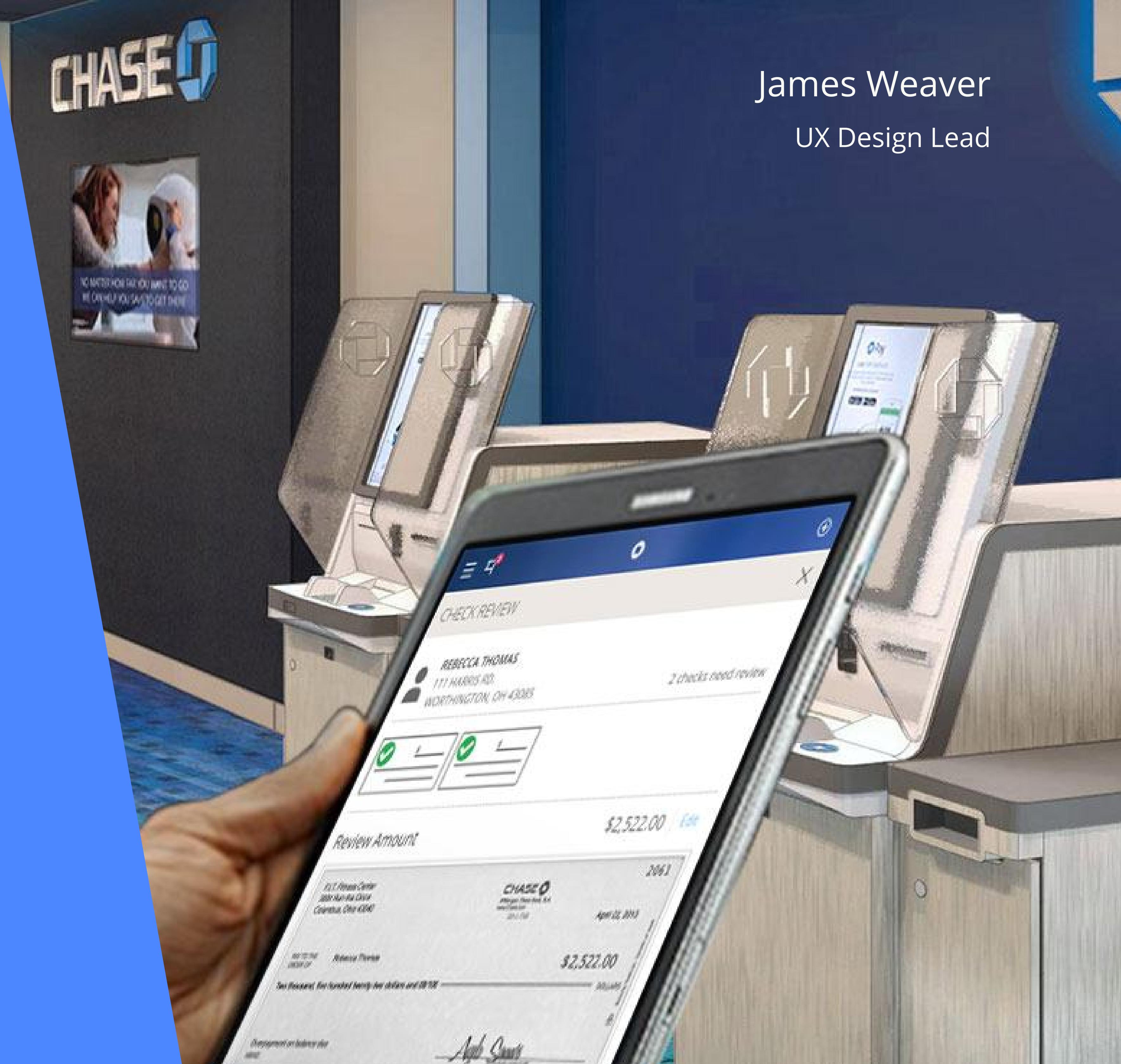


## Banker Tablet App

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.

