

FIRST AMERICAN **IGNITE**



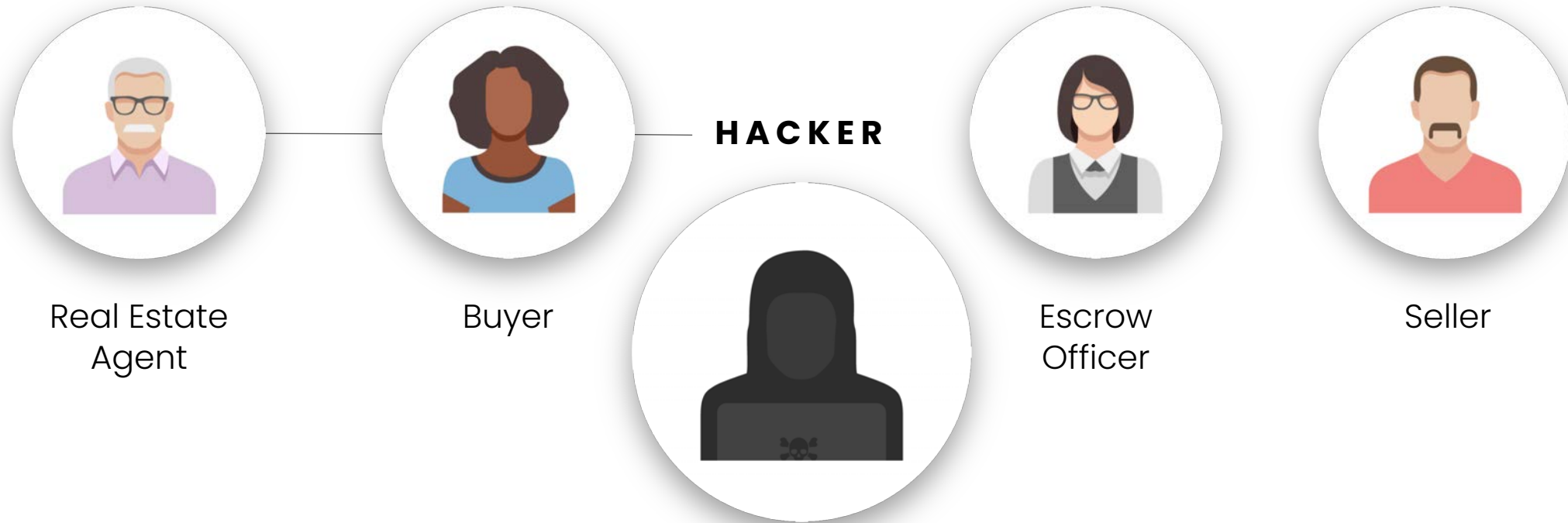
IGNITE

Escrow Desktop Application (Angular)

Role: UXD Lead

Ignite is First American's flagship escrow application. There are 4 personas that use Ignite: Real Estate Buyers, Real Estate Sellers, Real Estate Agents, and Escrow Officers. The goal of Ignite is to facilitate the process of transferring funds from the home buyer to the home seller. Before Ignite, the closing process was done through a series of emails. This less than secure method of communication posed great risks to the buyer. Risks that the buyer was completely unaware of. That risk is fraud.

