

Chase

James Weaver
UX Design Lead

Banker Tablet App

Native Android tablet app used by Chase retail bankers to manage ATM devices and customer transactions.

- Customer authentication
- Cash & receipt levels
- Physical devices
- Transaction review (deposits, withdrawals)



The Challenge

- 1 Redesign a newly released banker tablet app that digitally connects the banker and branch ATMs.
- 2 Fix check review and customer authentication usability issues.
- 3 Upgrade the UI by leveraging the newly released Chase.com and Mobile app style guide.

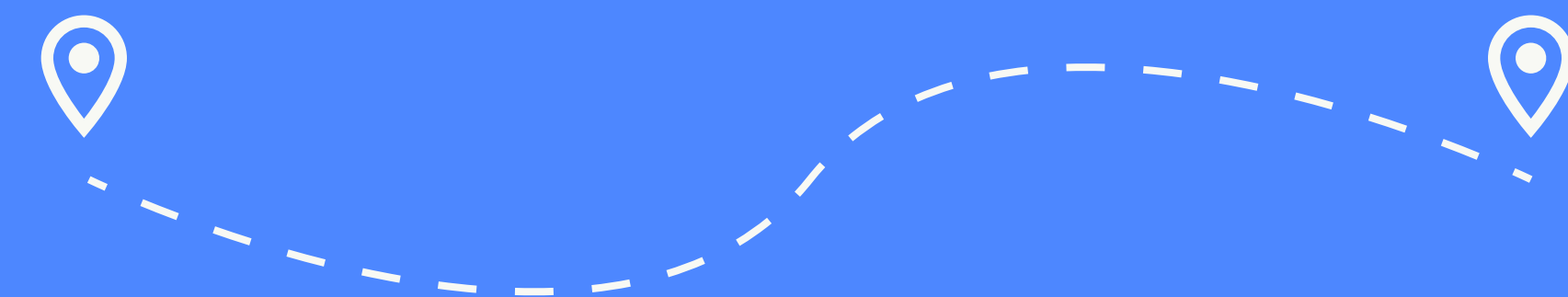
My Role: UX Design Lead



The executive team asked me to lead the discovery and design phases of the redesign. I led a team through initial research and design and managed all UX and UI deliverables.

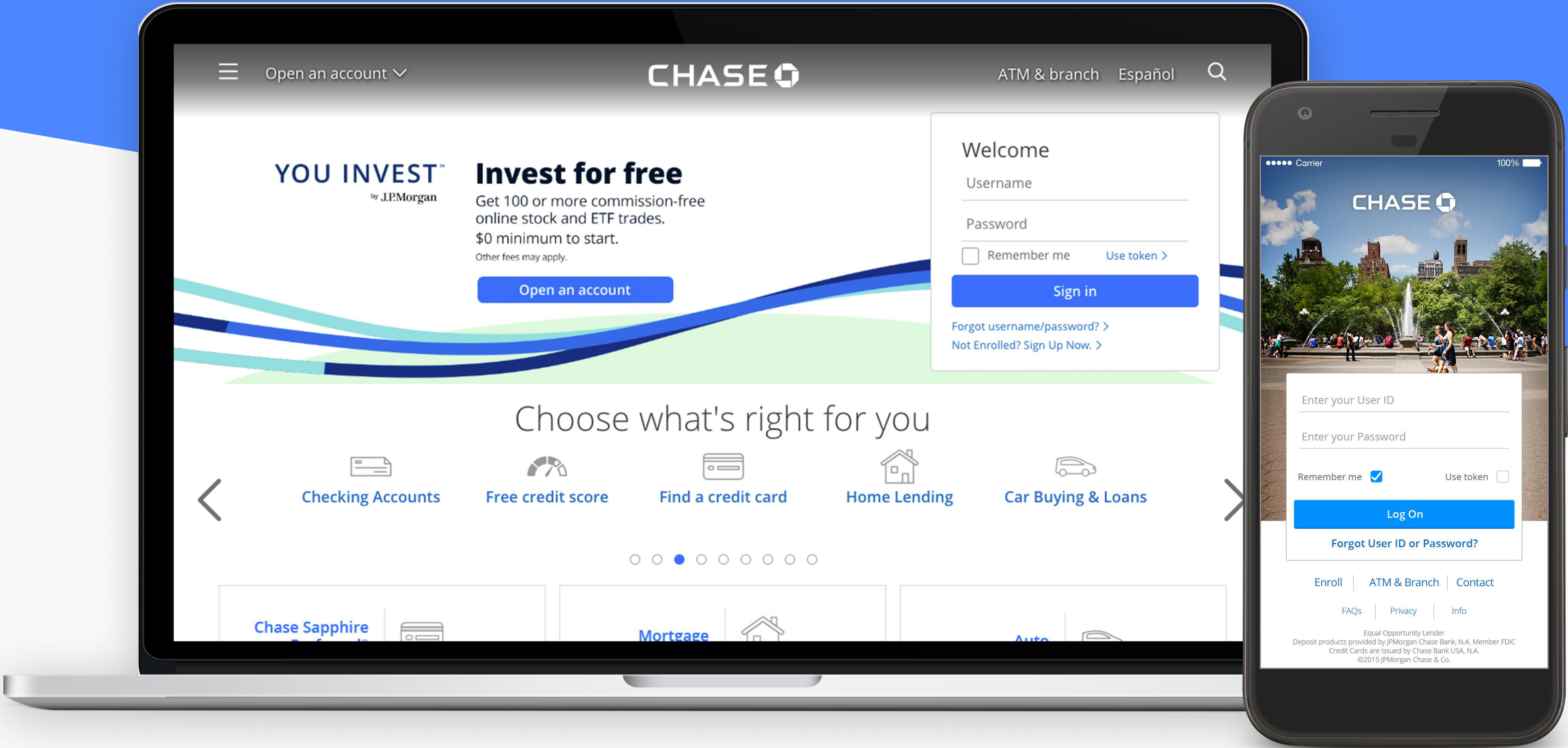
I also managed the transition from the existing UI design and experience to the new design system created by the Chase.com and Mobile design teams.

