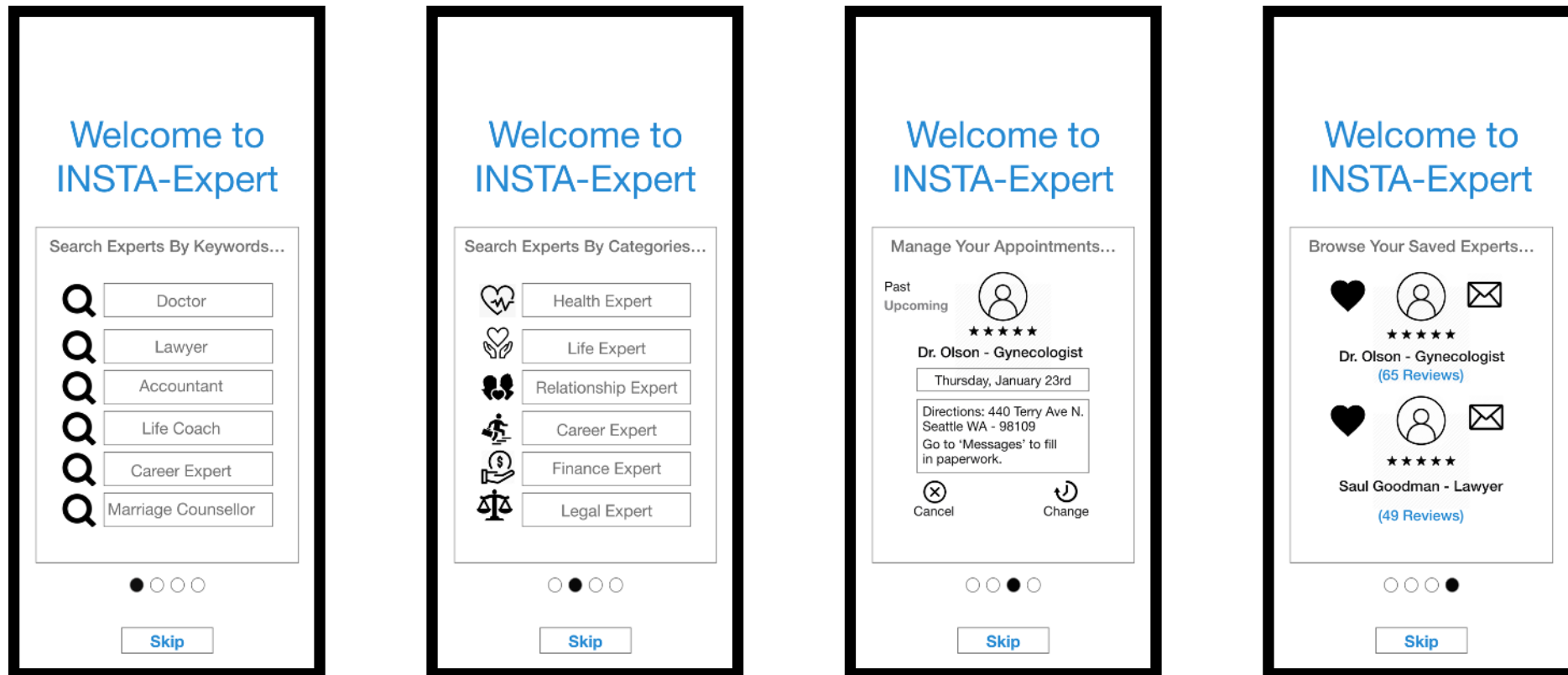
After
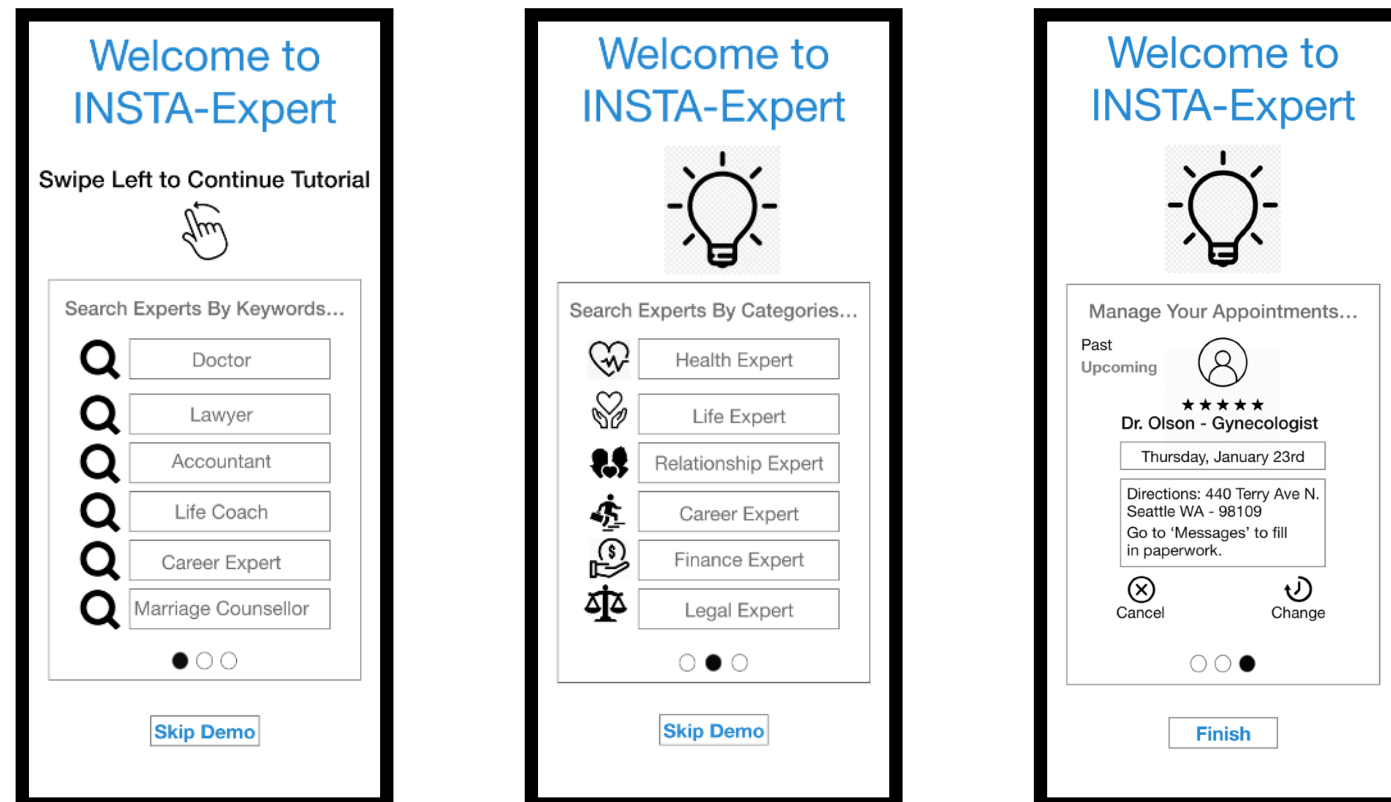
Issue 4: Revision:Sign in/Register Page Redesigned
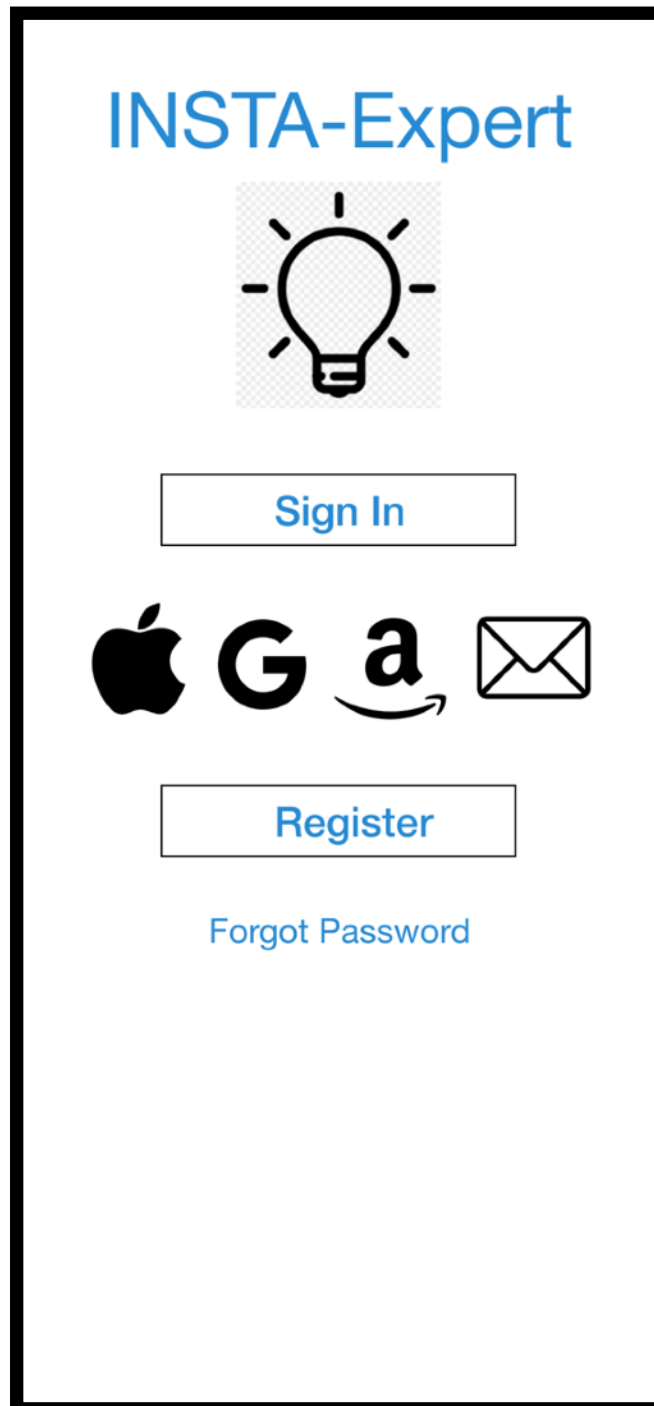
Before
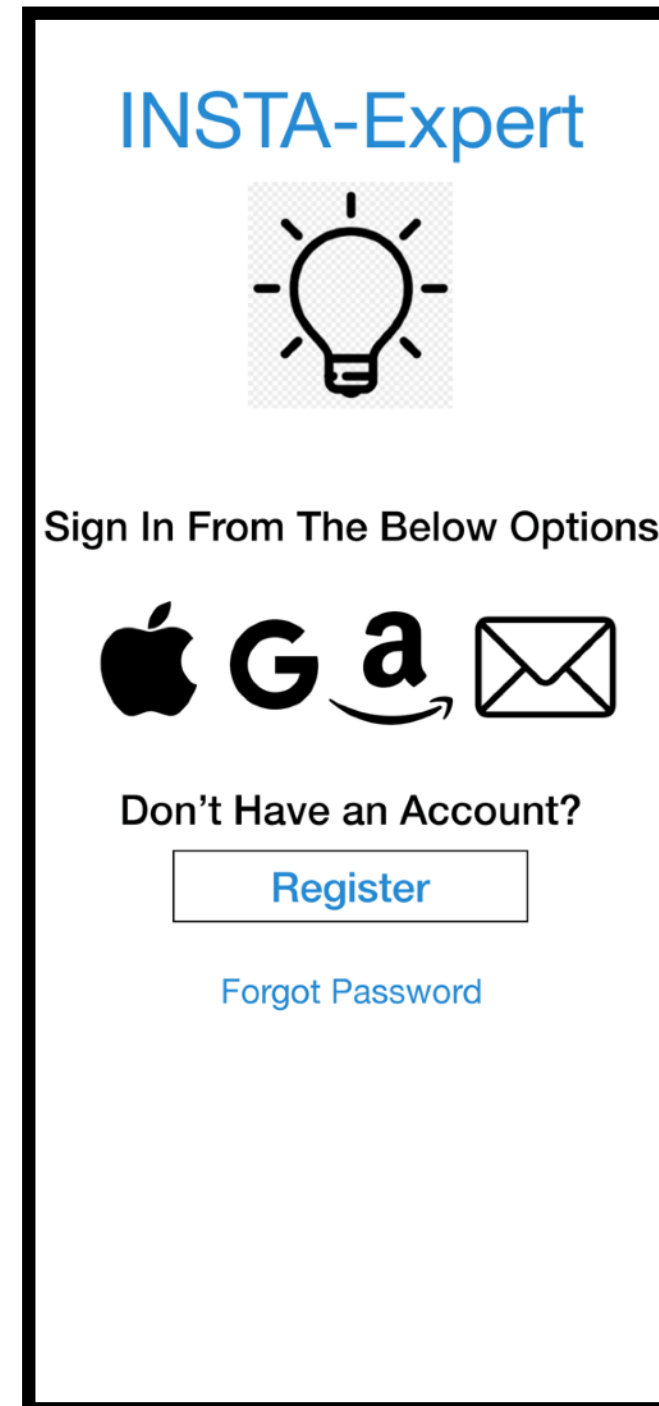
After

Issue 5 Revision: Removed 'Compose Message' Icon From Favorites
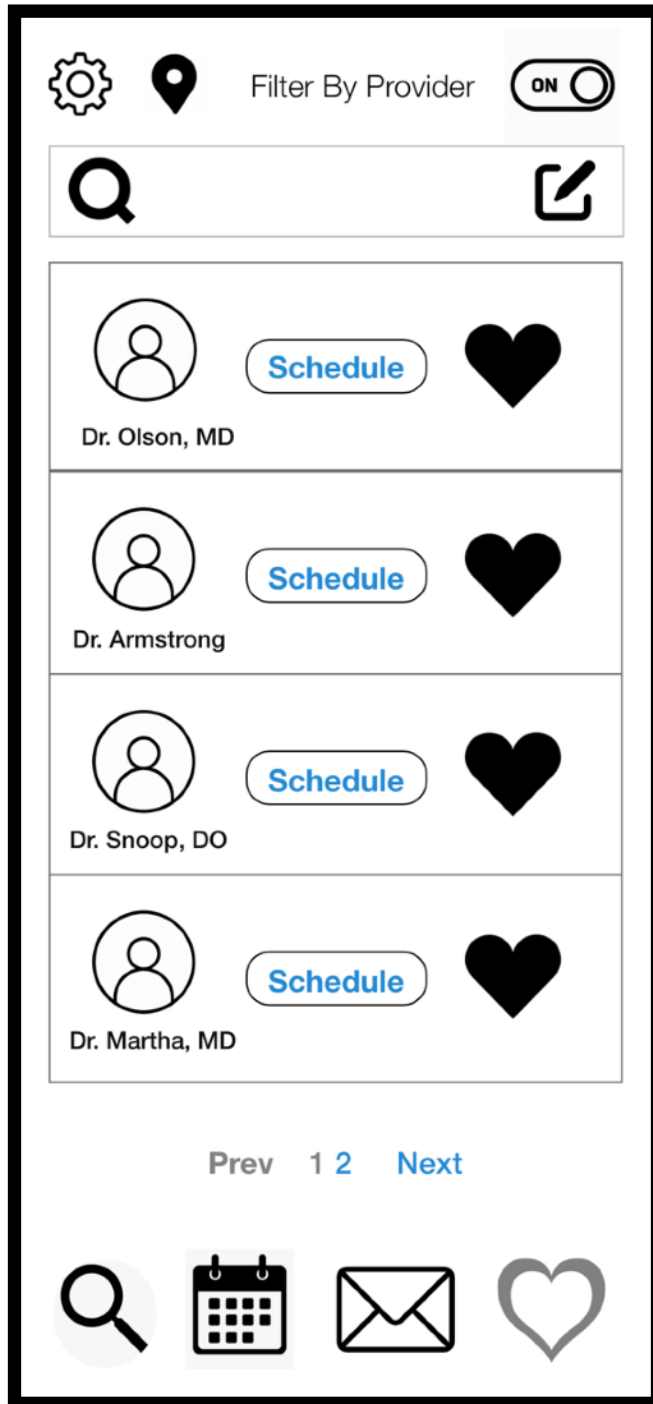
Before
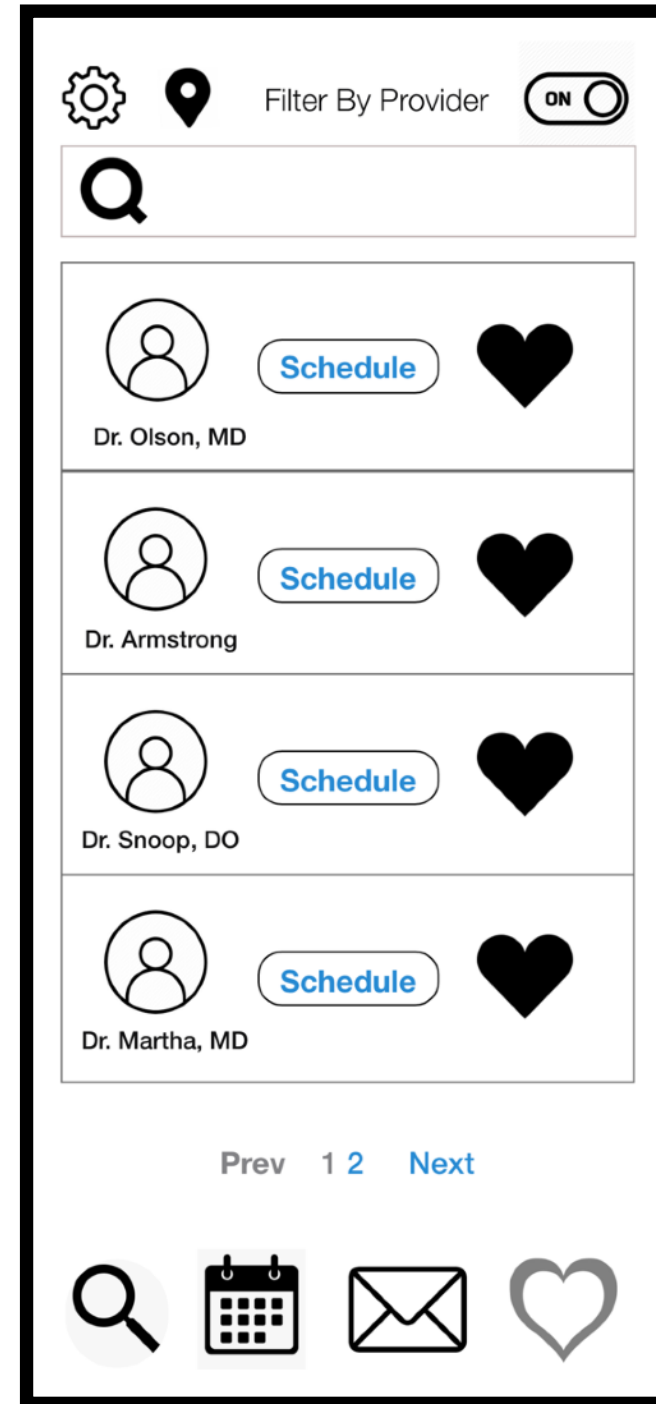
After

Conclusion

Overall, I feel satisfied with the participants' feedback on my interactive prototype. It helped me make the necessary revisions to my initial designs and I was able to proactively take their constructive feedback into consideration for the revisions. Conducting the usability tests gave me a clear understanding why it is so important to record user-behavior and get feedback that can help change the trajectory of my app and make it user-friendly. Here is the link to my revised prototype after fixing the design errors.

Preference Testing

Overview

For this exercise, I wanted to test two screens of my onboarding tutorial page and perform preference tests on 10 participants who I recruited on the CareerFoundry Slack community. Both screens were similar but one was more guided with instructions on how to walk through the tutorial.

I wanted to understand what screen would be better for my to use on my revised design prototype and what would make more sense as a designer.

Preference Testing Options
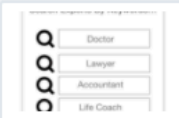
Welcome to
INSTA-Expert

Swipe Left to Continue Tutorial

Search Experts By Keywords…

Doctor

Lawyer

Accountant

Life Coach

Career Expert

Marriage Counsellor

● ○ ○

Skip Demo

Option A

Welcome to
INSTA-Expert

Search Experts By Keywords…

Doctor

Lawyer

Accountant

Life Coach

Career Expert

Marriage Counsellor

● ○ ○ ○

Skip

Option B

Participant Results

Participant Answers

- [ ] I like how 'guided' this is

- [ ] I think the swipe left text is redundant since users will already be familiar with swiping left when they see the slider dots below

- [ ] i personally know to swipe left

- [ ] Contains more info but the swipe is relevant, probably speeds up the process of trying to find what to do next

- [ ] clearer

- [ ] Visually looks cleaner.

- [ ] -

- [ ] I think it's pretty clear with the dots right below the square that you should swipe to get to the next page so thought it was unnecessary to have the swipe instructions up in the top. Also, "Skip" is pretty self explanatory as well especially if this is an onboarding screen so not necessary to say "skip demo" - also, think people now generally know that they can skip to go straight to the app.

- [ ] all information at once and it's clear what my options will be.

- [ ] The skip button gives enough information

^ Collapse

Findings

To my surprise, the second design got more likes than the first one. As a designer, I was rooting for the first design because of how guided it was. The second one was more minimal, clean and already intuitive. The participants appreciated the visually cleaner look of the second prototype and why having instructions was redundant, because with the three dots below it is almost obvious how the user needs swipe left to complete the tutorial.

Redesign

Conclusion

Using the participant feedback from both images, I decided to create a better version of my design. I completely got rid of the redundant text instructions and the 'swipe left' icon because the tutorial was already intuitive. However, I also took into account of my usability tests from the previous exercises and realized that I should emphasize that this is a tutorial because it did not 'click' to a lot of the participants right away that this was indeed a tutorial. Adding a bold 'Welcome To The Tutorial' reinforces the idea that this onboarding screen is indeed a tutorial and the three dots below makes the tutorial intuitive enough that the user must swipe left to continue.

1. Splash Screen
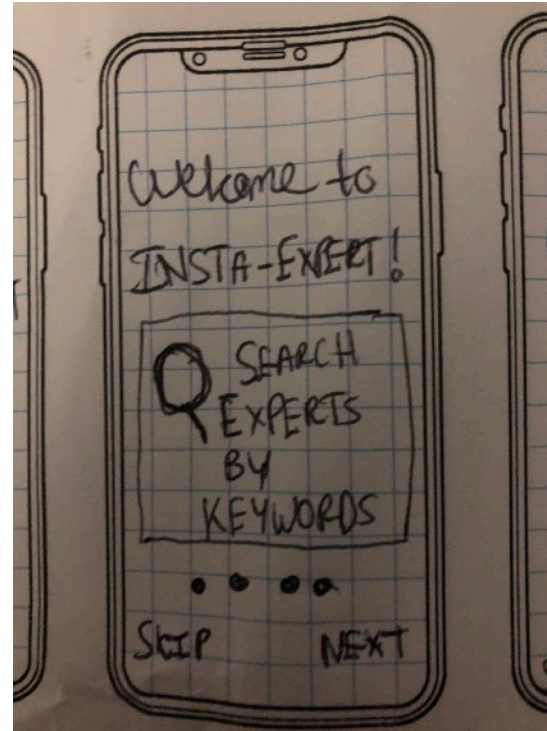
2. Tutorial - Keyword Search
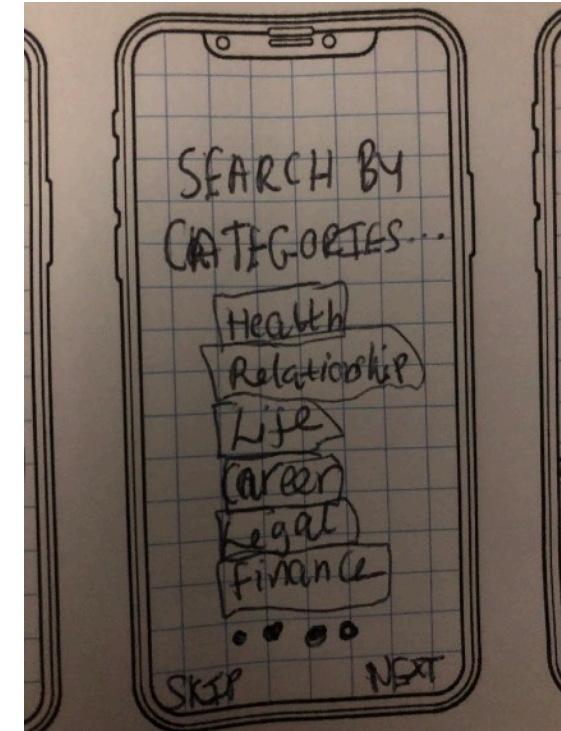
3. Tutorial - Category Search
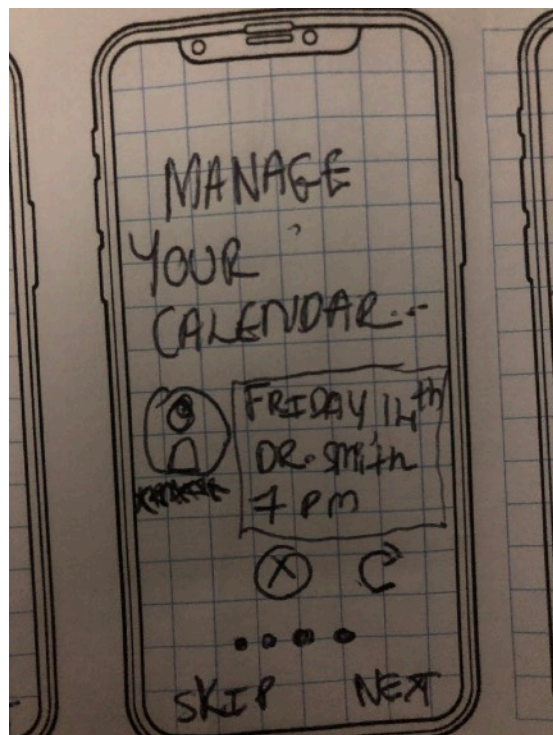
4. Tutorial - Manage Calendar
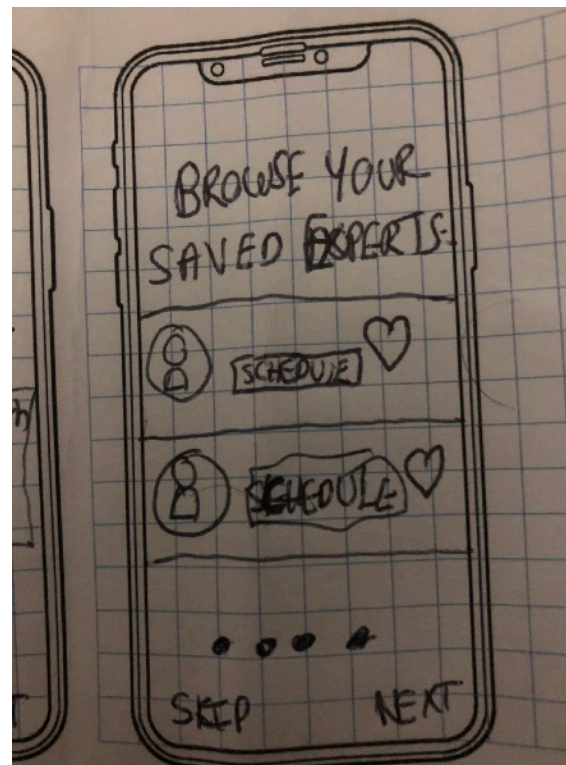
5. Tutorial - Browse Saved Experts

