

# LifeBank Arena Finance App Design

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**fyreform**

# Project overview



## The product:

LifeBank Arena is professional sports arena. However, a pressing challenge faced by their accounting team revolves around the timely collection of expense documents from other departments. LifeBank Arena is dedicated to setting new standards in operational efficiency within the world of professional sports.



## Project duration:

August 2023 to September 2023



# Project overview



## **The problem:**

The accounting team struggles to get expense documents on time from other departments.



## **The goal:**

Design an app for LifeBank Arena that helps in collecting, submitting, and organizing financial documents.

# Project overview



## **Role:**

UX designer designing an app for LifeBank Arena from conception to delivery.



## **Responsibilities:**

Conducting interviews, paper and digital wireframing, low and high-fidelity prototyping, conducting usability studies, accounting for accessibility, and iterating on designs.

# Understanding the user

- User research
- Personas
- Problem statements
- User journey maps

# User research: summary



Our team, through interviews and empathy maps, identified busy accountants as a primary user group for our design. While validating our assumptions about LifeBank Arena employees, we discovered that beyond needing a centralized database, they faced challenges such as collectively remembering to upload, ensuring an easy upload of various document formats, and needing a streamlined process for reviewing and organizing financial documents. This holistic understanding guided us in refining our design approach to address these multifaceted user needs.

# User research: pain points

1

## Time

Accountants are too busy to track down other departments for documents.

2

## Usability

Other document storage software doesn't account for other file types such as physical paper receipts.

3

## Accessibility

Other accounting apps are very busy and lead to option overload and user breakdown.



## Persona: Yvette

Age | 45

Education | Masters

Hometown | Chicago, IL

Occupation | Accountant

## “Time is the scarcest resource”

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### Goals

- To be a team player
- To have a balance between work-time & free-time
- To be efficient and accurate

### Frustrations

- Fixing mistakes that could be easily avoided
- Feeling under appreciated
- Doing other peoples jobs

Yvette is a CPA with a bustling schedule. She works at a hospital in the finance department. On her time off she spends time with her partner traveling. Yvette has vision impairment, and has tools to help her read on a screen. She receives documents in many ways, including on paper, and that can make it hard to process her work.



## **Problem Statement: Yvette**

**Yvette** is a **busy seasoned accountant** who needs **a way to collect financial documents from coworkers** because **there is no centralized place to get them from.**





## Persona: Chris

Age | 29

Education | Bachelors

Hometown | Miami, FL

Occupation | Office Manager

## “A chain is only as strong as its weakest link”

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### Goals

- Make sure everyone's comfortable & happy at work
- Climb the corporate ladder while balancing dating
- To get work done and have fun

### Frustrations

- Miscommunication
- Doing an unproductive task over and over again
- Putting in effort when my team doesn't

Chris is an Office Manager at a development agency. On his time off he likes to go to the beach or club to meet people. He's a hard worker but struggles when he feels he's not being taken seriously. He has to make sure that everyone in the office is happy and has the tools they need to get their jobs completed.

## **Problem Statement: Chris**

**Chris** is an **office manager** who needs **an easier way to get documents to the finance team** because **it currently takes too long to compile all the papers.**



# User journey map

Mapping Yvette's user journey revealed how helpful it would be for users to have access to a dedicated platform for collecting information.