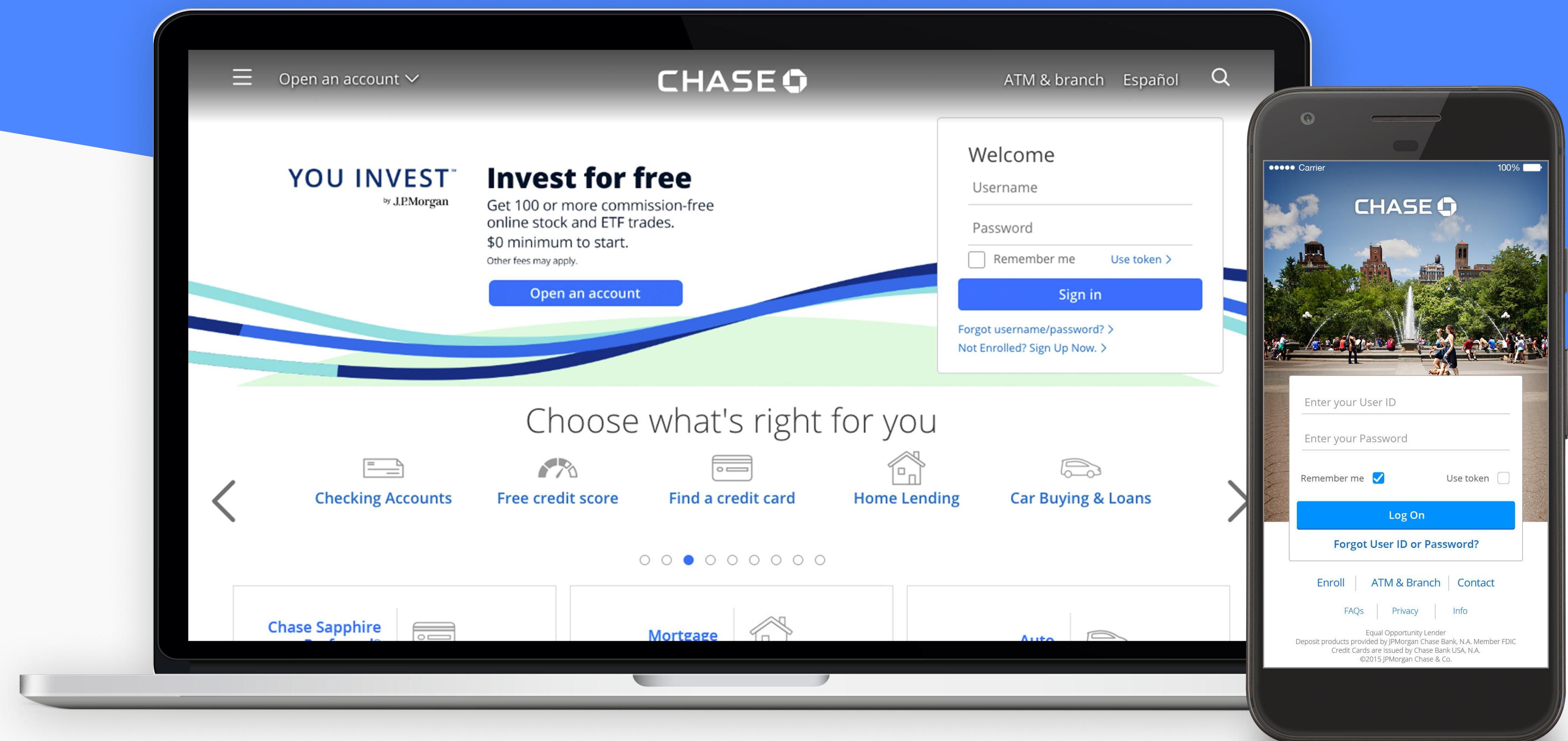
I also managed the transition from the existing UI design and experience to the new design system created by the Chase.com and Mobile design teams.

