

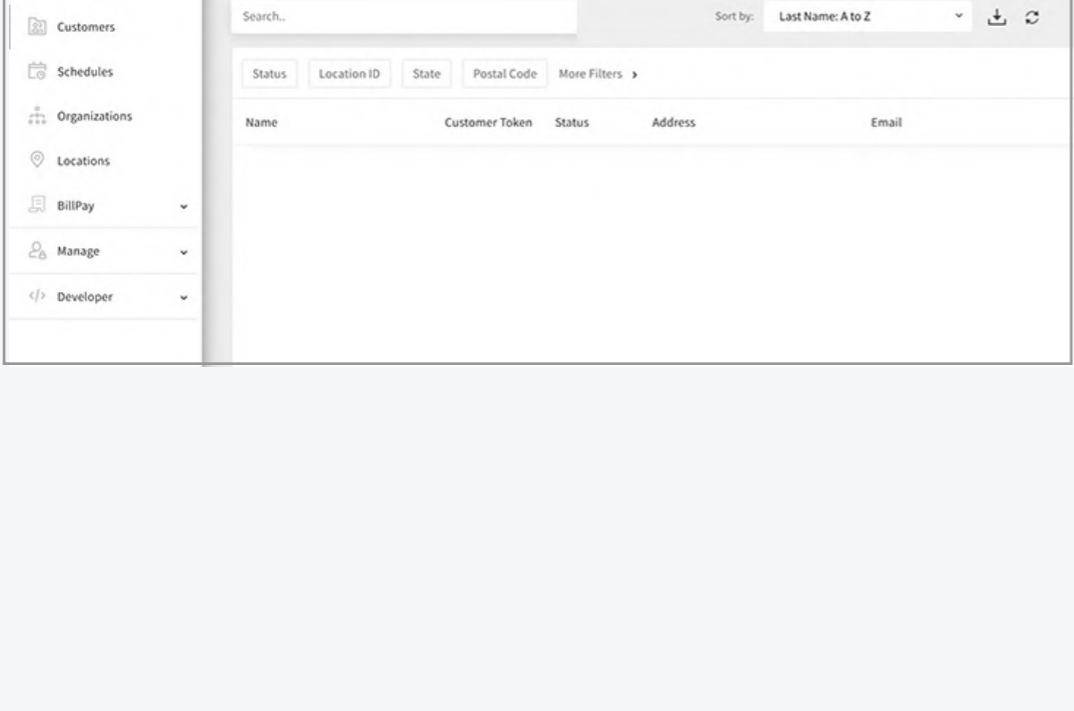


Payment app

Improve day to day merchant's tasks with a new opening dashboard

The case

Some user roles are overwhelmed by the onboarding tutorial and the app's main dashboard info modules.

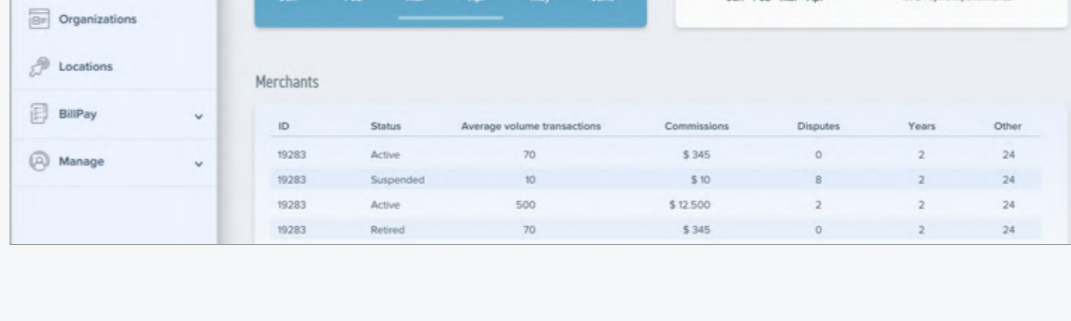


Improving ideas

Analyzing the user flow for each main task, and reviewing the UI navigation options. Getting inspiration from other platforms.

Design solution

Better color scheme, organized sidebar options, strategic dashboard components.



THE UX DESIGN PROCESS

Role: UX UI Designer | dex proof of concept

01 CONTEXT

About the Client

dex is a complete payment solution developed by csg Forte.

The platform and the team simplify the payments management so the merchants can process payments quickly and use the funds to fuel their growth.

The merchants can verify accounts, manage payment returns and automatically update account information to better manage one-time and recurring payments.

Define & Discovery

The problem is that the user in Merchant role gets lost with all the options from the sidebar nav and the information widgets.

No matter how complete the software is, users need key data easy to find and understand.

Each one of the competitors has several dashboard pages customized by roles and data visualization needs.

The Idea and the Solution

The brand, develop and management team came up with a requirement to improve the first pages (onboarding and dashboard), to help the Merchants to use the app with useful information from start.

As a fast paced project to explore some ideas, the team agreed to review the first moment when the user interacts with the app, and build from there issues with navigation, reading, layout and functions.

DESIGN

FRONTIERS

- User persona
- User scenario
- User task
- User flow diagram

GOALS

Create a new informative first screen to help the user with the most important next task to do.