**Yvette**  
Goal: Collect and process financial paperwork to run reports.

Action	Determine who to get documents from	Organize Documents	Review Compiled documents	File Paperwork	Run Reports
<b>Task List</b>	<b>Tasks</b> A. Talk with department heads B. Email vendors	<b>Tasks</b> A. Stack paper files in a pile B. Place digital files in folders	<b>Tasks</b> A. Determine if paper documents are relevant B. Review PDFs	<b>Tasks</b> A. Scan papers B. Sort papers into categories C. Add to software	<b>Tasks</b> A. Review imported categories B. Compose financial reports
<b>Feeling Adjective</b>	<ul style="list-style-type: none"><li>Overwhelmed</li><li>Insecure</li></ul>	<ul style="list-style-type: none"><li>Hopeful</li><li>Satisfied</li></ul>	<ul style="list-style-type: none"><li>Intimidated</li><li>Hopeful</li></ul>	<ul style="list-style-type: none"><li>Alert</li><li>Intimidated</li></ul>	<ul style="list-style-type: none"><li>Hopeful</li><li>Excited</li><li>Relieved</li></ul>
<b>Improvement Opportunities</b>	<ul style="list-style-type: none"><li>Checklist</li><li>Automation</li></ul>	<ul style="list-style-type: none"><li>1 collection point</li><li>Automation</li></ul>	<ul style="list-style-type: none"><li>Checklist</li></ul>	<ul style="list-style-type: none"><li>Automations</li></ul>	<ul style="list-style-type: none"><li>Automation</li><li>Optimization</li></ul>

# User journey map

Mapping Chris's user journey revealed how helpful it would be for users to have access to a dedicated platform for collecting information.

**Chris**

**Goal:** Compile receipts, invoices, expense reports and other documents, and deliver them to accounting.

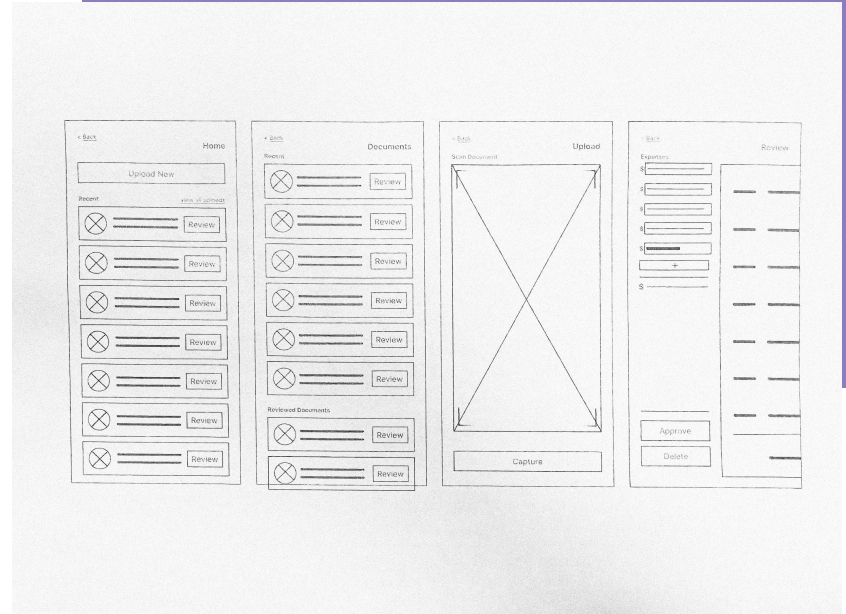
Action	Determine which documents to collect	Review Documents	Process Paperwork	Store Paperwork	Deliver Documents
<b>Task List</b>	<b>Tasks</b> A. Get Invoices B. Save Receipts C. Fill out expense forms	<b>Tasks</b> A. Inspect for accuracy B. Check if relevant C. See if current	<b>Tasks</b> A. Convert digital files to PDF B. Scan papers C. Sort receipts	<b>Tasks</b> A. Keep digital files on desktop B. Keep printouts in backpack	<b>Tasks</b> A. Email B. Upload to cloud C. Find CPA and hand deliver
<b>Feeling Adjective</b>	<ul style="list-style-type: none"><li>Confused</li><li>Forgetful</li></ul>	<ul style="list-style-type: none"><li>Annoyed</li><li>Hopeful</li></ul>	<ul style="list-style-type: none"><li>Intimidated</li><li>Satisfied</li></ul>	<ul style="list-style-type: none"><li>Glad</li><li>Relieved</li></ul>	<ul style="list-style-type: none"><li>Overwhelmed</li><li>Hopeful</li></ul>
<b>Improvement Opportunities</b>	<ul style="list-style-type: none"><li>Checklist</li><li>Examples</li></ul>	<ul style="list-style-type: none"><li>Checklist</li><li>Examples</li></ul>	<ul style="list-style-type: none"><li>Easy Upload</li><li>Automations</li></ul>	<ul style="list-style-type: none"><li>Automations</li></ul>	<ul style="list-style-type: none"><li>Automations</li></ul>