ELIMINATE FRAUD



My Approach

01

Enterprise Design Analysis

02

Heuristic Evaluation

03

Stakeholder Interviews

04

Design Thinking Workshops

05

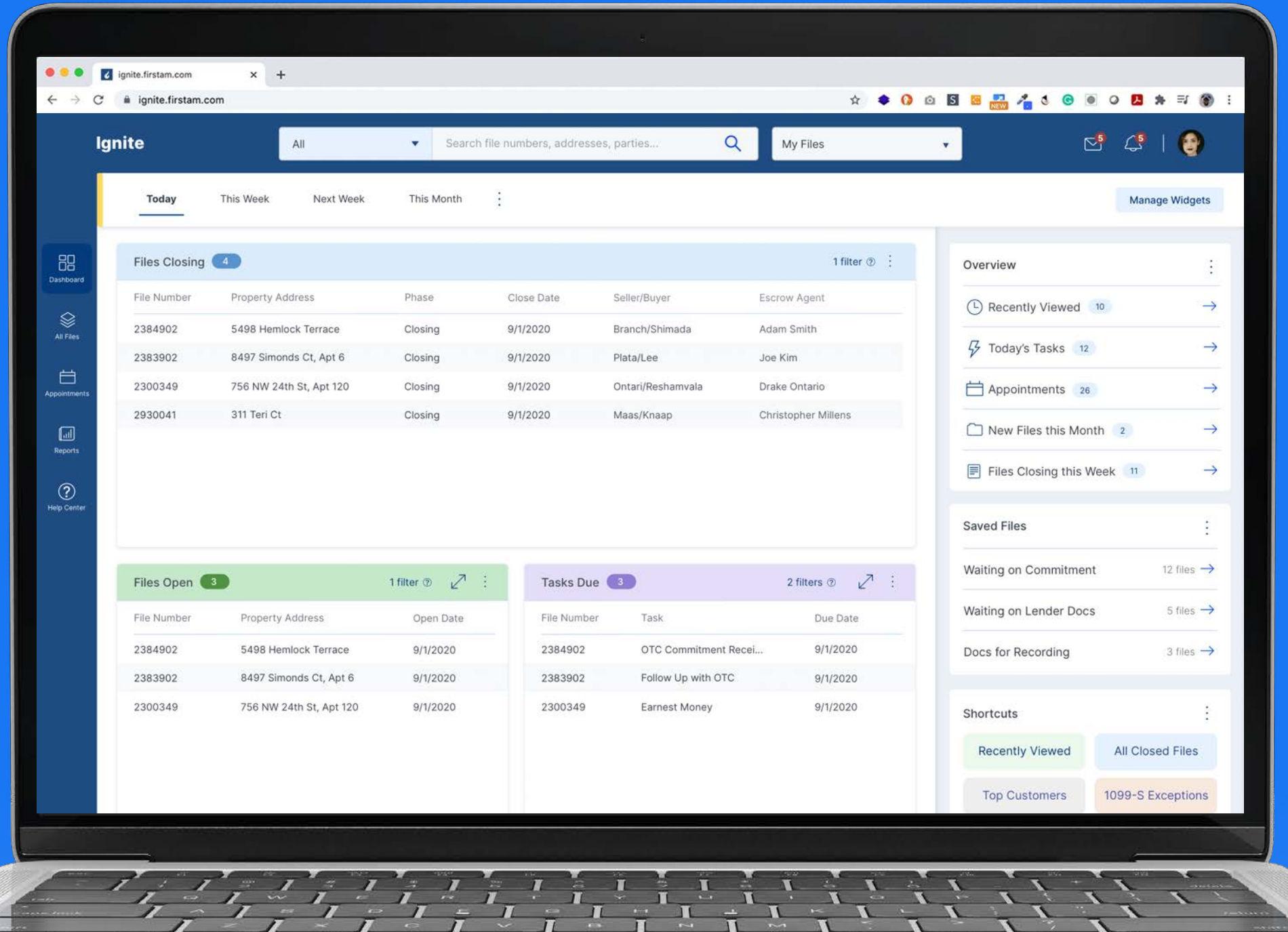
Qualitative User Testing

06

Feature Refinement

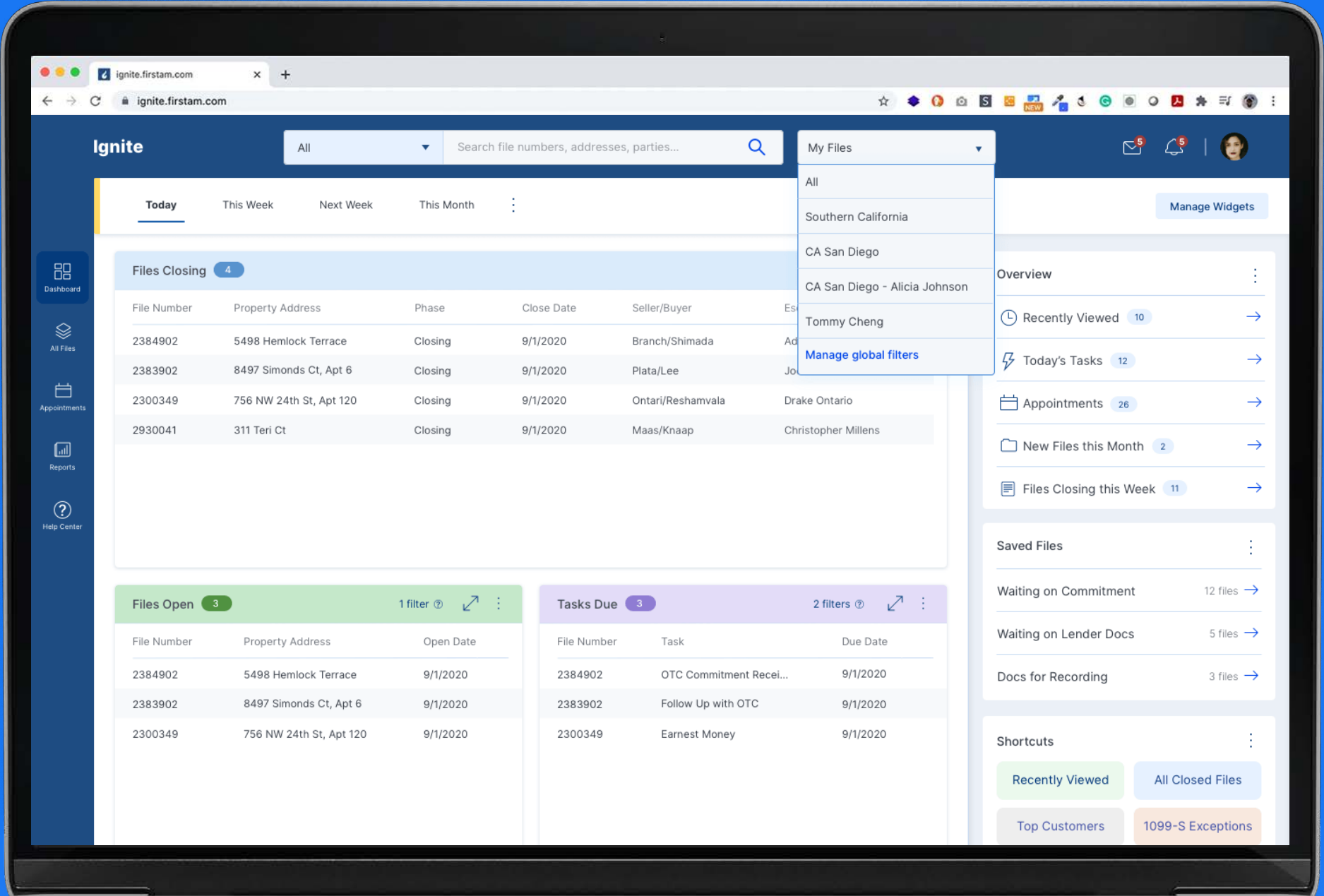
FEATURES

- Fully Customizable Dashboard
- Clean and intuitive file structure
- Access to all files at all times
- All appointments in one place
- Secure messaging between agent, buyer, and seller
- Reports and historical archives