6. Onboarding Screen

Hand Sketches - Desktop Version
Coach Marks
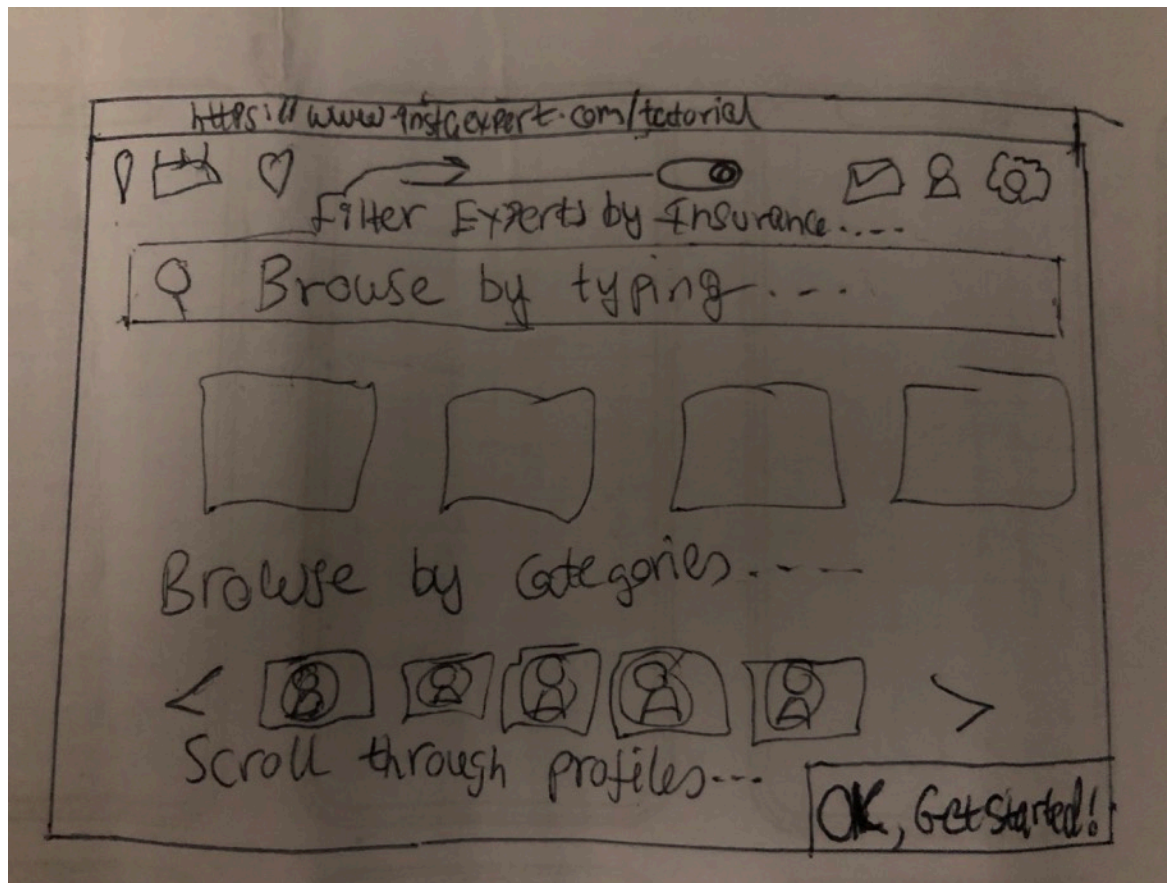
Explanatory messages to help users navigate

Click on 'Ok, Get Started' to end coach marks and start using website
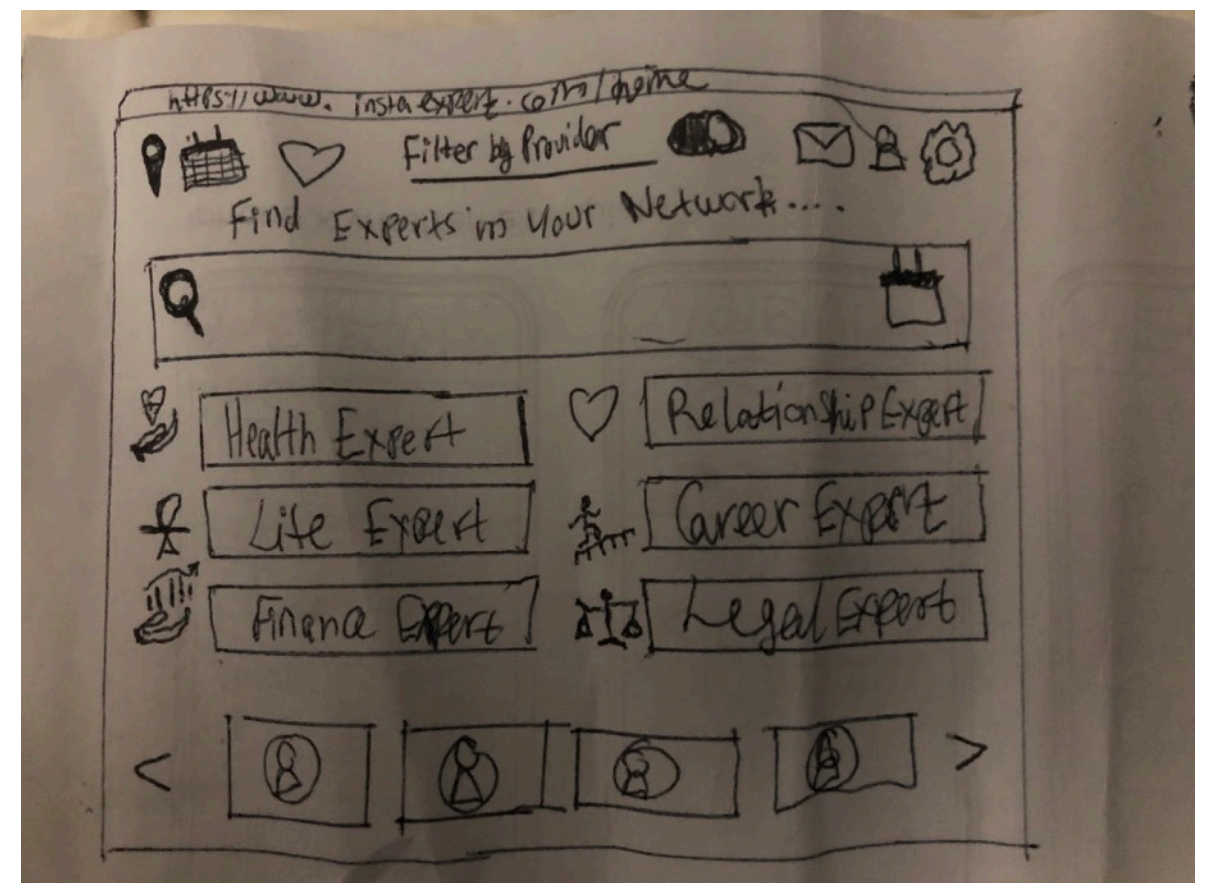
Digital Sketches - Mobile Version

Progressive Onboarding

1. Splash Screen
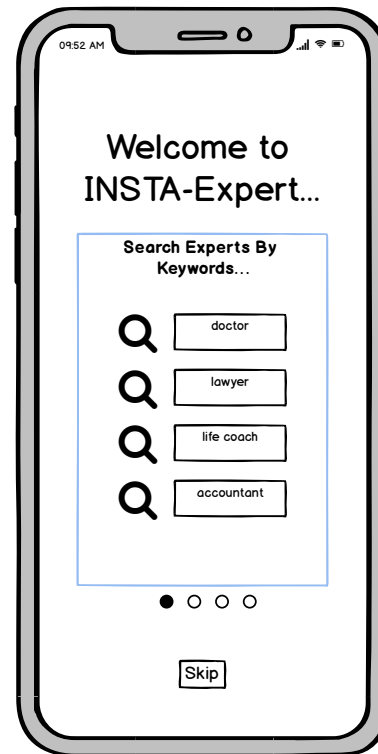
2. Tutorial - Keyword Search
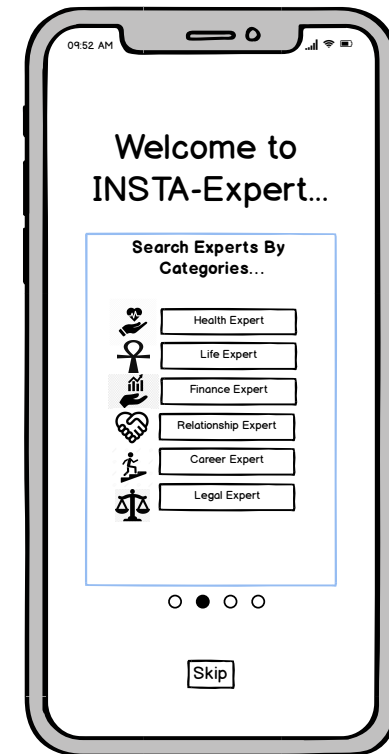
3. Tutorial - Category Search

4. Tutorial - Manage Calendar
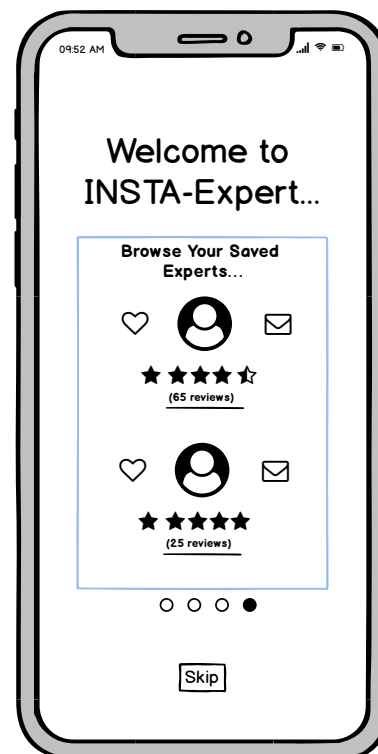
5. Tutorial - Browse Saved Experts
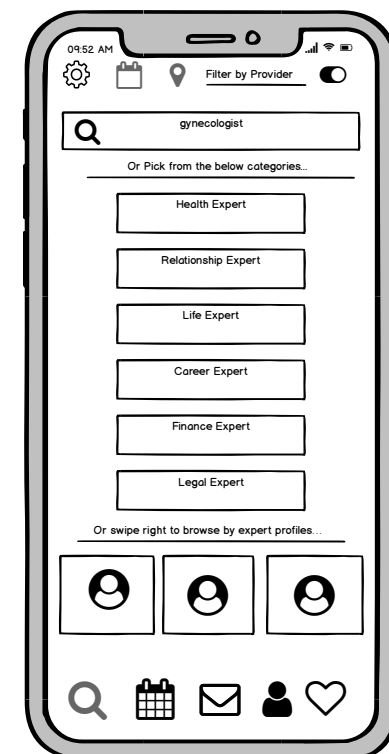
6. Dashboard Screen

Digital Sketches - Desktop Version
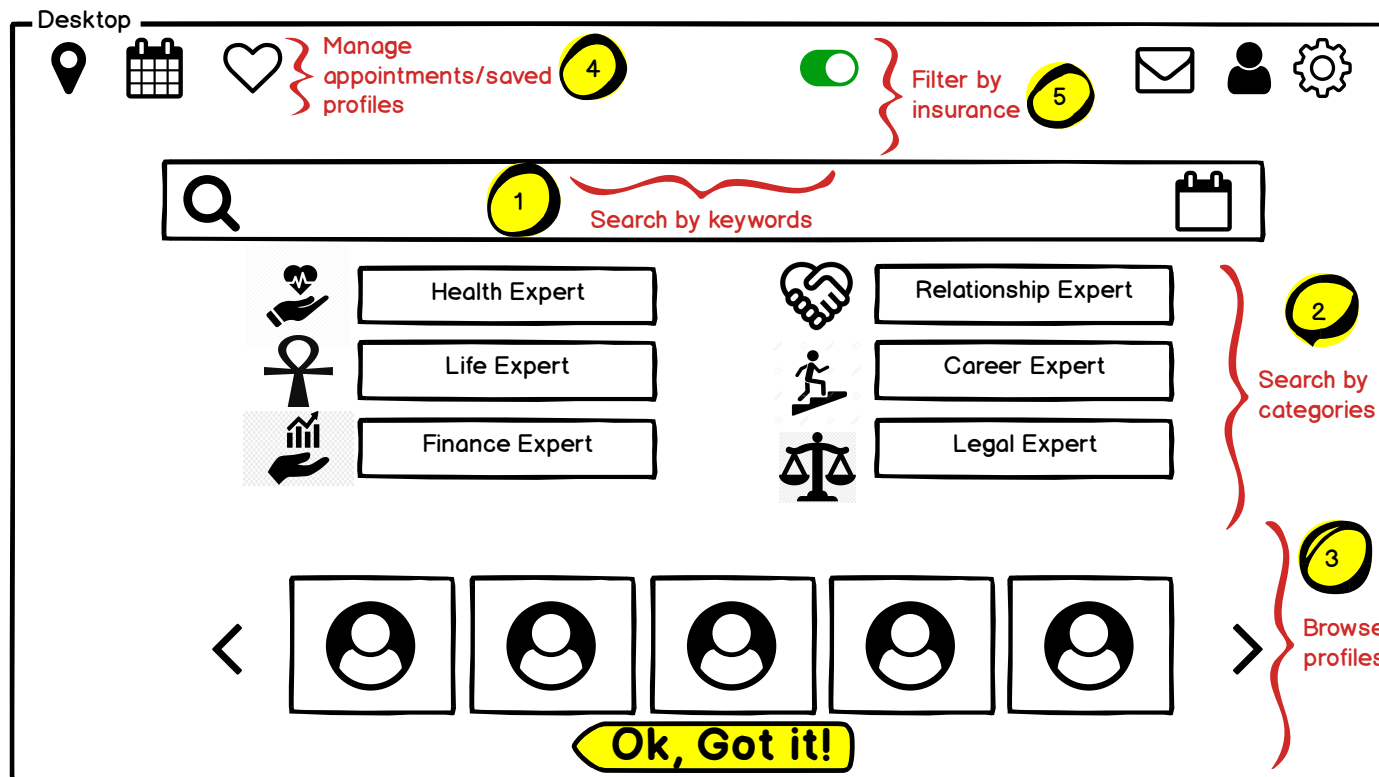
Coach Marks

Explanatory messages to help users navigate

Click on 'Ok, Got it!' to end coach marks and start using website
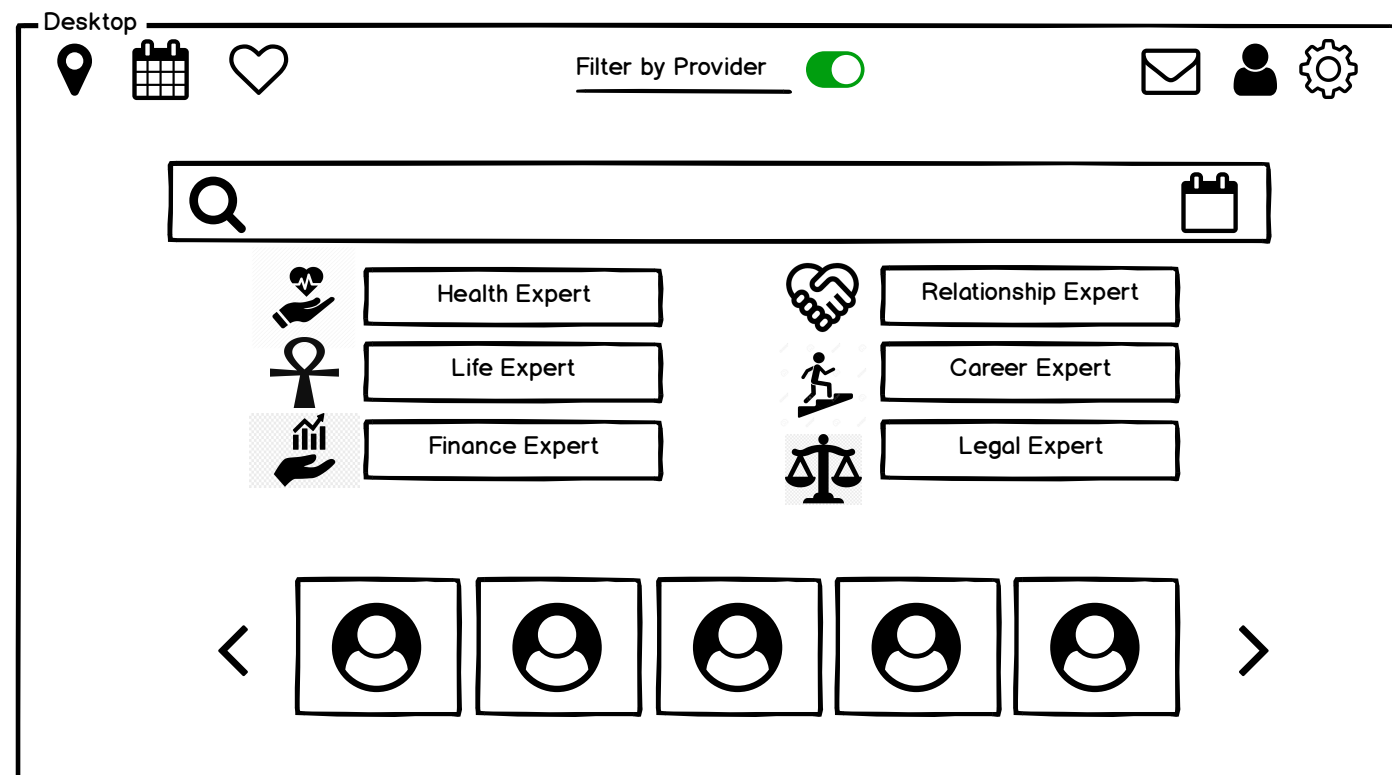
Rationale

The reason I applied the 'Progressive Onboarding' technique for the mobile wireframes is because it is easier for the user to navigate the different features within the app and swipe left or right.

In contrast, I use the 'Coach Marks' technique for the desktop wireframes because the screen is large enough to fit all the features and functionality so there is no immersive tutorial required.

Mid-Fidelity Wireframes & Prototyping

Onboarding Tutorial

Splash Screen

Tutorial - A

Tutorial - B
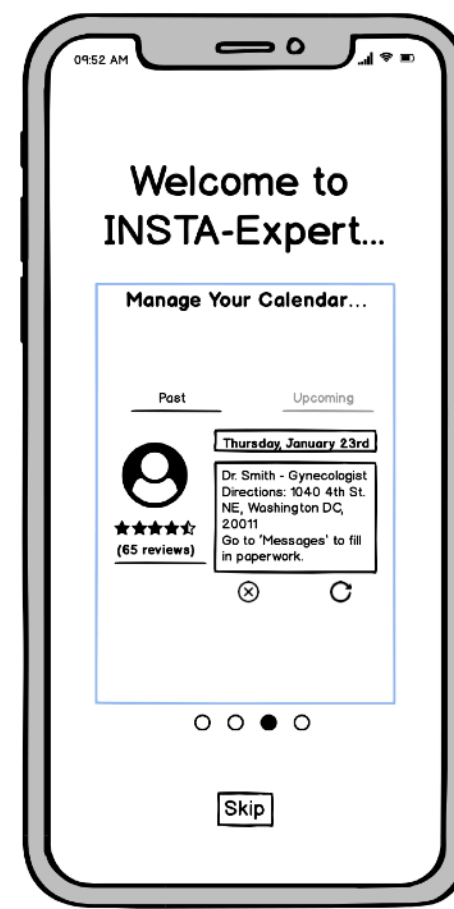
Tutorial - C
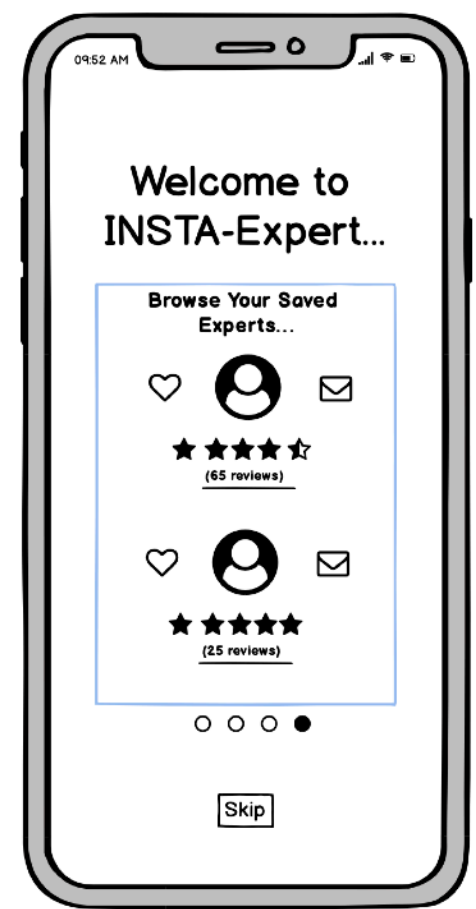
Tutorial - D

Register/Sign In/Forgot Password

Register/Log In Screen
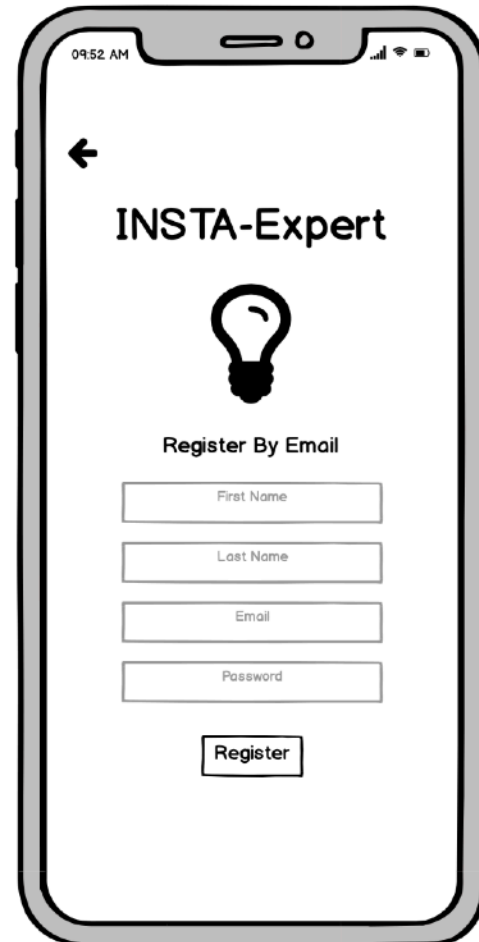
Register By Email
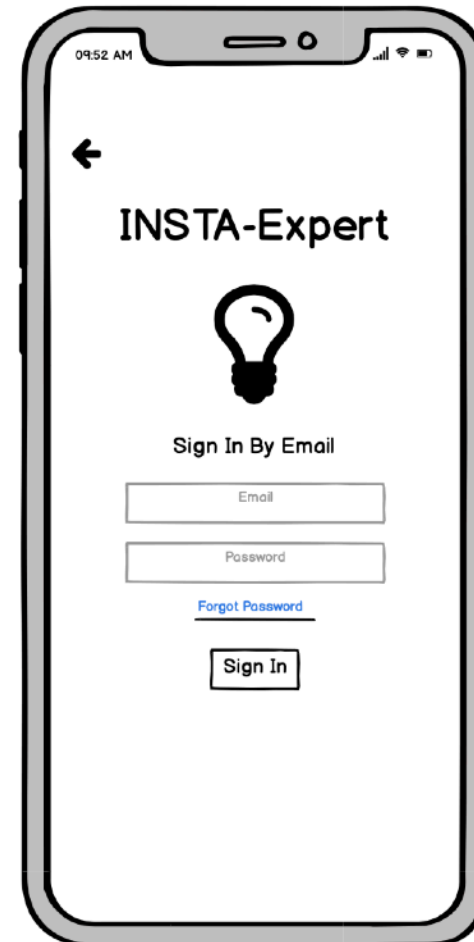
Sign In By Email

Forgot Password

Searching Experts
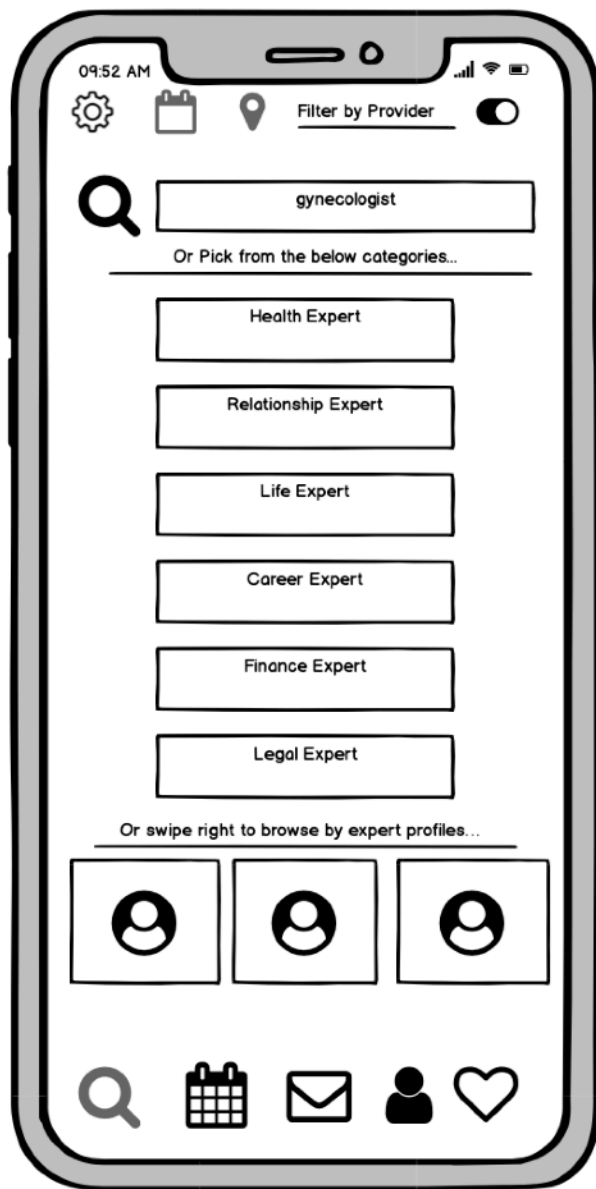
Dashboard
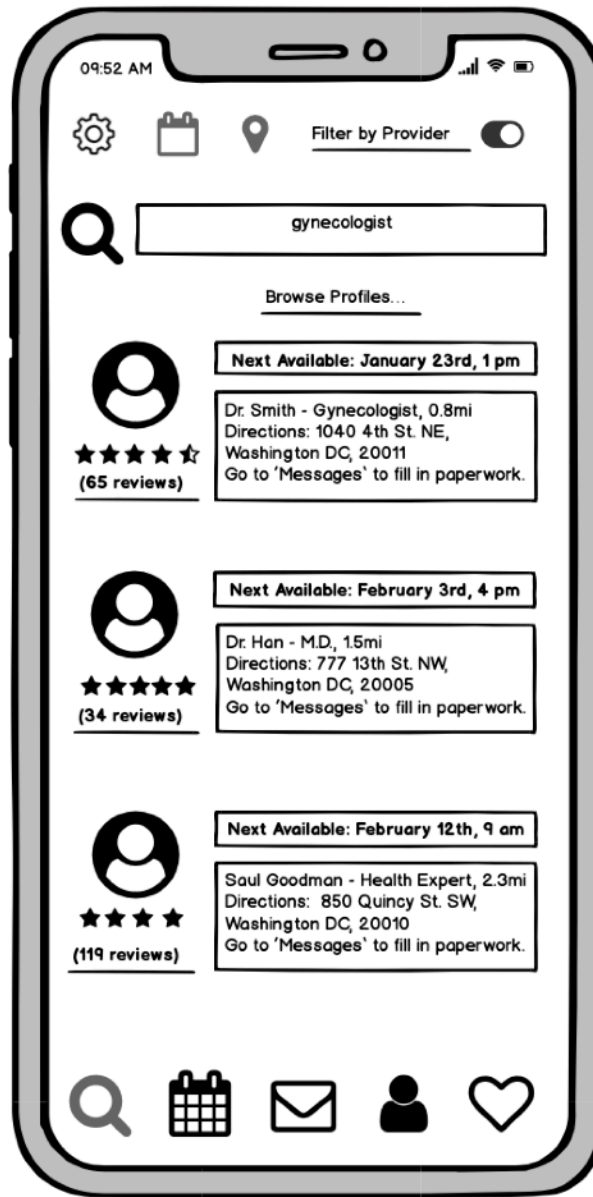
Browse Experts