PRINCIPLES

- Be Everywhere
- Be Purposeful
- Be Guest - Centric
- Be Human

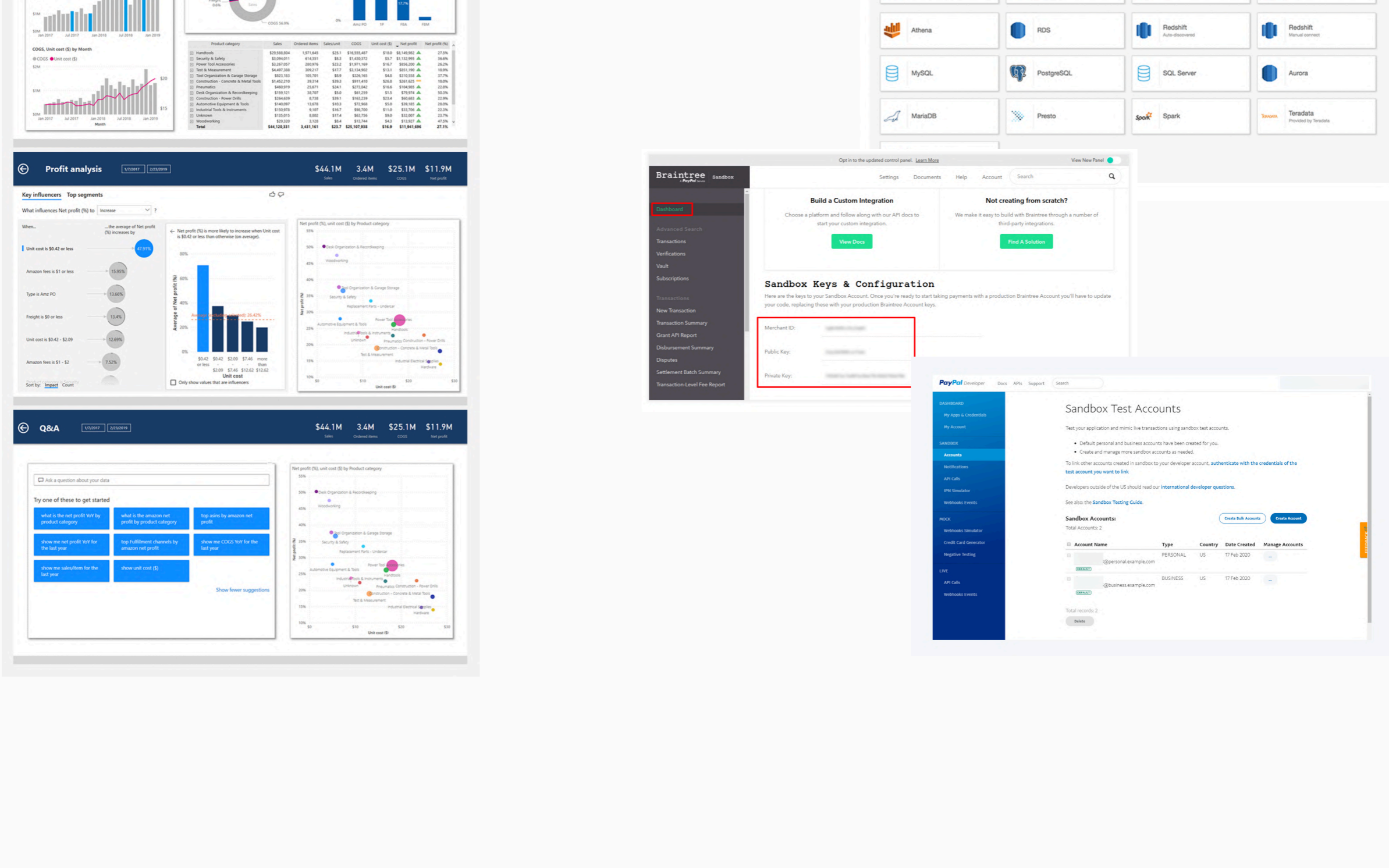


IMPLEMENTATION MODEL

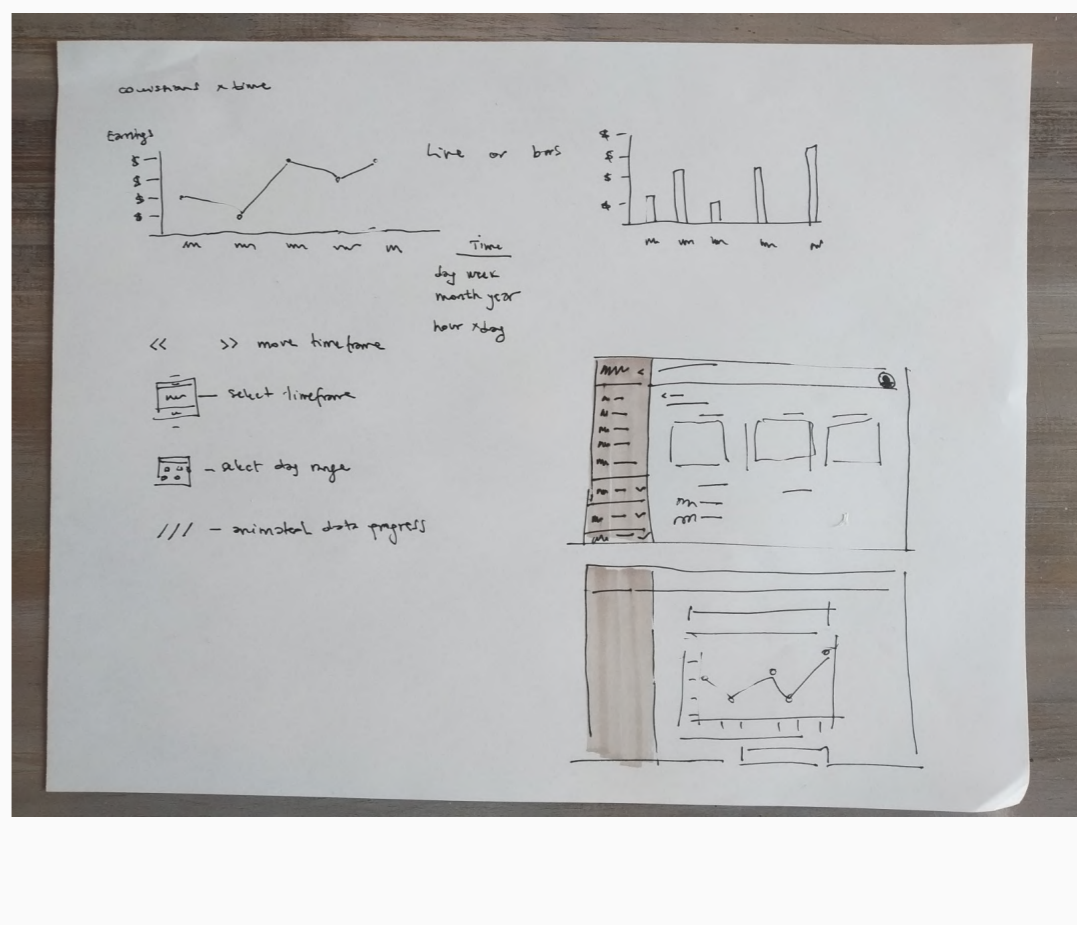
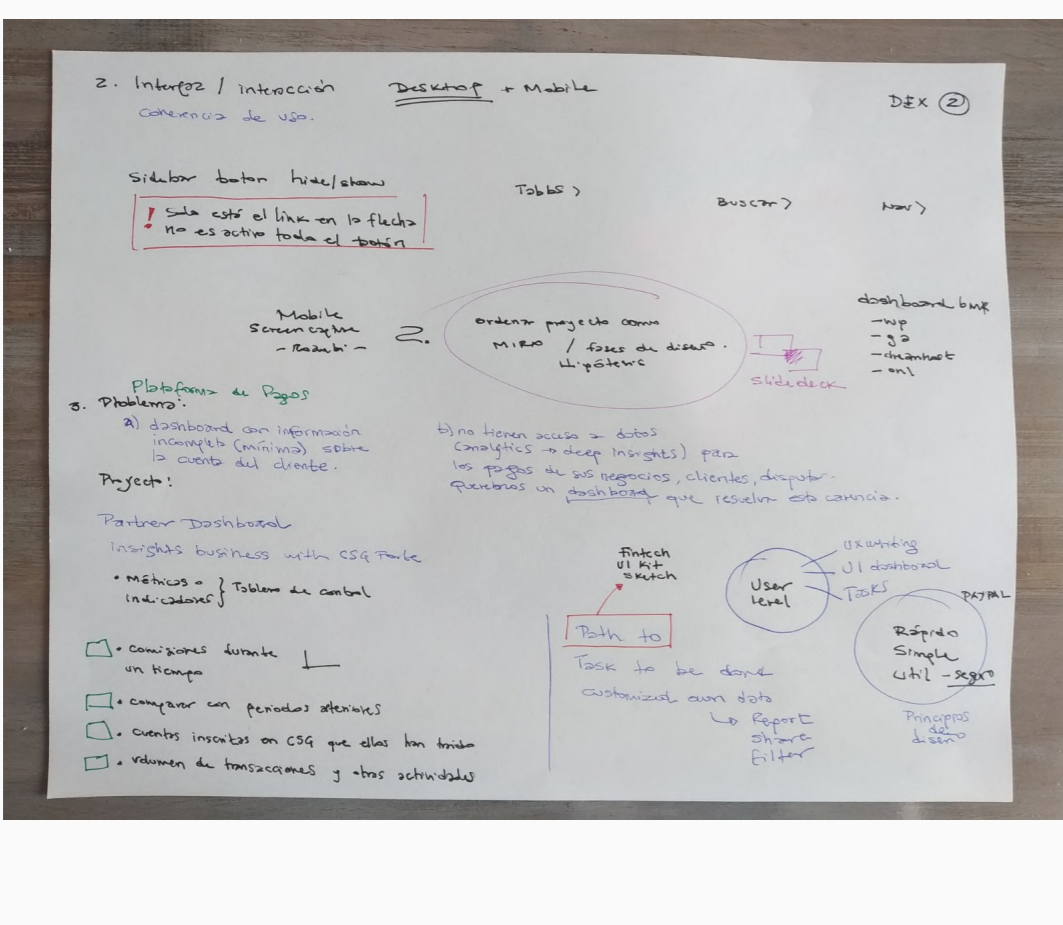