# Starting the design

- Paper wireframes
- Digital wireframes
- Low-fidelity prototype
- Usability studies

# Paper wireframes

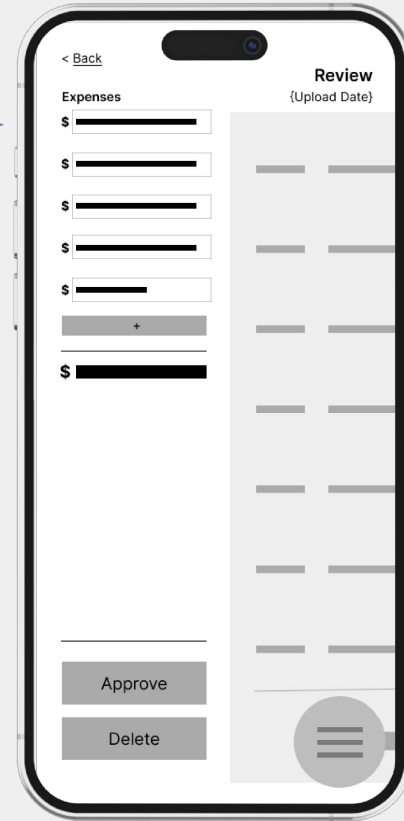
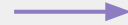
Taking the time to draft iterations of each screen of the app on paper ensured that the elements that made it to digital wireframes would be well-suited to address user pain points. For the home screen, we prioritized a **upload link** to help users save time.



# Digital wireframes

As the initial design phase continued, we made sure to base screen designs on feedback and findings from the user research.

These fields are available at the top of the screen to review and edit amounts.



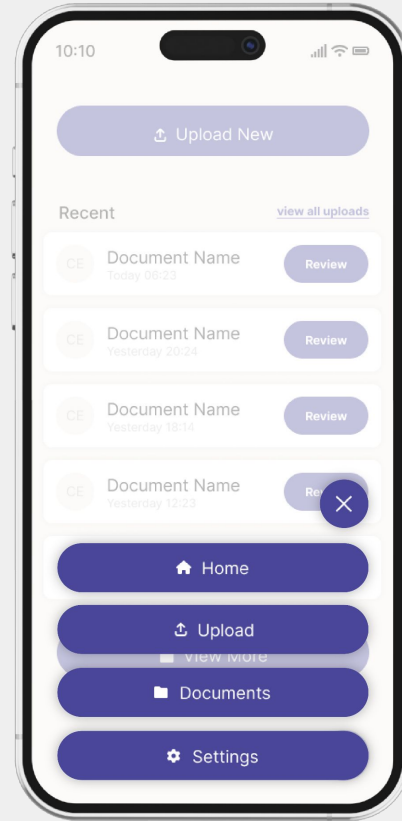
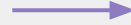
This overlay shows the originally uploaded document to review.



# Digital wireframes

Easy navigation was a key user need to address in the designs in addition to equipping the app to work with assistive technologies.