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	AGE	LOCATION
Personal Banker	34	New York
INCOME	STATUS	Tenure
\$80 to \$120K	VP	6 years

**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 his time and the customers.

**SYSTEMS USED MOST**

CUSTOMER ASSIST	80%
BANKER TABLET	75%
OUTLOOK	70%
TELLER EXPRESS	65%

**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."*

**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.

**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.



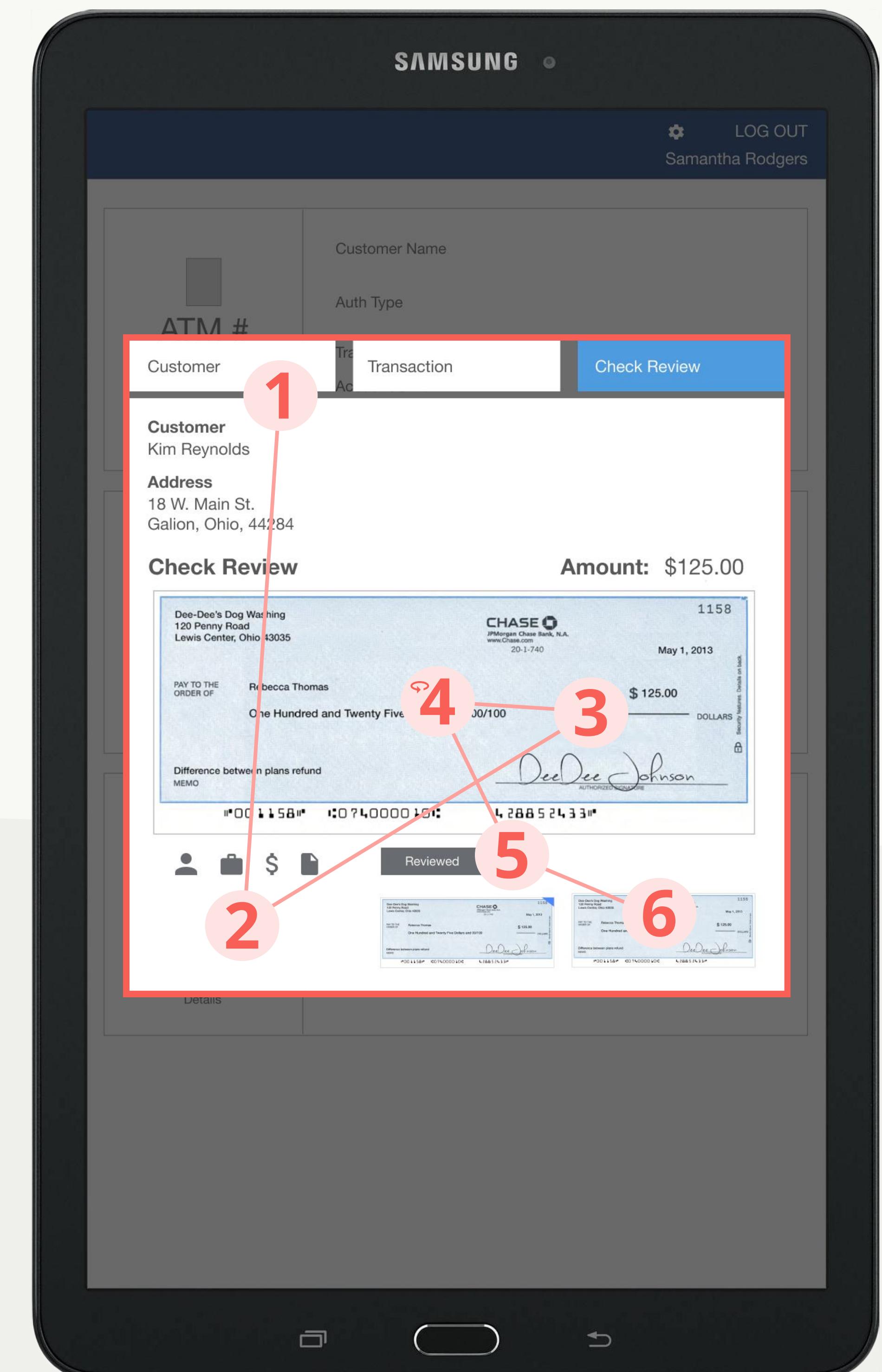
## Current Experience

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.