I managed and mentored two junior designers during the project.




Design System

In addition to fixing the existing usability issues, we also made it a priority to update the experience visually by working with the Chase.com and Mobile team to adopt their new style guide.



Understanding the User: Banker Persona

Since I had been working in the retail space for a few years I was able to pull from our existing research and reviewed our Personal Banker persona.



Personal Banker

ABOUT

John is a graduate student at OSU who cares deeply about helping customers manage their relationship with Chase.

He spares his own time to volunteer at the local animal shelter and to promote pet adoption. He hopes to move into a Business Banker role after finishing school.

PERSONALITY

PASSIONATE

MOTIVATIONAL

GIVING

LOVING

OPTIMISTIC

OCCUPATION

Personal Banker

AGE

34

LOCATION

New York

INCOME

\$80 to \$120K

STATUS

VP

Tenure

6 years

QUOTES

"I care deeply about my customers and spend time trying to ensure their success in financial management."

"Providing customers with financial help is a very rewarding job."

NEEDS

- The right information at the right time to answer customer questions.
- Support from management during certain customer conversations.
- Tools that make his job easier and help him be more efficient with the his time and the customers.

FRUSTRATIONS

- Tools and systems that take too long to load data into view.
- Working with other branch personnel and managing ATMs.
- Making him jump between disparate systems to find important information.

SYSTEMS USED MOST

CUSTOMER ASSIST

BANKER TABLET

OUTLOOK

TELLER EXPRESS

CURRENT FEELINGS

Stressed

Concerned

Busy

Helpful

Leader

Happy

Field Research: New York Market

- 1 Observe banker and customer interactions and identify and record the key breakdowns in their interaction and conversation.
- 2 Conduct follow-up interviews with branch managers and bankers.
- 3 Compile notes and prepare findings for the UX and project team as well as senior managers.