Navigation  
access at the  
bottom of the  
screen to make  
it easy to reach

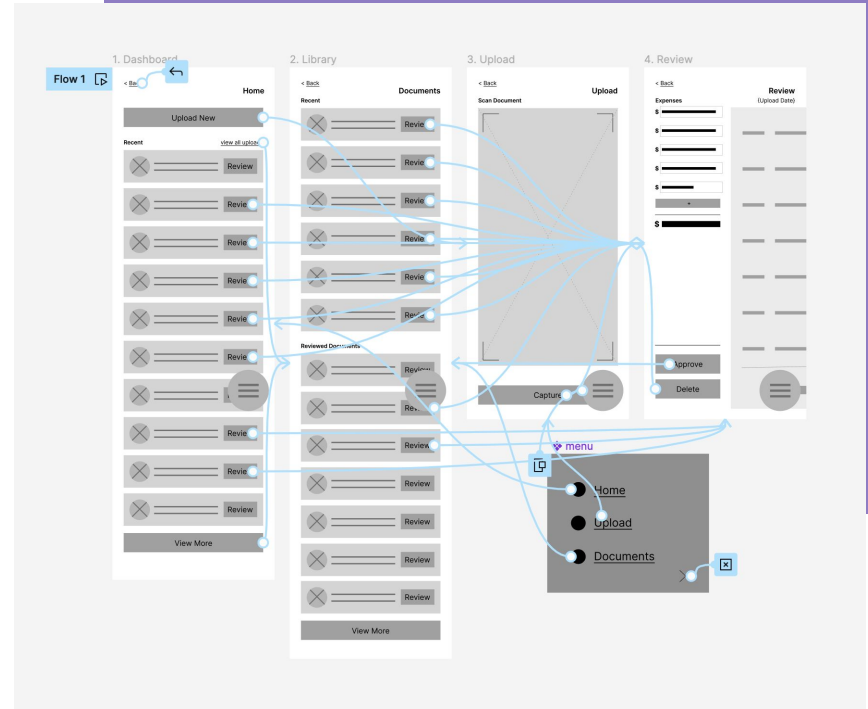


# Low-fidelity prototype

Using the completed set of digital wireframes, we created a low-fidelity prototype. The primary user flow we connected was uploading, viewing, and editing documents, so it could be used in a usability study.

View the LifeBank Arena App

[low-fidelity prototype](#)



# Usability study: findings

We conducted two rounds of usability studies. Findings from the first study helped guide the designs from wireframes to mockups. The second study used a high-fidelity prototype and revealed what aspects of the mockups needed refining.

## Round 1

- 1 Users want to upload quickly
- 2 Users want easier streamlined navigation
- 3 Users a way to mobile-scan

## Round 2

- 1 Page names were confusing and misleading
- 2 Reviewing and editing documents was difficult

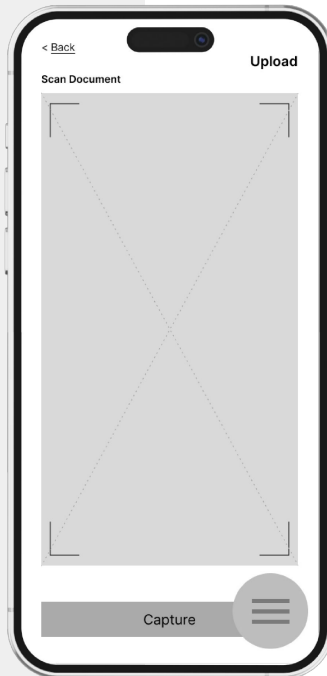
# Refining the design

- Mockups
- High-fidelity prototype
- Accessibility

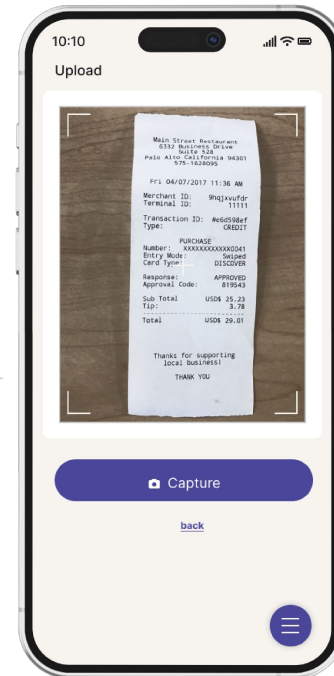
# Mockups

Early designs allowed for some customization, but after the usability studies, we added additional options to **quick upload documents**. we also revised the design so users see **only relevant information** when they first open the app.