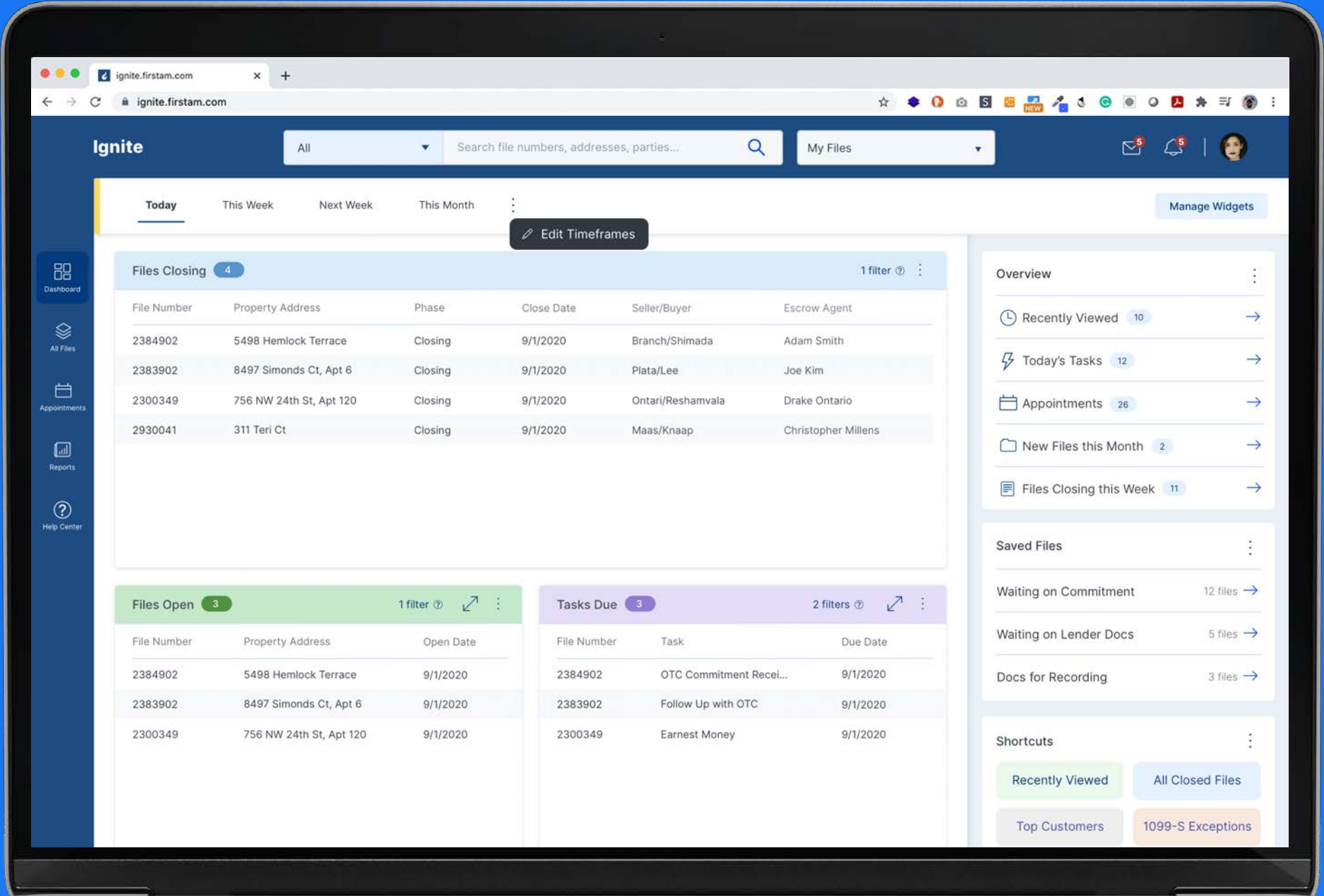
MY FILES

Users can quickly navigate to their pre-selected regional filters



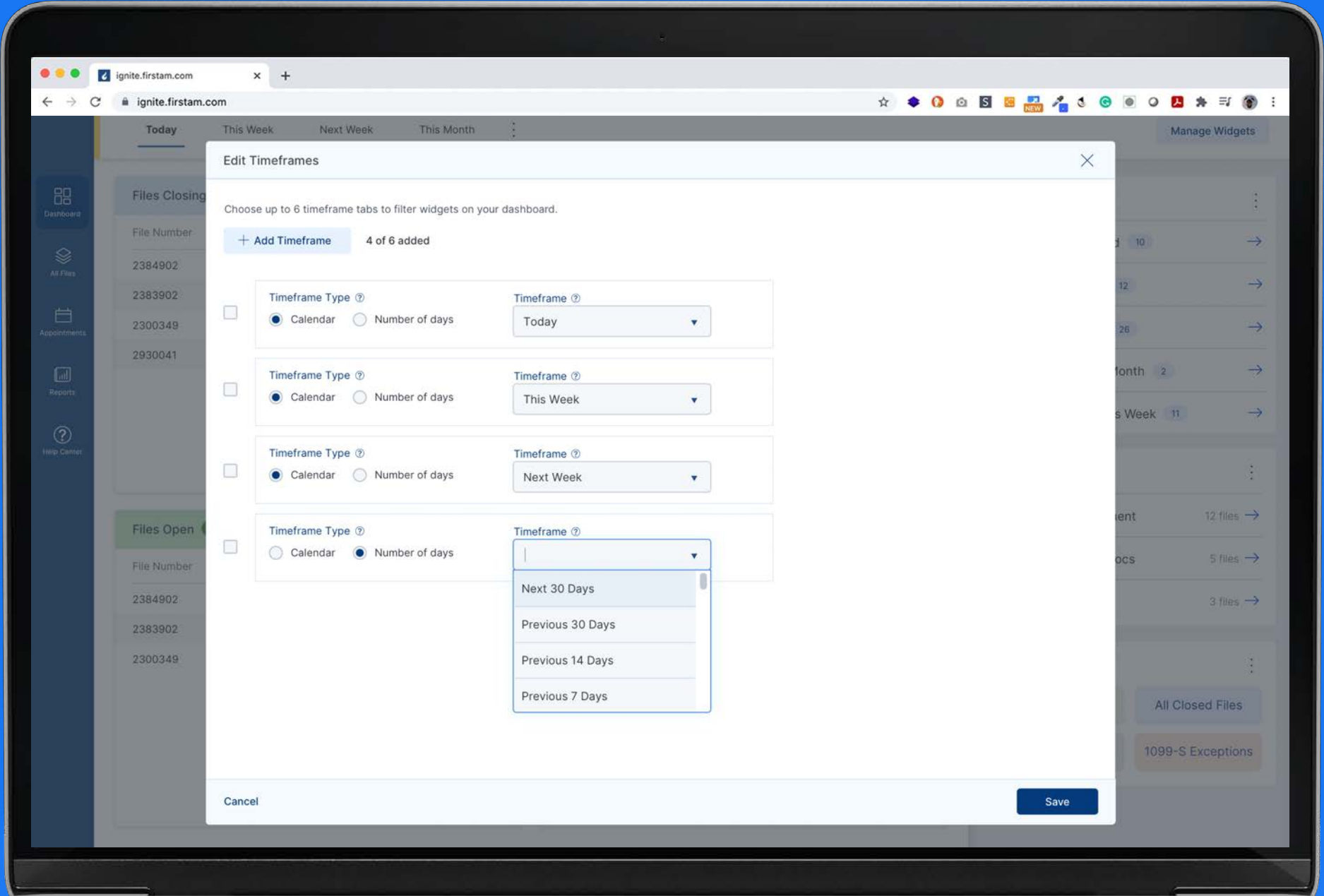
EDIT TIMEFRAMES

Users can customize the dates that are shown at the top level of their Dashboard



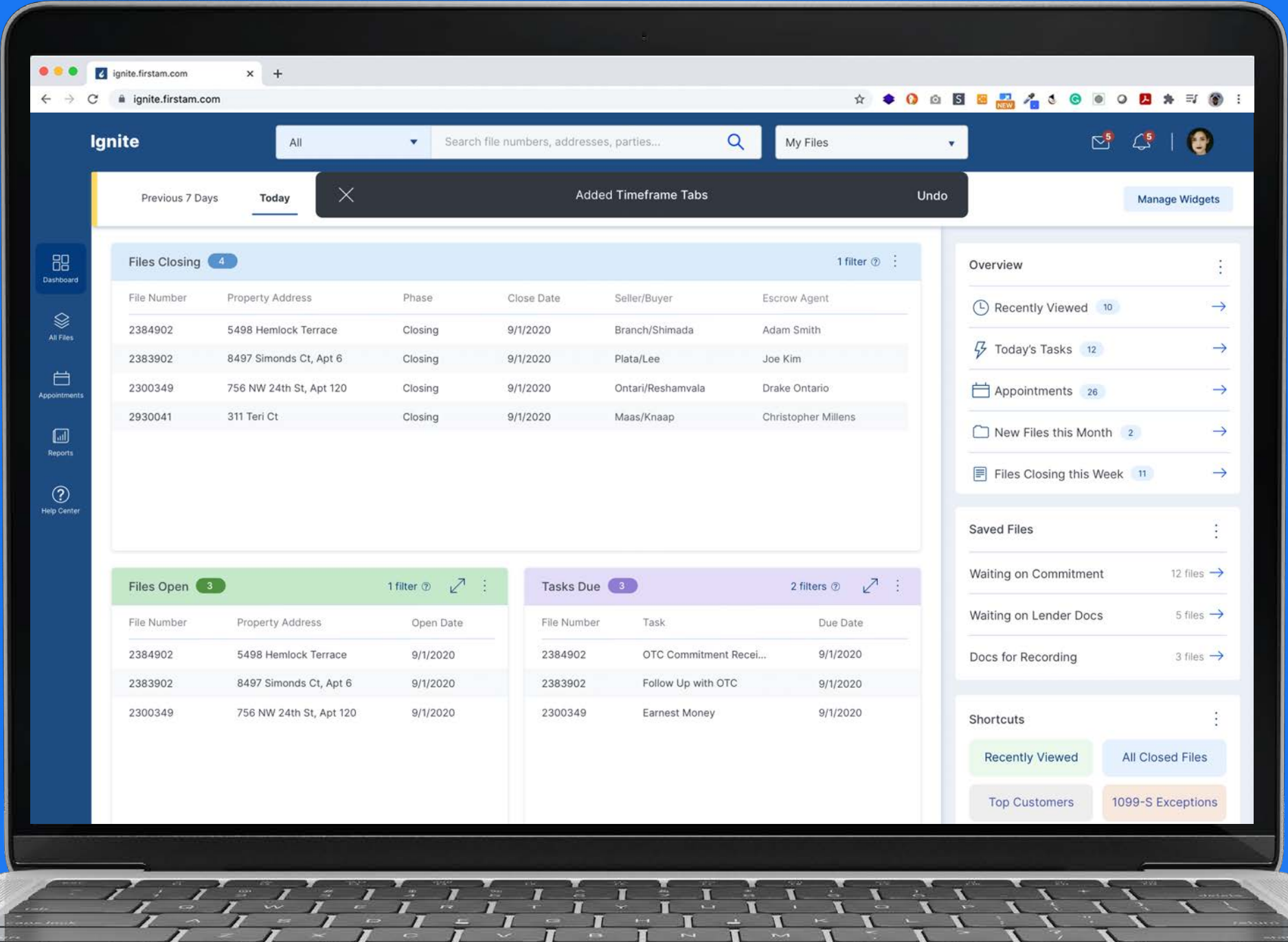
EDIT TIMEFRAMES

In the default setup the user can see Today, This Week, Next Week, and this Month. This feature allows them to add the Previous 7 Days