Expert Profile Page

Scheduling Appointment
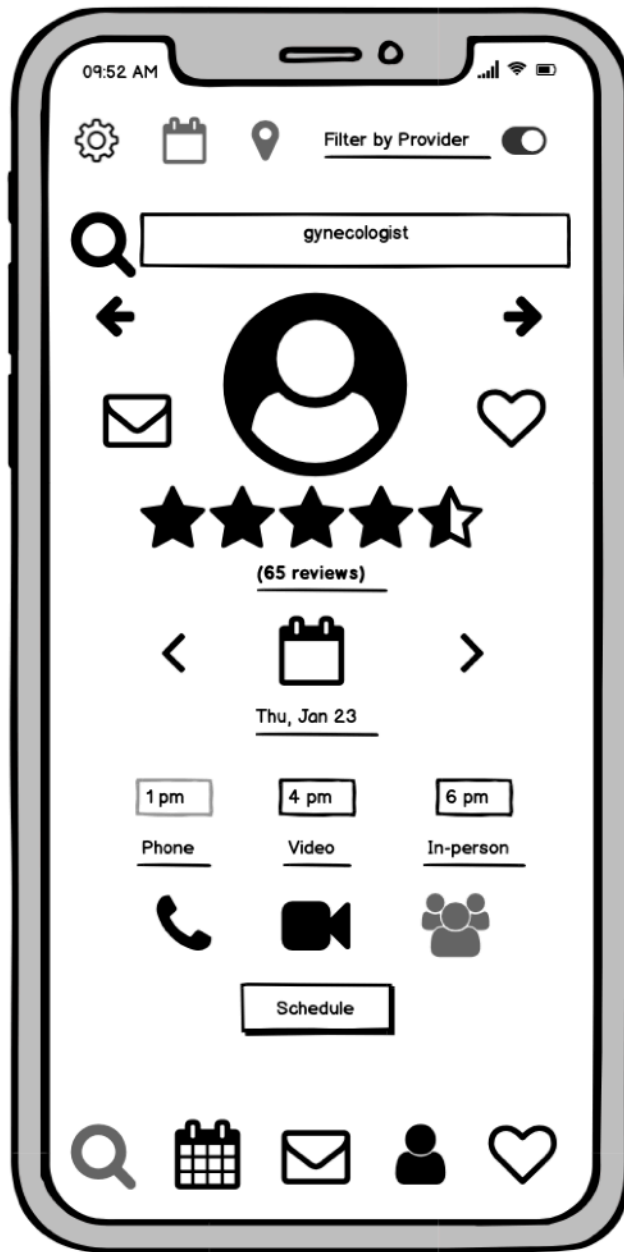
Expert Profile Page
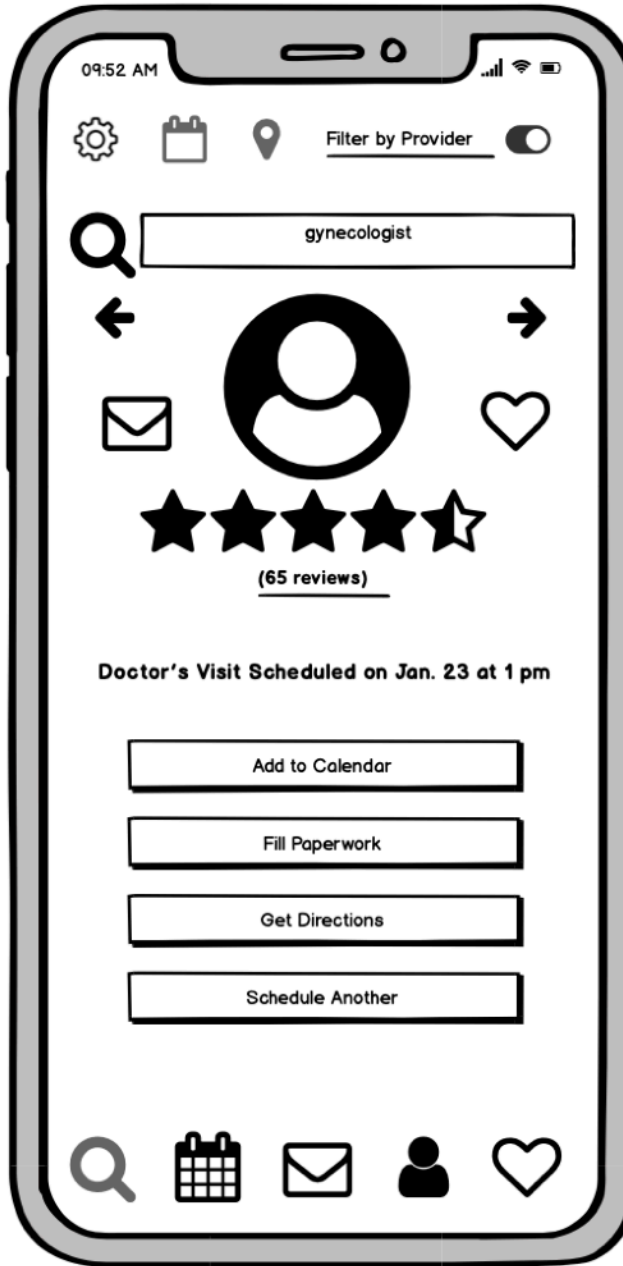
Appointment Confirmation
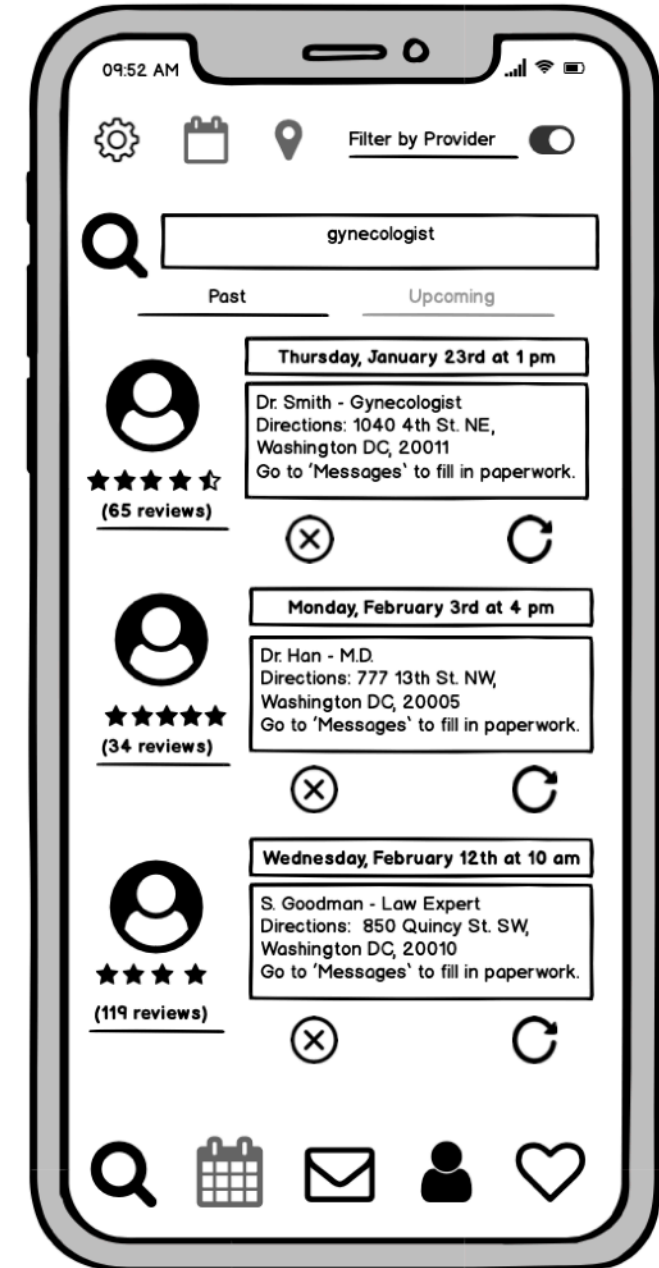
Appointment Schedule

Messages & Favorites
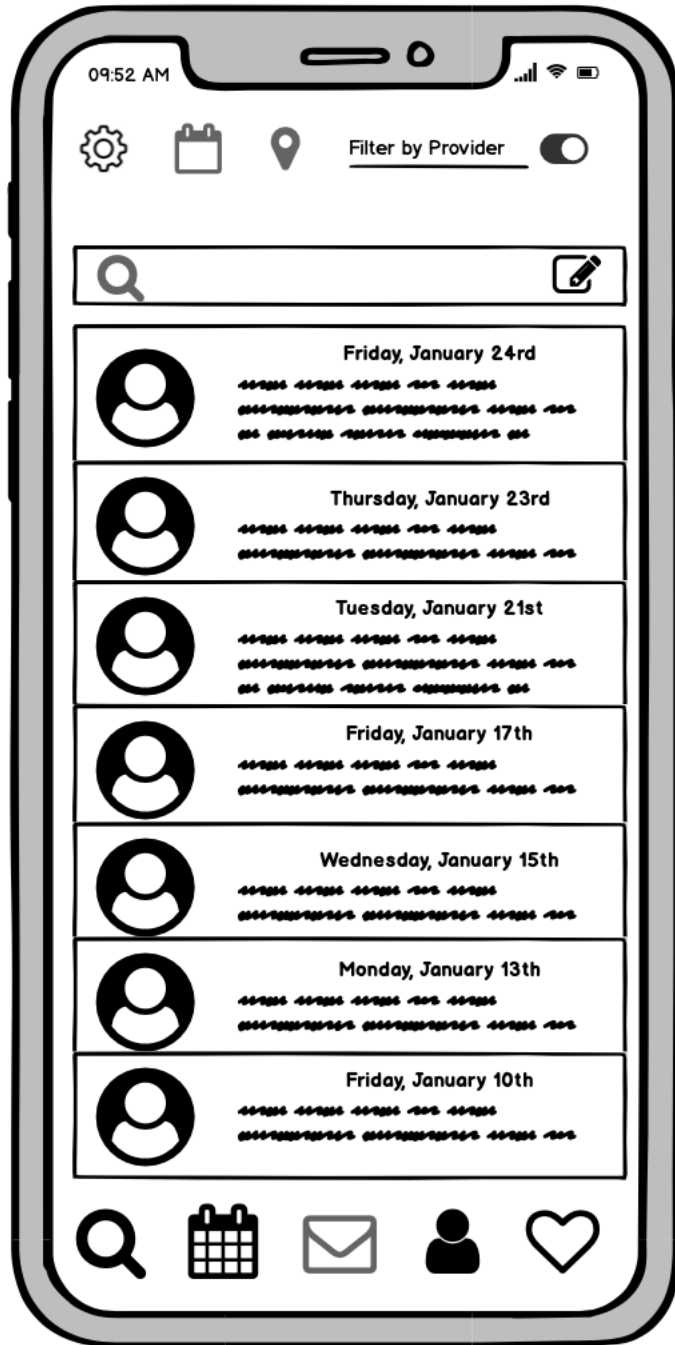
Messages
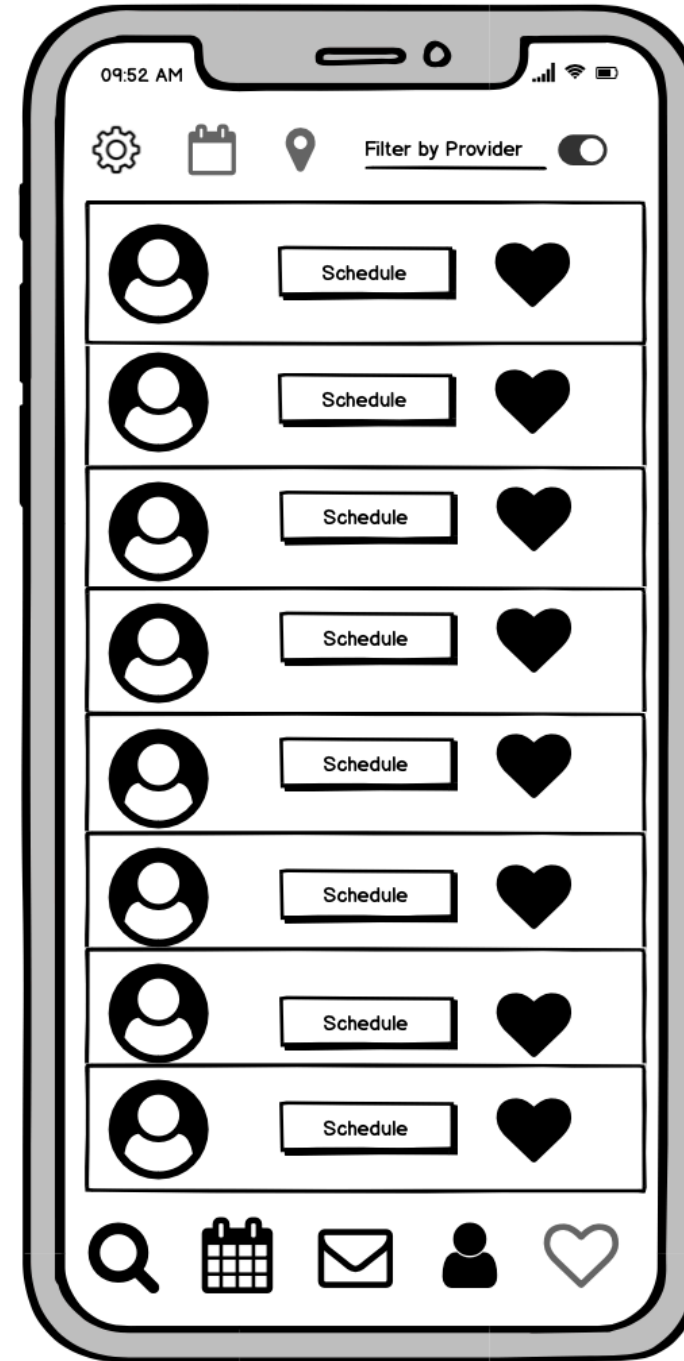
Favorites

1. Visual Design Principles

Splash Screen

Before
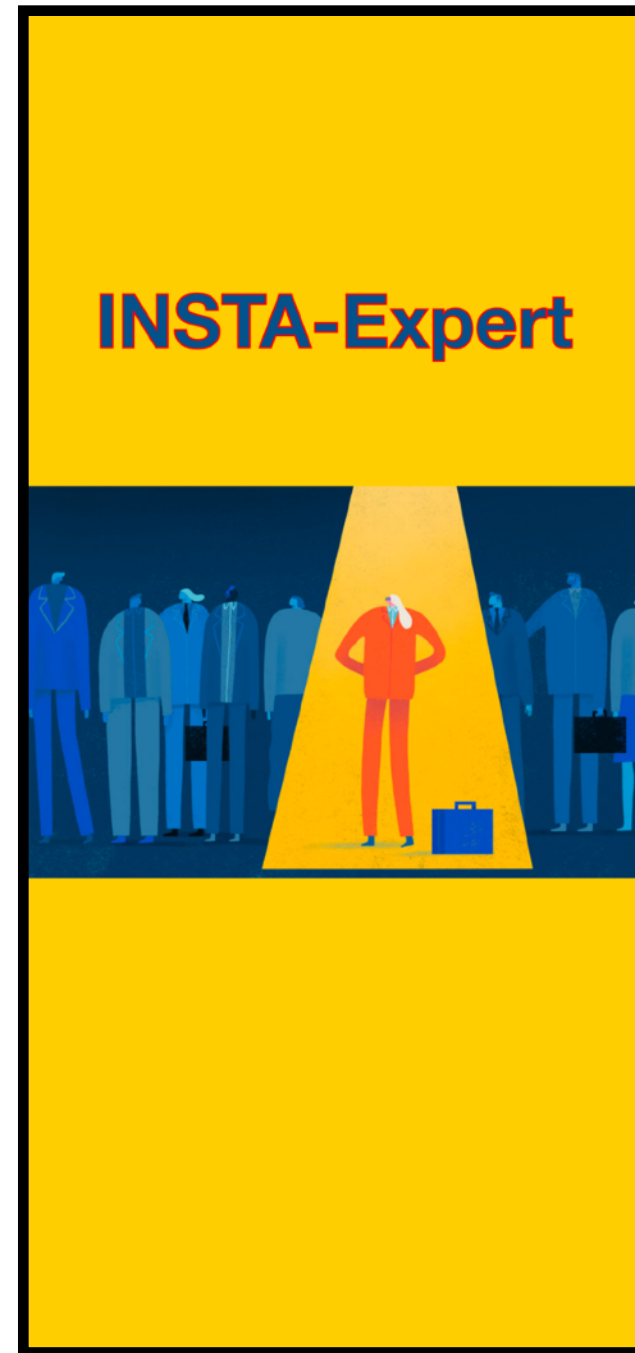
After

'Splash Screen' Design Thinking

- **Emergence** - The image on the splash screen has experts with heads disproportional to the size of their bodies. Our minds still recognize that these are whole bodies of people in the professional world even though some features are more exaggerated than others.

- **Reification** - The yellow color in the image combined with the yellow in the background create illusionary contours and one can form the shape of a triangle surrounding the person in red.

- **Law of Closure** - The blue area surrounding the image can be perceived as a missing rectangle whereas the yellow space in the image can be recognized as a missing triangle. This is because our mind tends to ignore gaps and complete contour lines.

Forgot Password

Before

After

'Forgot Password' Design Thinking

- **Law of Proximity** - The individuals in the image create an illusion of grouping due to the proximity leading our minds to think that these people are somehow related. The consistency in dress code of these people amplify that perception.

- **Unity** - There is a sinuous flow of colors across the screen that lead to the perception of unity. For example, the blue color on the image, button and the text are similar in contrast. The color background of the 'INSTA-Expert' text is similar to the text of the expert dressed in red color. As a result, the elements in the design are in agreement with one another.

- **Hierarchy** - The hierarchy of the 'Forgot Password' text on the screen is quite obvious. The text is large enough to indicate the title of the screen and the text underneath it is small to give a brief description of the text. Finally, there is a 'Send' button which is underneath the 'Email' entry field.

Dashboard
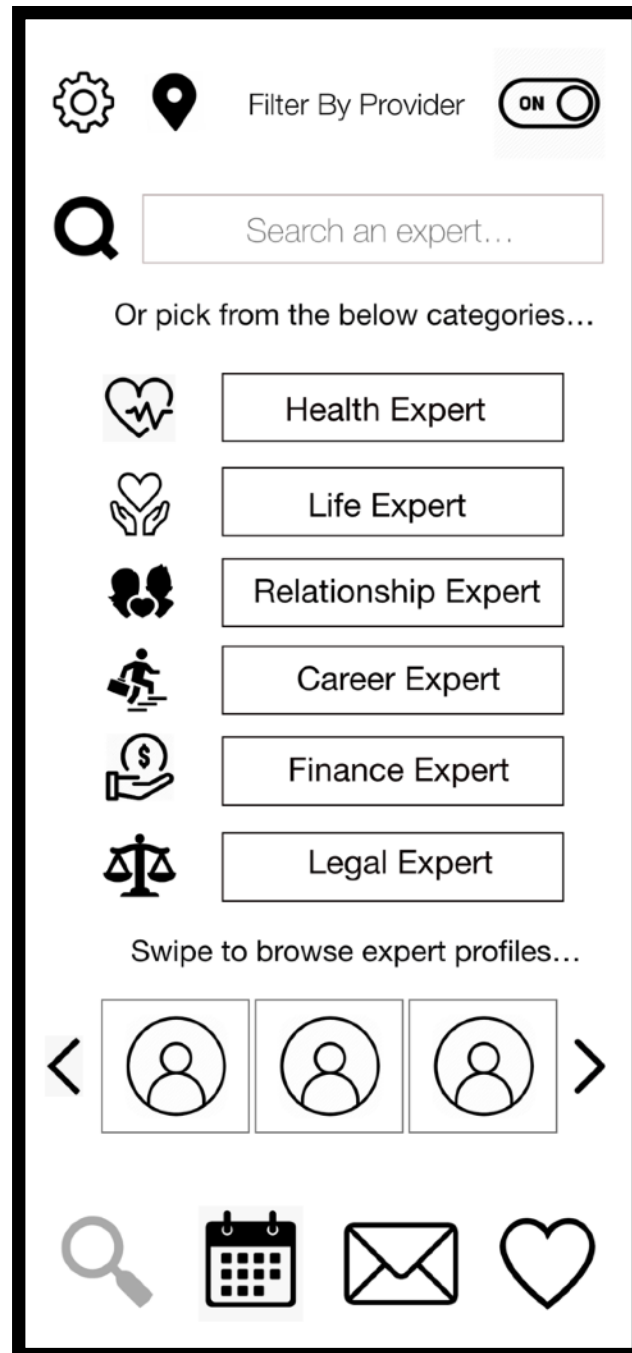
Before
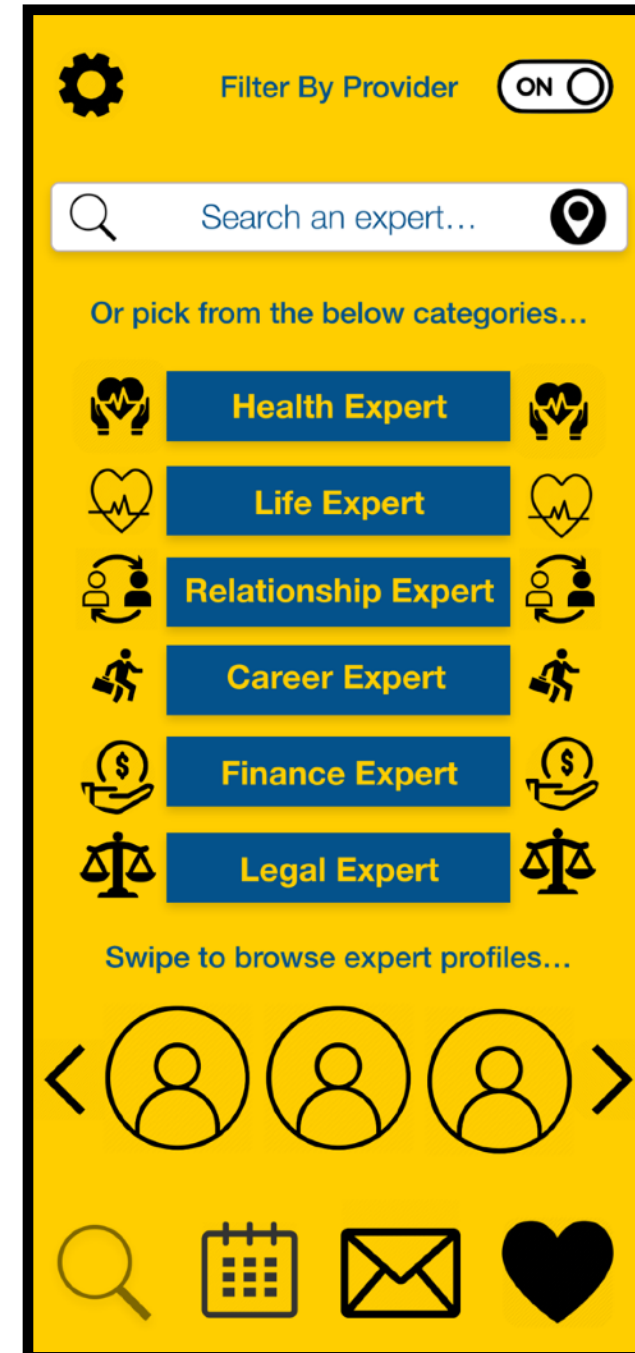
After

'Dashboard' Design Thinking

- **Balance** - There is an intentional symmetrical balance on the dashboard screen which gives the user-interface an overall uniformity. For example, the category based search has symbols on both sides of the buttons to indicate the type of expert and its visual significance.

- **Proportion** - The proportion of the elements is one of the most significant features of the dashboard screen. The size and proximity of buttons are harmonious and the profile icons are large enough to emphasize that the dashboard is designed to search and browse for experts on the app.

- **Law of Proximity** - The proximity of the buttons on the category based search are close enough to force our mind to think of them as a unit for searching experts by type. Similarly, the icons on the bottom of the dashboard are grouped evenly to give the use the perception that each icon represents a different page.

2. Emotional Design for User Engagement

Designing Rewarding Interactions

For my app INSTA-Expert, I will use a points based system keep them hooked onto using the app frequently by adding a reward based system. This feature will be added to the scheduling appointments with experts.

I will use gamification elements when a user books an appointment. For example, for every phone call appointment they get 1 reward point, for every video conference call they get 2 reward points and for every in-person appointment booked they get 3 reward points. These reward points can be used to redeem free consultation appointments for future visits and also earn the member a premium status on the expert app. In addition to this, for every appointment feedback and review the user posts about the expert they will automatically get 2 reward points

- For the first 25 points the user acquires, they get one free cancellation a month, one free 30 minute expert consultation, and a silver member status for 2x reward points.

- For the first 50 points the user acquires, they get two free cancellations a month, two 30 minute expert consultations, and a gold member status for 3x reward points.

- For the first 75 points the user acquires, they get three free cancellations a month, three 30 minute expert consultations, and a platinum member status for 4x reward points.

- For the first 100 points the user acquires, they get four free cancellations a month, four 30 minute expert consultations, and a diamond member status for 10x reward points and unlimited phone support 24/7.

Developing Personality

For my app INSTA-Expert, I will also engage the users by developing a personality by using fun emojis and informal text. There are four areas where I will focus on using emojis and text to trigger positive emotions: -

1. Scheduling Appointments - For every appointment scheduled the user will see a 'happy' face emoji with a message that has engaging text about their appointment. For example, "Thank you for booking your appointment with an INSTA-expert! Ken will be happy to consult you with your career goals and has five years experience with career coaching."

2. Favoriting and expert - I will use a 'Love' emoji every time a user favorites and expert to positively reinforce the user about their actions and trigger an emotion and a message that says something along the lines of: "Sweet! You have now added Dr. Han to your favorite lists. Click here to access your favorites menu."