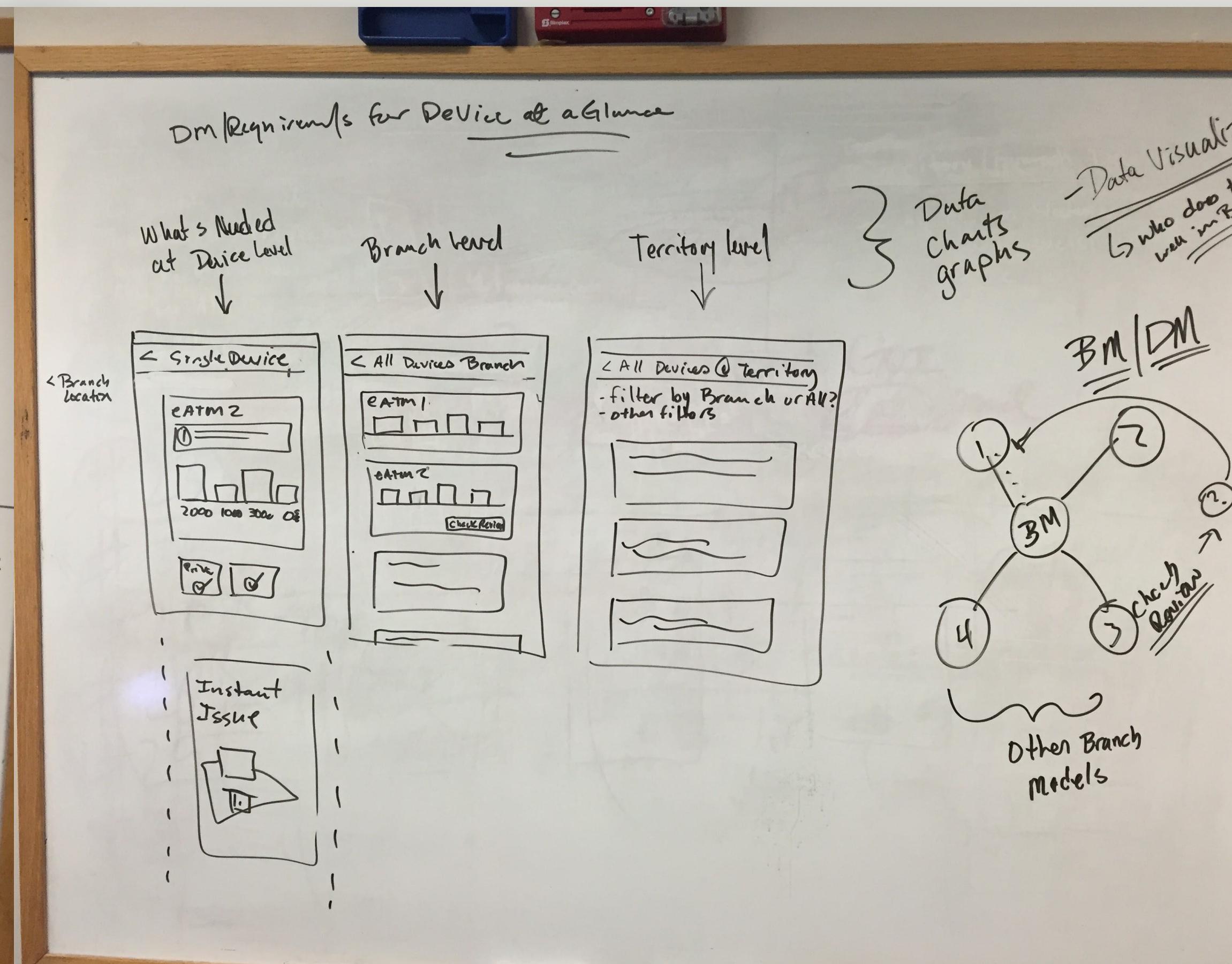