USER (MENTAL) MODEL

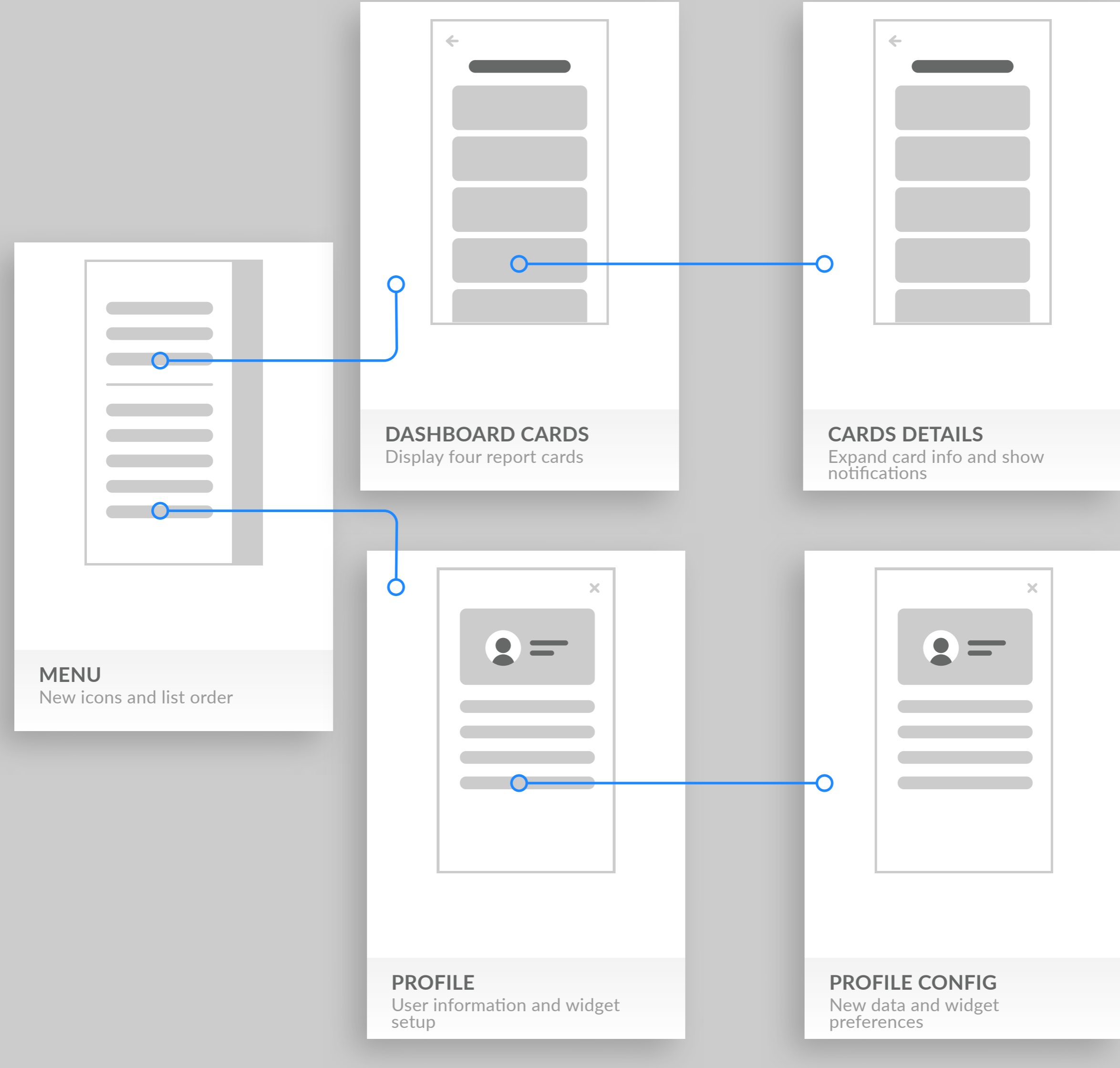
02 RESEARCH - BENCHMARKING



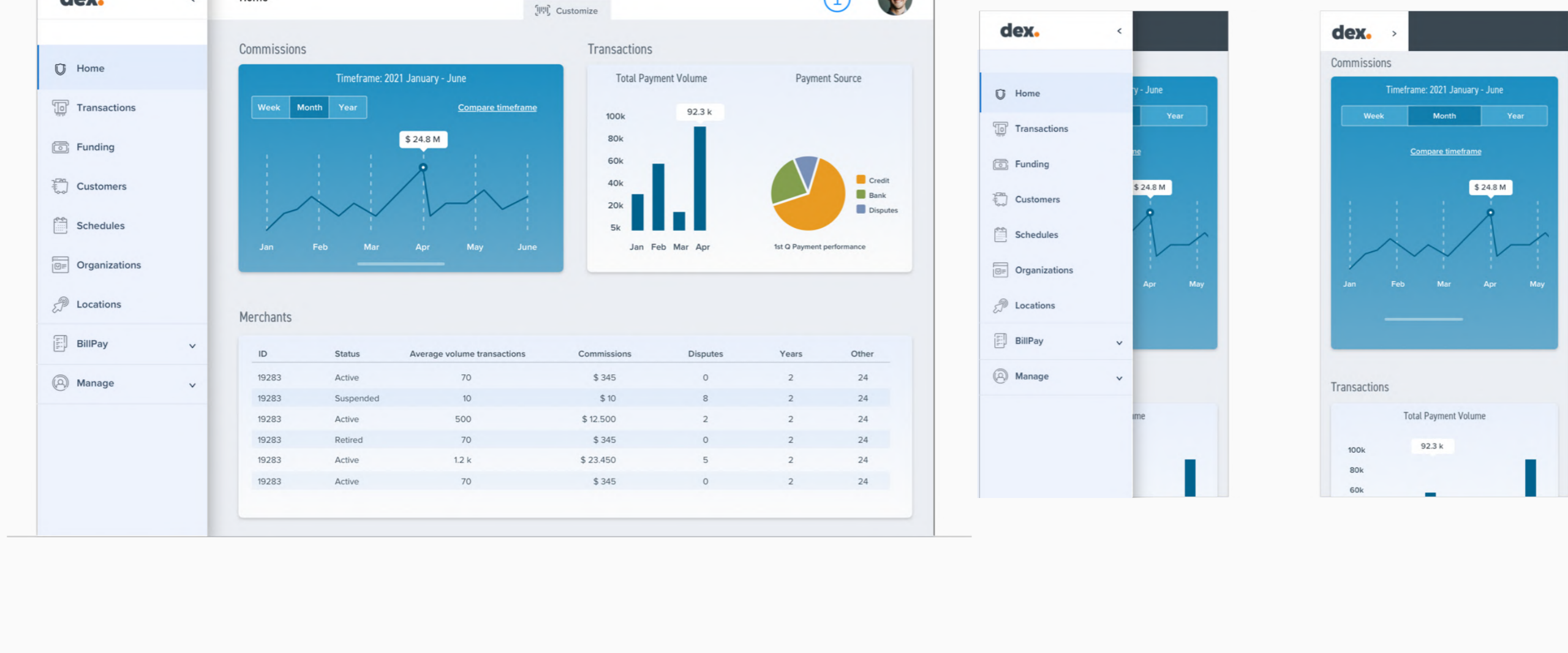
03 BRAINSTORMING



04 WIREFLOWING



05 PROTOTYPE



OUTCOMES

Specs

This project was completed in 3 days. The platform was designed to match the current dex framework version.

Although the main task to address was the dashboard information page, after the first review, we had to fix other items.

- Navigation (main sidebar)
- Profile options
- Critical user notifications
- UI themes and color contrast

Learnings

The app was complex to understand in some taskflows due to the different roles involved.

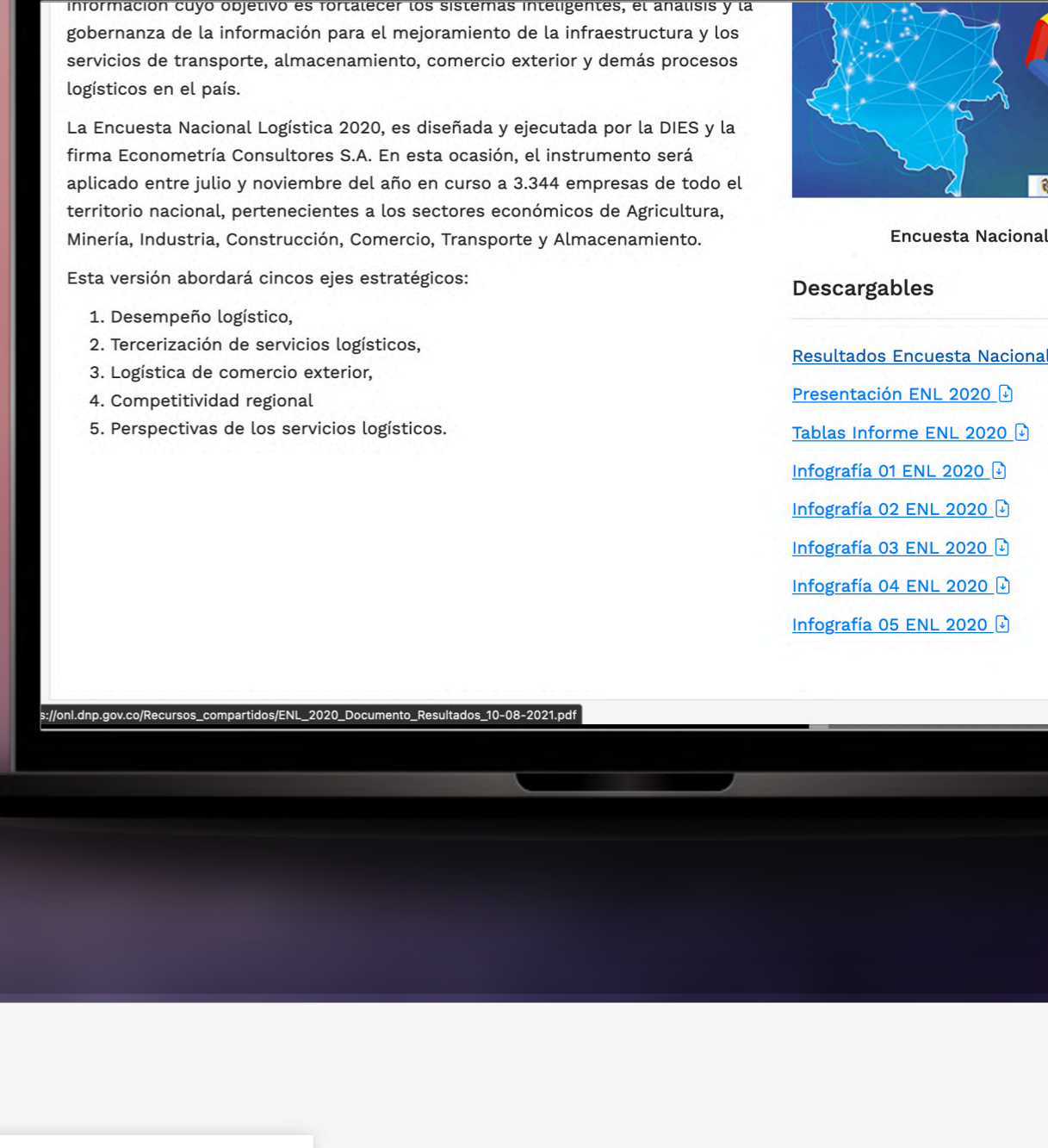
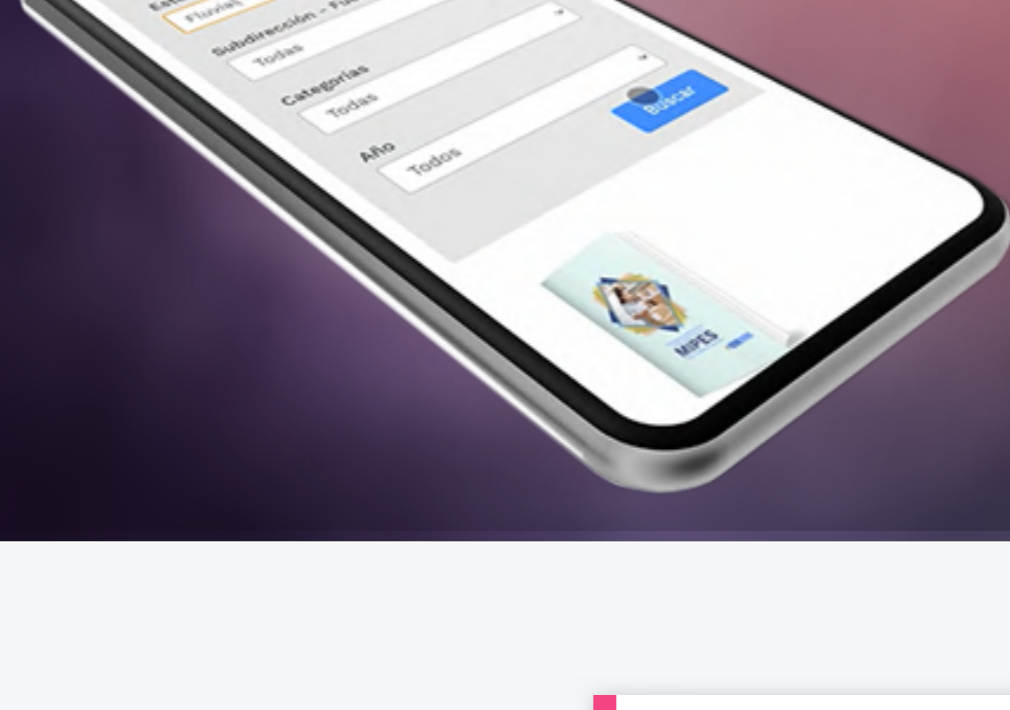
Some features should be redefined to match the user expectations and help them finish their tasks faster.

The app should alert the users even offline when there are things to resolve with payments, disputes and deadlines.

Some common app features as On boarding and Theming are implemented but there are things to improve.

Observatory

ONL information portal for logistics, transportation, mining and energy reports



The case

Huge amount of information to search and share for decision making users. Unordered documents to build projects.

Improving ideas

Taking the best ideas from the team and reviewing other data portals for gov initiatives. Downsizing the problem.

Design solution

Compact modules for map based information and updated reports. Library like functionality for docs.

THE UX DESIGN PROCESS

Role: UX UI Designer | Specialist Contractor DNP

01 CONTEXT

About the Client

The DNP is an eminently technical entity that promotes the implementation of a strategic vision of the country in the social, economic and environmental fields, through the design, guidance and evaluation of Colombian public policies, the management and allocation of public investment and the concretization of the same in plans, programs and projects of the Government.

Define & Discovery

The problem is how to manage and show key information about strategic topics for decision making.

The information is provided from different sources (gov agencies) and also legacy studies are stored in several unreachable backups.