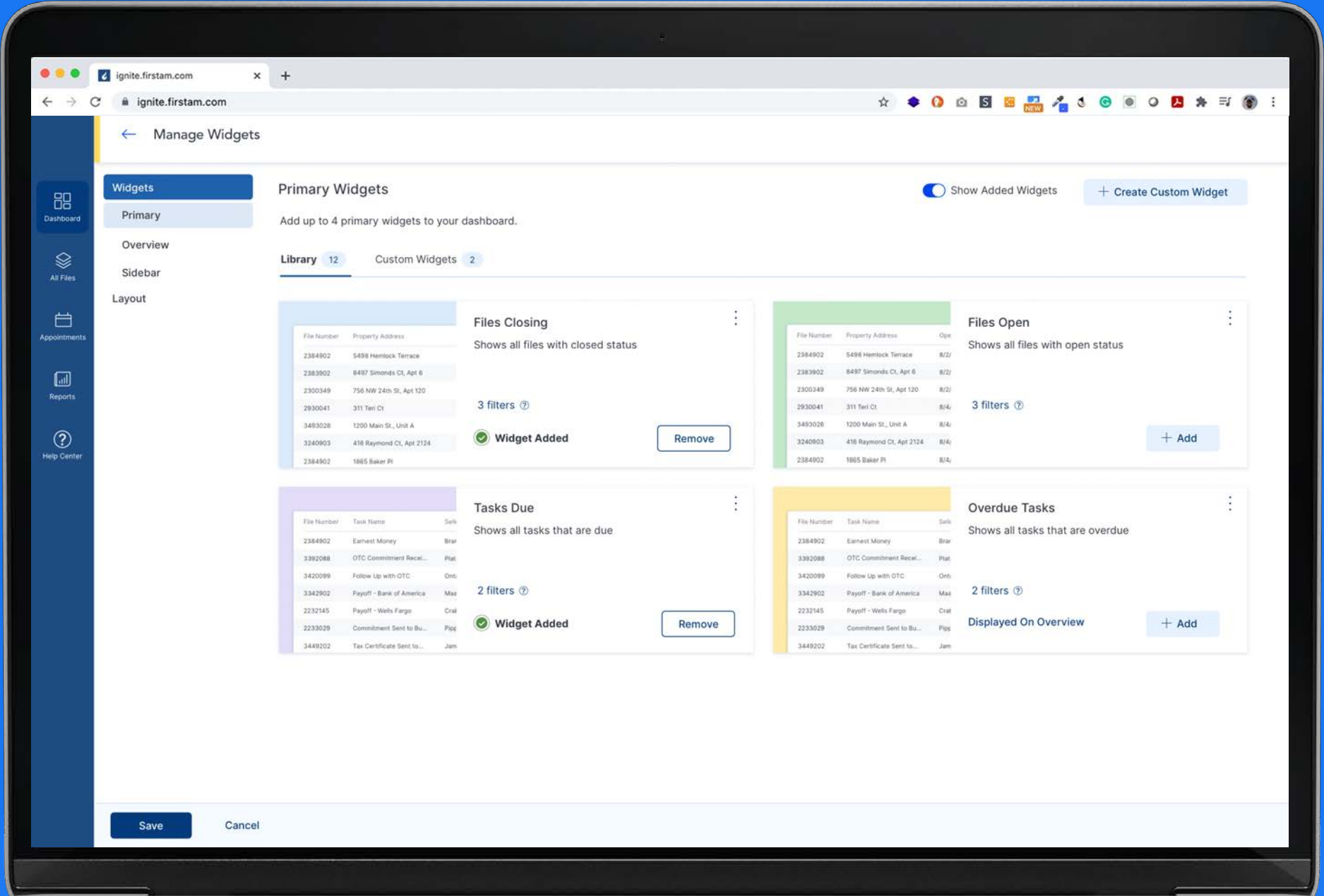
EDIT TIMEFRAMES

Once added, the system alerts the user to the completion of the task by way of a confirmation toast and Previous 7 Days is now visible within the timeframe