3. Onboarding - I will put 'congratulating' emoji for completing the tutorial so that the user is positively reinforced for the time they took to study the app. There will also be a message that says: "Thank you for taking a sneak peek of INSTA-Expert. You are all set to explore our massive list of experts!"

4. Inbox - Every-time a user asks a question by messaging the expert they will see an emoji with a smiling face and a message that says: "Great! Your message has been sent to your expert. Please allow 24 hours for a response and if it is takes longer please reach our expert support team to escalate your inquiry."

3. Grids & Spacing Fundamentals

Forgot Password Screen

INSTA-Expert

Forgot Your Password?

Just tell us the email you registered with...

Email

Send

Original

INSTA-Expert

Forgot Your Password?

Just tell us the email you registered with...

Email

Send

Redesign With Grid

INSTA-Expert

Forgot Your Password?

Just tell us the email you registered with...

Email

Send

Redesign W/O Grid

Specifications and Improvements

Specifications

Columns = 4, Gutter Width = 17, Column Width = 66

Improvements

1. The font size for the app name 'INSTA-Expert' was increased and it was centered to fit inside the grid without leaving any room for extra space.

2. The size of the back button icon was reduced to fit the gutter space.

3. The font sizes for 'Forgot Your Password?' And 'Just tell us the email you registered with…' was adjusted and centered to fit inside the grid.

4. The text 'Email' and the 'Send' button were also centered.

Dashboard Screen
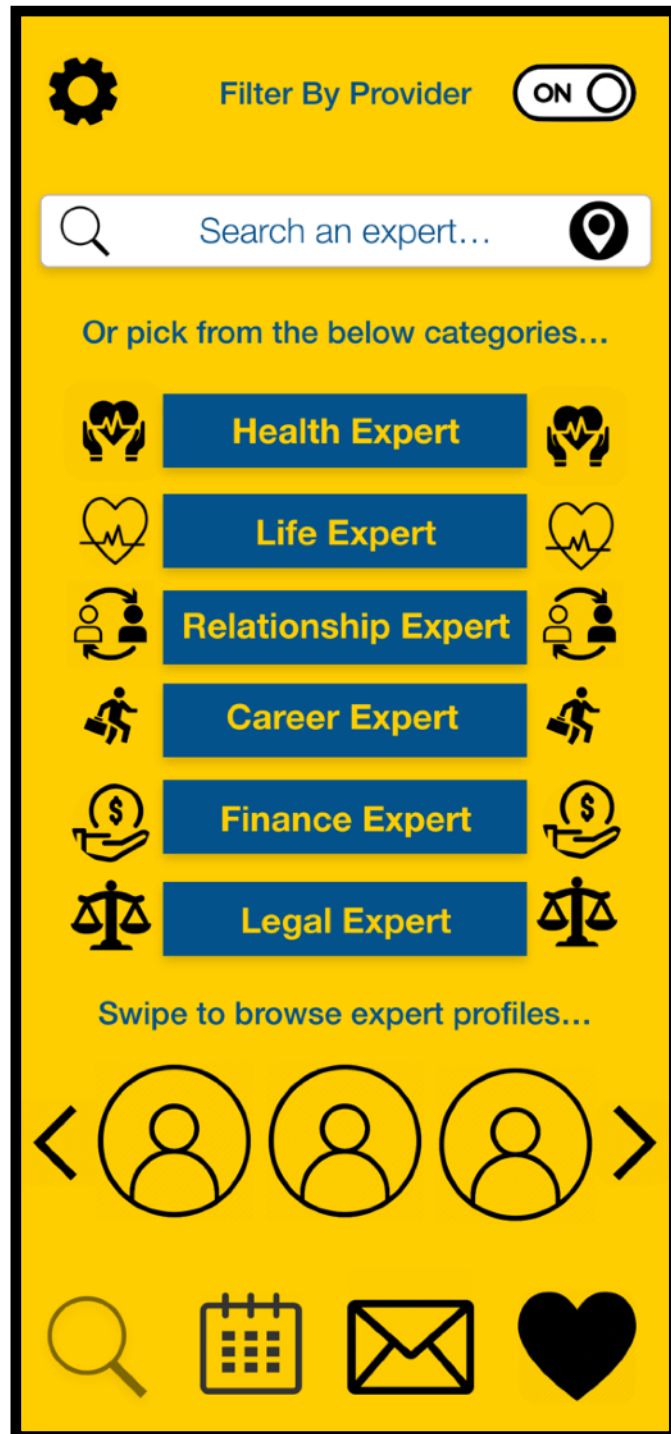
Original
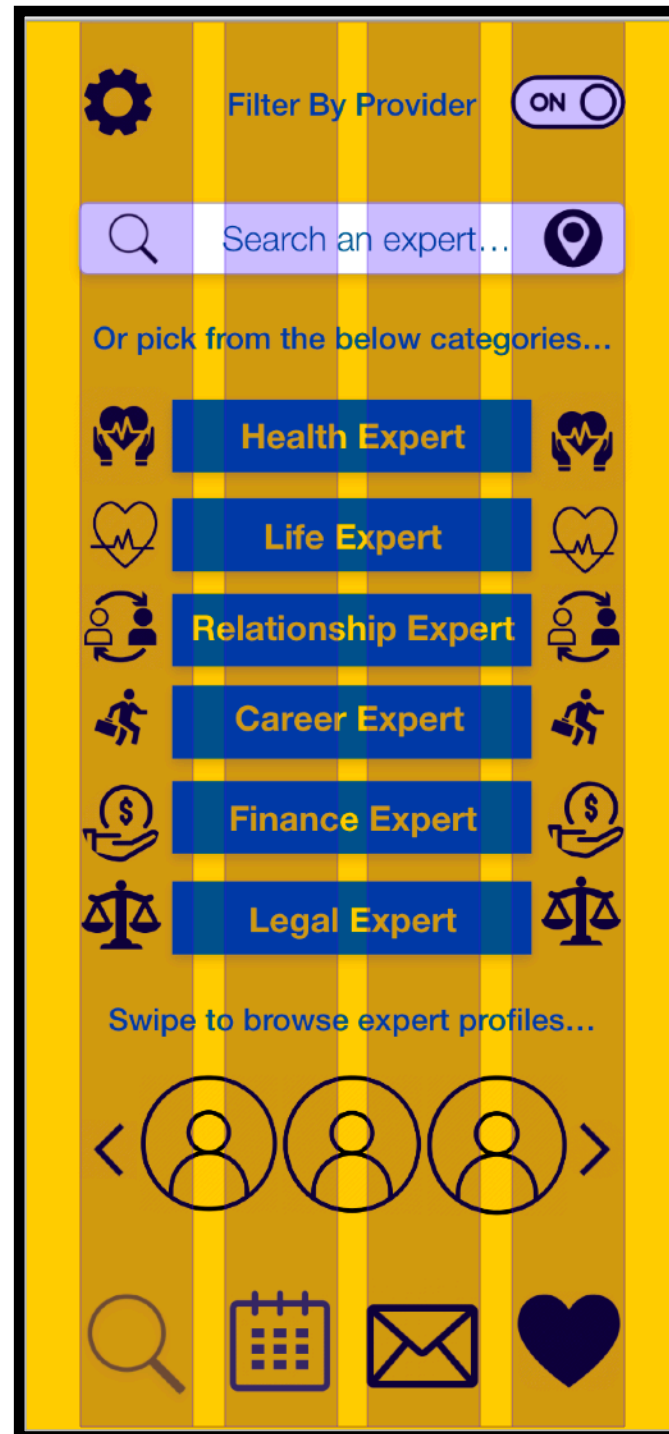
Redesign With Grid
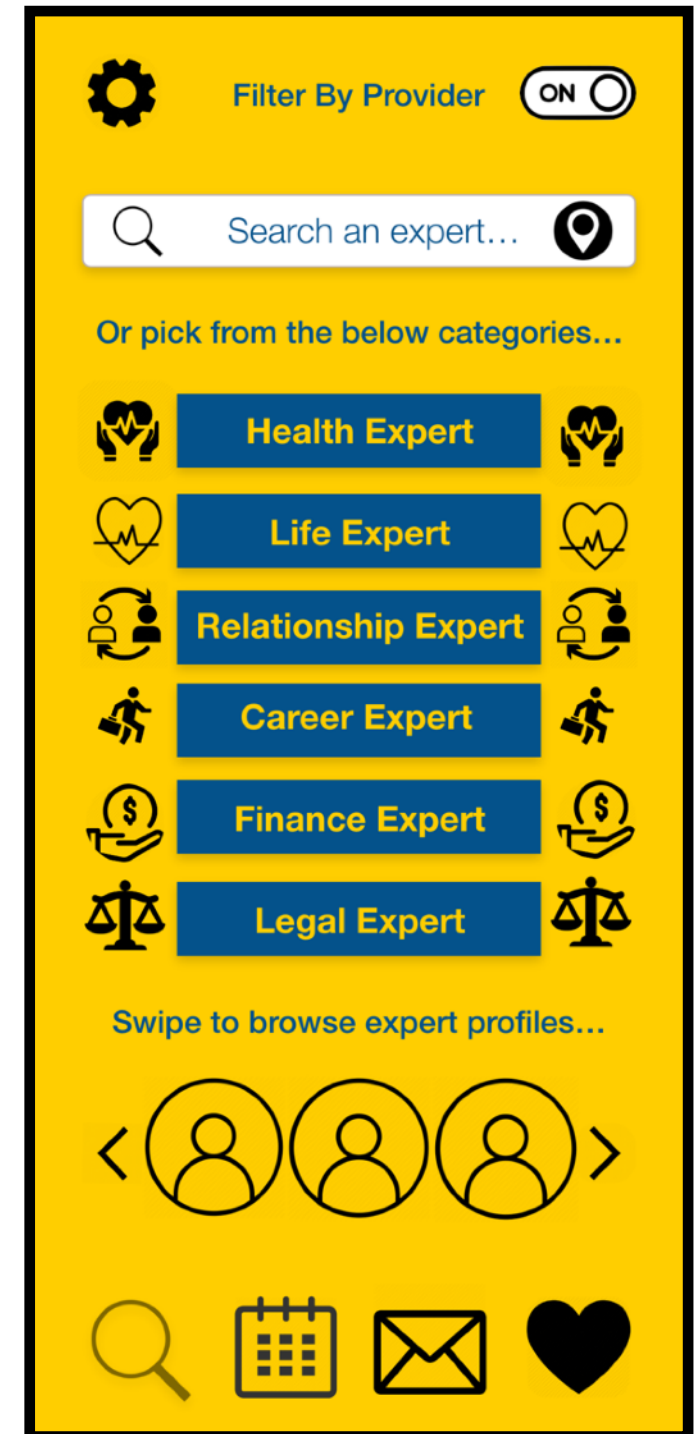
Redesign W/O Grid

Specifications and Improvements

Specifications

Columns = 4, Gutter Width = 17, Column Width = 66

Improvements

1. The settings button was positioned to the right, 'Filter by Provider' text was centered and the 'On/Off' toggle switch icon was reduced in size to fit within the grid.

2. The Search bar size was reduced and the rest of the icons and text within it were centered to fit within the grid.

3. The text for 'Or pick from the below categories…' and 'Swipe to browse expert profiles…' was also centered to fit within the grid.

4. The profile icons and the '<' and '>' arrows were reduced in size and centered to fit within the grid.

5. Some of the bottom navigation icons were reduced in size and they were all centered to fit within the grid.

4. Responsive Frameworks: Bootstrap & Foundation

INSTA-Expert Responsive Design
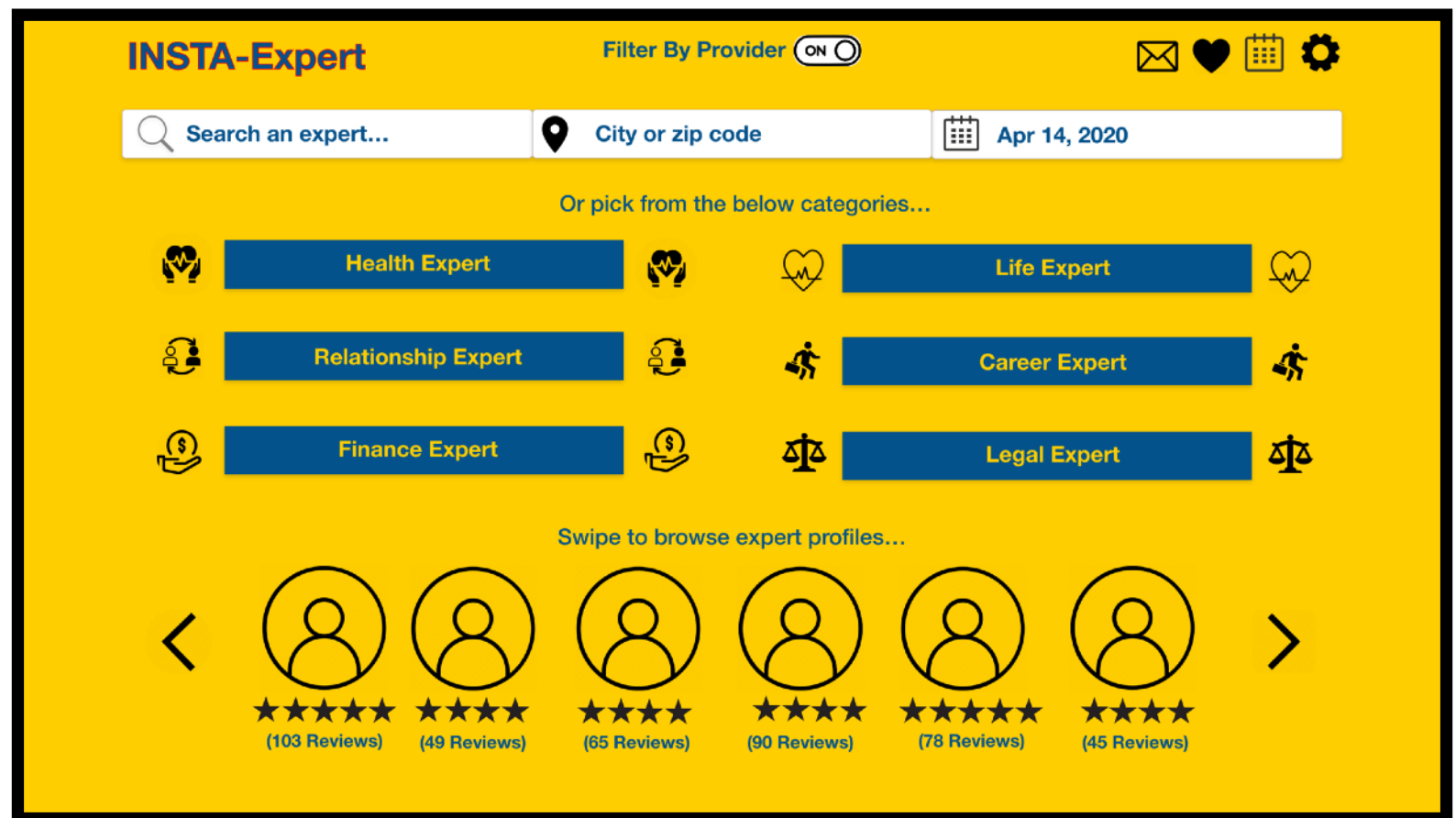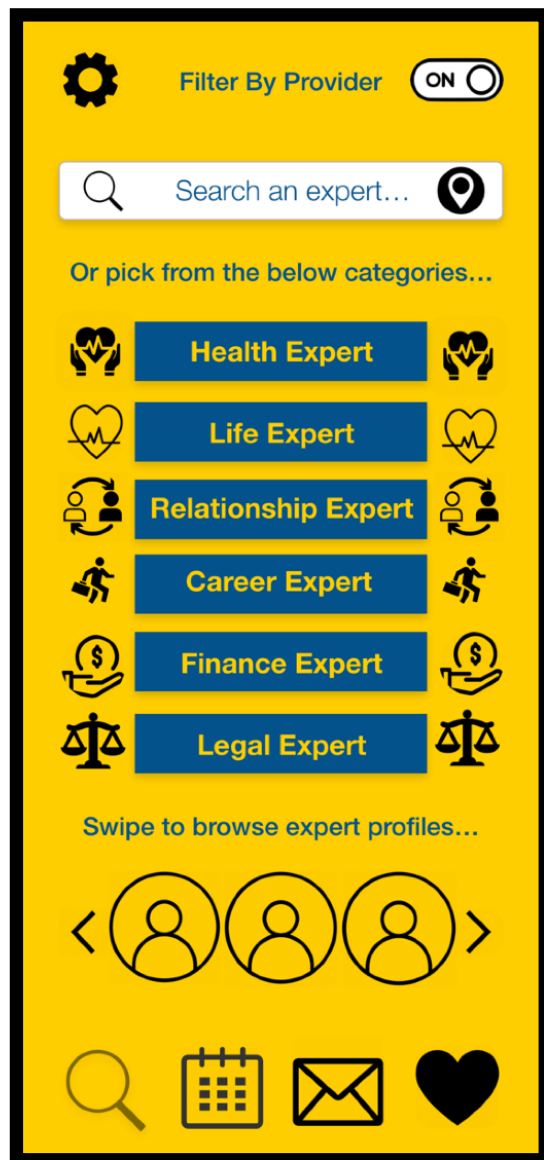
INSTA-Expert 12-Column Grid Design
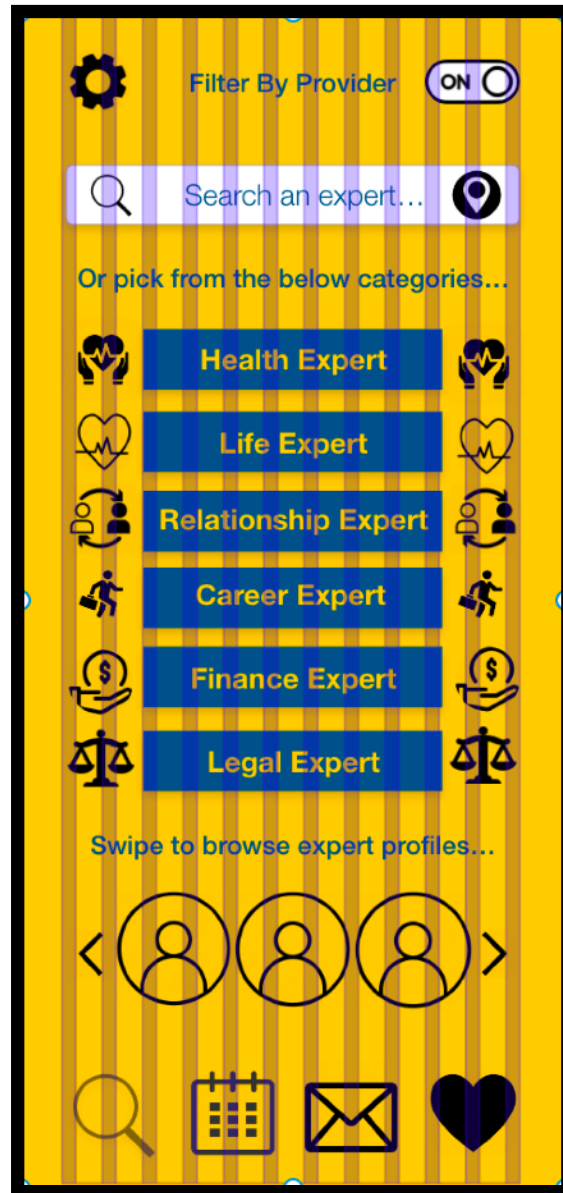
Bootstrap or Foundation?

Are you leaning more towards Bootstrap's components? Or, are you leaning towards Foundation's? Why?

I am leaning towards Bootstrap's foundations due to its simplicity, ease of use and mobile-first approach. Foundation, on the other hand is more complex especially for beginners.

How might you be able to use the reusable elements they provide in your responsive design?

A dropdown menu for the search and settings feature is an excellent reusable element in Bootstrap for both the mobile and desktop versions. Another reusable element would be the nested responsive grid for scheduling appointments with experts.

How might you use the 12-column grid to support your responsive design

12-column grids offer great flexibility, excellent structure and offer a good foundation across multiple devices. Overall, it makes the design neat and tidy and super organized.

5. Alternatives to HTML: Native Platforms

iOS Human Interface Guidelines

Launch Screen

According to Apple's website, "A launch screen appears instantly when your app starts up and is quickly replaced with the app's first screen, giving the impression that your app is fast and responsive." A launch screen is a requirement for every iOS app.

Typography

Apple provides two font options: San Francisco (SF) and New York (NY).

Actions

I ensured that the app has an appropriate launch screen that clearly depicts what this app is about as well as changed the font size to SF Pro text.

INSTA-Expert

Welcome to INSTA-Expert

Welcome To The Tutorial

Search Experts By Keywords...

Doctor

Lawyer

Accountant

Life Coach

Career Coach

Psychologist

Skip Demo
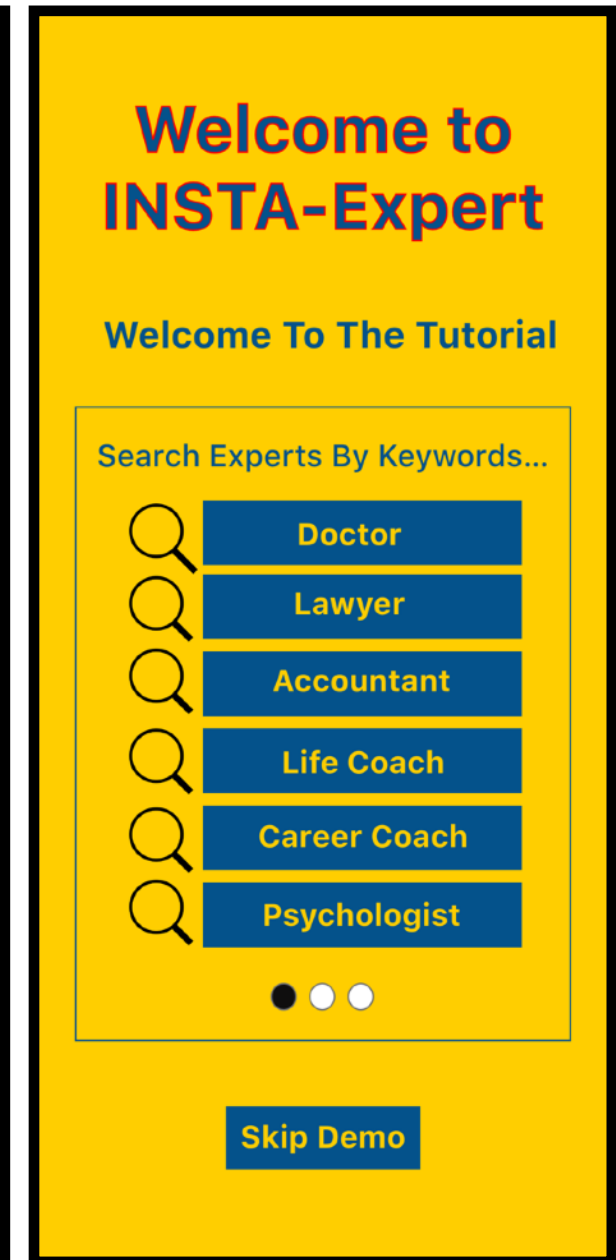
Splash Screen   Onboarding Tutorial A

iOS Human Interface Guidelines

Onboarding

It is important for the onboarding experience that helps a user learn more about the app and enjoy the experience. Therefore, it is important to cut to the chase, guide users through an effective tutorial and make the experience fun.

Actions

I ensured that the onboarding experience was consistent with Apple's iOS guideline and cut right to the chase without adding any redundant steps or making the tutorial too long. As a result, I came up with a three page tutorial that can be skipped.

Welcome to INSTA-Expert

Search By Categories...

- Health Expert
- Life Expert
- Relationship Expert
- Career Expert
- Finance Expert
- Legal Expert

○ ● ○

Skip Demo

Onboarding Tutorial B

Welcome to INSTA-Expert

Manage Your Appointments...

Past   Upcoming

★ ★ ★ ★ ★

Dr. Olson - Gynecologist

Thursday, January 23rd

Directions: 440 Terry Ave N. Seattle WA - 98109

Go to 'Messages' to fill in paperwork.

⊗ Cancel   ↻ Change

○ ○ ●

Finish
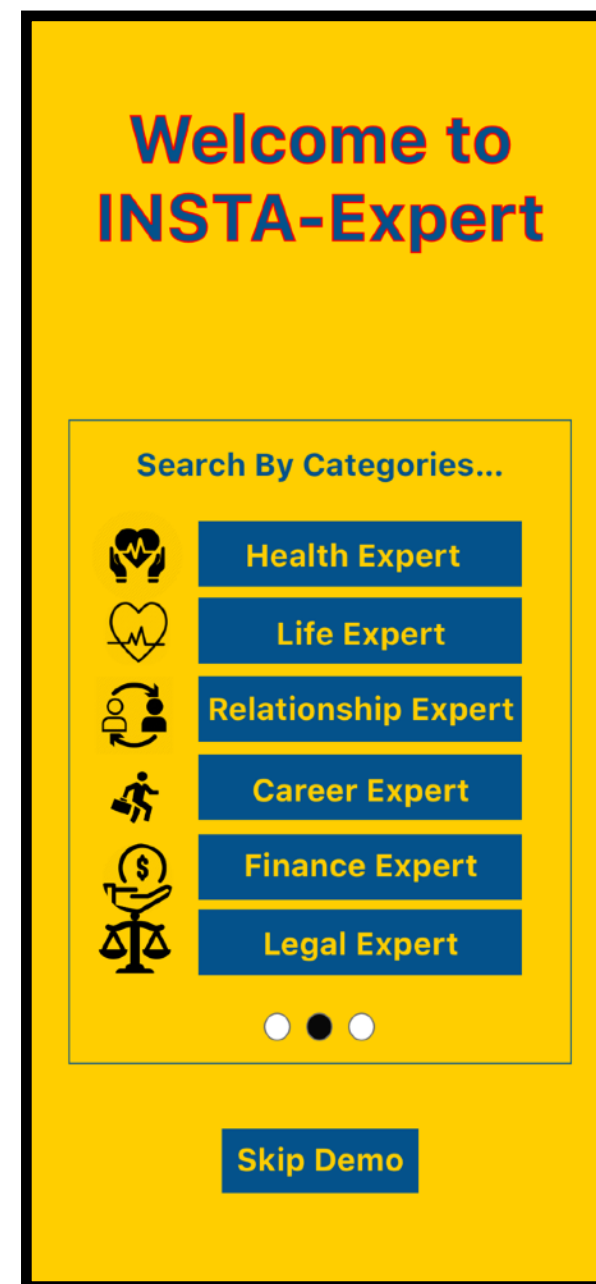
Onboarding Tutorial C

iOS Human Interface Guidelines

Onboarding

It is important for the onboarding experience that helps a user learn more about the app and enjoy the experience. Therefore, it is important to cut to the chase, guide users through an effective tutorial and make the experience fun.