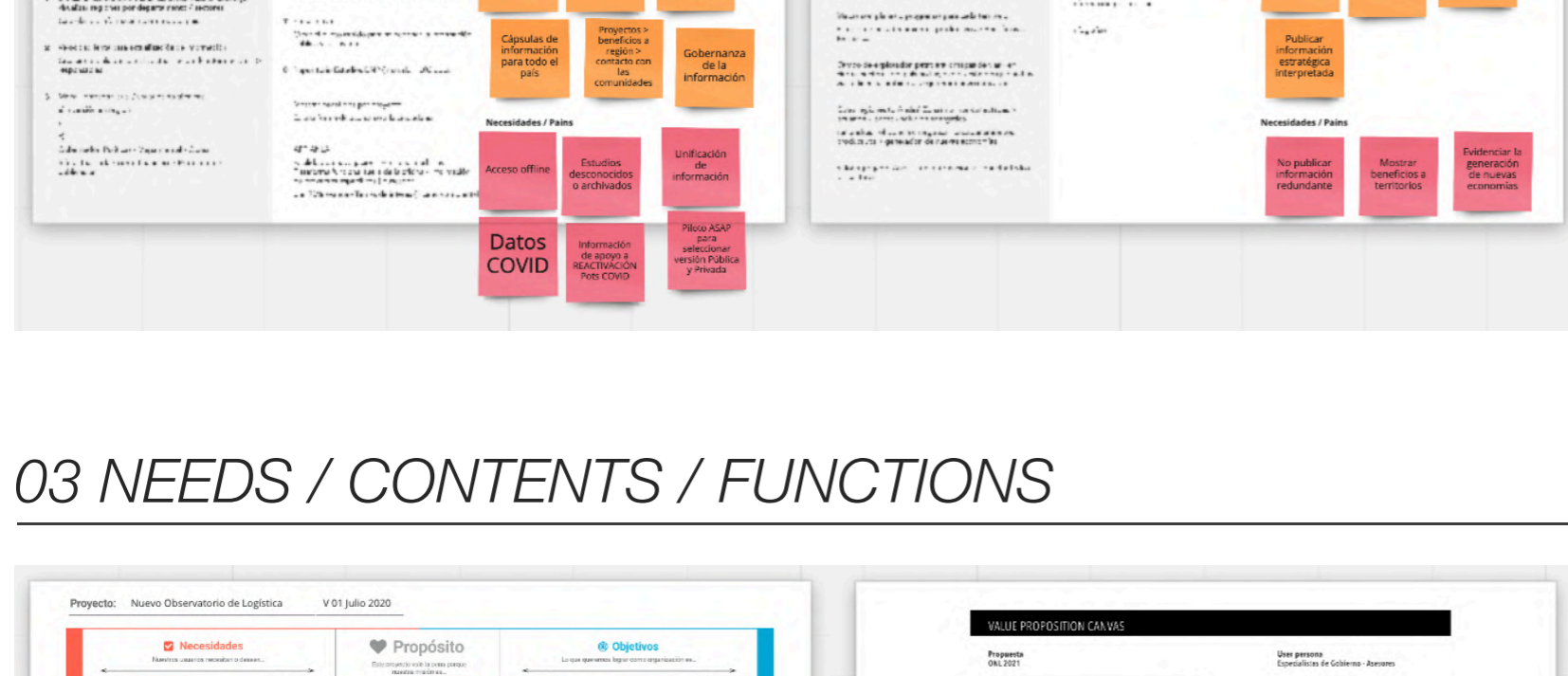
The office behind the project has the drive to implement a solution based on UX design methodology.

The Idea and the Solution

The Idea is to organize the information and match the topics with the current keywords used in the government and provide an easy way to find updated data.

The solution is to display information with maps and charts for the most searched reports. Also to build a custom library with more than 100 complex studies related to gov investment projects.

02 RESEARCH - INTERVIEWS



For the Research phase, we conducted more than 20 interviews with stakeholders (directors, developers, data scientists and citizens).

We had reviews for Benchmarking solutions in Colombia, Latam and Worldwide.

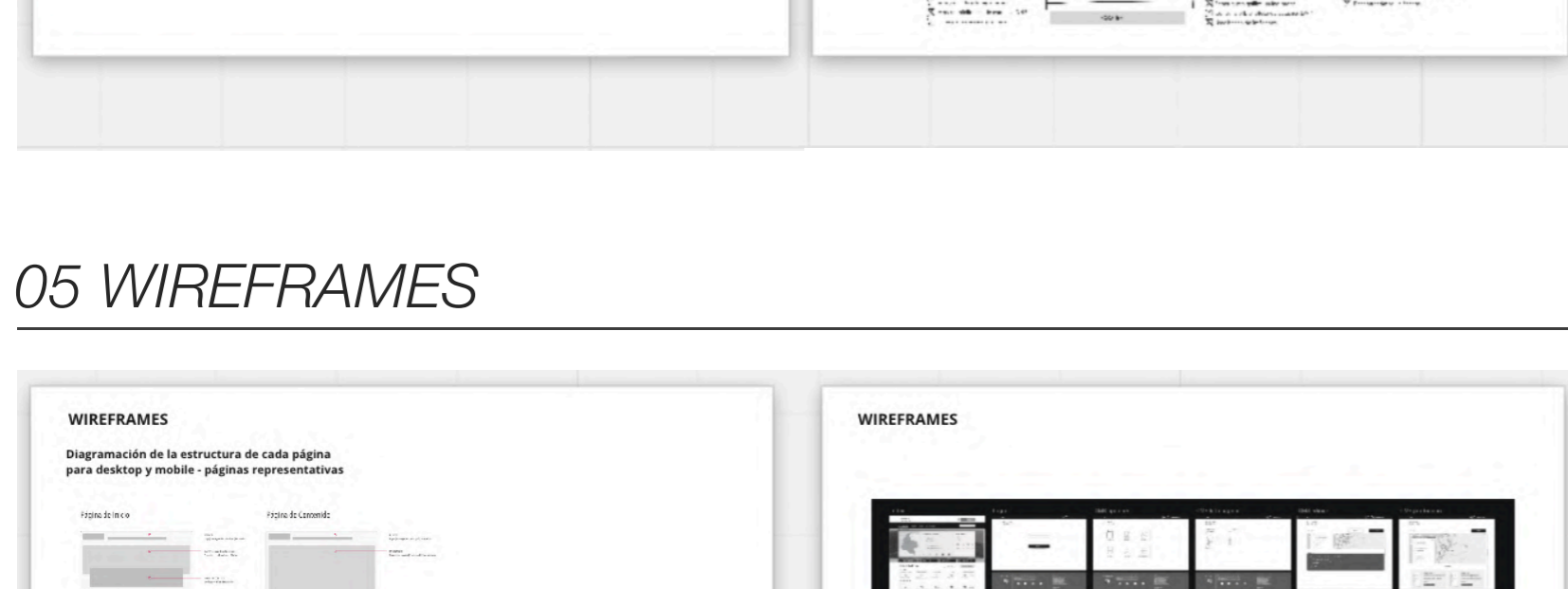
03 NEEDS / CONTENTS / FUNCTIONS



To organize and select the most useful solution ideas we used a Scope Canvas and a Value Proposition Canvas matrix.

Those tools help to give a high level view for the ideas and how to match them with the project goals.

04 CONTENT ARCHITECTURE

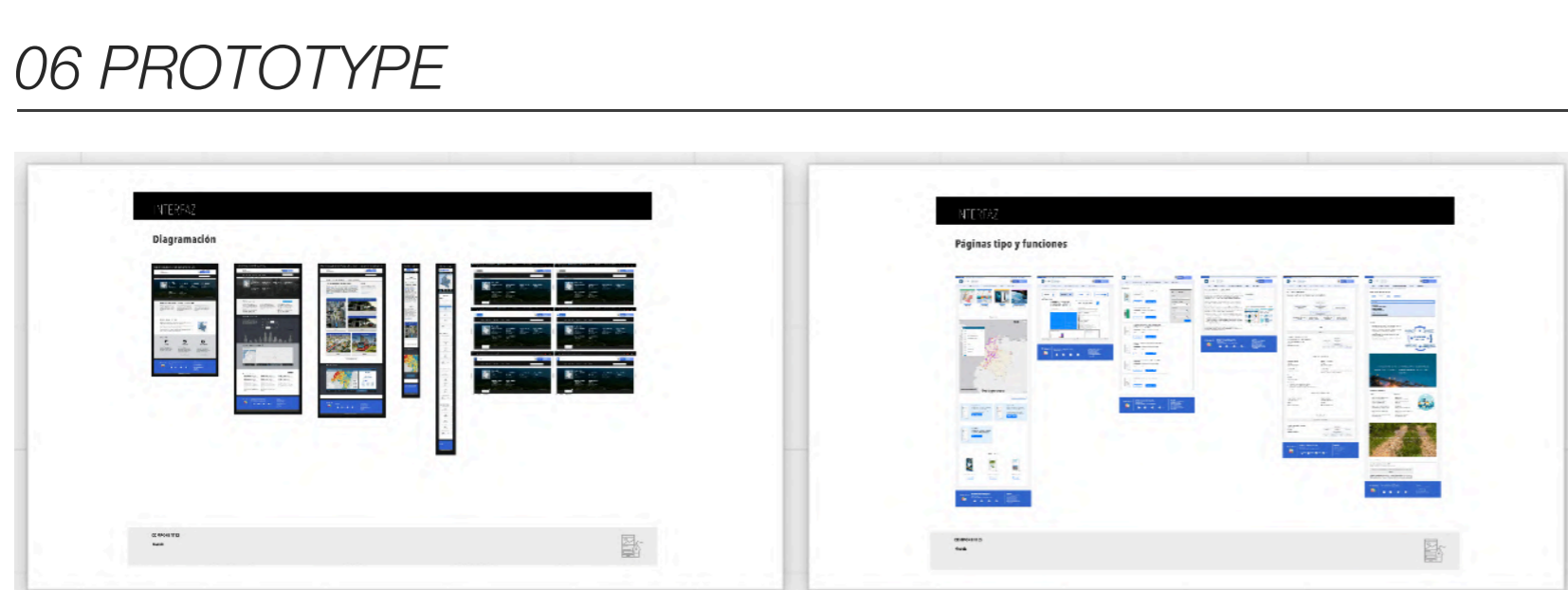


From the beginning we use a site map and a function chart to track the solution architecture.