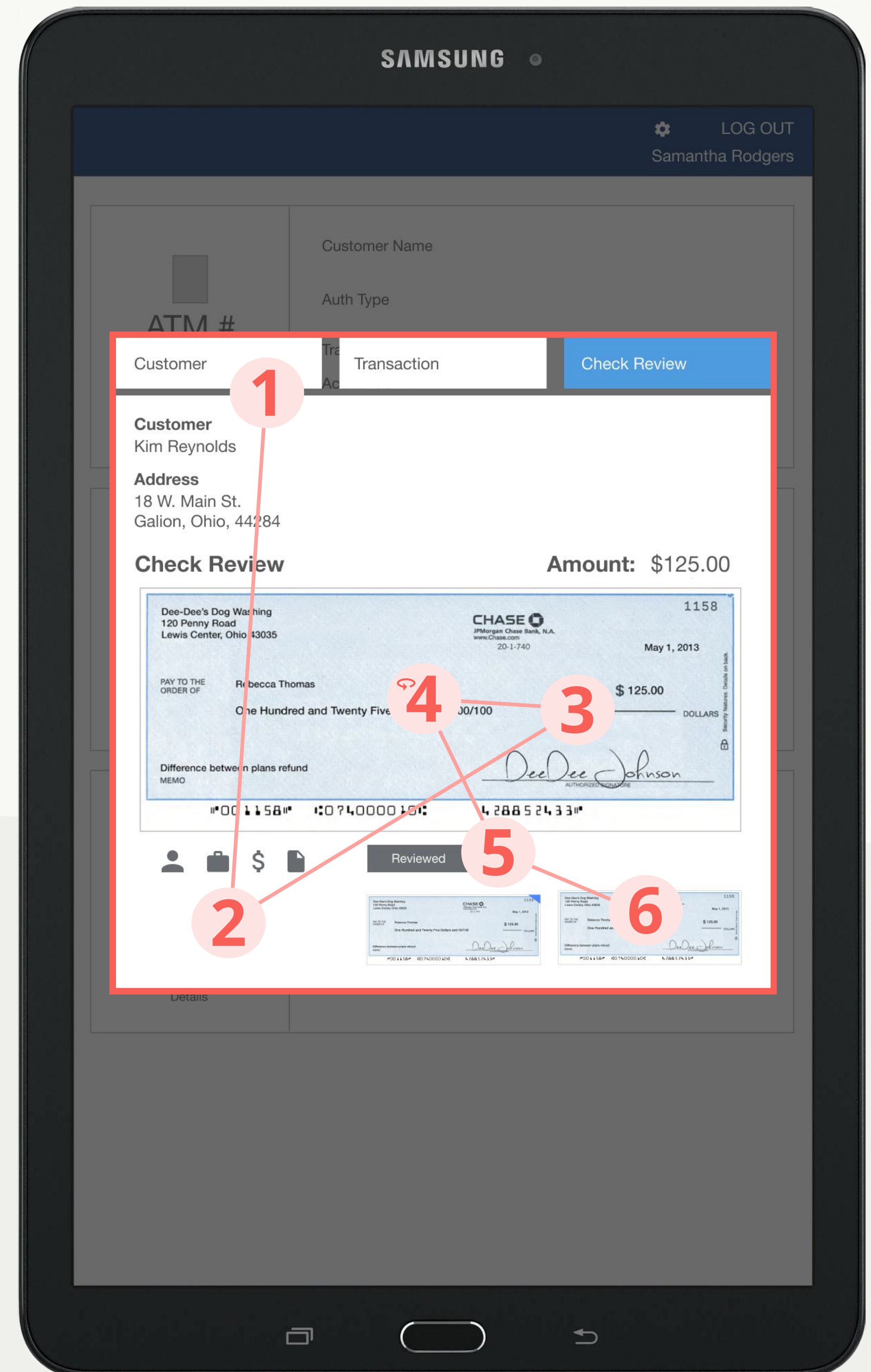
Current Experience

The majority of the usability issues were identified as a part of the Check Review process. As much as **10% of the transactions** were unable to be completed.

Based on our observations the **existing path to completion** resulted in misguided users and failed transactions.