Before usability study



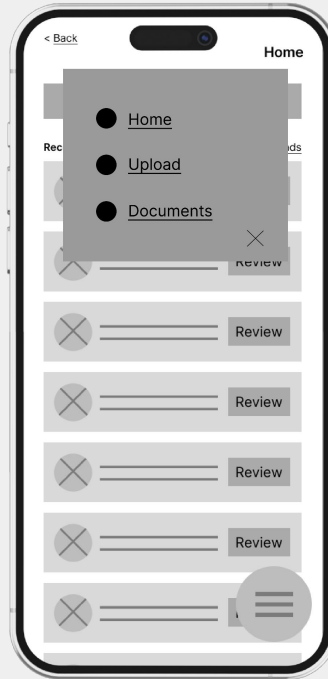
After usability study



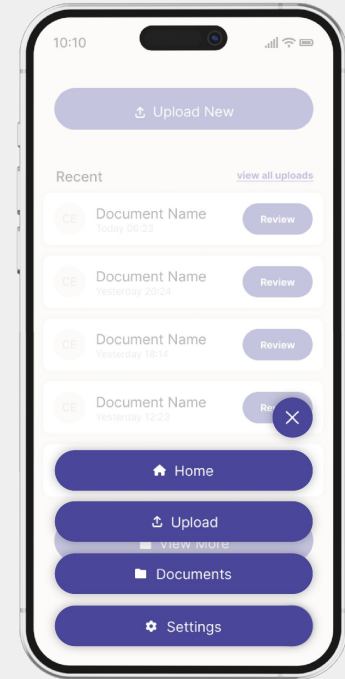
# Mockups

The second usability study revealed frustration navigation and review functionality. To fix this, we changed the link sizes and page names like “Library” to “Documents”. we also updated the review page to only be accessible from a **document page** or **after upload**. To guide users.

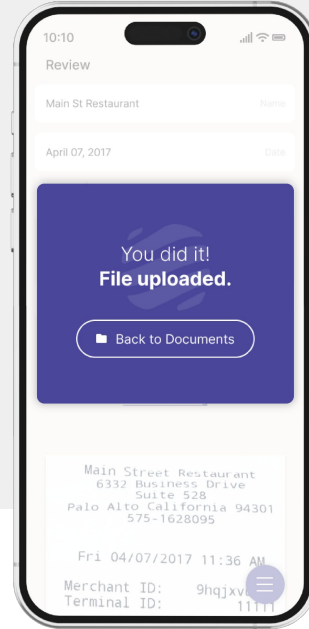
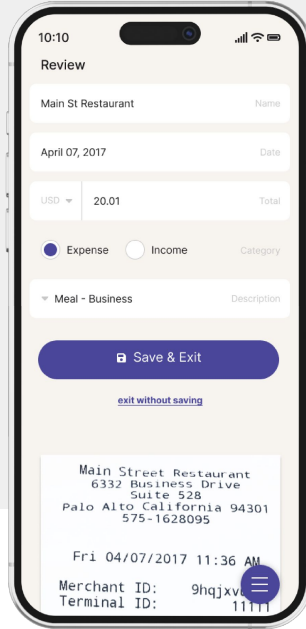
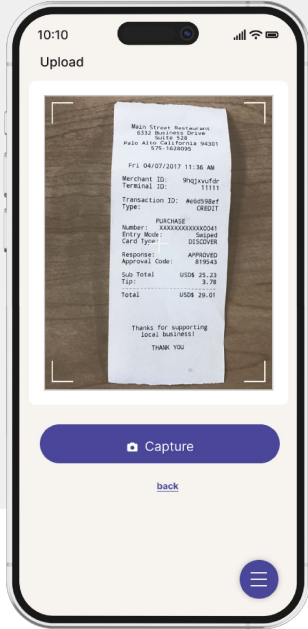
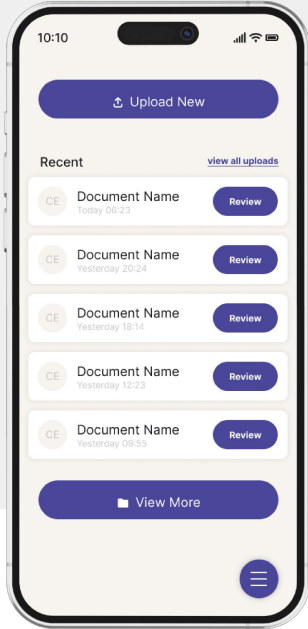
Before usability study