We used a Content Core tool to create all the content for each page in the Portal.

Also we used this to implement the future Content Strategy.

05 WIREFRAMES

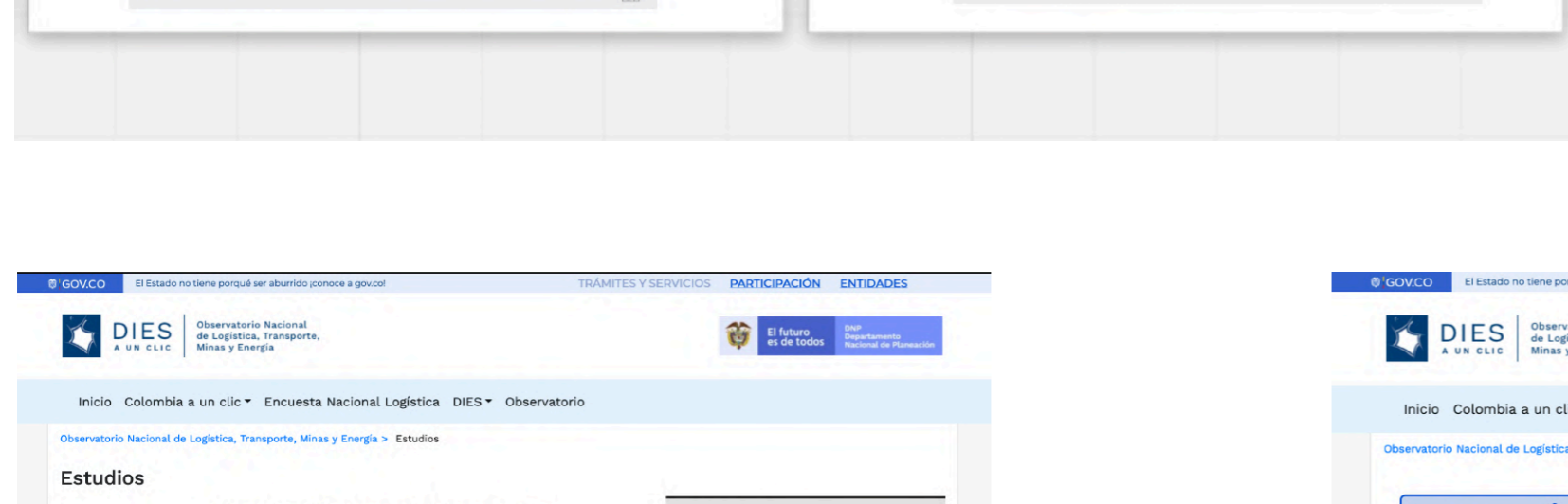


With the information about content and functions we designed the layout for the most unique pages.

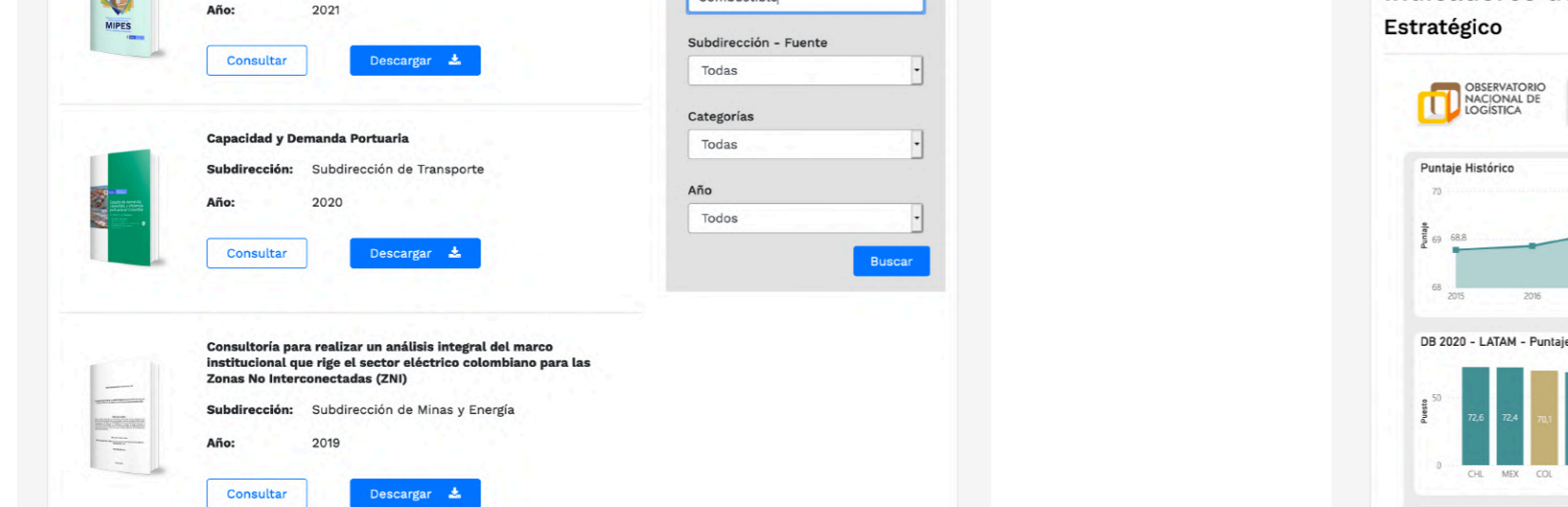
Also the wireframes were the starting point to present the user flow in some user scenarios.

This approach gave us the sense for the tasks to carry out in desktop and mobile connection moments.

06 PROTOTYPE

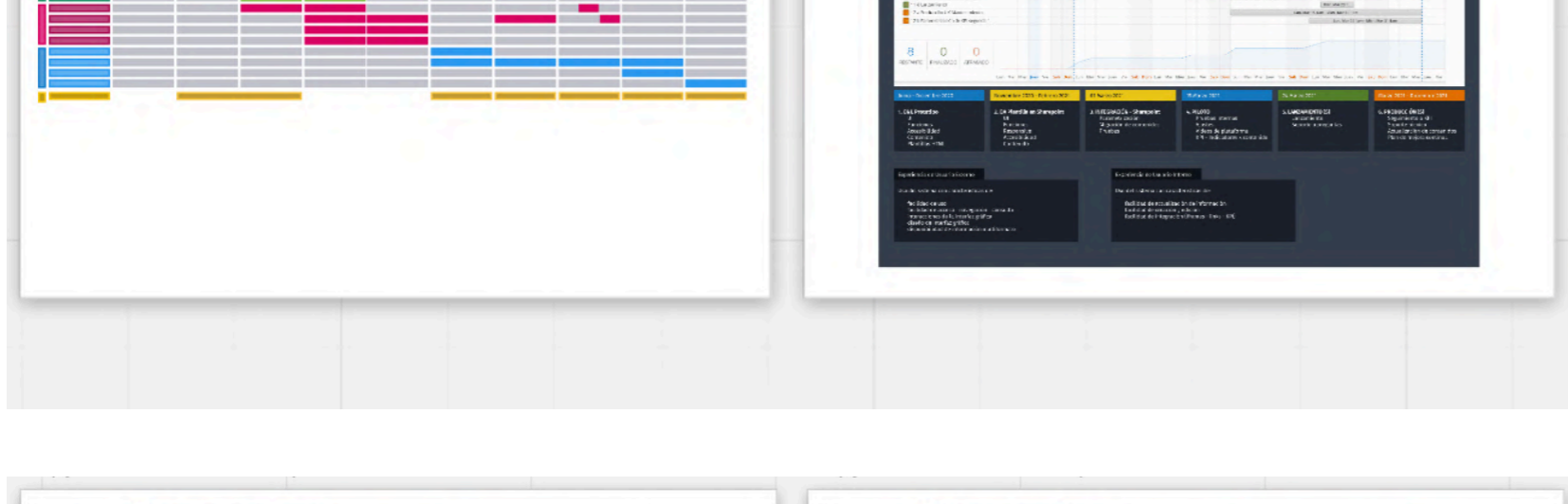


We presented 5 design alternatives to match the brand guidelines, the project unique look and the better option for data visualization at the moment.



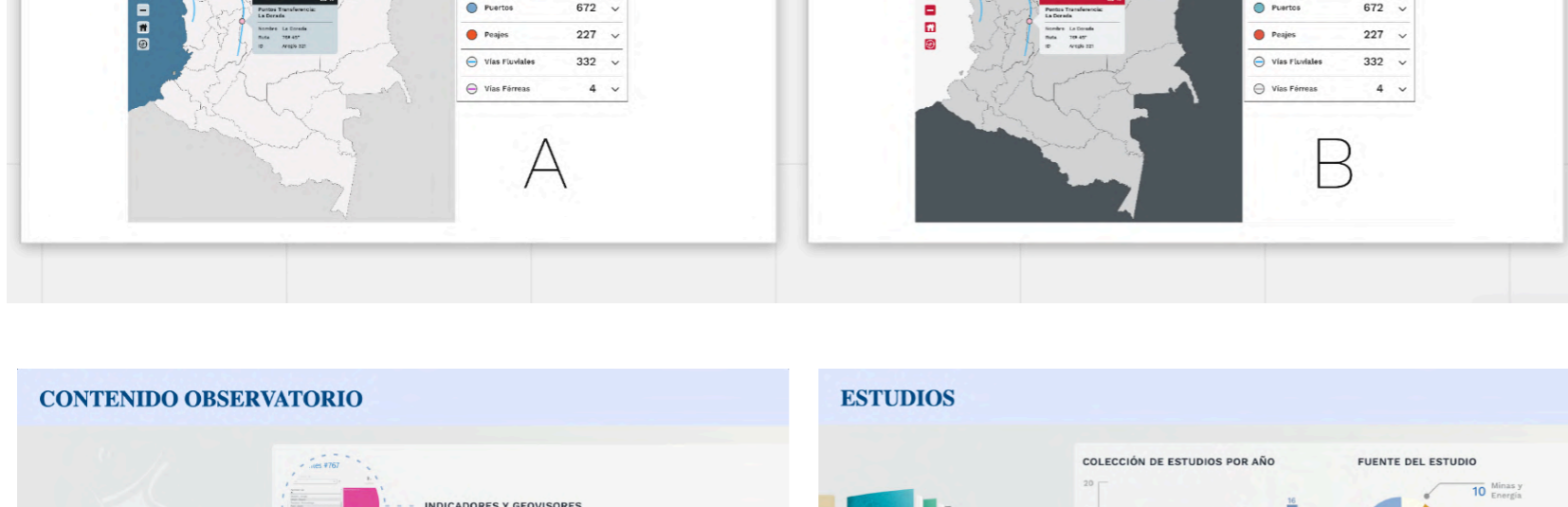
We create a Design System to control the UI elements and prepare for scaling up the project.