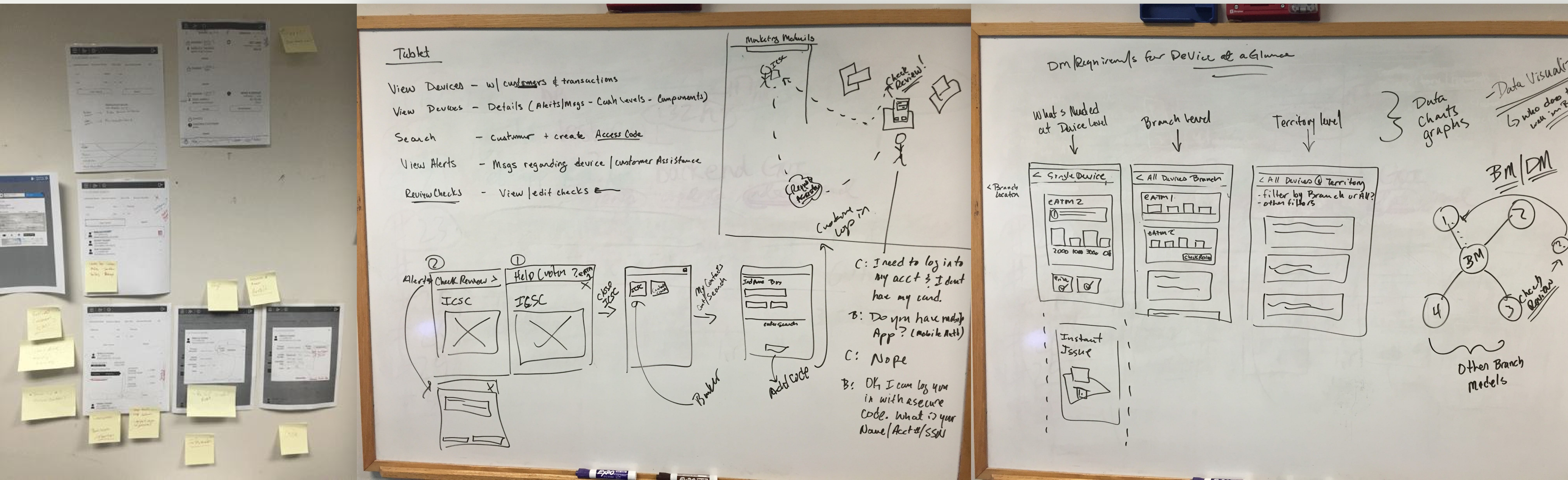
Problems

- Customer information in multiple places
- Hidden information
- Unable to flip check
- Unable to mark the check as “Reviewed”
- Unable to “Reject” a check/transaction and get out of the modal