Actions

I ensured that the onboarding experience was consistent with Apple's iOS guideline and cut right to the chase without adding any redundant steps or making the tutorial too long. As a result, I came up with a three page tutorial that can be skipped.

iOS Human Interface Guidelines
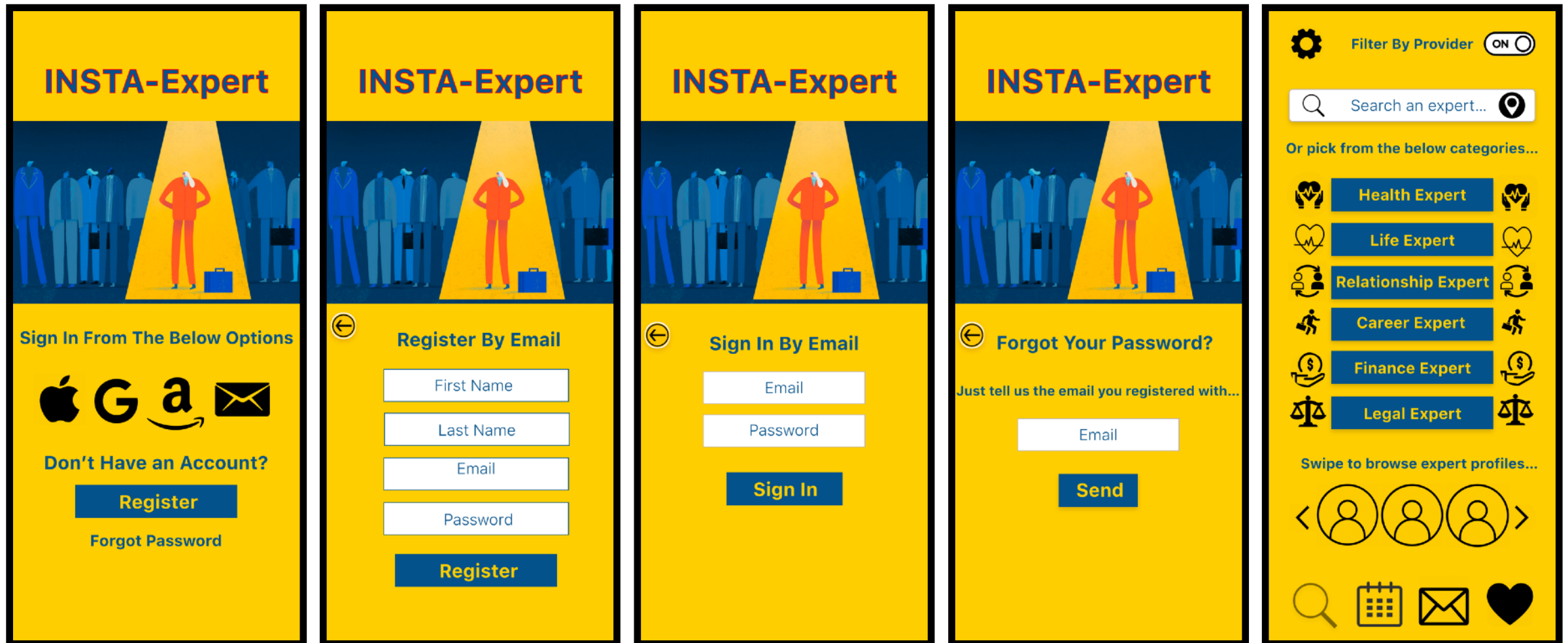
Sign In/Register

Register Via Email

Sign In Via Email

Forgot Password

Dashboard

Additional Screens for INSTA-Expert App

6. Design Documentation

Logo

Welcome to INSTA-Expert

Typography

Font

SF Pro Text

Font Size

- Title 1 - 42 pts/Bold/#04528B and #FF0000

- Title 2 - 24 pts/Bold/#04528B

- Title 3 - 20 pts/Bold/#04528B

- Button Text - 20 pts/Bold/#FFCE00

- Entry Field Text - 20 pts/Light/#04528B

Colors

Header Text Color - #04528B and #FF0000

Background Color - #FFCE00

Button Text Color - #FFCE00

Entry Field Background Color - #FFFFFF

Text Color - #04528B

UI Elements & Styles

Button Layout

Register

Entry Field Layout

First Name

Search an expert...

Icons

Health Expert

Life Expert

Relationship Expert

Career Expert

Finance Expert

Legal Expert

Favorites

Tutorial Slider

Profile

Star Ratings

Search

Calendar

Back

Settings

Location

On/Off Switch

Messages

Swipe Left

Swipe Right

Icons for users to Sign In the app: Apple, Google, Amazon and Email

Copy/Language Guidelines

INSTA-Expert is an expert app designed for users across all age groups and demographics. It is design for users to find experts in the range of health experts, relationship experts, live experts, career experts, legal experts and finance experts.

INSTA-Expert language is simple, concise and to the point. The use of complex words are avoided. While the tone of the text is not formal, it is also not casual, hip or trendy like the many apps designed for Millennials or Gen Z users are. This is because there will be a diverse age of users interacting with this app so we wanted to keep the tone neutral.

7. Design Language Systems

Table of Contents for INSTA-Expert

- Color

- Common UI elements and how to use them

- Language

- Tone of voice

- Accessibility

- Grids/layouts

- Typography

- Iconography

- Other visual or emotional aspects of the design

Colors

The primary colors for the INSTA-Expert app were #04528B and #FFCE00 .

#04528B (blue) was used for most of the text in the app including the header text. #FFCE00 (yellow) was used for the background and color of the button text. Additionally, #FF0000 (red) was used for the outline for the header text and the #FFFFF (white) was used for the background color of the entry fields such as 'Email' and 'Search'.
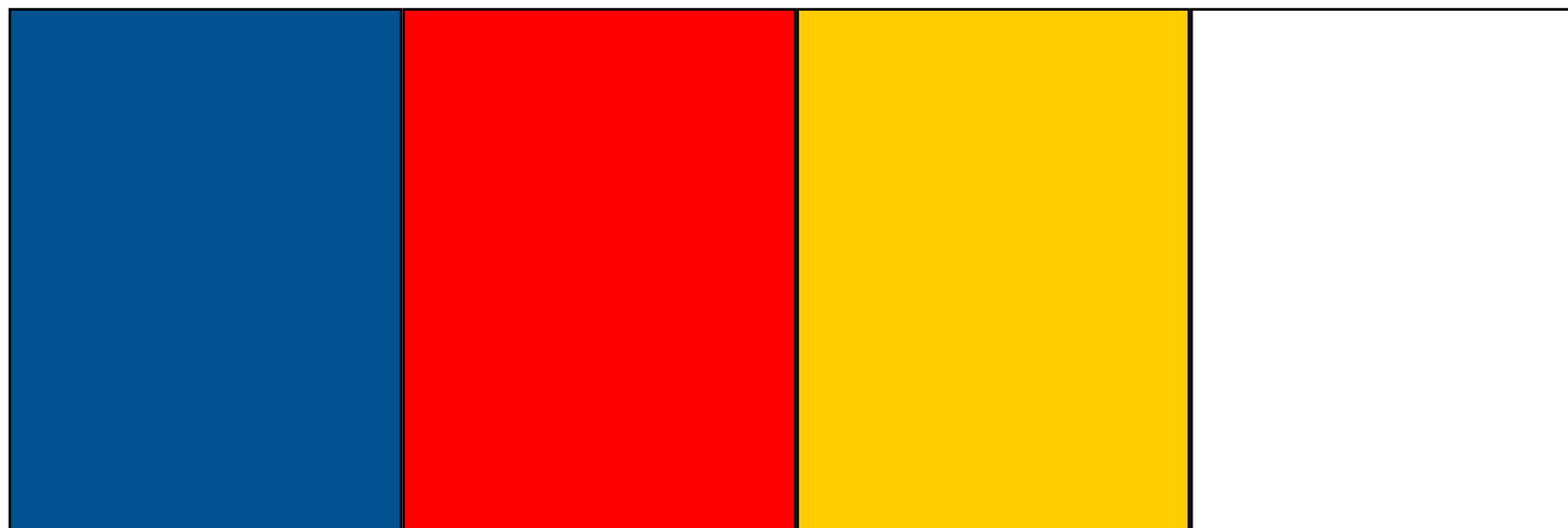
UI Elements

Search Button - This button is plain white and designed with a drop-shadow to make it stand out from the background. It is the main point at which the user searches for an expert.

Category Based Search Buttons - These action buttons are designed for filtering experts by profession with a symbol indicating the type of expert.

Filter By Provider 'On/Off' Switch - This button is specifically design to filter by insurance provider so as to filter searches for providers in the user's network based on their insurance card.

Settings Button - This button located on the top left corner of every page is designed to access the settings menu.

Other buttons like 'Send', 'Register', etc. - These are action buttons that perform a specific task such as send an email, register into the app, etc.

Health Expert

Life Expert

Relationship Expert

Career Expert

Finance Expert

Legal Expert

Search an expert...

ON

Send

Language and Tone

INSTA-Expert language is simple, concise and straight to the point. The use of complex words are avoided. While the tone of the text is informal, it is not too casual, hip or trendy like the many apps designed for Millennials or Gen Z users are. We wanted to keep the tone neutral because there will be a diverse age group of users interacting with this app.

Welcome to INSTA-Expert

Welcome To The Tutorial

Thank you for confirming your appointment
Here is some paperwork for you to fill out.

Forgot Your Password?

Don't Have an Account? **Just tell us the email you used...**

Search an expert...

Or pick from the below categories...Swipe to browse expert profiles...

Accessibility

INSTA-Expert has good accessibility functions for creating an incredible user-experience.

Navigation: There is consistency across each page with the color scheme and placement of objects such as the search bar, bottom navigation, etc.

User Interface: The use of industry-standard visual icons and placement of buttons make the app feel intuitive when using it. For example, the location or settings icon is something that is clearly identifiable as its appearance is consistent across many apps.

Options for Scheduling Appointment: The user is prompted with various options to contact experts: phone, video or in-person meeting.

Grids/Layouts

Specifications

- 4 Columns

- Gutter Width 17px

- Column Width 66px

The elements in the screen are aligned to fit within a vertical grid and nothing is extruding outside the grid-lines. The design and arrangement of the elements are well balanced on the left and right side which makes it visually appealing. Overall, all elements in the screen are proportional to one another.
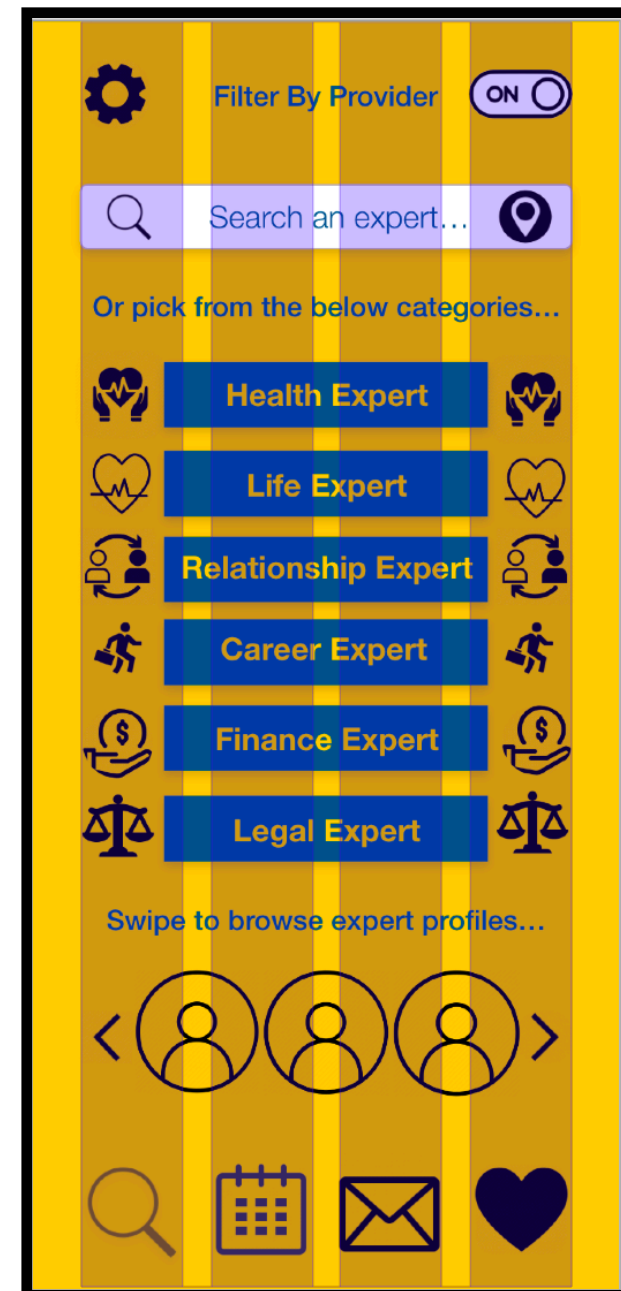
Typography

To follow the protocols of Apple's iOS guidelines, the font used for INSTA-Expert is **SF Pro**.

Font sizes are as follows:

- Title 1 - 42 pts/Bold/#04528B and #FF0000

- Title 2 - 24 pts/Bold/#04528B

- Title 3 - 20 pts/Bold/#04528B

- Button Text - 20 pts/Bold/#FFCE00

- Entry Field Text - 20 pts/Light/#04528B

Welcome to INSTA-Expert

Welcome To The Tutorial

Search Experts By Keywords...

Doctor

Lawyer

Accountant

Life Coach

Career Coach

Psychologist

Skip Demo
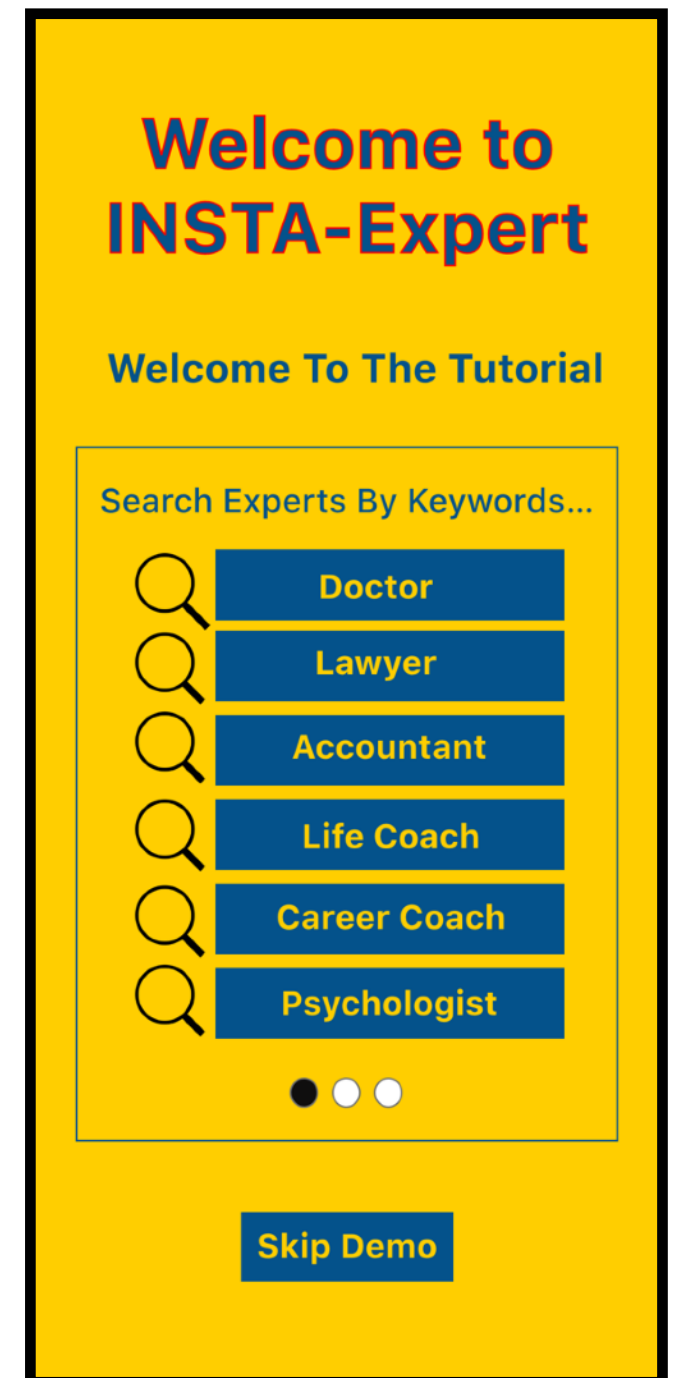
Iconography

Icons serve as quick actions for users throughout the INSTA-Expert app. Most of the icons used are industry-standard and common across many app platforms, for example, the search bar, settings, messages, favorites, etc. Using elements that users are already familiar with instantly allows them to recognize its purpose and functionality.

Health Expert

Life Expert

Relationship Expert

Career Expert

Finance Expert

Legal Expert

Favorites

Tutorial Slider

Profile

Star Ratings

Search

Calendar

Swipe Left

Back

Settings

Location

On/Off Switch

Messages

Swipe Right
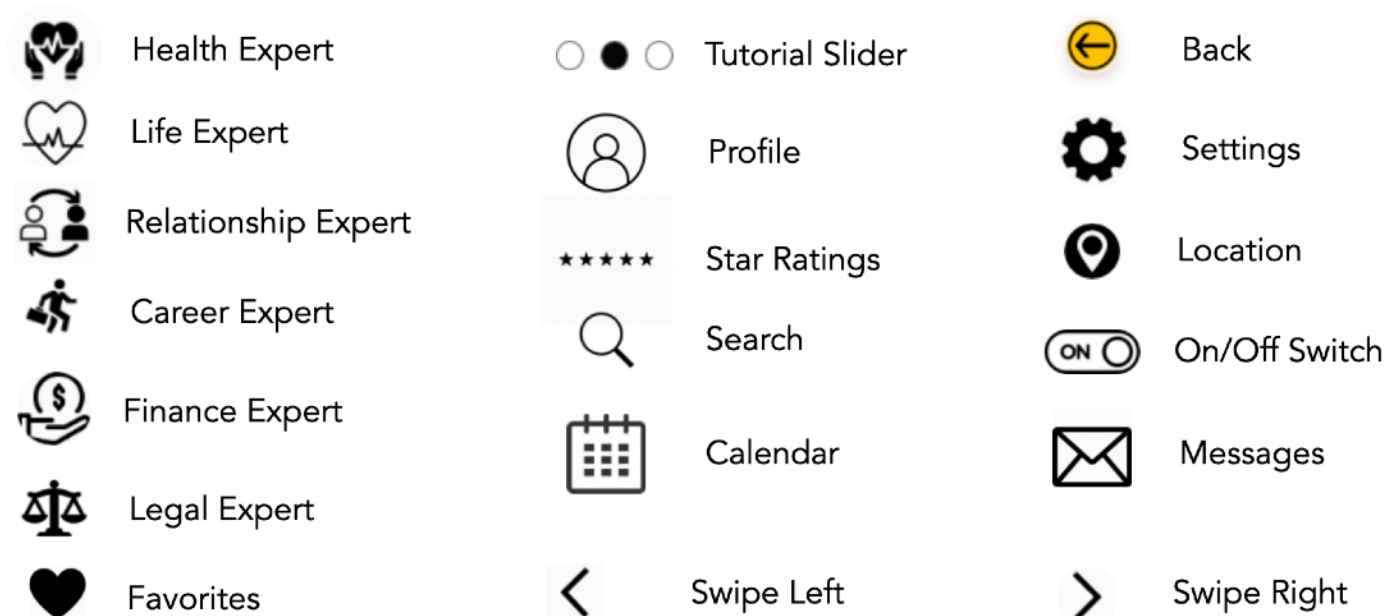
Icons for users to Sign In the app: Apple, Google, Amazon and Email

Other Illustration: Logo

The logo has a symbolic purpose and is used on the splash screen and onboarding screens. The colors in the logo are synchronous with the color scheme used across all pages in the expert app. The professional dressed up bodies in the logo illustrate the purpose of this app and represent experts in various fields. The yellow color in the logo shines light on user who is in the spotlight.

8: Design Collaboration and User Feedback

Splash Screen

Before

INSTA-Expert

Splash Screen

Sofia Guest May 03

Like the simplicity and how my eye is drawn right away to "Insta-Expert". I don't like the red outline on the Insta-Expert text though. Choose a different outline colour maybe? Also the image isn't intuitive - it makes me think of something in fashion because of the spotlight.

IB **Irem Bayrak** • a day ago
I liked the bright colors it definitely draws attention. It's just my personal idea but maybe image could be bigger or the background above image could be a shade of blue (like the ones in image). I wouldn't also prefer and outlined text. Blue and red doesn't go along well in this text.

N **Nevena** • 19 hours ago
I would like to see perhaps the background blue instead of yellow because there is so much yellow throughout the app. Also I think that image will stand out more. And if you decide to do that the "INSTA-Expert" can become white or yellow?

After

INSTA-Expert

Removed the red outline on title per feedback from two users.

Sign In/Register

Sign In/Register Screen
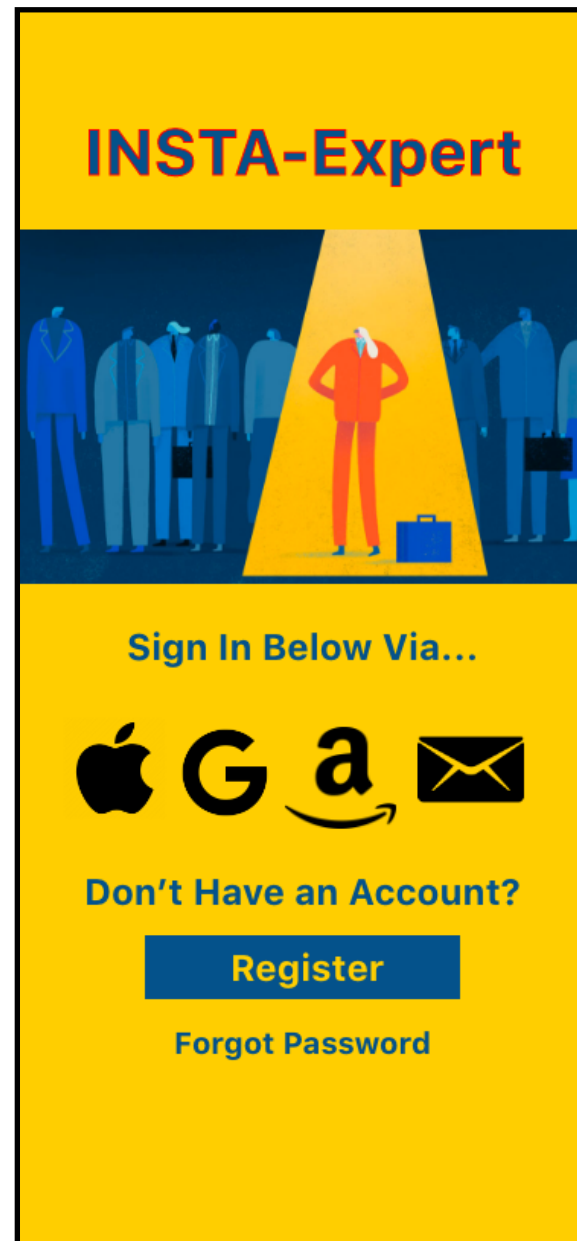
Sofia Guest May 03

Like the option to sign in using four other platforms, I think it would be useful to include LinkedIn on this as well. I'm seeing too many ellipses -- I don't understarstand the usage for the ellipses after "sign in below via". I think the Sign In Below and the Don't have the Account needs to be separated from each other a little more since they are two different routes.

Irem Bayrak a day ago 👍

I liked that it allows to sign in/sign up with social media accounts which I would prefer because it's easier and quicker. To reduce the steps, maybe this screen could be directly a sign in screen via email and it could offer link to sign in with social accounts and sign up.. The other thing is, I think forgot password could be in sign in screen.

Nevena a day ago 👍

Agree with Irem.

INSTA-Expert

Sign In Below Via...

 G a ✉

Don't Have an Account?

[Register]

Forgot Password

Sign in to INSTA-Expert

[Sign In Via Email]

[Sign In With]

[Sign In With G]

Don't have an account?

[Register]
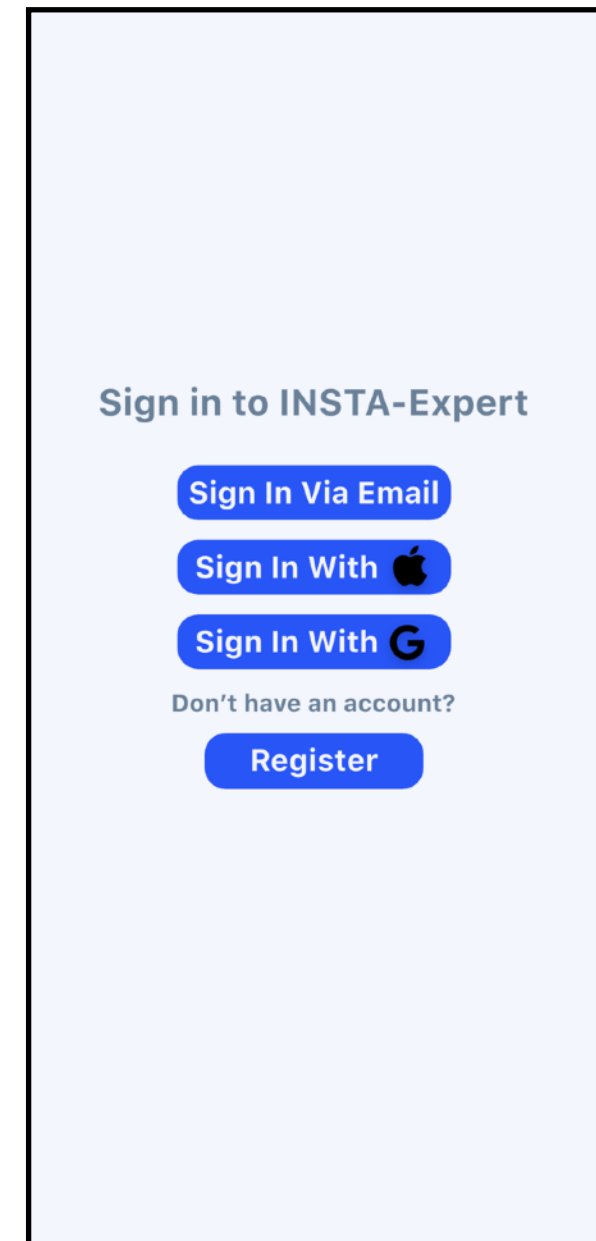
Before

After

Made modifications per user feedback.