The prototype was implemented with WordPress to test the interaction, visual design and functions before the main development phase.



The ONL Observatory was launched on 2021 as a tool to help the country in Government Transparency and Information Access.

The project has several success metrics to measure the UX, Strategic and Law requirements.



There are more than 15 interactive maps and 11 dynamic reports that show information from more than 25 offices.

There is a unified document repository to search and filter the most important studies from the past 10 years.



OUTCOMES

Learnings

Time management is key to achieve deadlines as planned.

There must be always a team right understanding about words, tasks and deliverables.

The digital product design project sometimes has also to open its way in traditional organizations.

Most of the time in the project we had to "show not tell"

The final product was up to the expectations and there was a design case win for the ONL.



Competitive Territories

Transform information from several printed sources to a new web dashboard reference



The case

Transform a book based report into an online reference web portal, with the functionality to create project id cards.

Indicador	País	2014	2015	2016	2017
Indicador de competitividad	Colombia	6,67	70,55	5,47	55,09
Indicador de competitividad	Colombia	6,67	70,55	5,47	55,09
Indicador de competitividad	Colombia	6,67	70,55	5,47	55,09

Improving ideas

Organize and display in one page all the KPI information for each state. Help managers to keep track of projects.

Design solution

Migrated information from analog to digital with dynamic KPI rendering dashboards for each territory.



THE UX DESIGN PROCESS

Role: UX UI Designer | Specialist Contractor Pixelpro

01 CONTEXT

About the Client

The Chamber of Commerce Confederation manages the information about projects that improve the territories indicators, among other functions.

Each territory (State - Department) has to comply with a yearly report about Competitive Indicators based on the mix of some key numbers and projects developed.

Define & Discovery

The agency has to develop an online solution to provide a unique source of information about those KPI and create a digital tool to keep track of projects information.

The scope for the indicators and projects is above the Chamber of Commerce so there must be a universal solution to include all the actors in every territory.

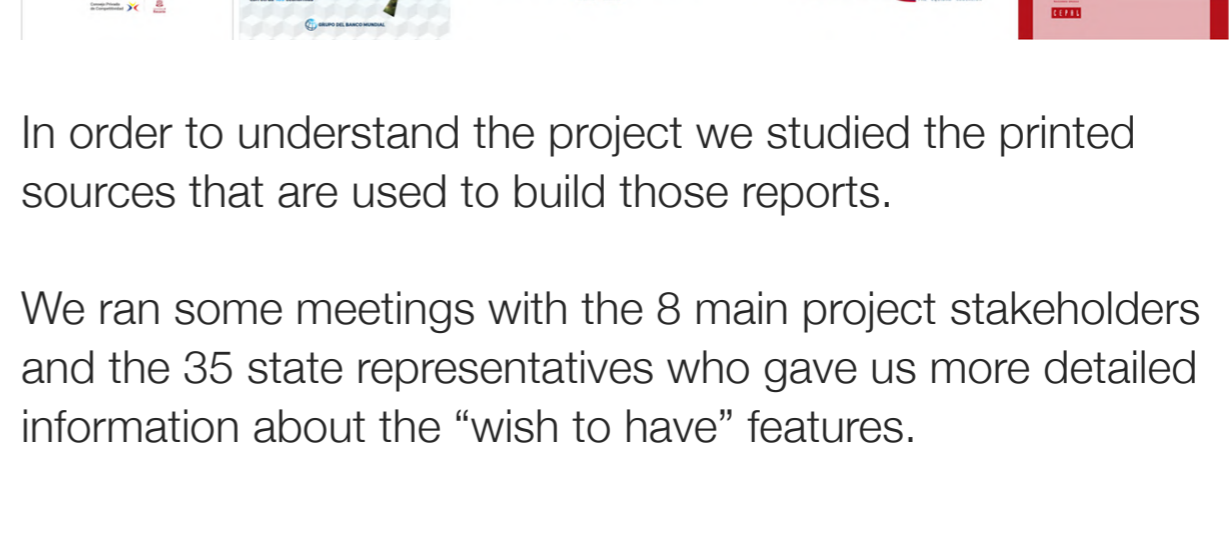
The Idea and the Solution

Bring the information into a new digital format to build dashboards for each state in the country.

Create a digital community to register, collaborate and keep track of the projects related to competitive indicators.

Comply with the gov guidelines for usability and accessibility.

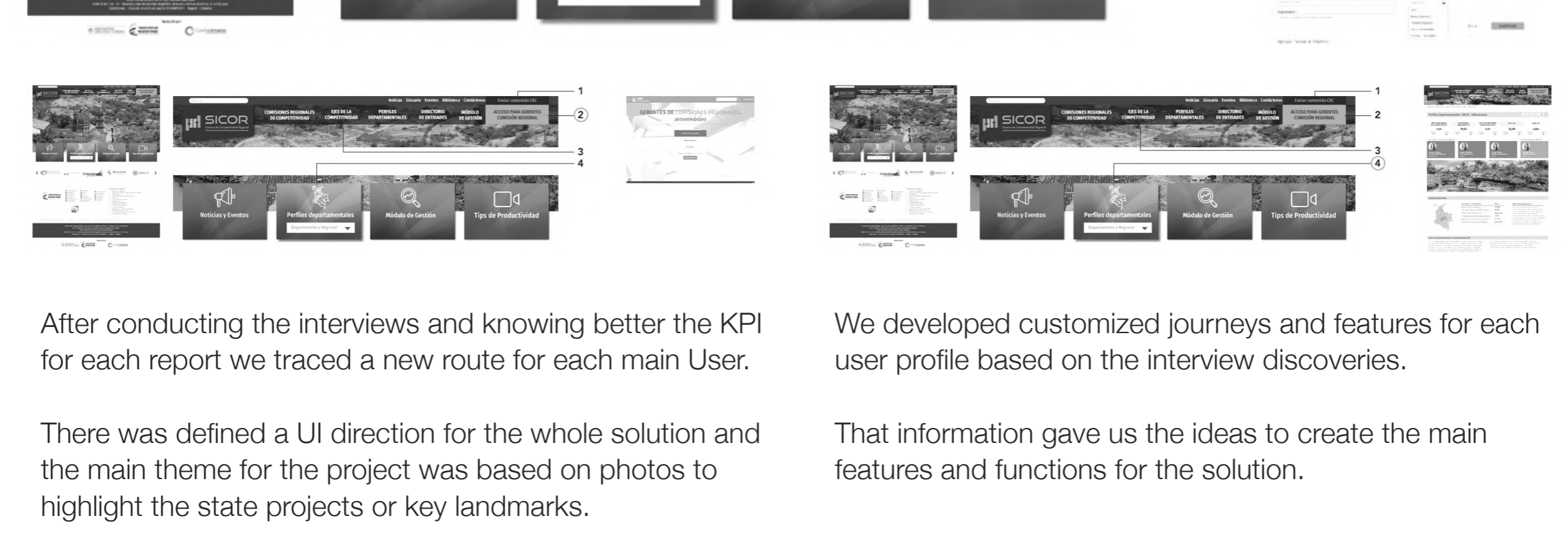
02 RESEARCH - INTERVIEWS



In order to understand the project we studied the printed sources that are used to build those reports.

We ran some meetings with the 8 main project stakeholders and the 35 state representatives who gave us more detailed information about the "wish to have" features.

03 USER NEEDS



After conducting the interviews and knowing better the KPI for each report we traced a new route for each main User.

There was defined a UI direction for the whole solution and the main theme for the project was based on photos to highlight the state projects or key landmarks.

We developed customized journeys and features for each user profile based on the interview discoveries.

That information gave us the ability to create the main features and functions for the solution.

04 CONTENT PLANNING

Indicador	País	2014	2015	2016	2017
Indicador de competitividad	Colombia	6,67	70,55	5,47	55,09
Indicador de competitividad	Colombia	6,67	70,55	5,47	55,09
Indicador de competitividad	Colombia	6,67	70,55	5,47	55,09