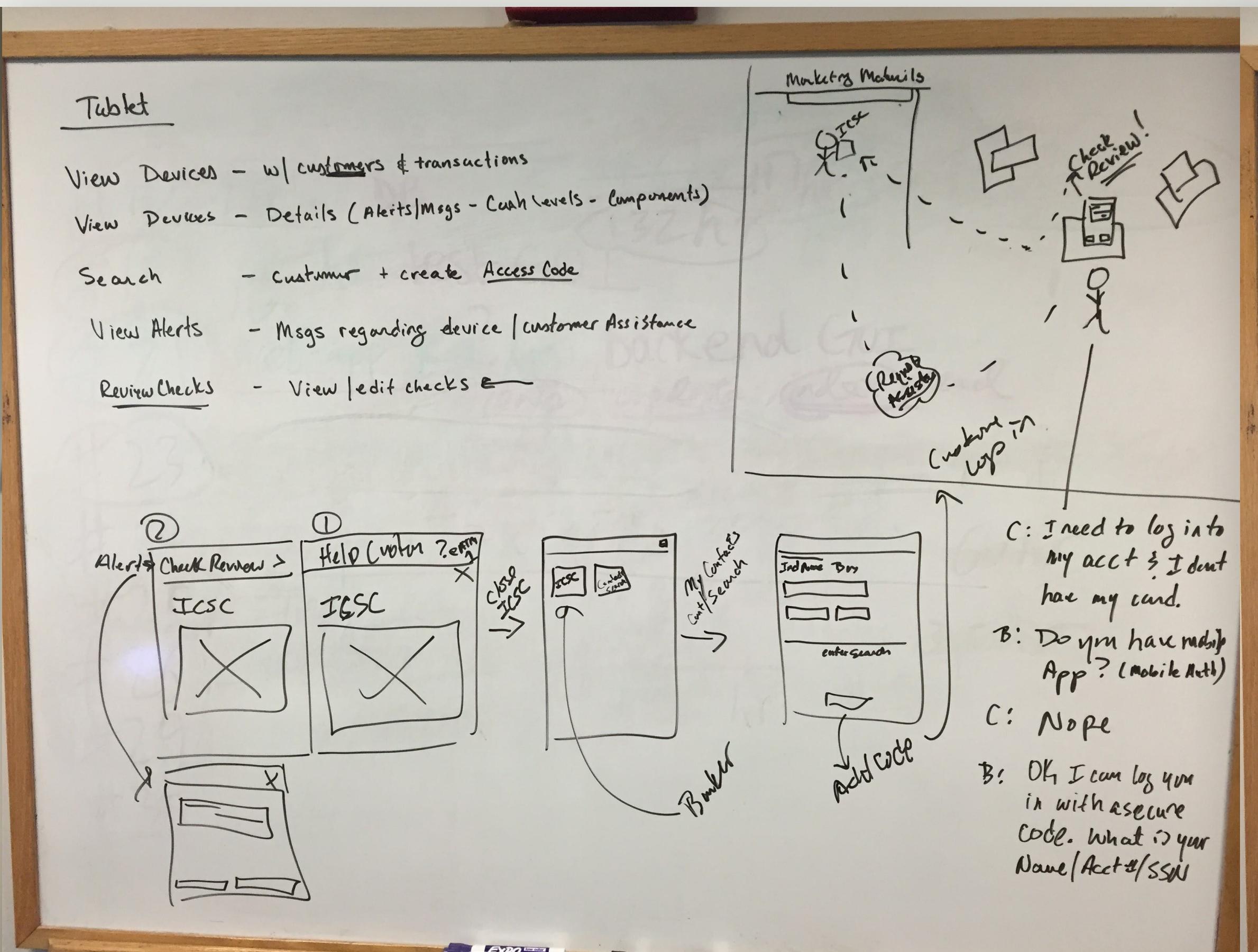
## Problems