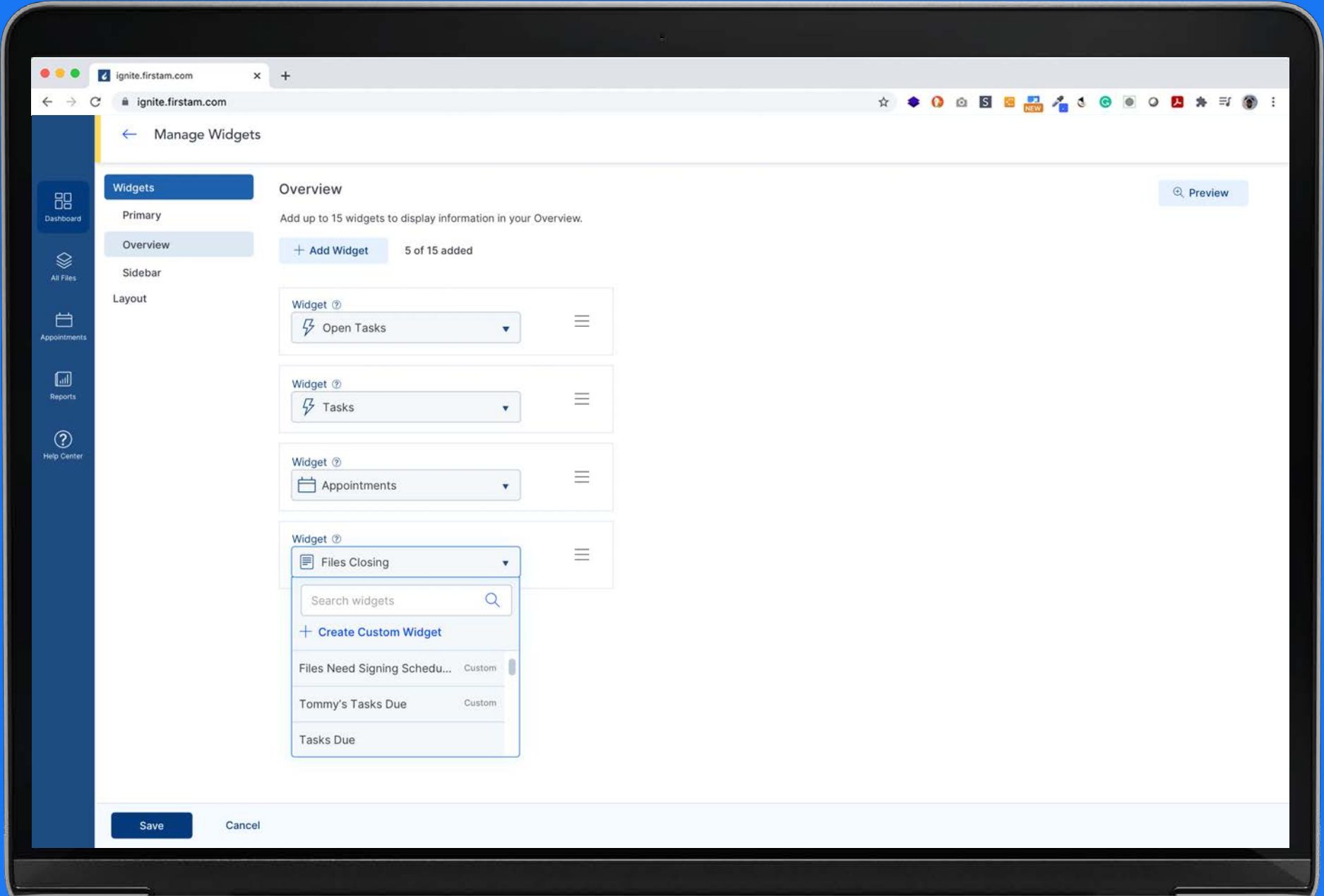
MANAGE WIDGETS

Complete control and customization of Dashboard widgets



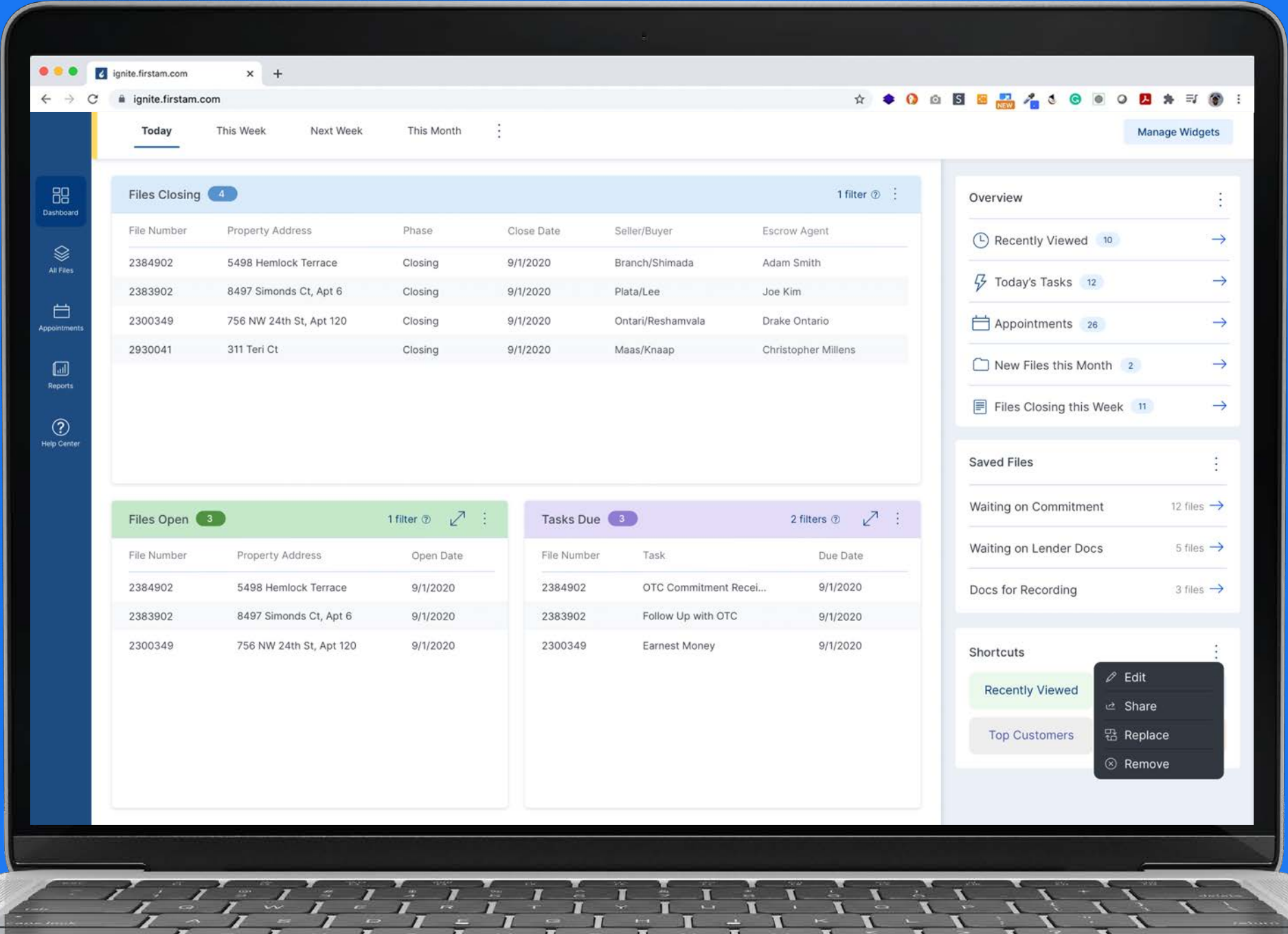
MANAGE WIDGETS

The user can control how many widgets they want in their Dashboard in addition to selecting which widgets are shown



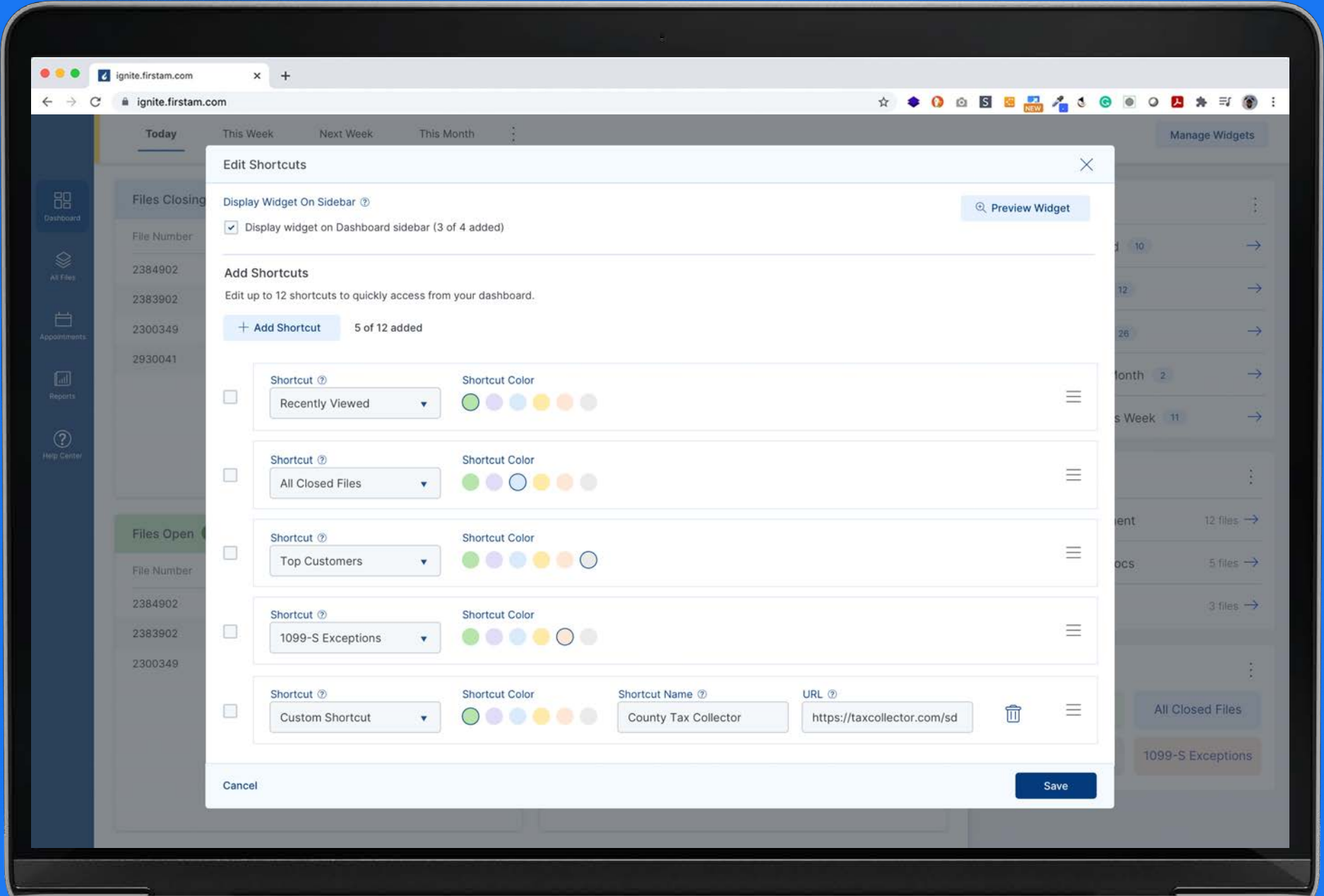
MANAGE SIDEBAR

The user also has complete control over the data that is shown within the sidebar