After usability study



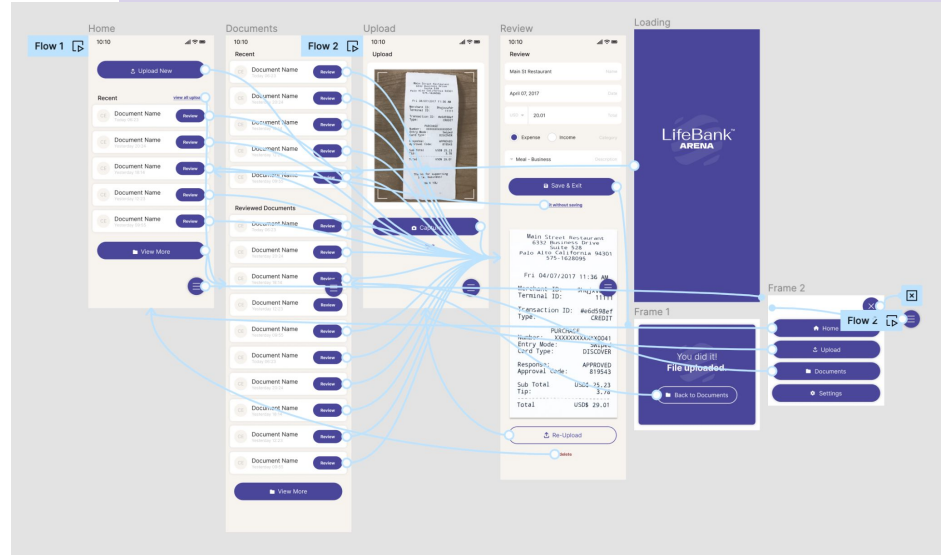
# Key Mockups



# High-fidelity prototype

The final high-fidelity prototype presented cleaner user flows for uploading and reviewing. It also reached users accessibility needs for navigating.

View the Life-Bank App [high-fidelity prototype](#)





# Accessibility considerations

1

Used larger buttons for easier clicking for users with limited motor functions.

2

Used icons and simplistic page names to help make navigation easier.

3

Simplified the homepage to only highlight relevant data to help with focus.

# Going forward

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- Takeaways
- Next steps

# Takeaways



## Impact:

The app allows accountants to easily collect documents which makes their jobs cleaner and easier.

One quote from peer feedback:

“I think anyone could figure this out”



## What I learned:

While designing the LifeBank Arena app, we learned that the first ideas for the app are only the beginning of the process. After research, usability studies, and peer feedback each design step got progressively better and more useful.

# Next steps

1

Conduct another round of usability studies to validate whether the pain points users experienced have been effectively addressed.

2

Conduct more user research to determine any new areas of need.

# Let's connect!



Thank you for your time reviewing our work with LifeBank Arena.  
Check out our Website to learn more about us and our work!

Website: [www.FyreForm.com](http://www.FyreForm.com)