- 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



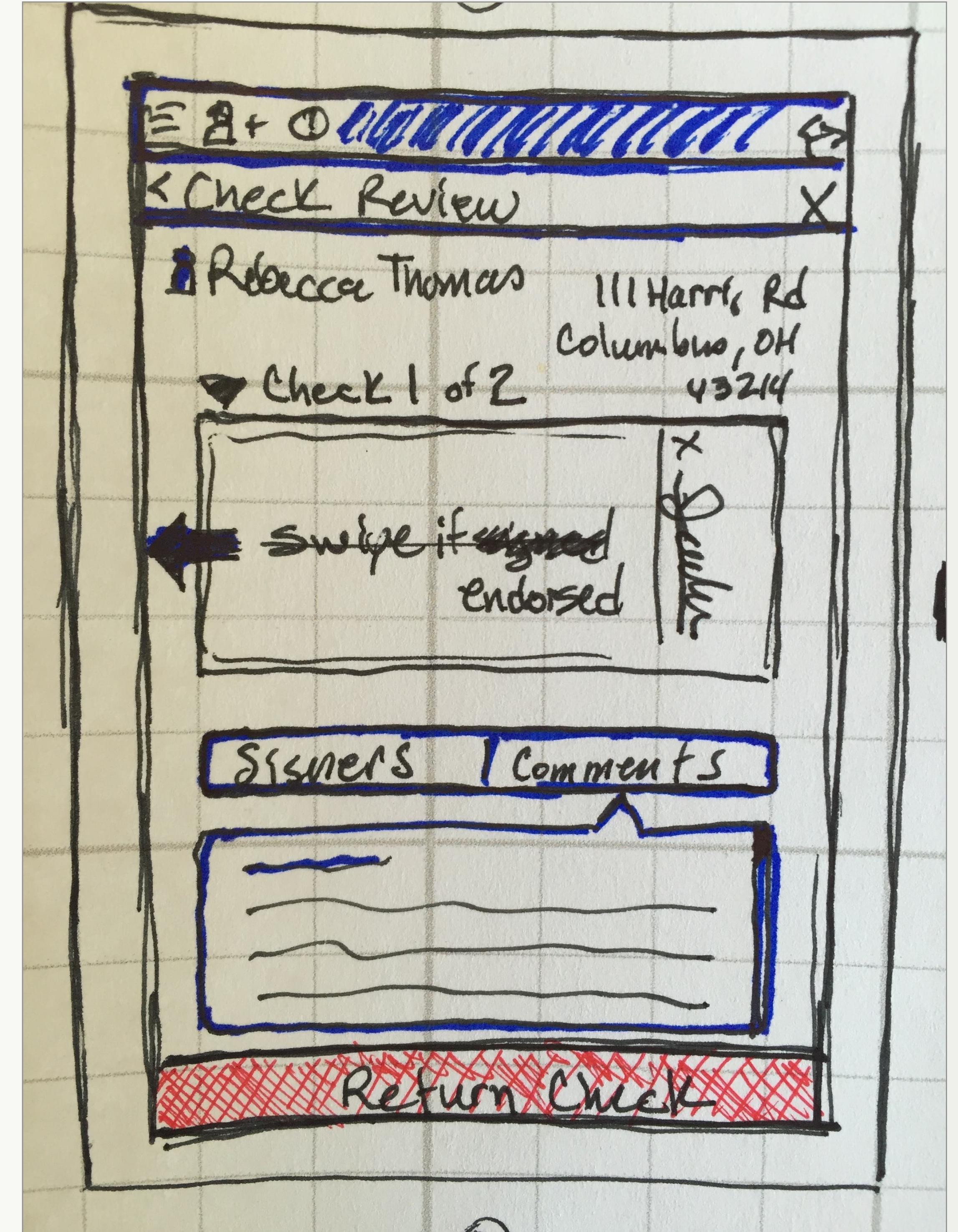
# Discovery and Workshops

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.