Sign By Email

INSTA-Expert

Sign In By Email

Email
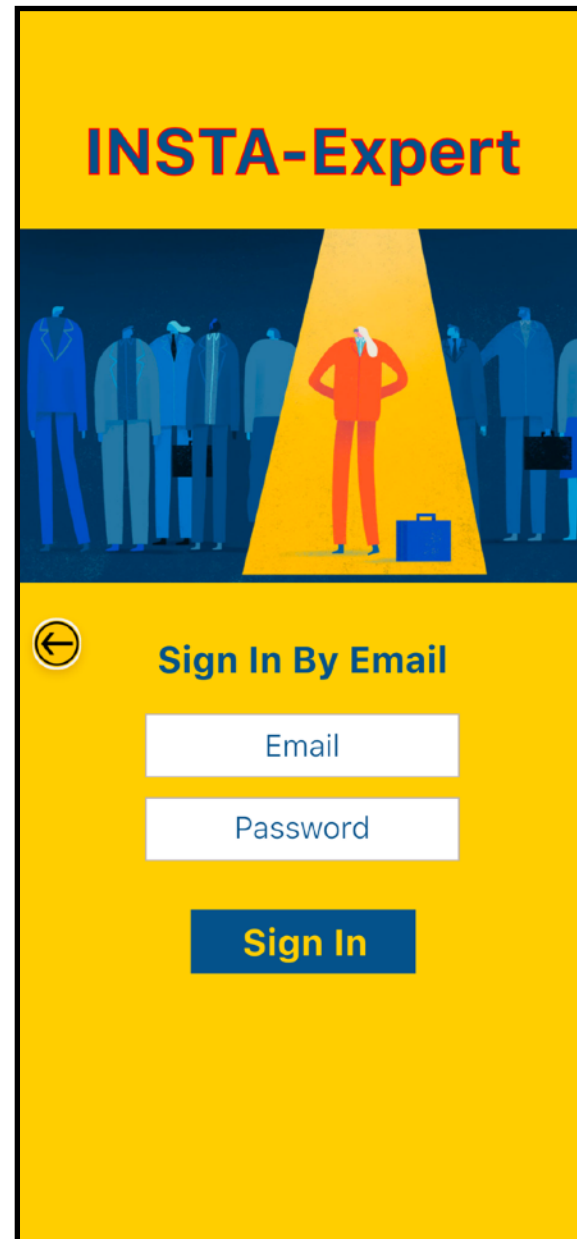
Password

Sign In

Before

Sign In By Email

Sofia Guest May 03

I like this screen, easy to understand.

Reply

IB **Irem Bayrak** a day ago
I would also use input text boxes wider and a forgot password link.

N **Nevena** a day ago
Agree with Irem.

← Sign in by email

Email

Password

Sign In

Forgot Password?
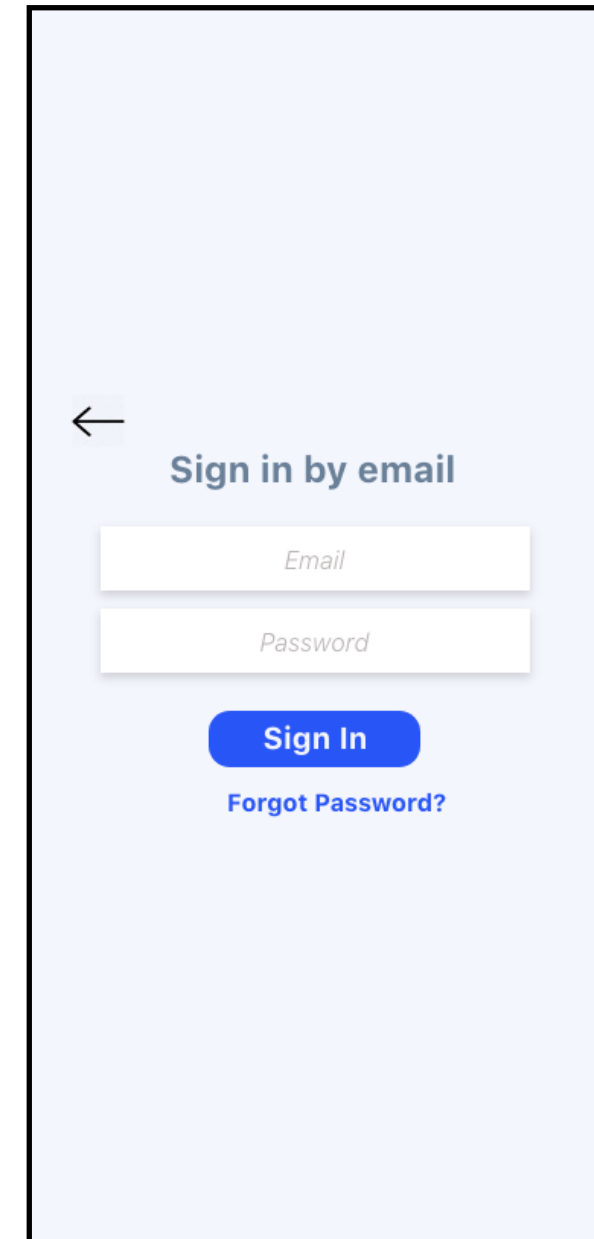
After

Made modifications per user feedback.

Dashboard

Before

Filter By Provider (ON)

🔍 Search an expert... 📍

Or pick from the below categories...

- Health Expert
- Life Expert
- Relationship Expert
- Career Expert
- Finance Expert
- Legal Expert

Swipe to browse expert profiles...

Dashboard

Sofia Guest May 03

Don't need the ellipses; also don't need redundant images (e.g., the left and right hand side of the categories have duplicate images - only the left side needs an image).

Reply

Nevena a day ago

Overall, everything on this screen appears the same size and there is no visual hierarchy. I would like the most important content to stand out first. So maybe the icons next to the "blue" buttons are smaller so that the buttons stand out. Also, I think you only need the icons next to the buttons once, not on both sides.

Irem Bayrak a day ago

I liked it offers to browse among experts. But I'm not sure if those arrows are really necessary. It also says to swipe above it. It could be more pleasant, if it's designed in a way that makes users to swipe intuitively. The other thing is when I browse expert, I would probably want to see more information than a photo. Maybe their expertise, rating etc.

Nevena a day ago

Is it possible to make the bottom icons smaller?

After

Filter By Provider (ON)

🔍 search for experts... 📍

Or pick from the below categories

Health	Life
Relationship	Finance
Career	Legal

Browse Featured profiles

⭐⭐⭐⭐⭐
Dr. Olson - Gyno
(49 Reviews)

⭐⭐⭐⭐⭐
Dr. Snoop - DO
(420 Reviews)

⭐⭐⭐⭐⭐
Dr. Martha - MD
(38 Reviews)

⭐⭐⭐⭐
Saul Goodman, Law
(114 Reviews)

Prev 1 2 3 4 5 6 7 8 9 10 Next

Made modifications per user feedback.

Compliments

Nevena a day ago
Great to have a back button!

Nevena a day ago
I like how this button stands out and is easy to find.

Nevena a day ago
I like that you have the settings up here. It is very easy to find.

Irem Bayrak a day ago
It's really useful to have back buttons in every screen. I liked that 👍

Nevena a day ago
I really like the placement of this information. It stands out immediately and is easy to read.

Irem Bayrak a day ago
I liked that there are different versions of icons when selected. But I think it could be more obvious. Maybe different color or solid/filled version when selected.

Irem Bayrak a day ago
I liked that it offers options to cancel or change it.

Nevena a day ago
This is a great feature!

Nevena a day ago
I think this is smart to have all of the options. They are all very helpful and important.

Mark as resolved

Nevena a day ago
Great hierarchy of information here. I know where to find everything I need and would be able to complete the task of scheduling.

Irem Bayrak a day ago
I liked the bright colors it definitely draws attention. It's just my personal idea but maybe image could be bigger or the background above image could be a shade of blue (like the ones in image). I wouldn't also prefer and outlined text. Blue and red doesn't go along well in this text.

Messages

Sofia Guest May 03 (edited)
Like this screen a lot. The two suggestions I would suggest is to remove the "new email" icon from inside the search box. The second suggestion is to gray out the magnifying glass, calendar and heart at the bottom to indicate that those are not selected; instead make the inbox icon stronger in colour to indicate that this is the screen you're on

Profile Page 4

Sofia Guest May 03
Love this screen because of the different actions I can take. I think it would also be helpful to add another action which is to "Cancel/Reschedule"

Nevena a day ago
This is a comment for the overall onboarding: I think it is very informational! I understand how the app works by these three screens.

Nevena a day ago
This is a great feature! And one I use often, especially for this type of app.

Irem Bayrak a day ago
Screen is clear and straightforward. But maybe input text boxes could be wider to allows users to see whole email.

Browse Profiles

Sofia Guest May 03
This is a really great screen! It provides me so much information about the provider right away, such as their review score, photos, next available appointment (which is great when I'm looking for a timeframe for an appointment), their addresses and a place to fill out my paperwork. One thing I would suggest is to add an option for "Search by Date Availability" so that if I am looking for an appointment for tomorrow, it should narrow providers that are available tomorrow instead of showing me hundreds of providers with different availabilities.

Profile Page 1

Sofia Guest May 03 (edited)
Like this screen a lot, lots of information and actions I can take from this screen. I don't understand the icon with the two people sitting at the table together though and why is "schedule" grayed out?

Irem Bayrak a day ago
I like that icons are related to categories. I think same things as I wrote for the previous screen.

Irem Bayrak a day ago
I like that it allows user to skip demo. But it's a button but it shares the same layout with the list above. So it can be assumed that they are buttons too. There is no hotspot so I don't what is clickable but maybe to make it interactive, users could be allowed choose from these expertise and save it to customize their experience.

Sofia Guest May 03
Like the simplicity and how my eye is drawn right away to "Insta-Expert". I don't like the red outline on the Insta-Expert text though. Choose a different outline colour maybe? Also the image isn't intuitive - it makes me think of something in fashion because of the spotlight.

Sofia Guest May 03
Like the option to sign in using four other platforms, I think it would be useful to include LinkedIn on this as well. I'm

Sofia Guest May 03
Love this screen, easy to read and take action on my appointment for the cancel/change option. Love that it has everything I need, from the provider photo, their title, addresses, directions, a place to fill out paperwork and also see previous and upcoming appointments. For the 3 ellipses under "Manage your appointments", is there more text that's hidden -- is that what this signifies?

Dashboard/Allow Location

Sofia Guest May 03
I like this screen, it has my settings on the left, allows me to filter by provider, search, pick from categories, use my current location, and just browse experts.

Sign In By Email
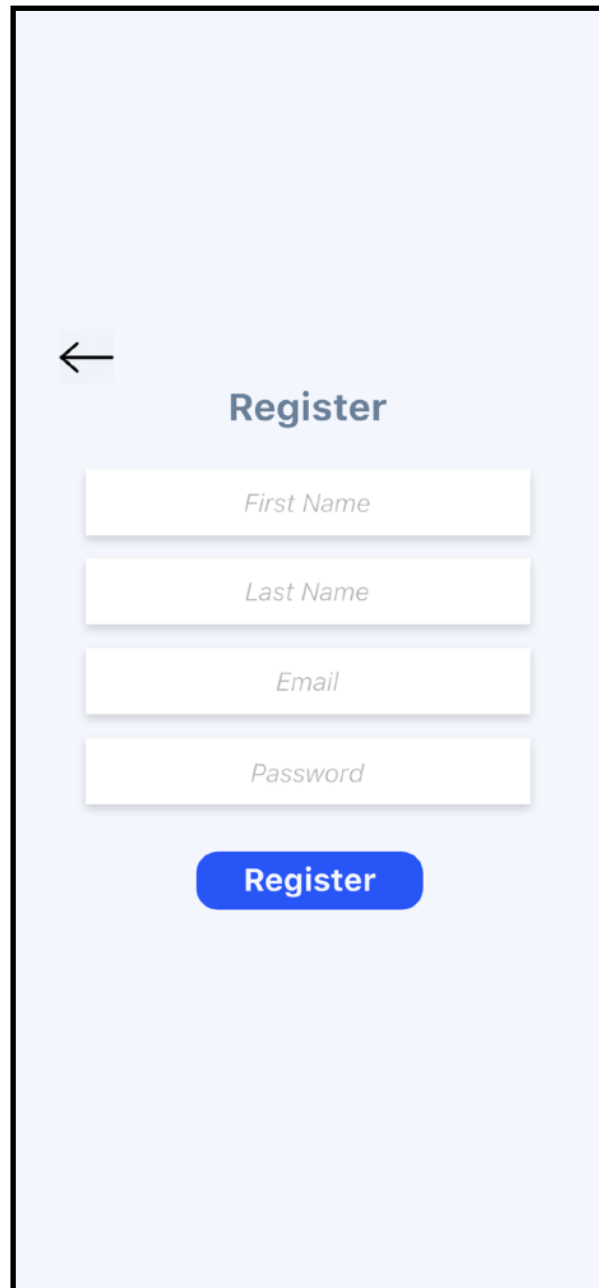
Sofia Guest May 03
I like this screen, easy to understand.

9. Refining The Design: Prototype

Task 6.1: Designing For Accessibility

Mihir Shah

Register Screen - Required Indicator & Contrast Between Text and Background

Register

First Name

Last Name
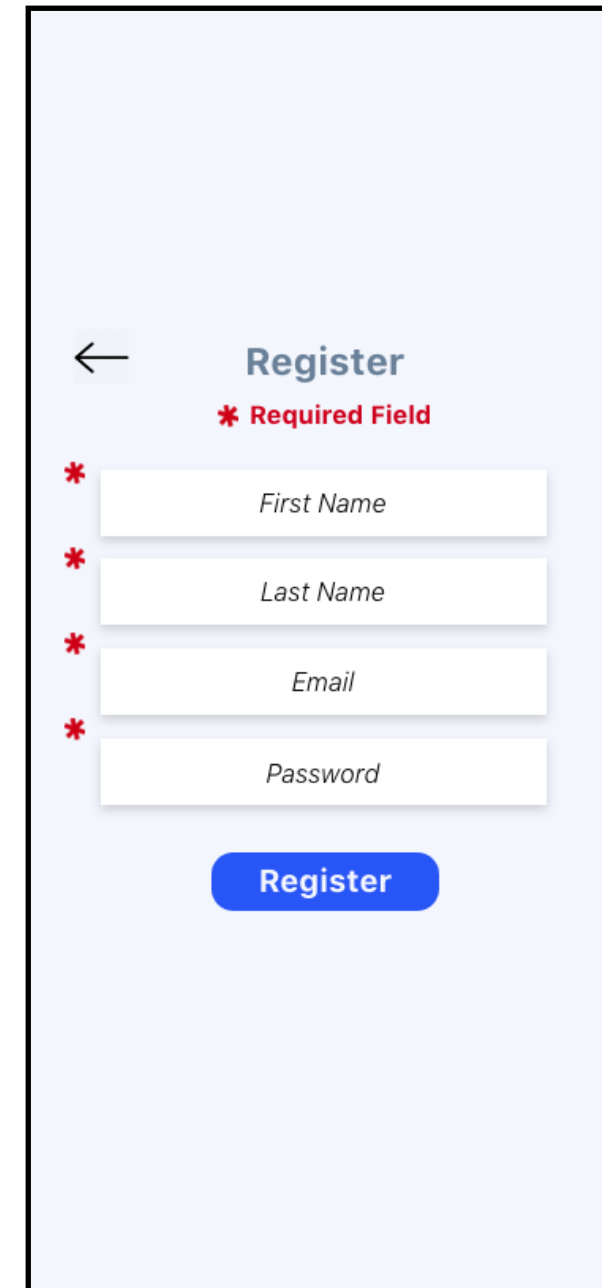
Email

Password

Register

V1

I added required fields and highlighted them in red on the new version to assist the user and indicate that the field is required.

I changed the font of the text in the boxes to black from light gray so that it is more accessible for a color blind user to read.

Register

∗ Required Field

First Name

Last Name

Email

Password

Register

V2

Dashboard - Contrast Between Text and Background
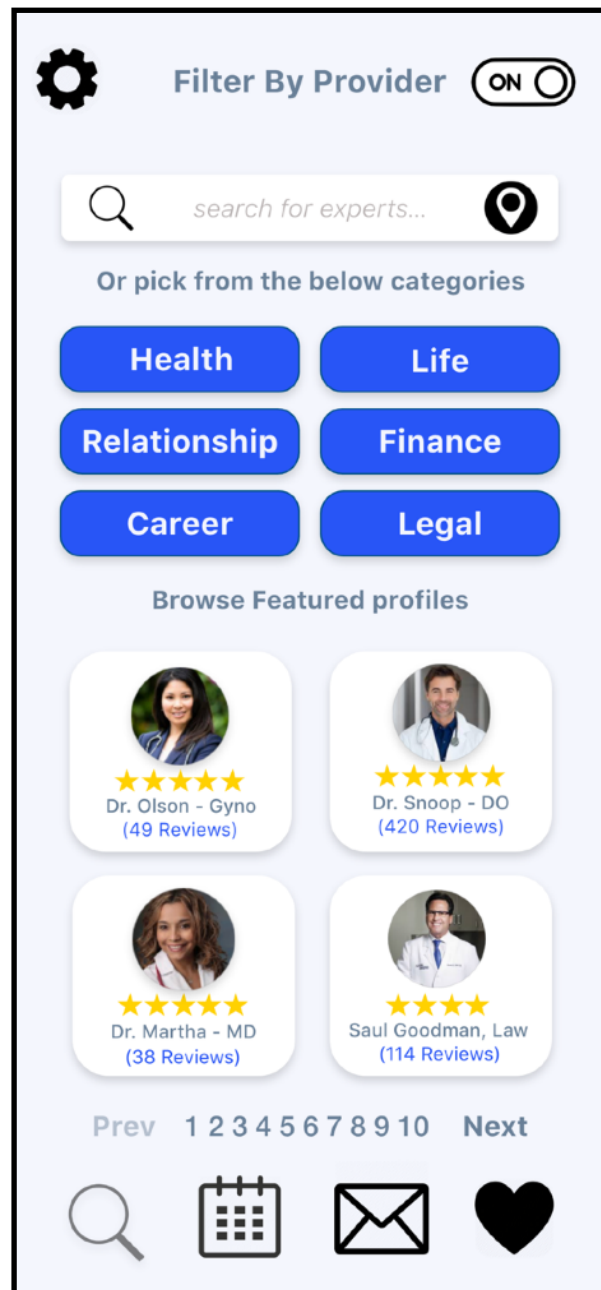
I changed the font of the text in the boxes to black from light gray so that it is more accessible for a color blind user to read.

Similarly, the contrast and font of the text on the profile page was also enhanced to make it clearly readable to the eye.

V1
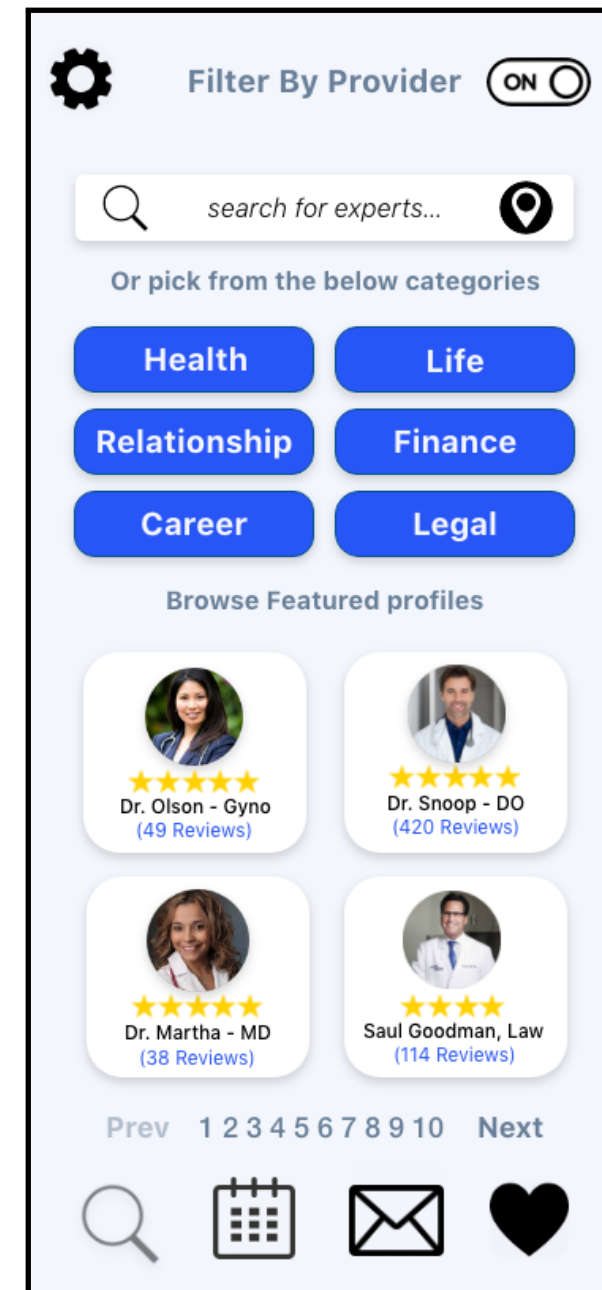
V2

Browse Profiles - Contrast Between Text and Background
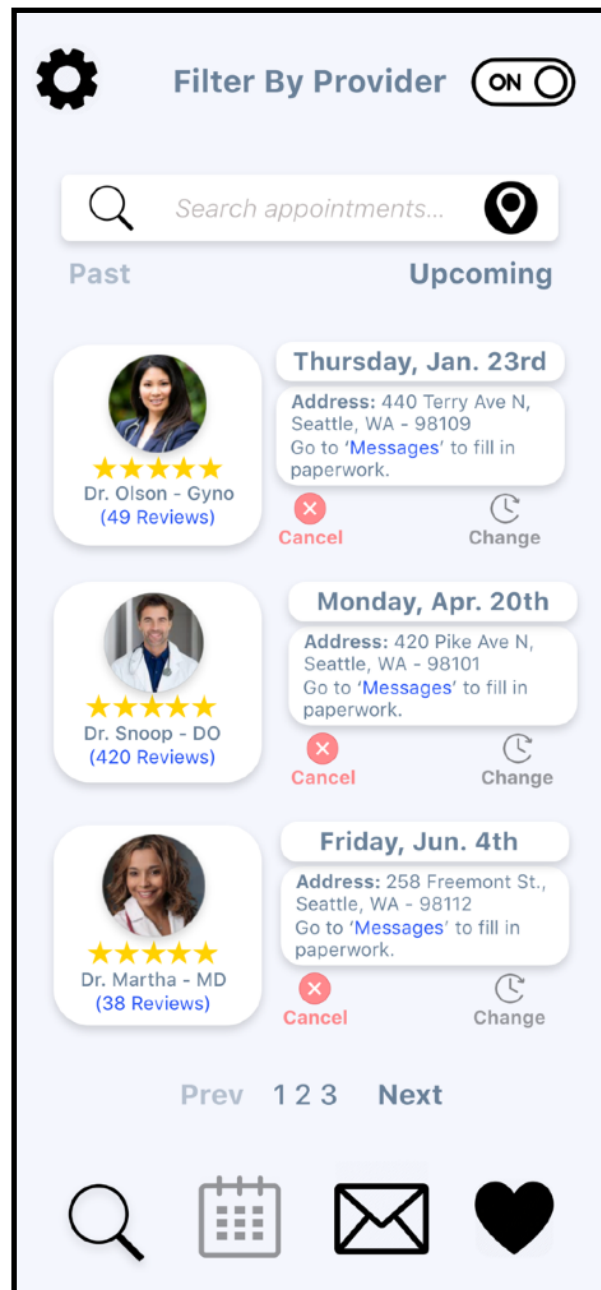
I changed the font of the text in the white boxes and profile page to black from light gray so that it is more accessible for a color blind user to read. It also makes it easier to interpret and catches the user's eye.

V1
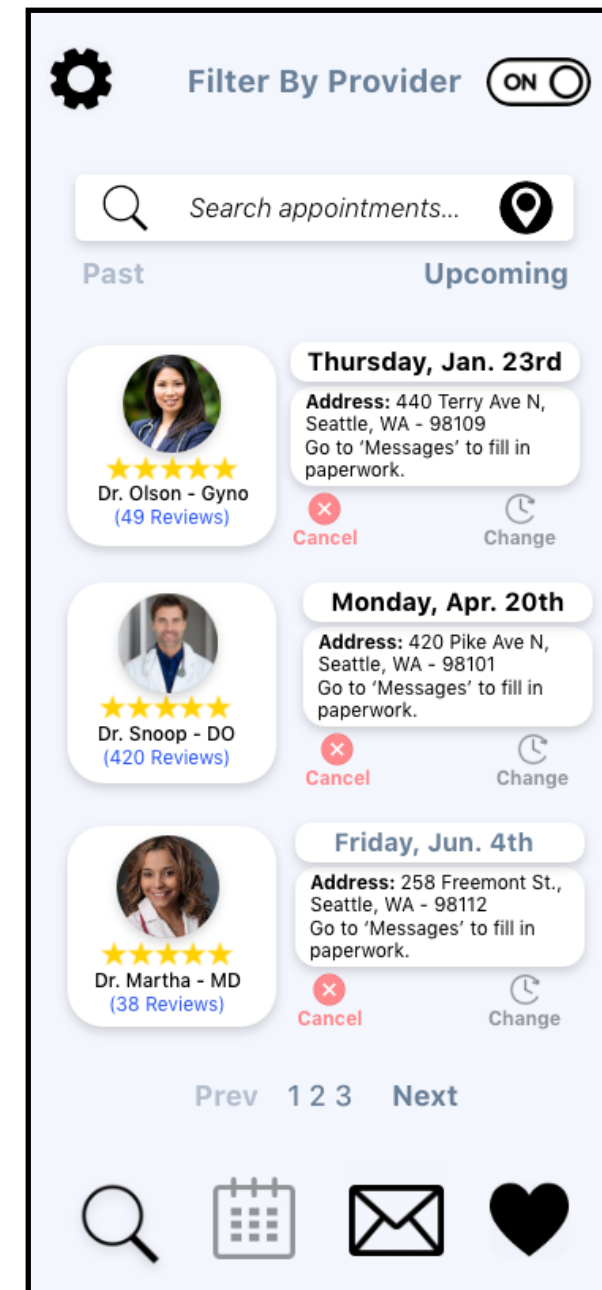
V2

Messages - Contrast Between Text and Background
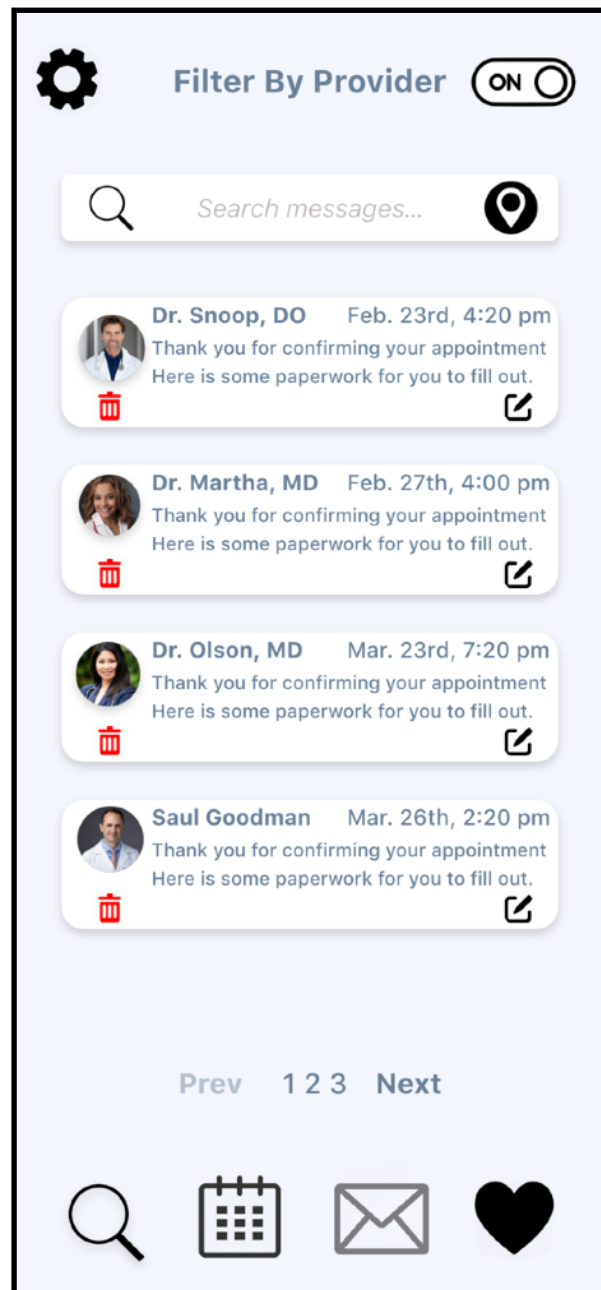
Similar to the above pages, I changed the font from gray to black in the messages page so that average users can clearly read the text without squinting their eyes.