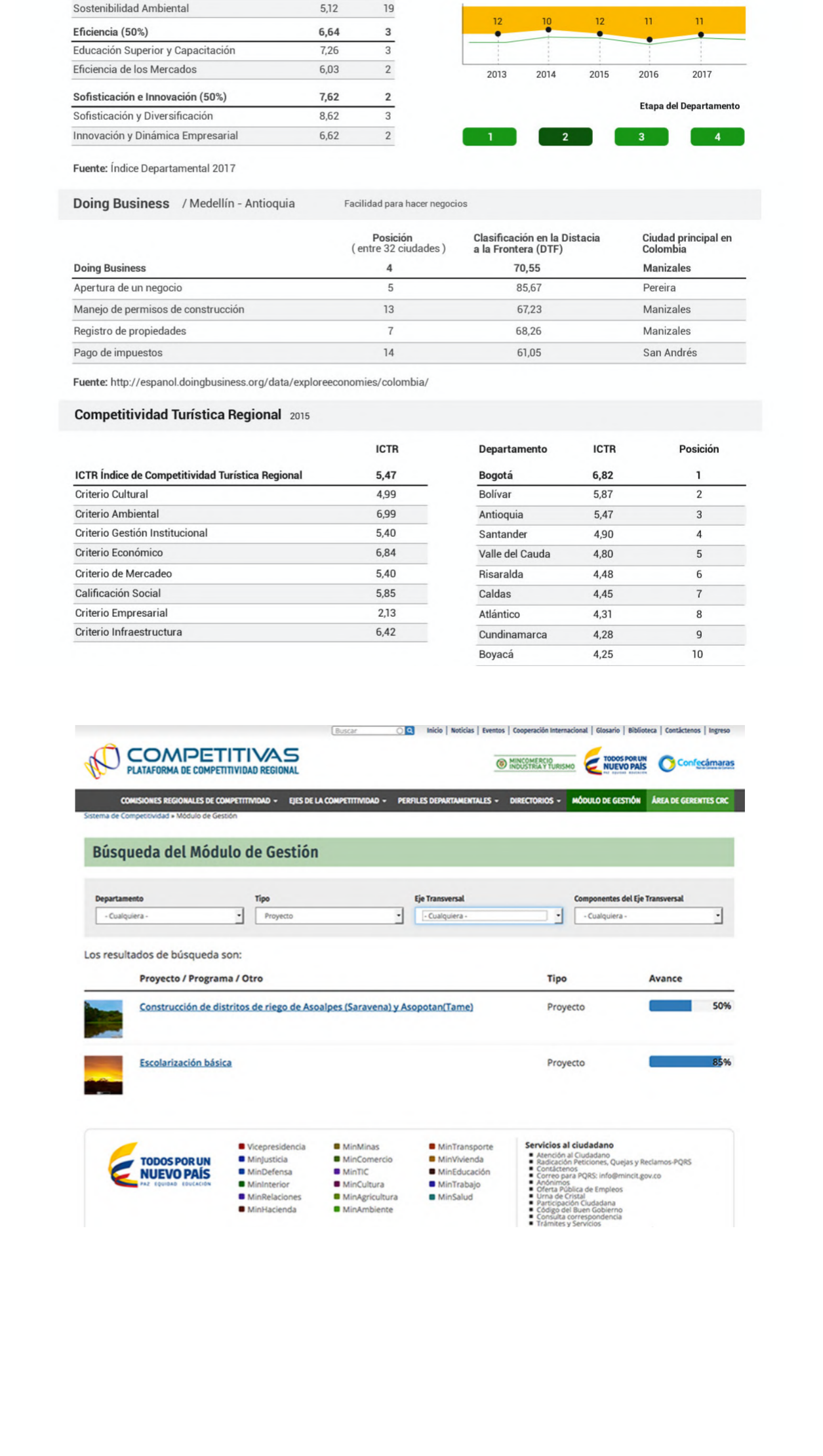
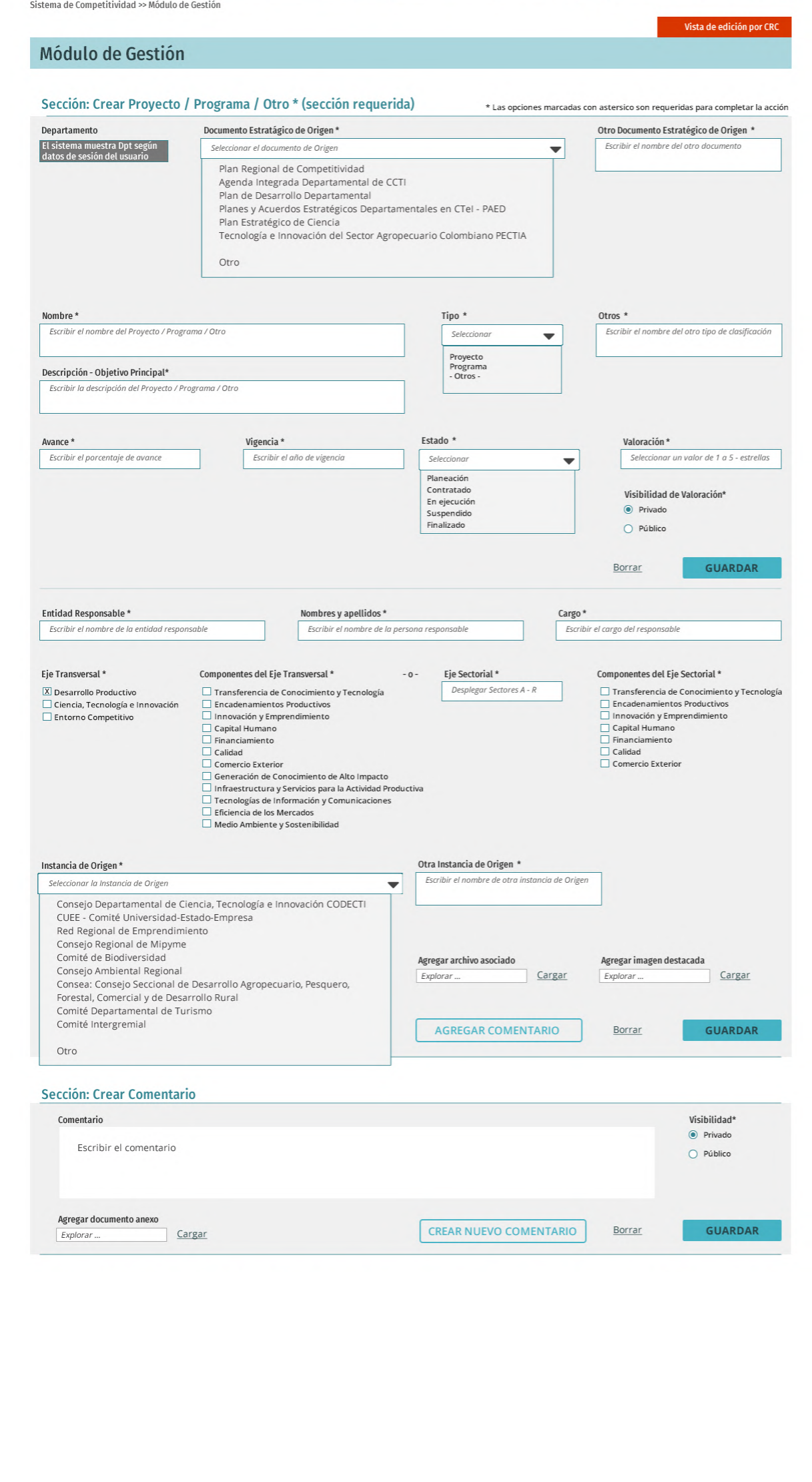
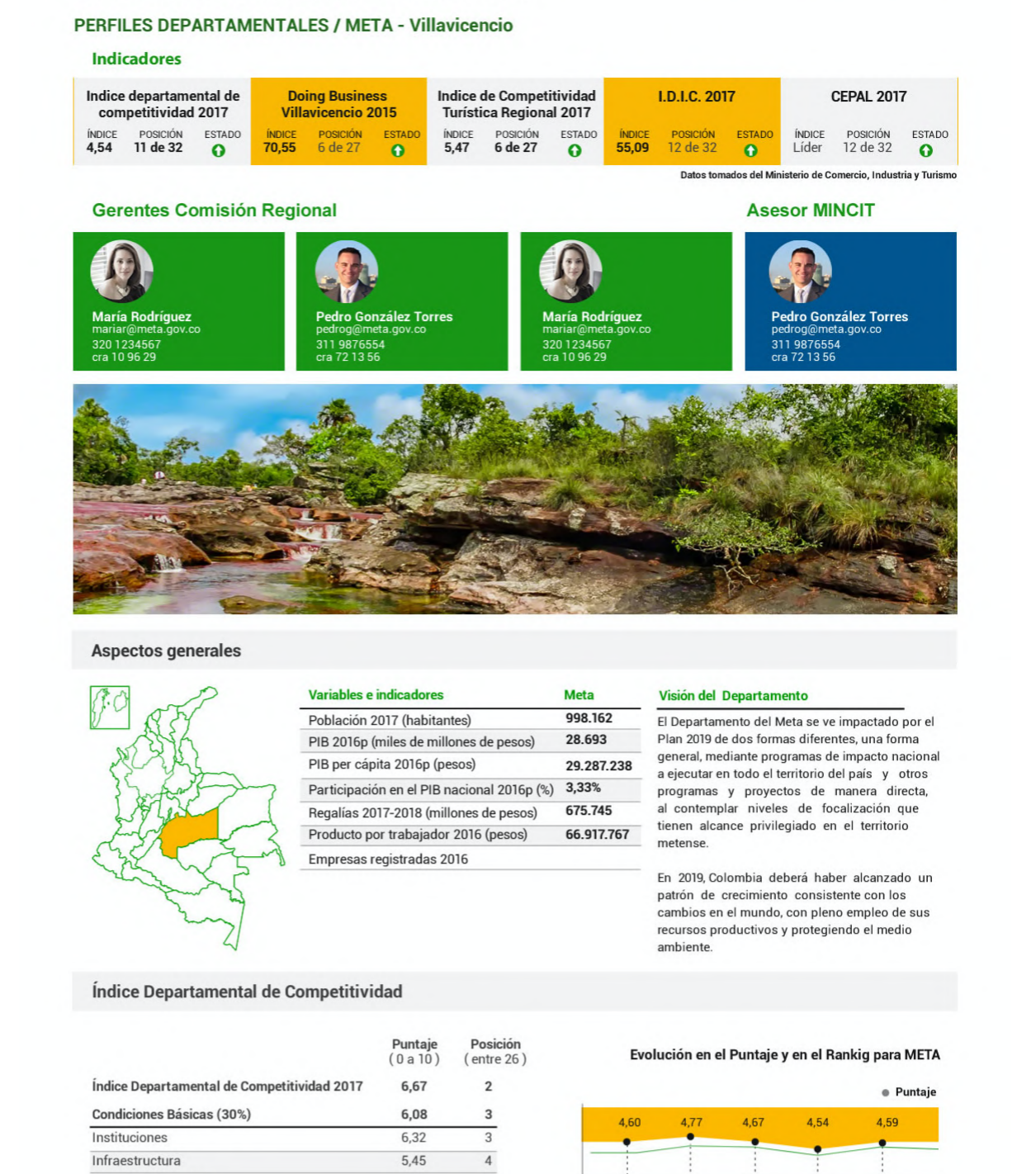
Indicador	País	2014	2015	2016	2017
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We designed high fidelity wireframes to preview the data arrangement and the order to showcase the required KPI per state.

The wireframes also served as blueprints to develop the dynamic module for project's register and track.

We built the information inventory for the main website, the list of KPI for each state and also the checklist for gov requirements.