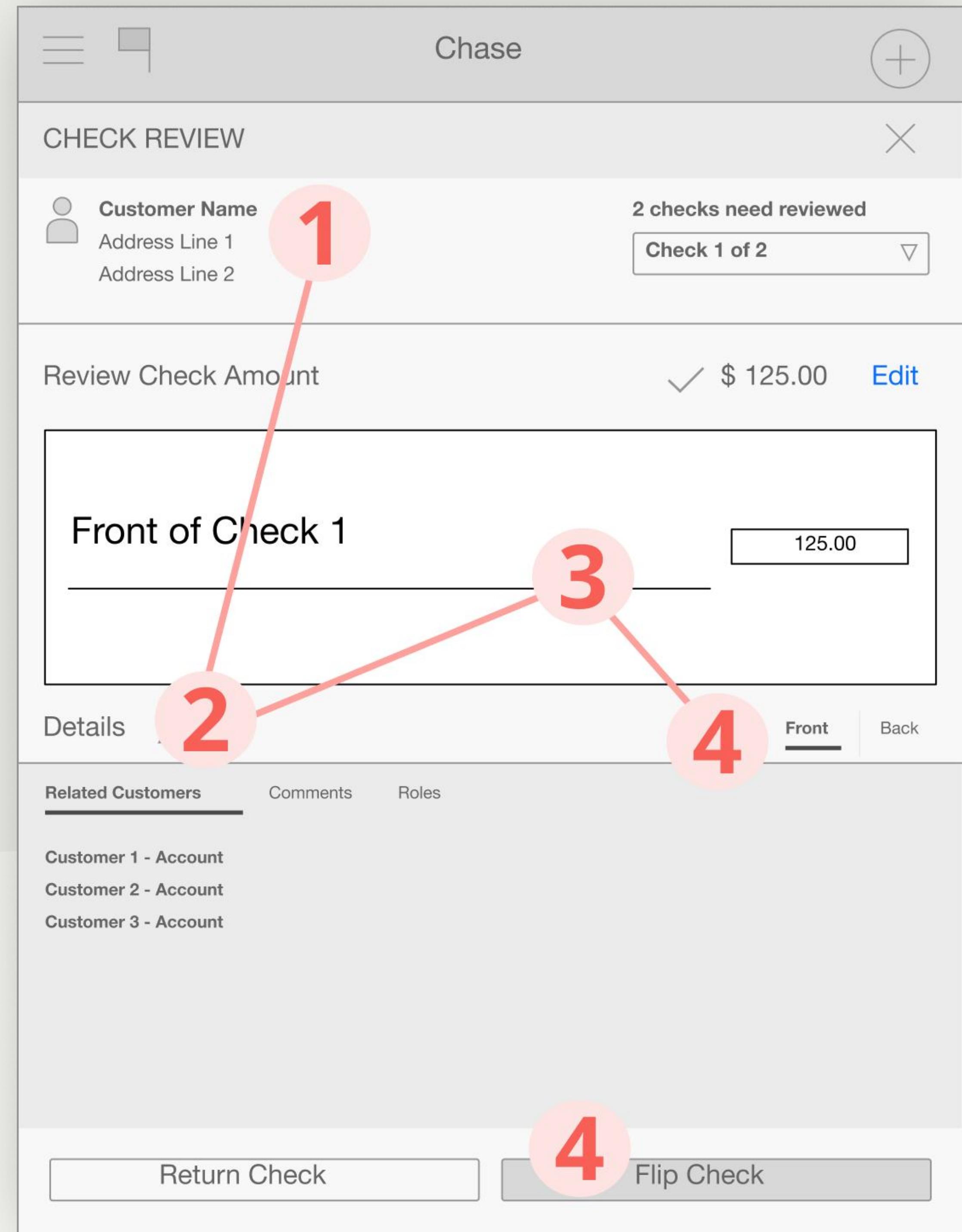


## Design Iterations

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



## 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.

The screenshot shows a mobile application interface for 'CHECK REVIEW'. At the top, there are three icons: a menu, a search bar with a red notification badge (2), and a plus sign for adding new items. The main content area displays a customer profile for 'REBECCA THOMAS' with the address '111 HARRIS RD. WORTHINGTON, OH 43085'. A note indicates '2 checks need review'. Below the profile are two small check images labeled '1' and '2'. The next section, 'Review Amount', shows a check amount of '\$125.00' with an 'Edit' link. A large image of the check itself is shown, with the front side visible. The check is from 'Dee-Dee's Dog Washing' to 'Rebecca Thomas' for '\$125.00'. The memo on the check reads 'Difference between plans refund'. The check is dated 'May 1, 2013' and has a signature 'DeeDee Johnson' over it. Below the check image, there are tabs for 'Account Details', 'Related Customers', 'Comments', and 'Title'. The 'Related Customers' tab is selected, showing entries for 'THOMAS SIGNER' and 'REBECCA'. At the bottom are buttons for 'Return Check' and 'Flip Check'.