V1
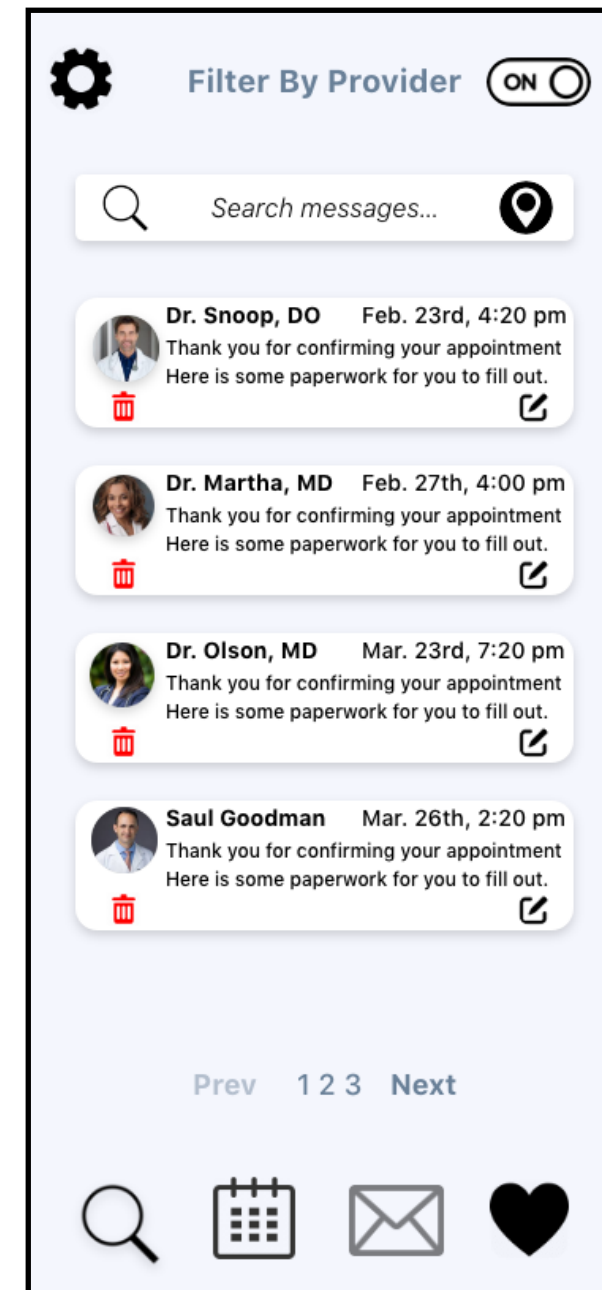
V2

Settings Menu - Conveying Information by Added Text

Settings

Payment Settings

Provider Settings

Notifications

Languages

Terms & Privacy

Support
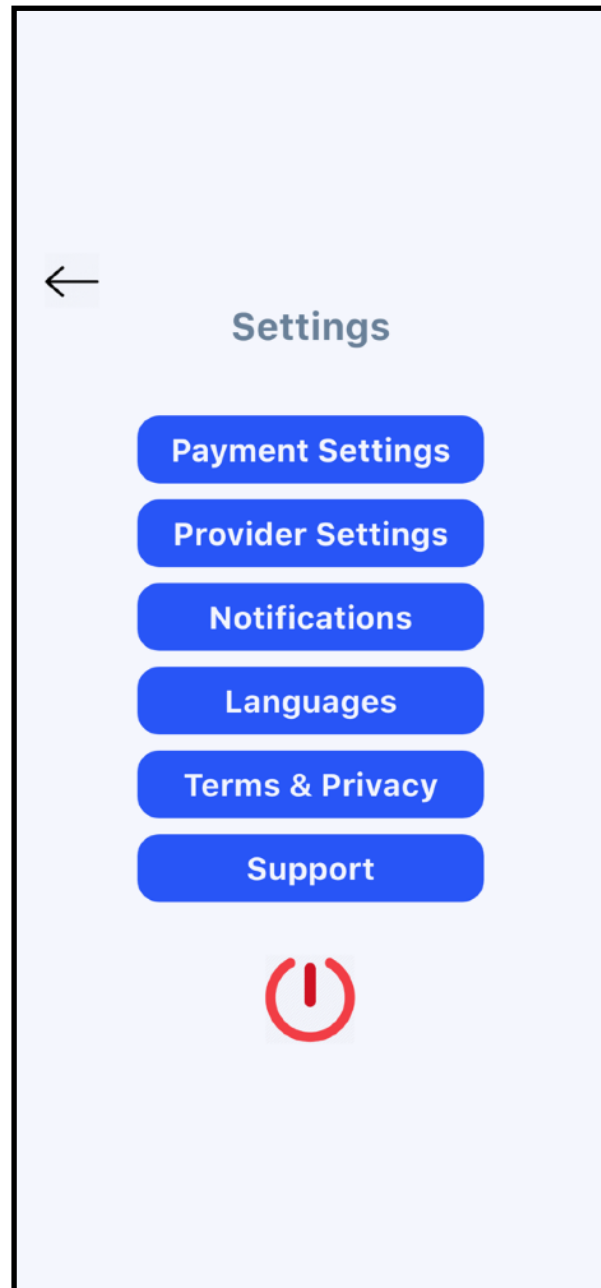
V1

Right underneath the distinct red 'Sign Out' button, I added a description of the button so that the user understand's its purpose. Because it is a standalone button and not blue like the other buttons, it might not seem intuitive that the red icon is actually a button. Adding the text reinforces the user that is it for logging out.

Settings

Payment Settings

Provider Settings

Notifications

Languages

Terms & Privacy

Support

Sign Out
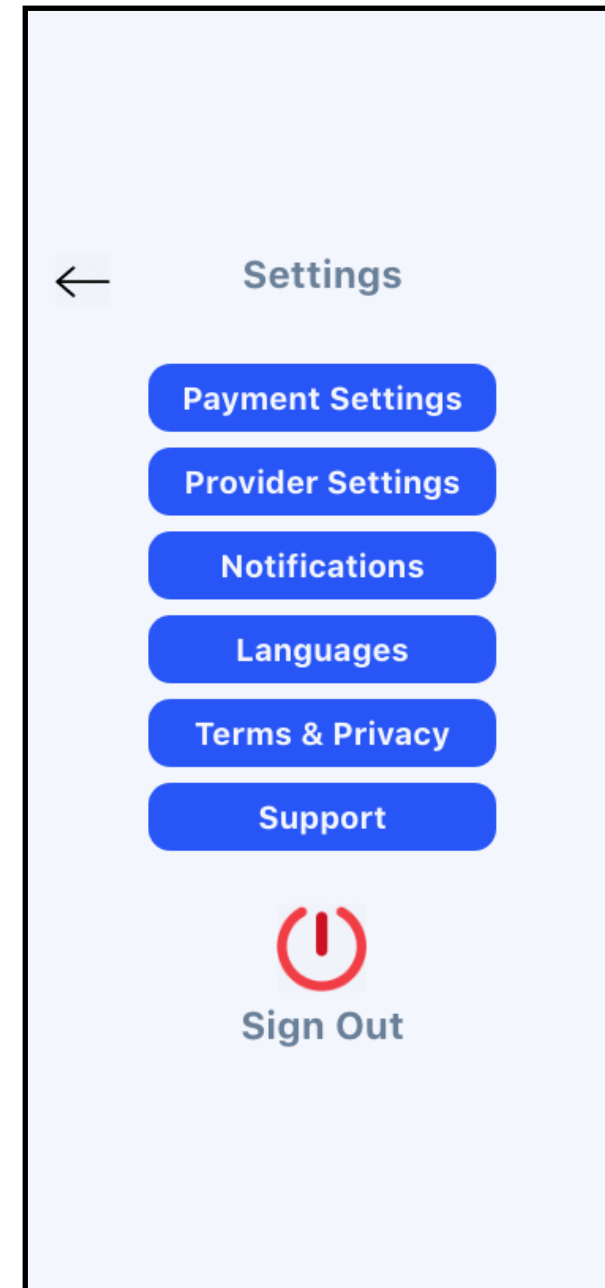
V2

Task 6.2: Polishing the Design

Mihir Shah

Splash Screen

The splash screen evolved from a simple light bulb to dressed up professionals and to finally one professional and a light build next to them. I used a darker and rich background for the splash screen that will make it stand out from the rest of the application.
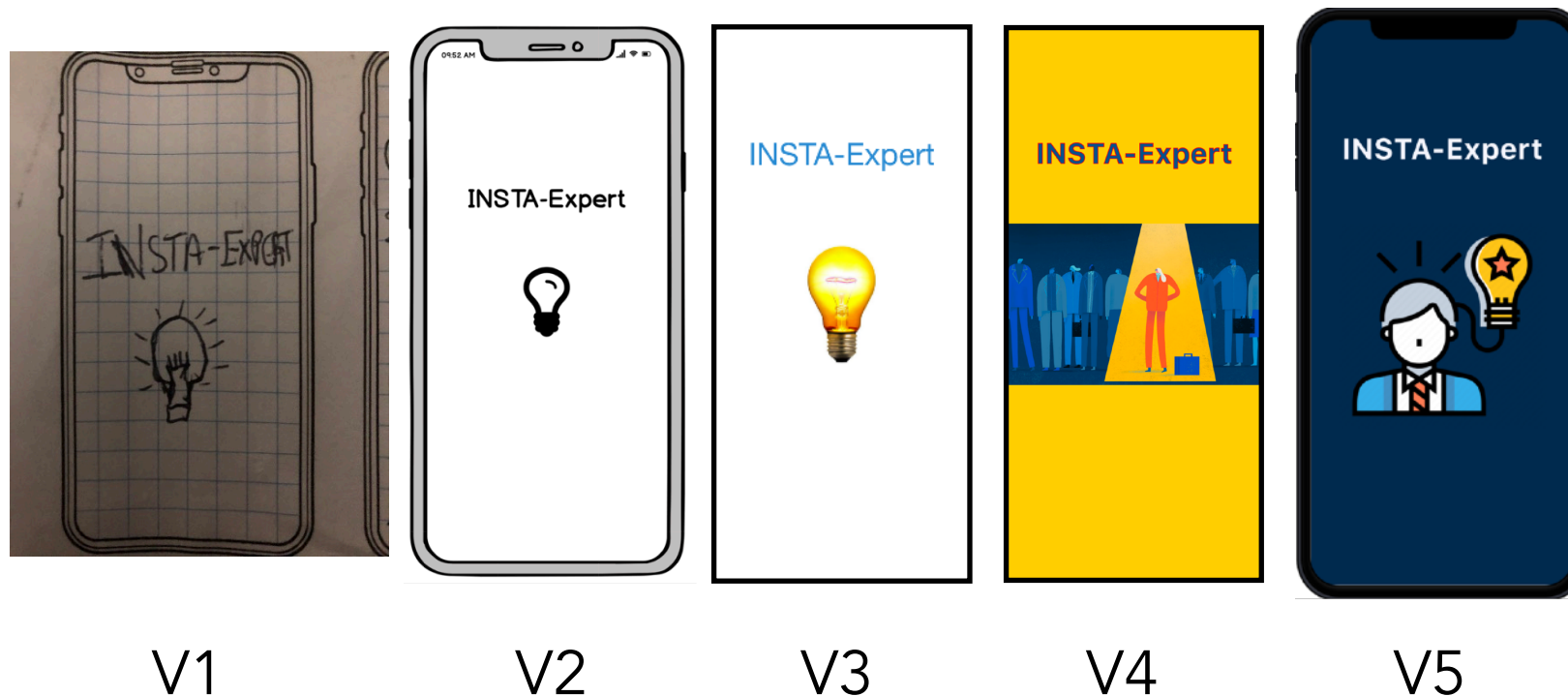
V1   V2   V3   V4   V5

Sign In/Registration Page

It took several iterations to get the Sign In/Registration screen right and the result was a clean and simple design with minimal colors.
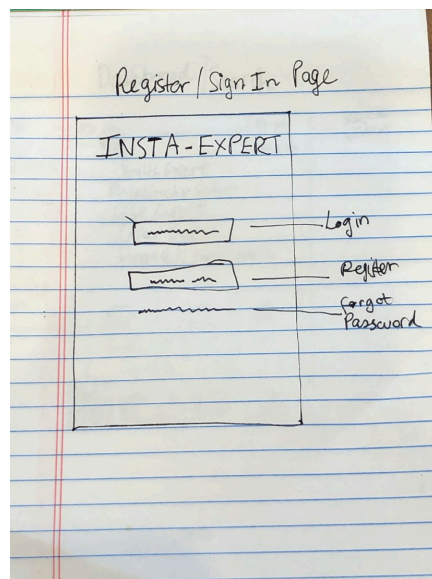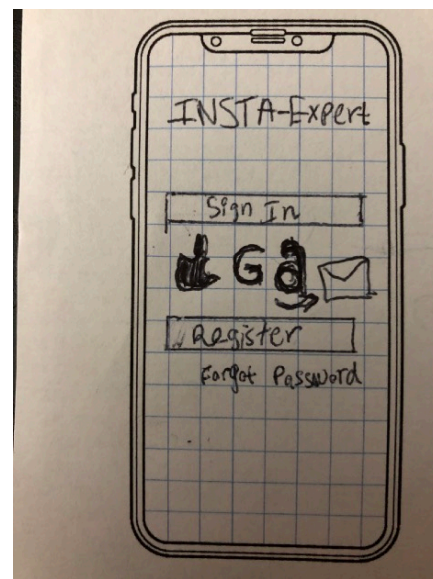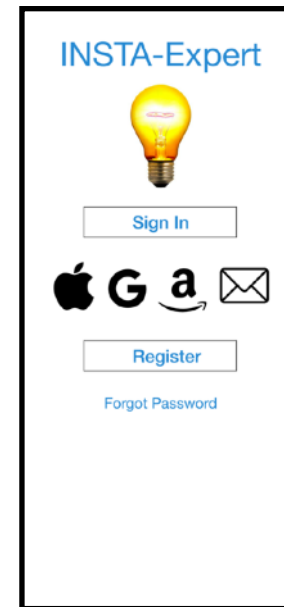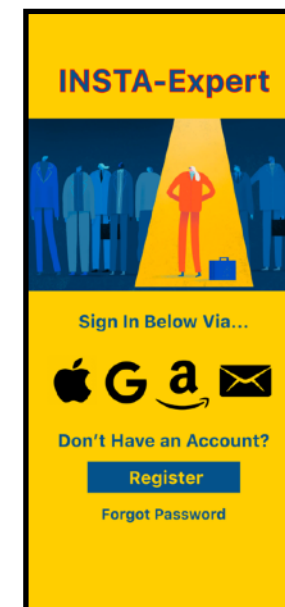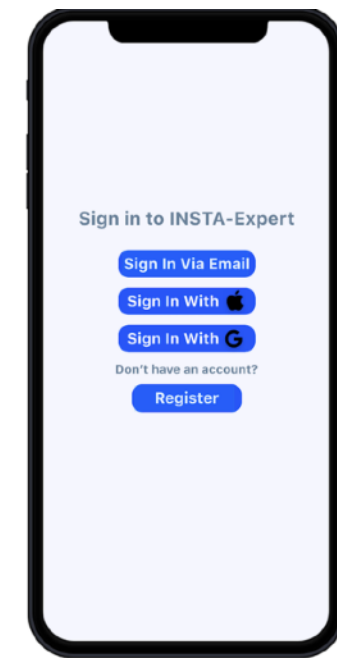
| V1 | V2 | V3 | V4 | V5 | V6 |

Dashboard

One of the hardest screens to design, the dashboard had the most iterations. The final result is a screen with just enough functionality for the user with minimized clutter and clean expert profiles.
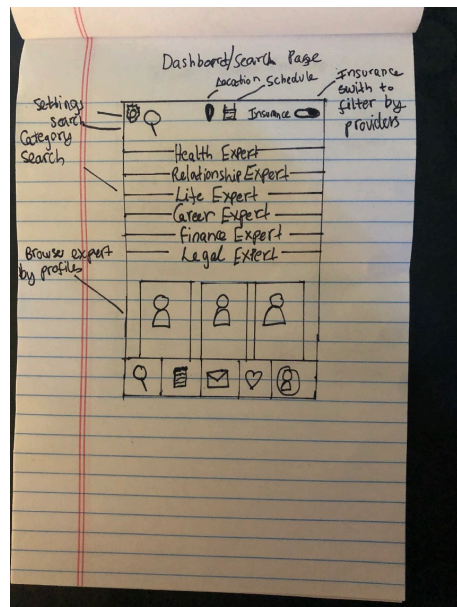
V1
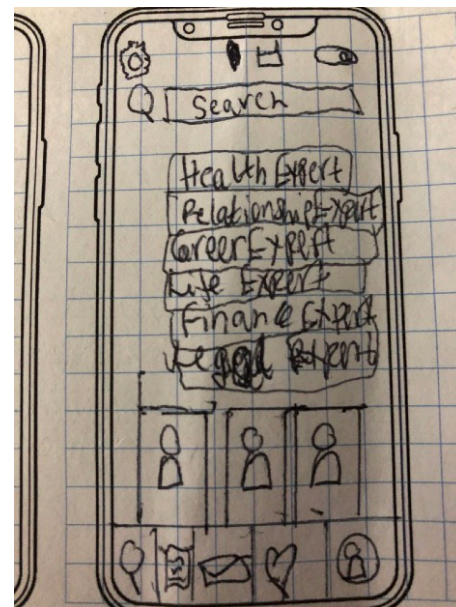
V2
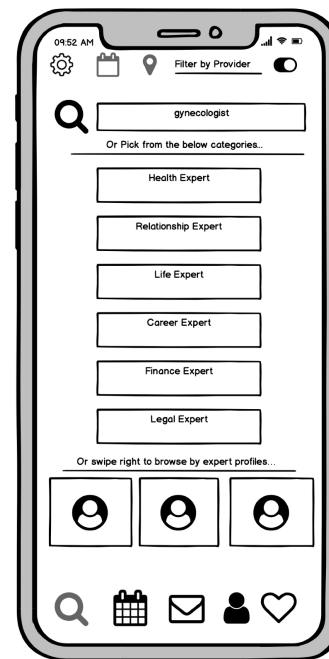
V3
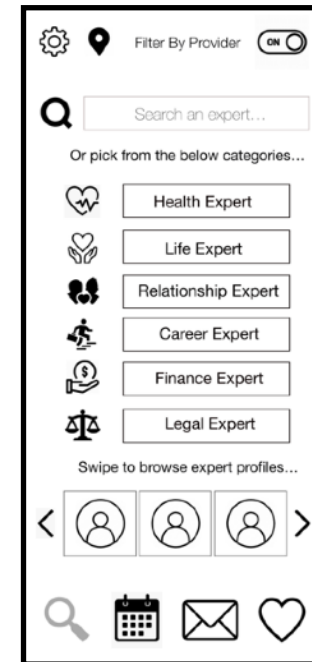
V4
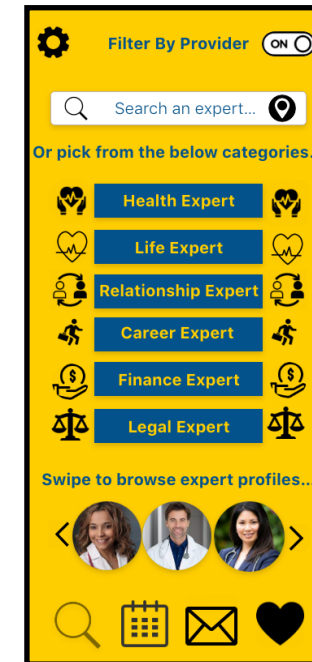
V5
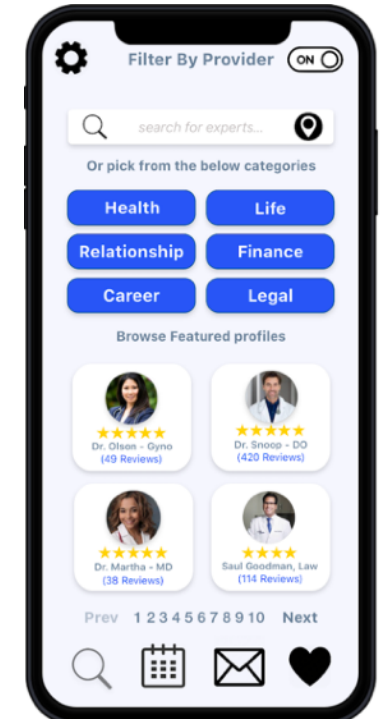
V6

Browsing Experts

The browsing page went through several iterations and I made it consistent with the dashboard, minimized clutter, reshaped boxes and used simple colors.
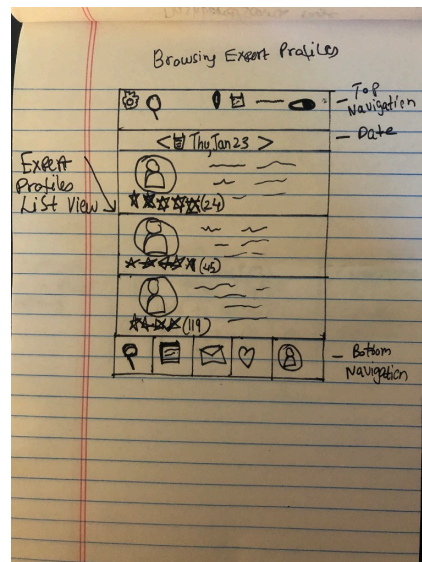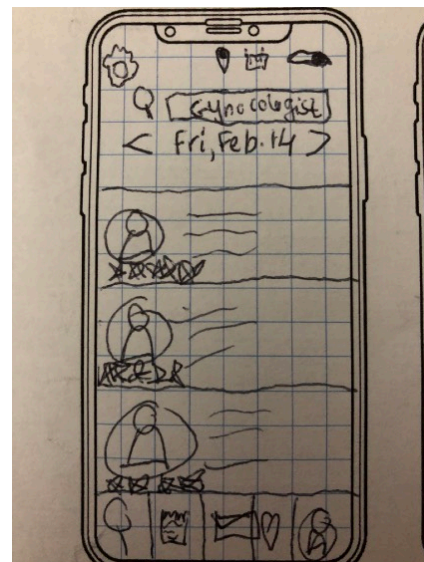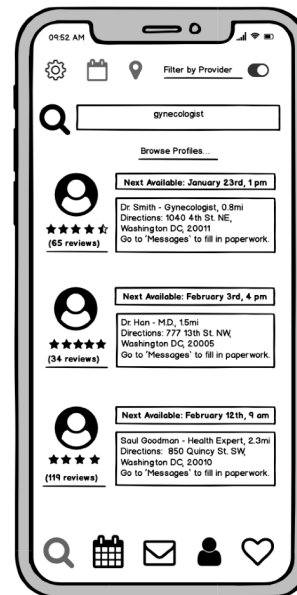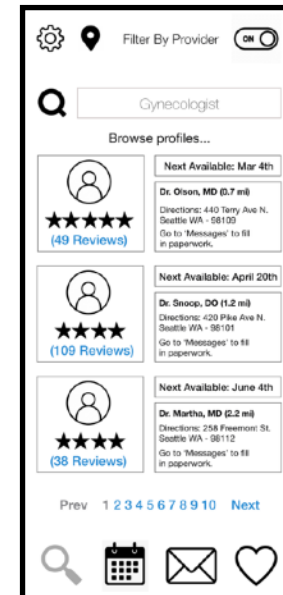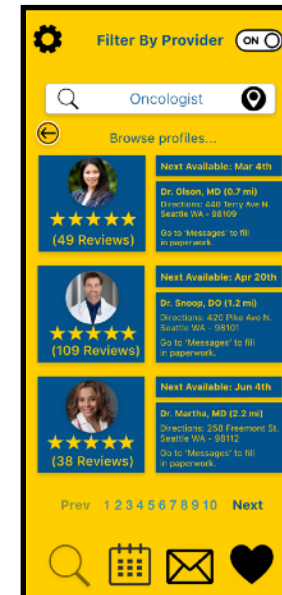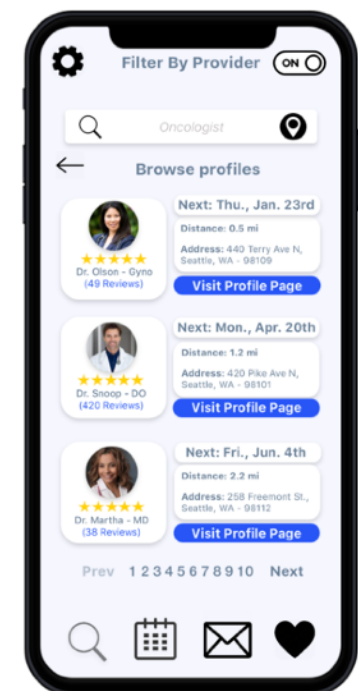
V1 V2 V3 V4 V5 V6