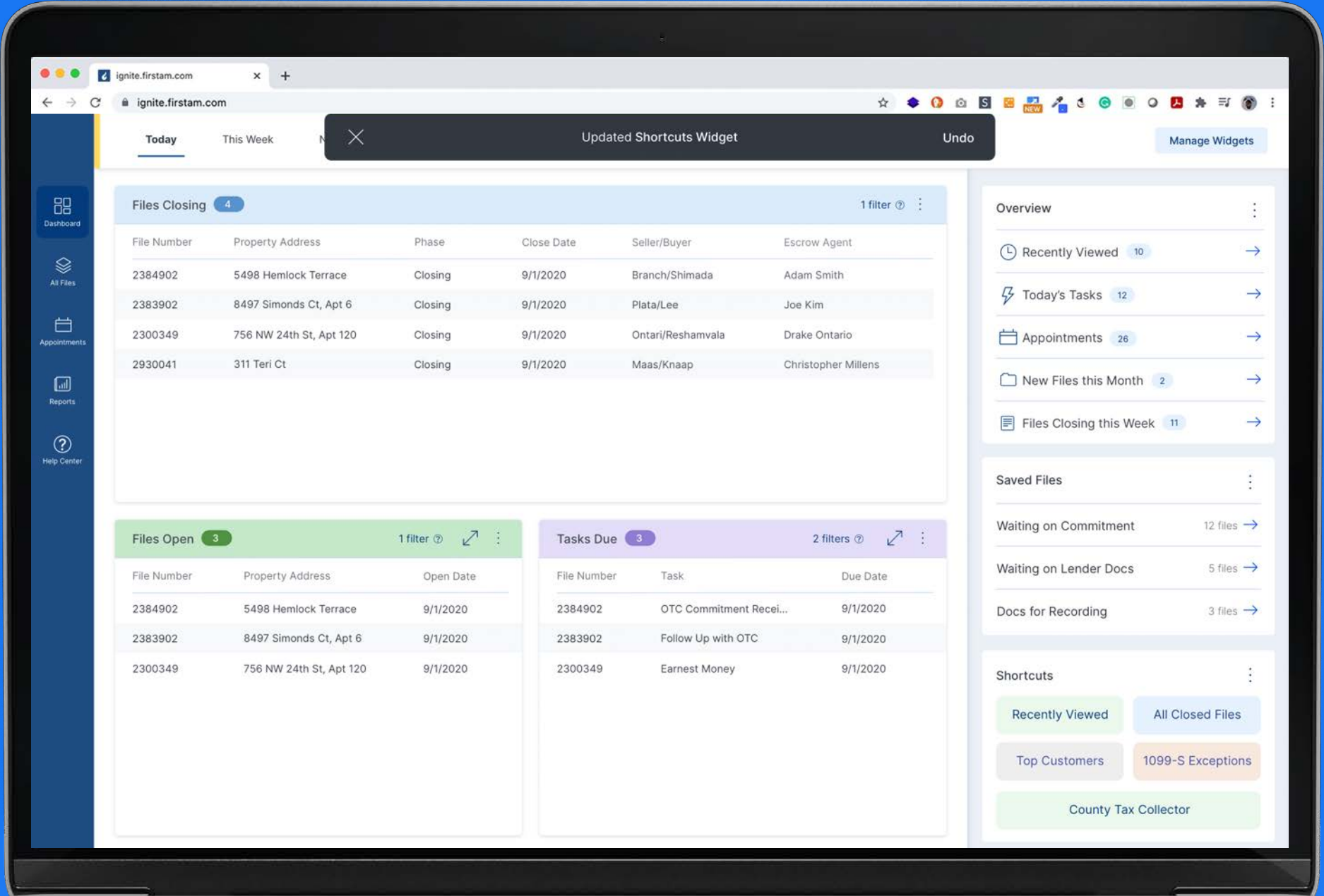
MANAGE SIDEBAR

In this example, the user is adding a fifth shortcut called County Tax Collector



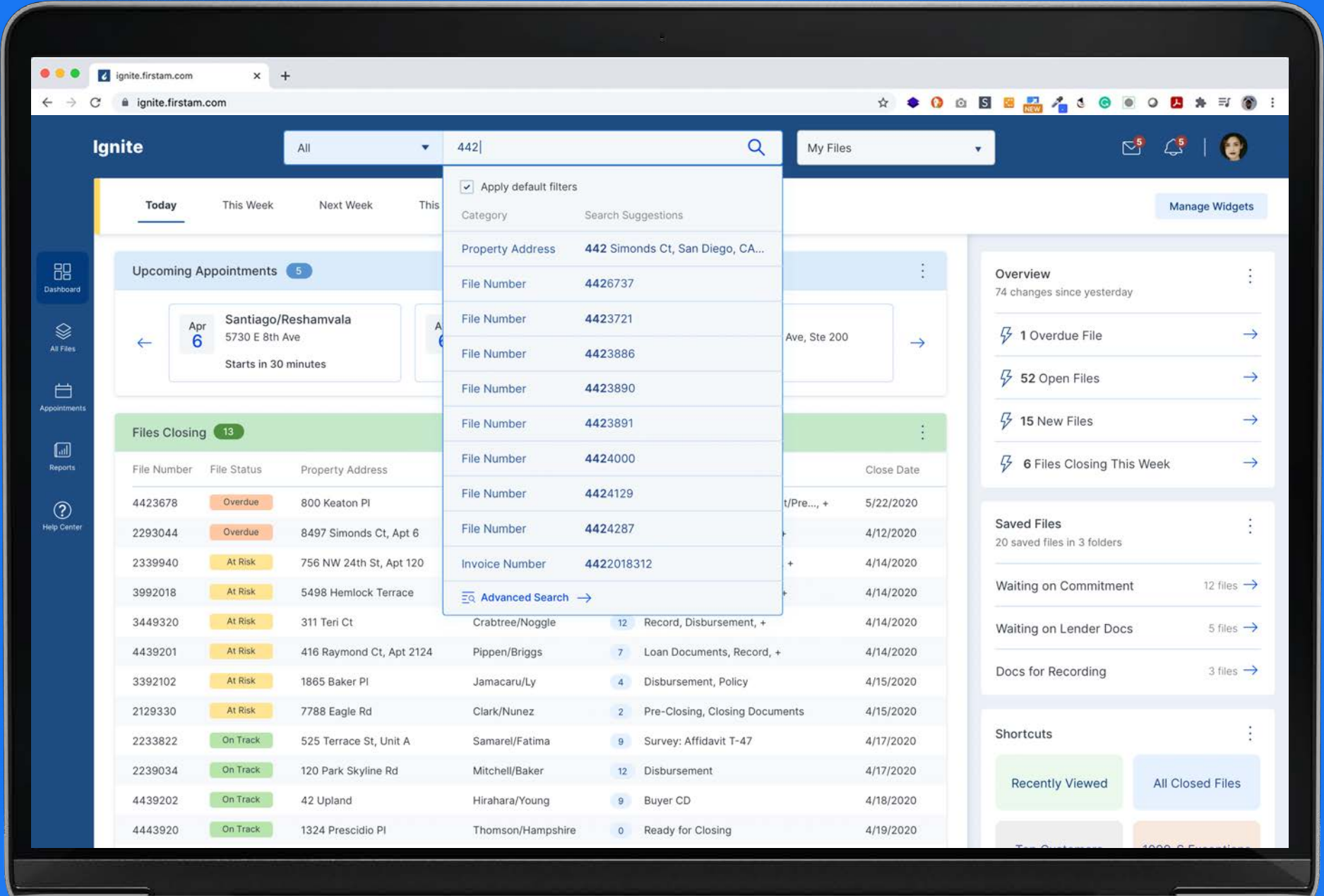
MANAGE SIDEBAR

Once added, the system alerts the user to the completion of the custom shortcut



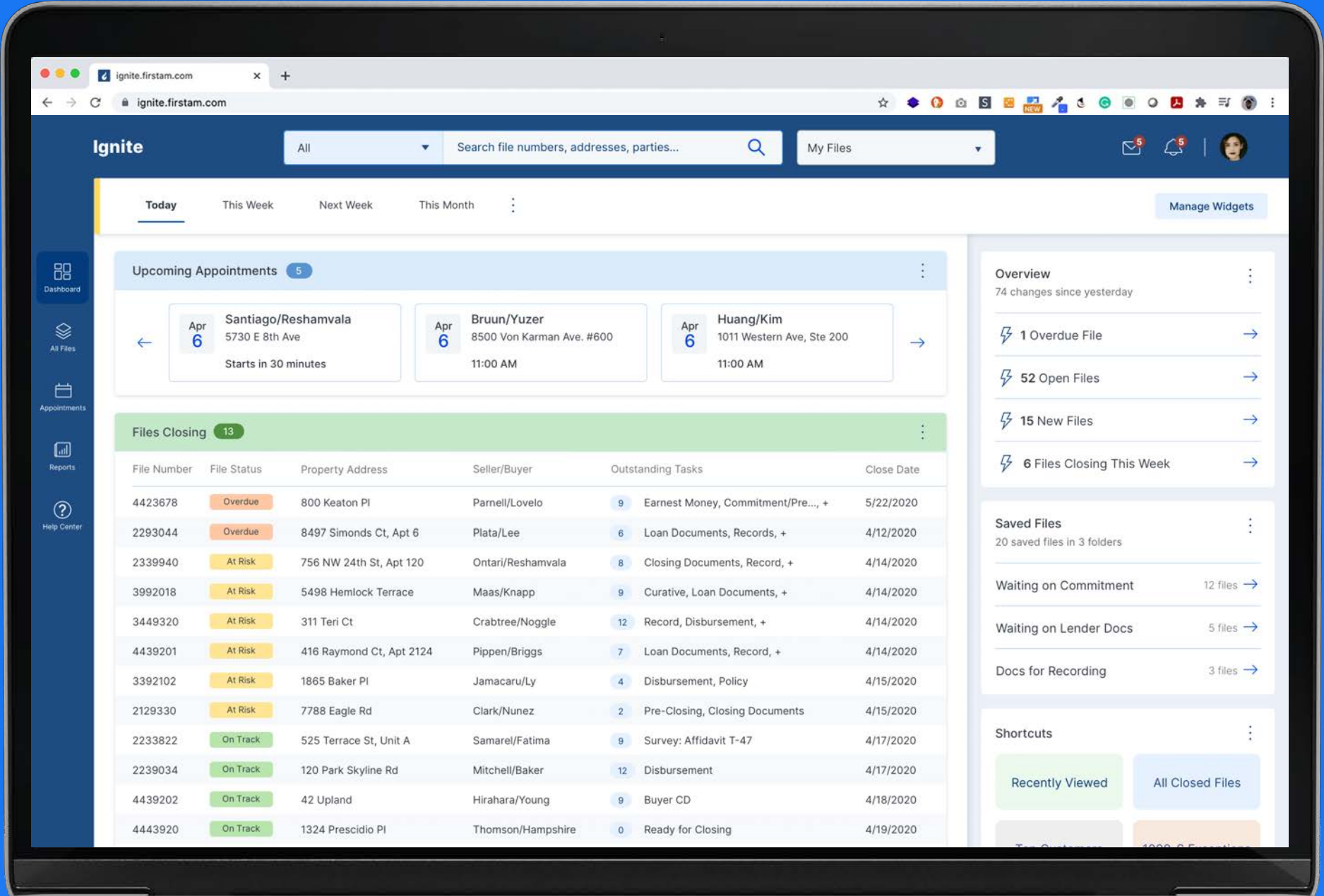
SMART SEARCH

Quickly find any and every file by searching the API powered file archive



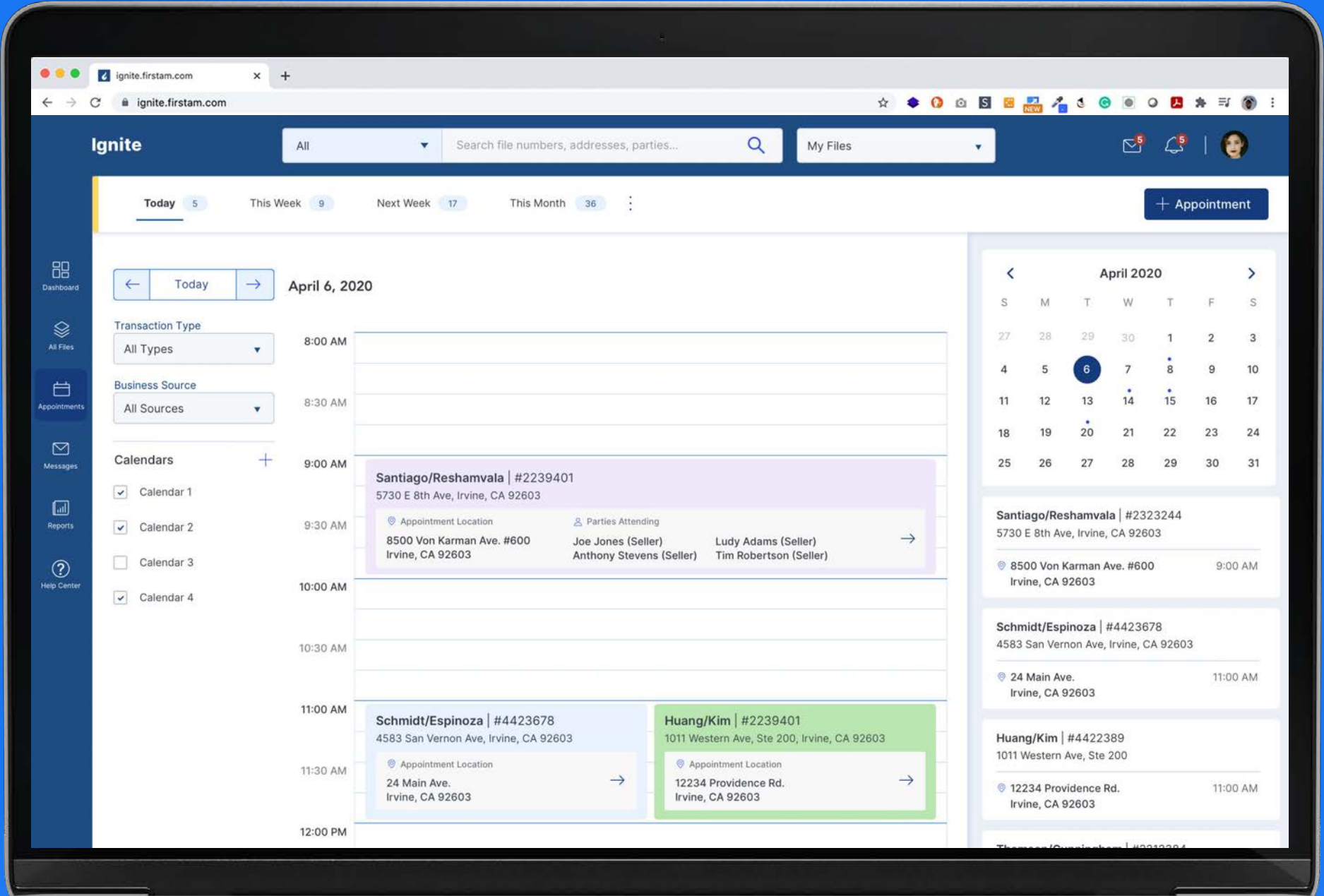