06 PROTOTYPE



OUTCOMES

Learnings

- I could manage the project from the Kickoff meeting to the user Training.
- Lead the meetings with the stakeholders
- Scout and hire developers to build the project's module
- Organize and lead the design team to build the UI
- Coordinate the content compilation and migration

As a team we could finish the project before the deadline and we managed successfully the client's objections for design decisions.

The web portal Competitivas was a useful tool for some years to check and review the information to build the reports.

CONTEXT AND GOALS

The design audit is based on common and standard UX best practices for web page components.

It would be great to know the real context, goals and problems behind the actual design.

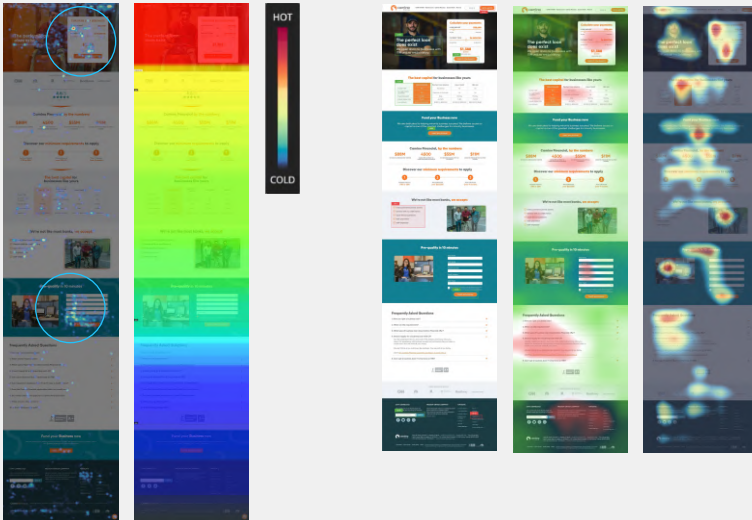
- Lack of brand awareness
- Underperformance in CTA for applications
- Missaligned Brand Identity and Brand Values
- Upscaling users perception for the Brand
- Improving the actual look & feel
- Opening new products and branches
- Creating the "FIT" between the services and the needs

HEATMAP IMAGES

The heatmaps give clues about page areas with high activity or not interesting content.

The users can't find enough key CTAs near to the first served content, the form and the action banner are way below the fold.

There are some interaction clusters where the users focus their attention: CTA forms, keywords and misplaced links.



MULTIDIMENSIONAL APPROACH

The design intervention for the CF page should consider a multidimensional approach to manage issues with UI, writing, user flow and brand consistency.

The design brief should be created to match the C-level expectations and also include the complaints and claims from current customers.

Design process

Documentation

- Discover and understand the users
- Frame the problem
- Find references and best cases

Site audit

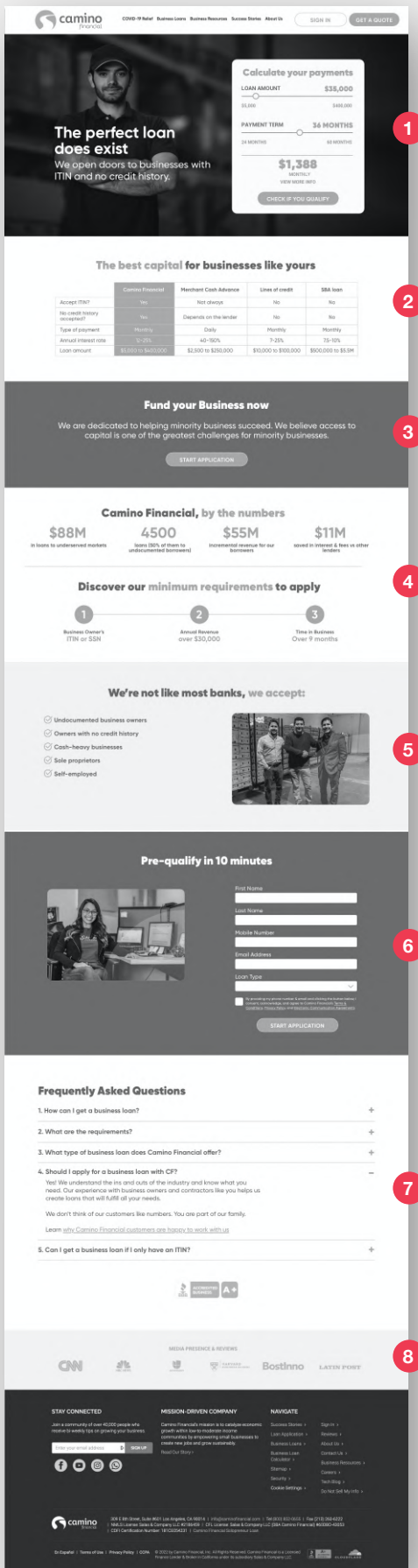
- Review and evaluate the working prototype
- Analyze and comment the heatmap images

Benchmarking and related studies

- Compare similar sites
- Discover common practices

Find a solution by wireframes testing

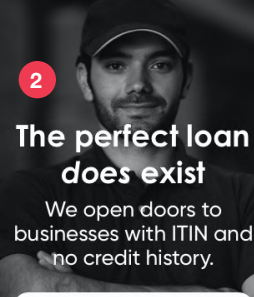
- Define design principles - Rules for Design
- Define ideal solutions
- Design elements to fix problems to each level
 - UI design
 - UX design
 - UX writing
- Match the findings and best designs with the business goals
- Aim at business growth based on superb digital products for the customers



Recommendations

- 1 Hero section**
 - Display logo and main nav with a solid color background from the beginning
 - Increase H1 and H2 size & align copy with Business Mission and Users' expectations
 - Match the first value with the range values for the calculator
 - Reveal the interest rate slider without forcing to use more info btn
 - Update state link copy to "hide info" when expanded
 - Improve photo contrast and framing to showcase the H1 and H2 copy + avoid low contrast for the logo
- 2 Comparison features**
 - Increase contrast in CF column
 - Highlight CF's benefits and explain why
- 3 Take action**
 - Move the key CTA to an upper position to increase hits
 - CTA buttons have not hover feedback - or unified behaviour
- 4 Data to support our promise**
 - Highlight the best number for the business, amount for lends or people helped
 - Add links to success stories (let the visitor relate to the cases)
 - Change the presentation form for Minimum Requirements, can be a list, the sequential numbers refers to a process
- 5 Open to common people**
 - We accept + description text must be made of keywords
 - Use keywords and controlled vocabulary for inbound links and build your own CF phrases / motto
 - Apply style guidelines to keep quality and message, for photos and copy
- 6 The form**
 - Improve usability by leaving labels always present
 - Add placeholders and system messages easy to read
 - Show mandatory and optional fields
 - Avoid setting default checked options - do it only if most of the users accept or if it helps them completing the task
 - Add focus state to help the user find the field to fill
 - Error check before using the send button
- 7 FAQ section**
 - Reduce the quantity of questions, improve the line height in the answer text, try other icon or underline text in the question to expand and close the module
- 8 Media**
 - Show the reviews or the news article - leverage the promise with other's authority saying

camino **1** GET A QUOTE



2

The perfect loan does exist

We open doors to businesses with ITIN and no credit history.

Calculate your payments

LOAN AMOUNT **\$35,000**

\$5,000 ————— \$400,000

PAYMENT TERM **36 MONTHS**

24 MONTHS ————— 60 MONTHS

\$1,388
MONTHLY

VIEW MORE INFO

CHECK IF YOU QUALIFY

3

The best capital for businesses like yours

	Camino Financial	Merco
Accept ITIN?	Yes	Not c
No credit history accepted?	Yes	Dep on
Type of payment	Monthly	Do
Annual interest rate	12-25%	40-
Loan amount	\$5,000 to \$400,000	\$2,500 to \$250,000

4

Fund your Business now

5

We are dedicated to helping minority business succeed. We believe access to capital is one of the greatest challenges for minority businesses.

START APPLICATION

Camino Financial, by the numbers

6

\$88M
in loans
to underserved markets

4500
loans (50% of them to undocumented)

\$55M
incremental revenue
for our borrowers

\$11M
saved in interest & fees
vs other lenders


7

Discover our minimum requirements to apply

- ✓ Business Owner's ITIN or SSN
- ✓ Annual Revenue over \$30,000
- ✓ Time in Business Over 9 months


8

We're not like most banks, we accept:



- ✓ Undocumented business owners
- ✓ Owners with no credit history
- ✓ Cash-heavy businesses
- ✓ Sole proprietors
- ✓ Self-employed

9 Pre-qualify in 10 minutes



First Name

Last Name

Mobile Number

Email Address

Loan Type

By providing my phone number & email and clicking the button below, I consent, acknowledge, and agree to Camino Financial's Terms & Conditions, Privacy Policy, and Electronic Communication Agreements.

START APPLICATION

Frequently Asked Questions

- How can I get a business loan? +
- What are the requirements? +
- What type of business loan does Camino Financial offer? +
- Should I apply for a business loan with CF? +
- Can I get a business loan if I only have an ITIN? +

BBB ACCREDITED BUSINESS A+

MEDIA PRESENCE & REVIEWS

CNN NBC NEWS UNIVISION

HARVARD BOSTONIAN Bostinno LATIN POST

Recommendations

- Header section**
 - CTA for "ESPAÑOL" instead of "GET A QUOTE" / I still don't know what is this about, too early to make a commitment
 - Show search icon / option here and outside the menu window
 - Keep always visible the header space + background contrast
- Hero section**
 - Improve readability for the text over the image
 - Apply controlled vocabulary and keywords in every main banner
- Calculator**
 - Curate the information to show before and after "view more"
- Data table**
 - Show fixed the first column to compare values
- Call to action sections**
 - Review copy and apply the brand's tone and voice
 - Relate the copy before the CTA to a convincing statement to help the future customers with the CF products
- The numbers to back our promise**
 - Display less information for each row or scanning line
 - Highlight and order the data to stand out the best ones
- Requirements section**
 - Use the same graphical language to list the rq
 - Enhance the experience with inline help texts
- We are different**
 - Use this section to promote the CF values + mission + and why
 - Display full width images to take advantage or phone limited real state space
- Pre-qualify form**
 - Replace the text area for checkboxes or second level buttons, in Loan Type field if there are no more than two types