Expert Profile Page

The expert page was another page that went through major redesigns but the result was a cleaner screen and less claustrophobic.
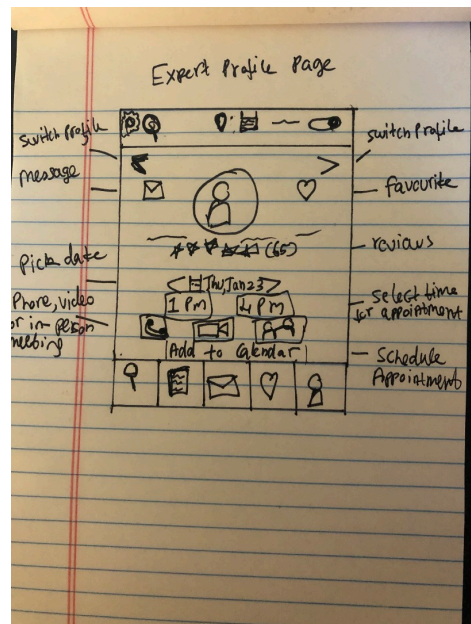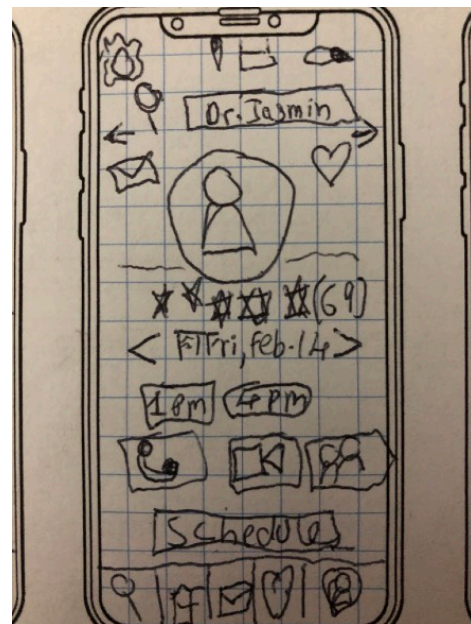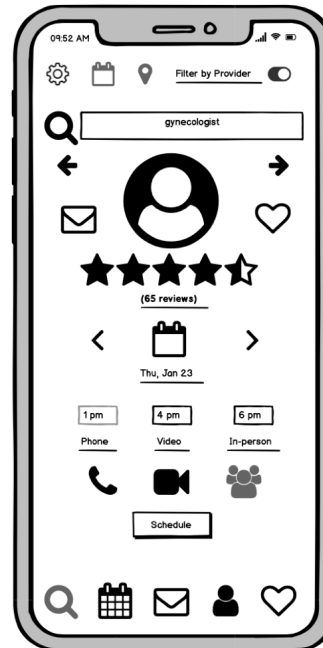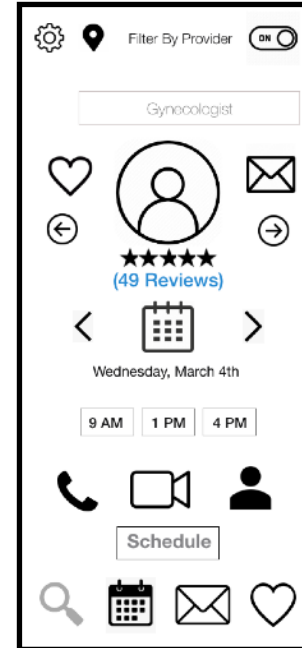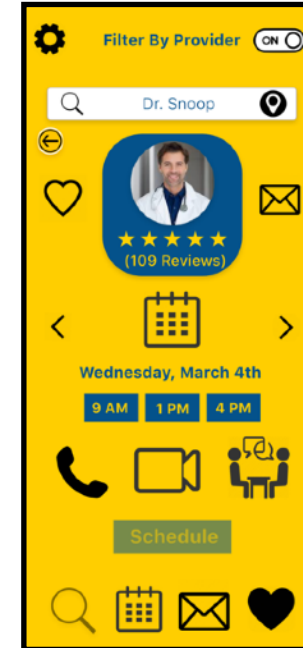
V1   V2   V3   V4   V5   V6

Settings Menu

The buttons and the final design was designed more consistently. I also used a red icon to display the 'Sign Out' button to make it stand out from the rest of the buttons.
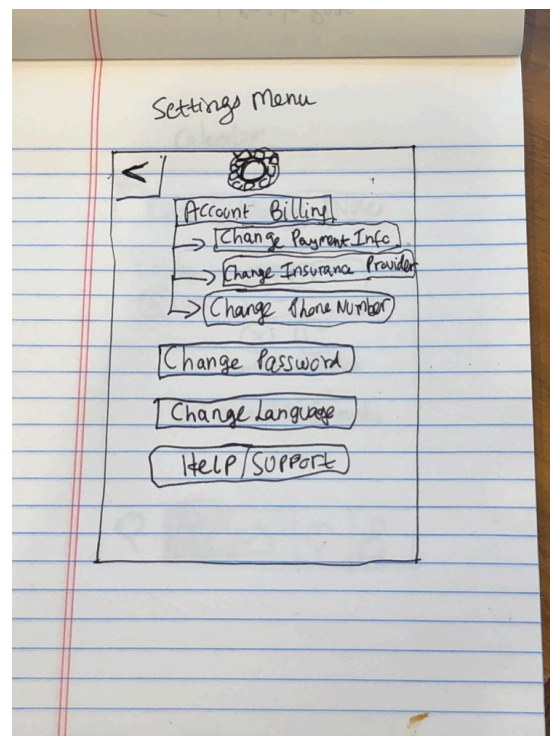
V1
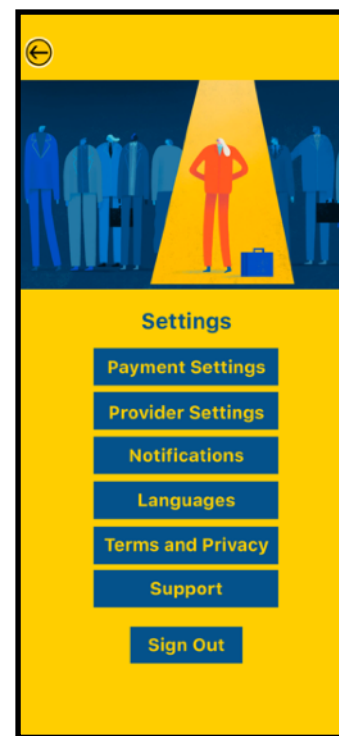
V2
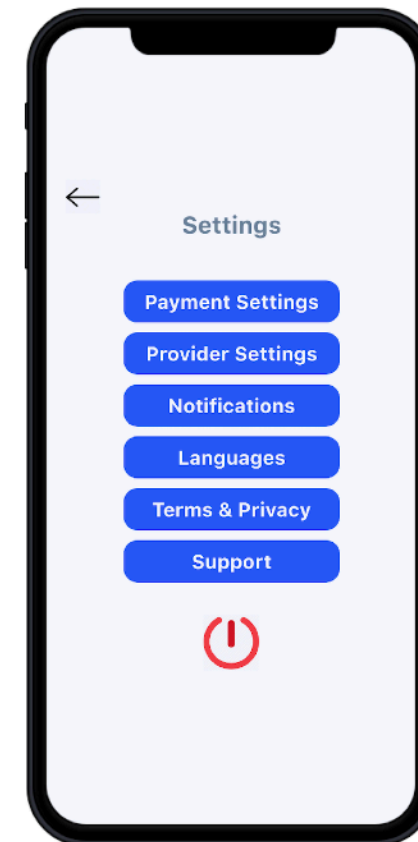
V3

Schedule

The schedule page was designed to be more consistent to the rest of the app screens and I also made the 'Cancel Appointment' button red in contrast to the remainder colors to reinforce the user that it is an important action button that immediately catches the user's eye.
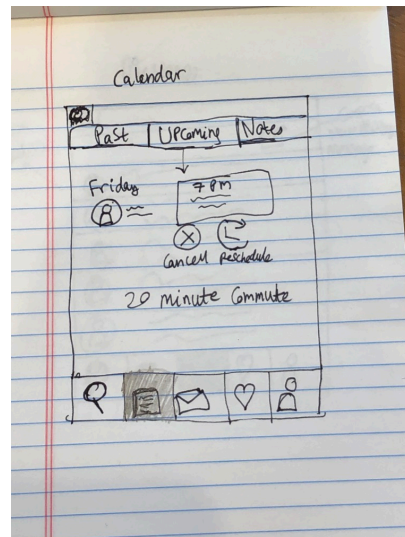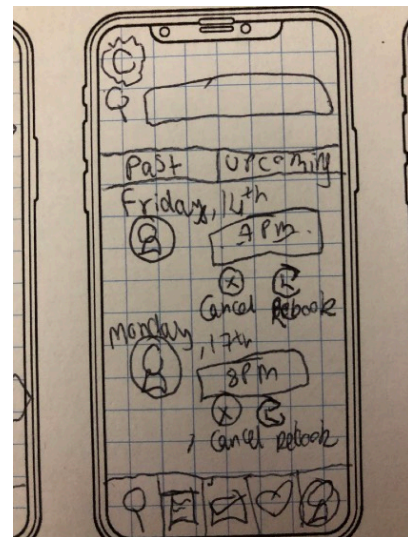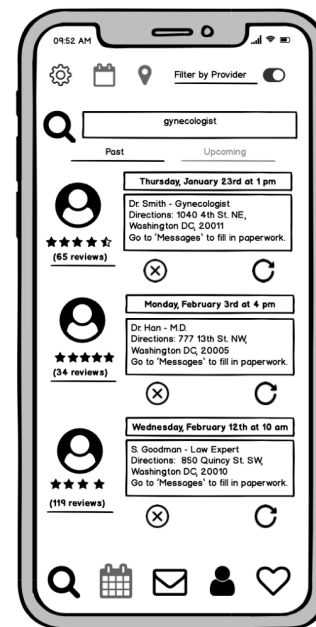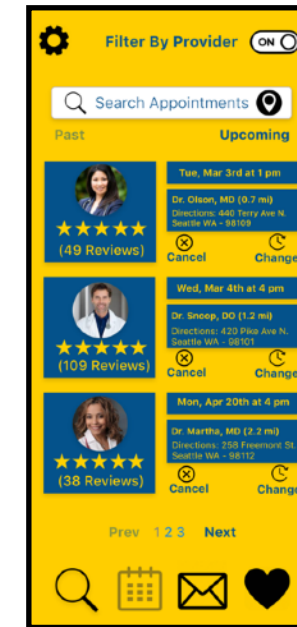
V1   V2   V3   V4   V5   V6

Messages

The shape of the boxes on the messages screen was formatted to be more consistent with the rest of the pages. The 'delete message' icon was intentionally colored in red for the same reason as the previous page.
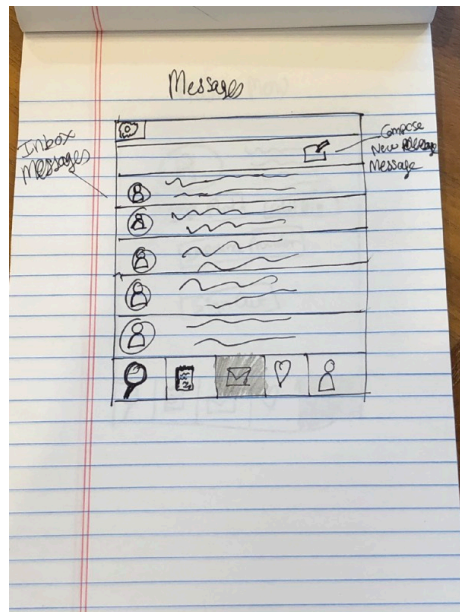
V1
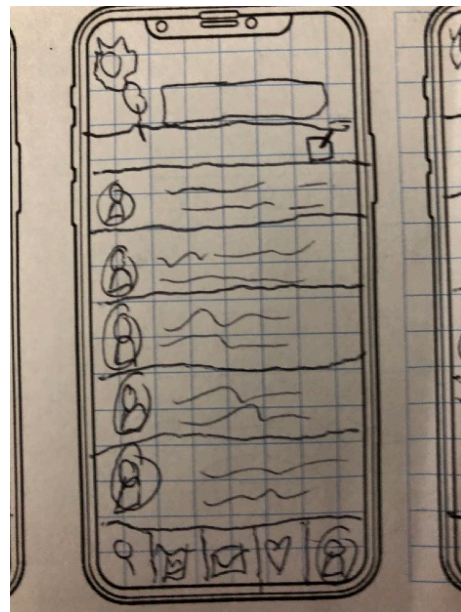
V2
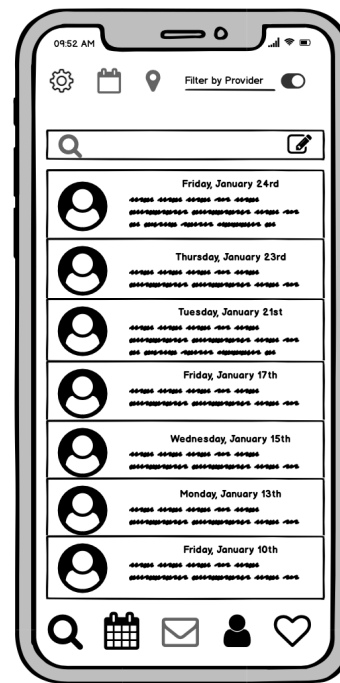
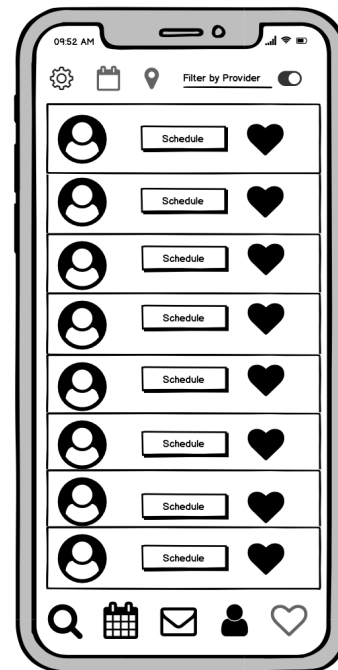V3
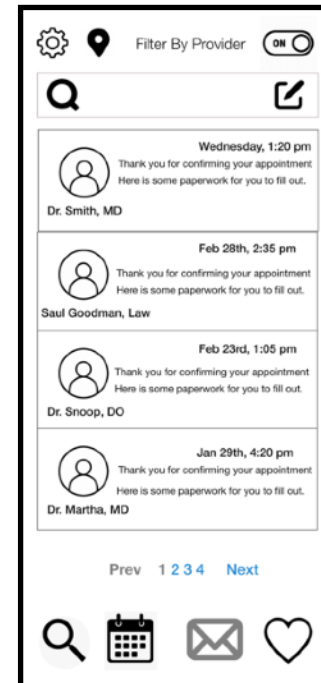
V4
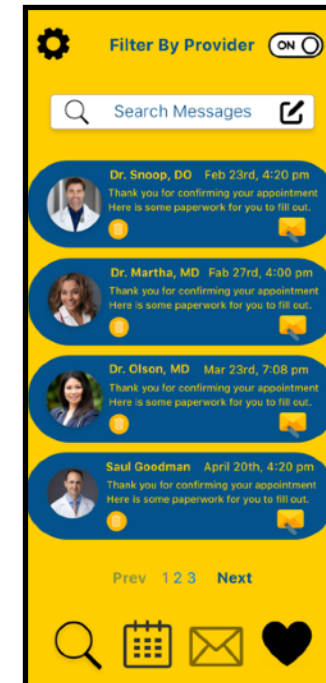
V5

V6

Favorites

The overall design of the favorites page evolved to become more simplified, less cluttered and more cleaner looking. The shape of the hearts was exaggerated to give it a proportional size with the expert profile box on the left side.
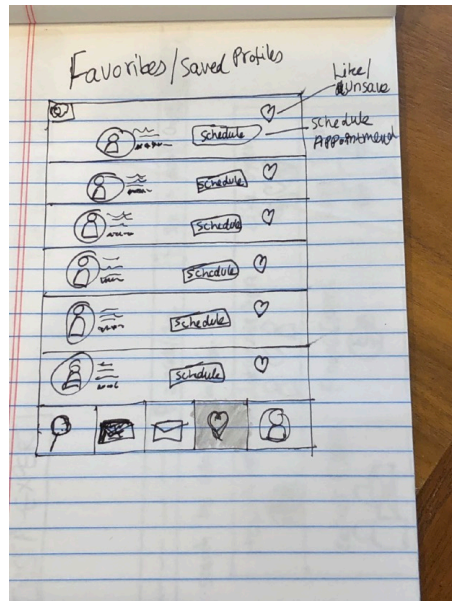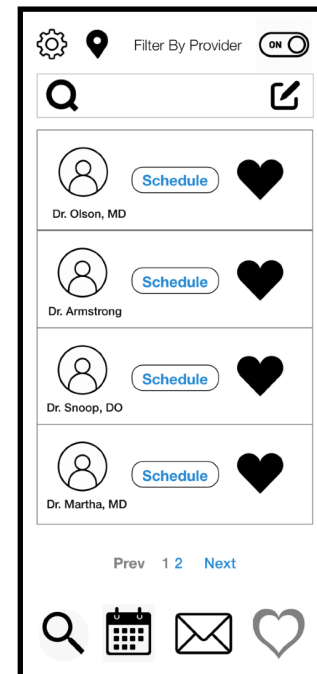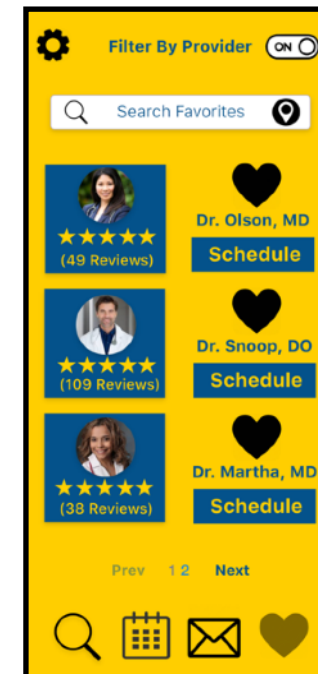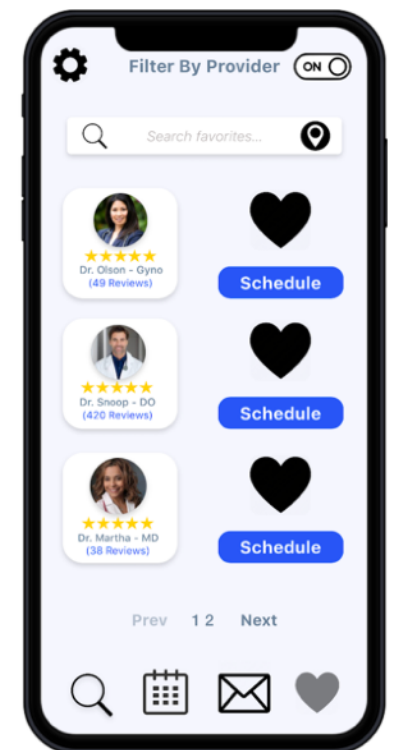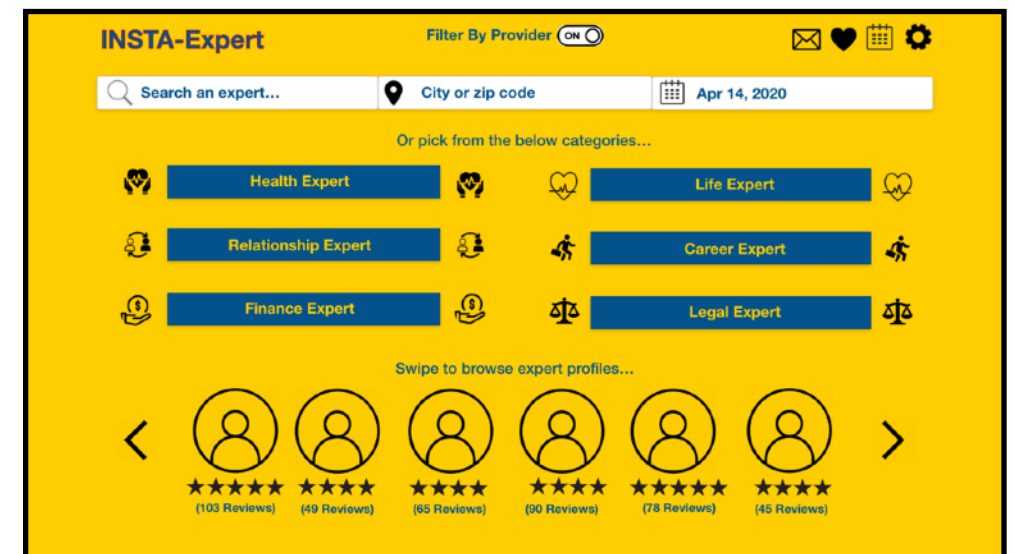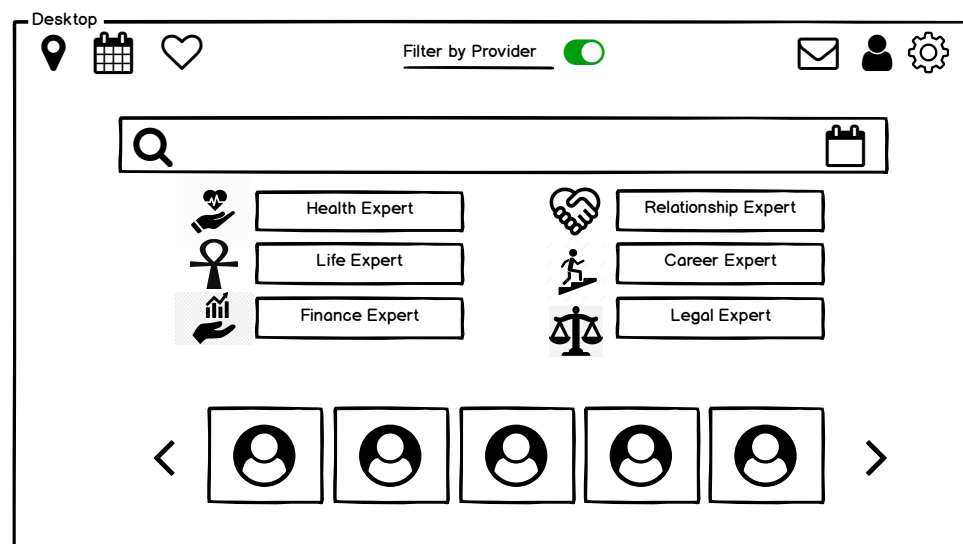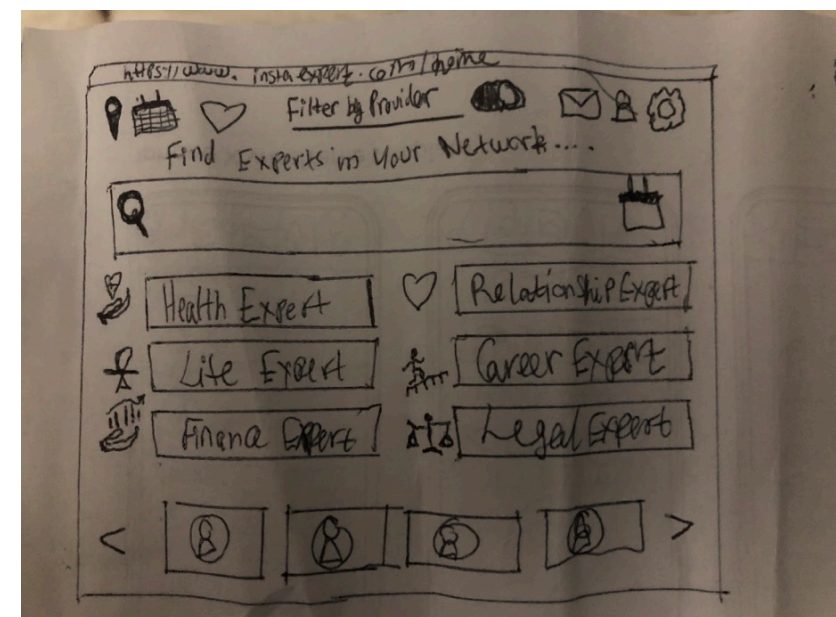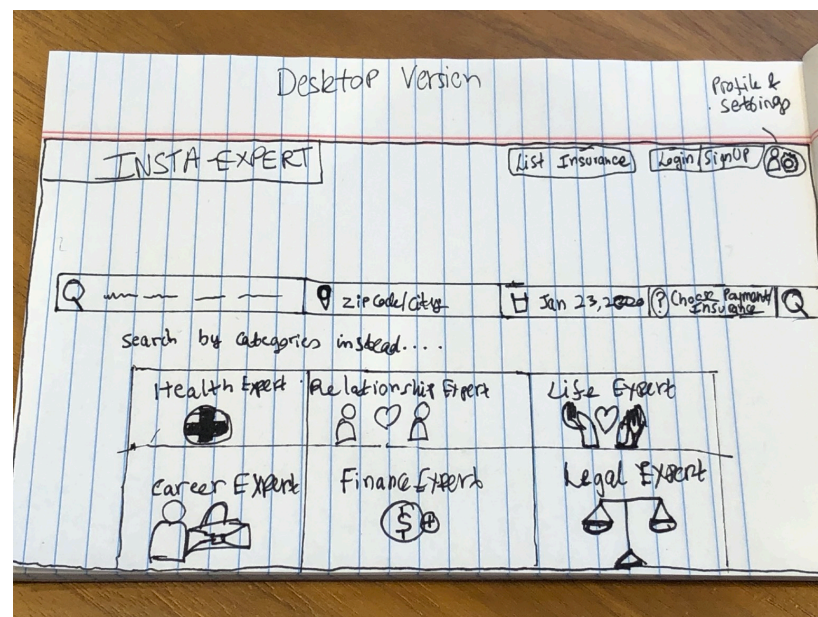

V1
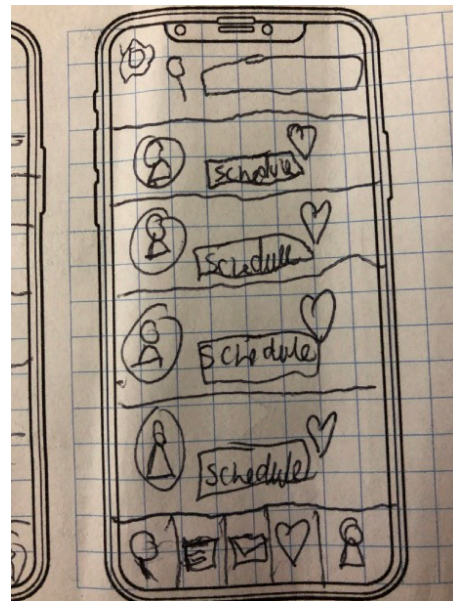
V2

V3

V4

V5

V6

Desktop

There were four iterations of the desktop version of INSTA-Expert and the final version was proportionally spaced out with the help of grid-lines.

Personal Code of Ethics

Ethics in design is invaluable and essential in today's world. A lot of companies have crossed gray areas to market their products or services and manipulate human psychology through the use of colors, gamification elements, misrepresentation of information, invasion of privacy and user-data, price-gouging and much more. The schemes used by many companies have worked and resulted in many short-term gains, but it has negatively impacted their long-term gains and overall reputation. As a designer, it is important for me to build an ethical platform so I can win my customers for the long-term to avoid scrutiny and lose my brand image over the course of many years. As a big support of *Amazon's* and *Apple's* core principals, I see my values strongly relating to customer obsession and protection of human privacy. A strong focus on these fundamentals have enabled these two trillion-dollar companies to function like startups because their design principals have won users across all backgrounds and demographies.

Handling of Projects

- What types of projects do you want to work on?

I am an innovative thinker with a mindset that tends to pivot with the current times. I see myself wearing multiple hats in design projects by leading a team of engineers and designers to collaborate together and build user-friendly products that can win the end-user. I would like the projects I work on to have values of honesty, integrity and good faith. At the end of the day, I want the project to add positive value to people's lives and their environment.

- Are there any examples of projects you would absolutely *not* work on? Why?

The COVID19 pandemic has led a lot of companies to associate their brand with false information and use the scarcity technique to enable price-gouging. I refuse to see myself work on a design project that takes advantage of people's lives for capitalism and short-term gains. I do not want to profit off of desperate people and tarnish my reputation.

- Is there a group of underserved people you would like to focus on (either in your regular work or in volunteer/side projects) to increase their accessibility to the world around them? Why?

The healthcare industry and the front-line services industry is desperate during today's times of uncertainty. If I had the means, I would spend a large potion of my time adding value to people working in these sectors and improving their accessibility to find affordable or even free supplies of PPE equipment that are FDA approved and protects against viruses.

- How do you anticipate handling issues of customer data and privacy when designing?

I value people's privacy and would like to design products and experiences that enhance user-privacy in today's world. Unlike many governments such as China's who are using privacy against people and monitoring their movements through data, I like the approach Apple and Google are using to screen individuals who may have COVID19 without directly breaching user privacy. It is by far one of the most innovative software design tools that can not only save millions of lives, but also protect the integrity of the end user from being exposed.

Thank You