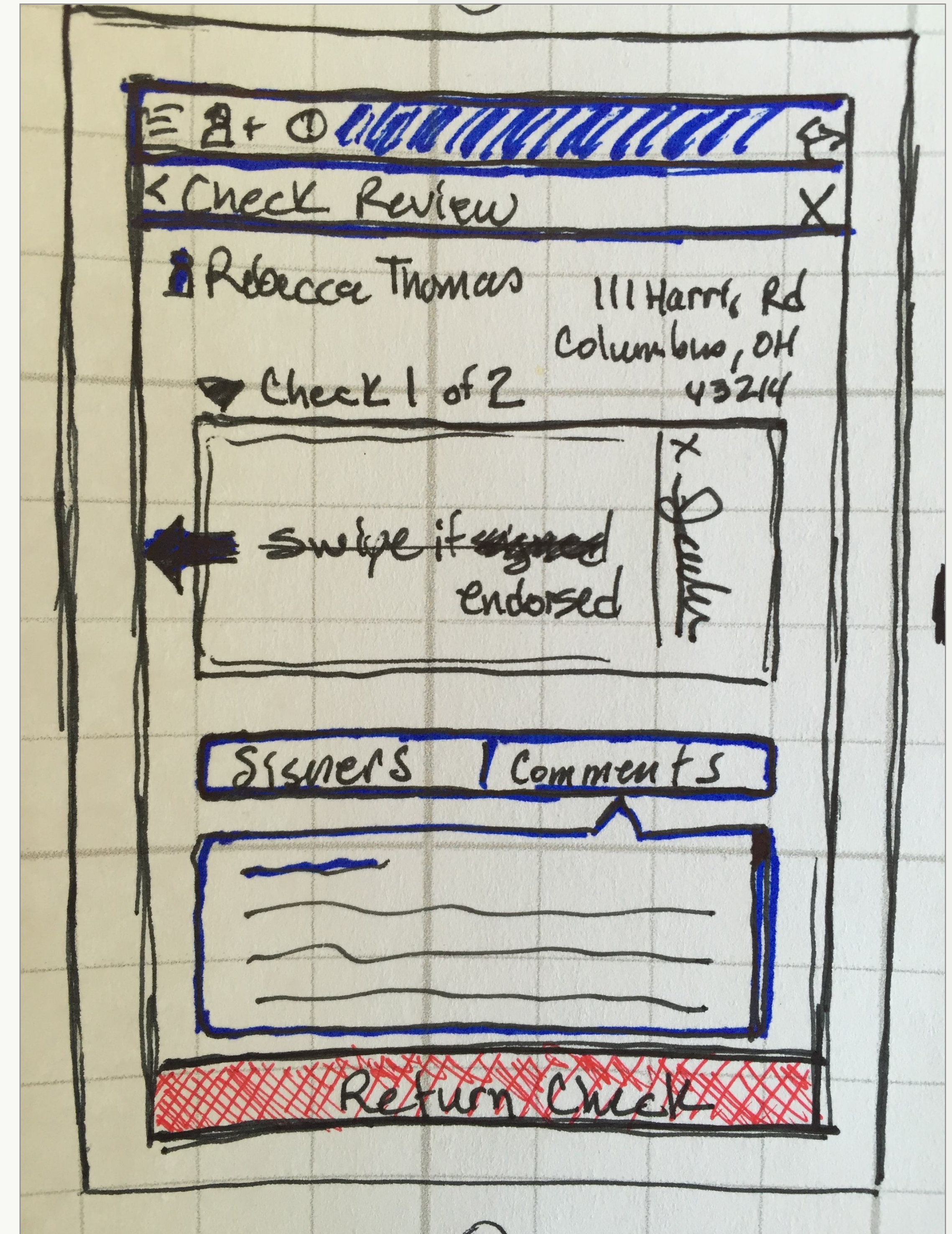
Discovery and Workshops

We mapped out our findings in our UX room and reviewed the information and feedback we gathered for each section of the app - Check Review, Customer Authentication, Physical Device Management.



Initial Sketches

After reviewing the feedback and findings with the larger project team I started to sketch out some updated screen designs before moving to wireframes. I focused mostly on creating a better path to completion for the Check Review flow.



Design Iterations

After iterating on the design and sketching out the flow as well as thinking through use cases I created some initial wireframes for review. We reviewed the updated design with the project team as well as some local bankers.

Solution

- A single place to view details
- Two explicit actions to flip check
- Explicit action to accept the check
- Explicit action to return the check
- Explicit action to close the page
- Automatic transition to next check

The image shows a mobile app wireframe for the Chase 'CHECK REVIEW' screen. The interface includes a header with a menu icon, a flag icon, the 'Chase' logo, and a close button. Below the header, the title 'CHECK REVIEW' is displayed with a close button. The main content area is divided into sections: a customer information section with fields for 'Customer Name', 'Address Line 1', and 'Address Line 2'; a status section indicating '2 checks need reviewed' and a dropdown for 'Check 1 of 2'; a 'Review Check Amount' section showing a check for '\$ 125.00' with a checkmark and an 'Edit' link; a large image placeholder for the 'Front of Check 1' with a '125.00' amount box; a 'Details' section with tabs for 'Related Customers', 'Comments', and 'Roles'; and a bottom action bar with 'Return Check' and 'Flip Check' buttons. Red numbered circles (1-4) and lines highlight specific UI elements: 1 points to the Customer Name field, 2 points to the Details section, 3 points to the Front of Check 1 image, and 4 points to the Flip Check button.

Chase

CHECK REVIEW

Customer Name
Address Line 1
Address Line 2

2 checks need reviewed
Check 1 of 2

Review Check Amount ✓ \$ 125.00 Edit

Front of Check 1 125.00

Details

Related Customers Comments Roles

Customer 1 - Account
Customer 2 - Account
Customer 3 - Account

Return Check Flip Check

Outcome: Check Review

The final product provided bankers with a much easier check review flow.

We updated the visual design which matched Chase.com and mobile app.

We fixed some issues with the customer authentication flow.

We added some new functionality for the bankers to manage aspects of the physical devices and cash levels of the ATMs.

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CHECK REVIEW

REBECCA THOMAS
111 HARRIS RD.
WORTHINGTON, OH 43085

2 checks need review

1

\$

2

\$

Review Amount

\$125.00

Edit

Dee-Dee's Dog Washing
120 Penny Road
Lewis Center, Ohio 43035

CHASE
JPMorgan Chase Bank, N.A.
www.Chase.com
20-1-740

1158

May 1, 2013

PAY TO THE ORDER OF
Rebecca Thomas

\$ 125.00

One Hundred and Twenty Five Dollars and 00/100

DOLLARS

Dee Dee Johnson
AUTHORIZED SIGNATURE

Difference between plans refund
MEMO

Security features. Details on back.

⑈00 1158⑈

⑆074000010⑆

⑆28852433⑆

Account Details

FrontBack

Related Customers

Comments

Title

CHECKING (...1214)

THOMAS
SIGNER

REBECCA

THOMAS
SIGNER

DAVID

Return Check

Flip Check