APPOINTMENTS

Today view includes the user's calendar to streamline efficiency



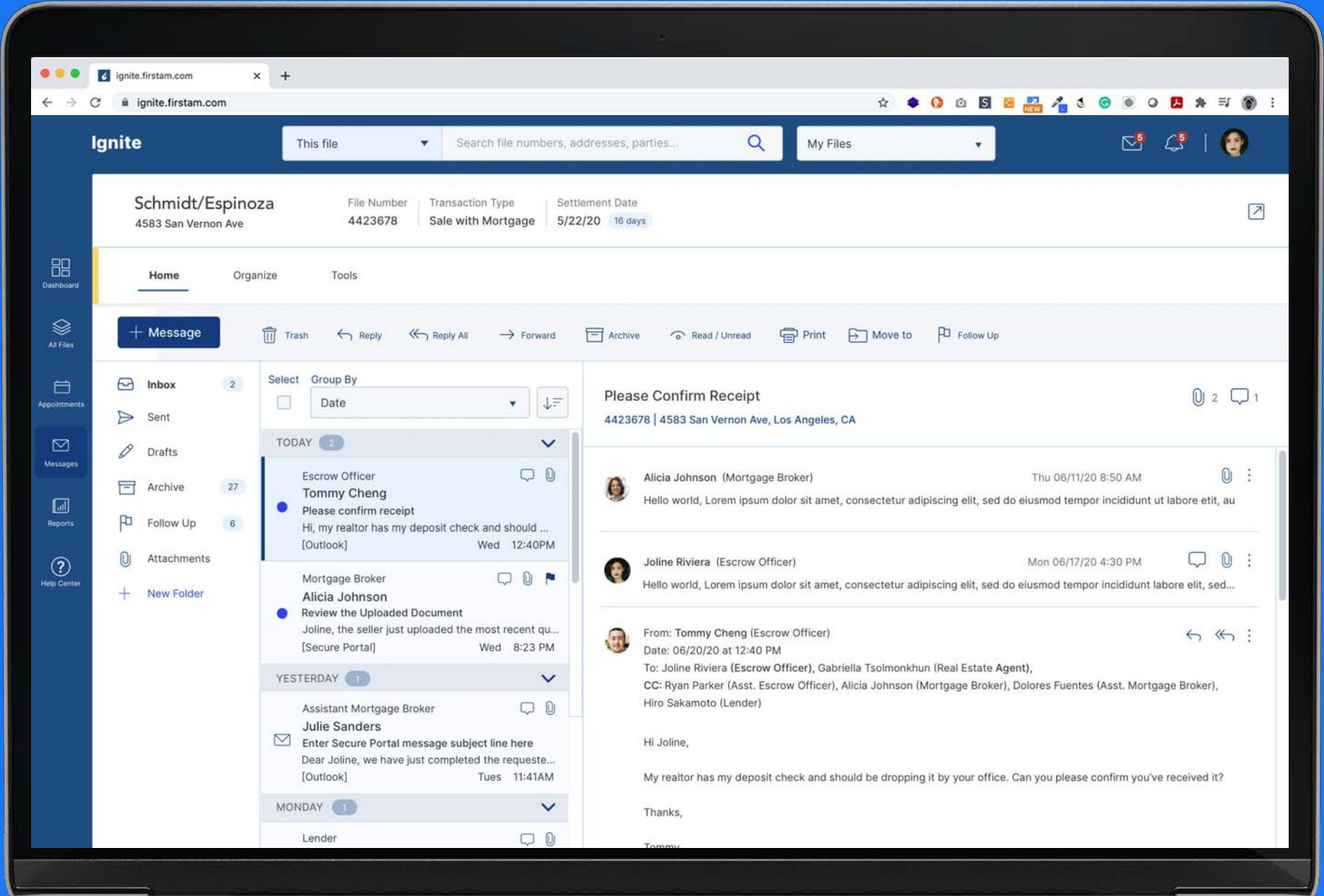
APPOINTMENTS

Today view includes the user's calendar to streamline efficiency



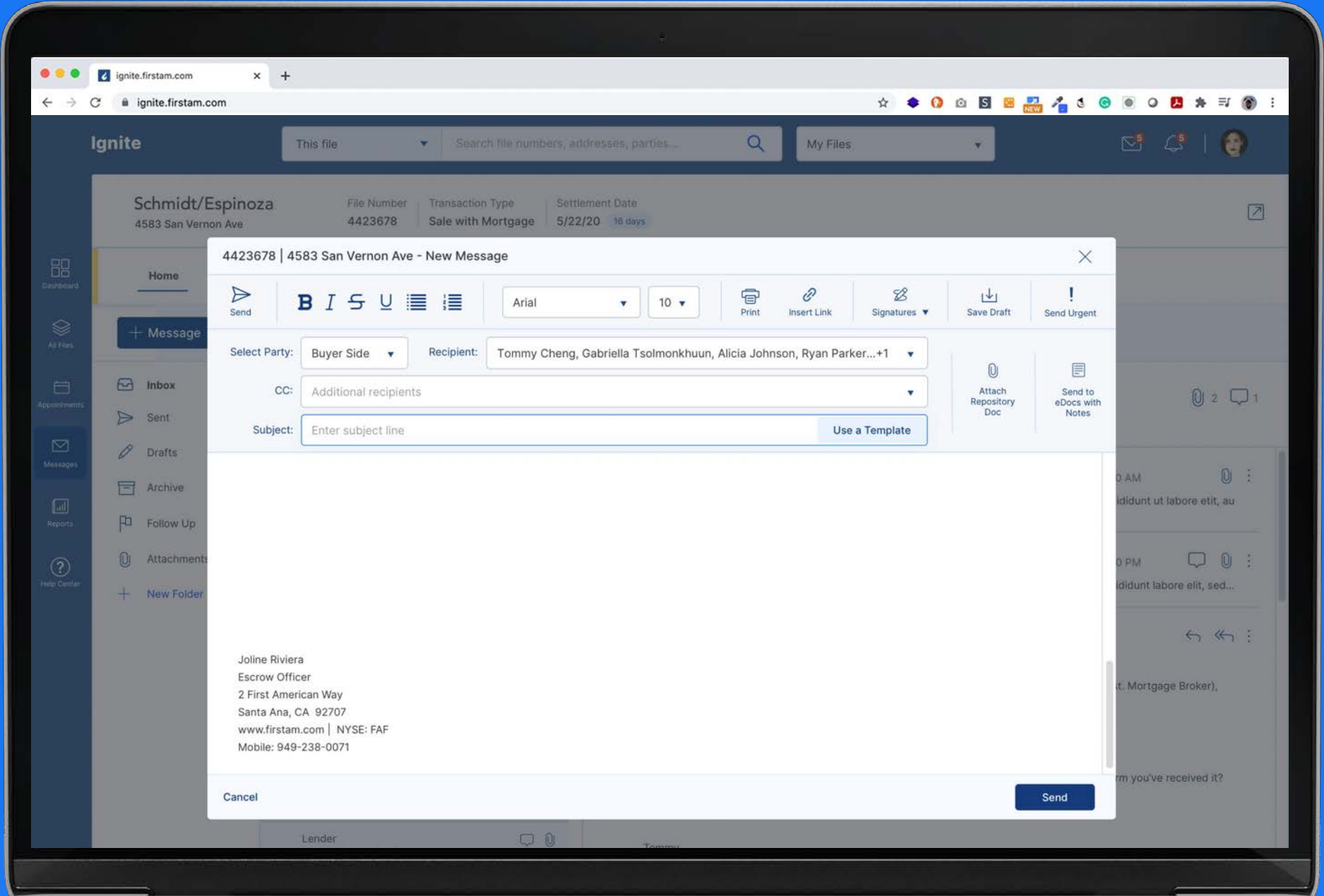
MESSAGE CENTER

Secure end-to-end encrypted messaging platform to prevent malicious interception



MESSAGE CENTER

Messaging utilizes Two Factor Authentication



ENTERPRISE VERSUS CONSUMER DESIGN

Objectives

01

Understand the difference between consumer and enterprise design so we can best leverage the existing work done for FA Portal.

02

Identify key opportunities and interaction patterns within dashboard experiences.

03

Focus on experiences and features that will increase efficiency and ease of use.

KEY DIFFERENCES

Key Differences

Focusing on the organization vs. focusing on the individual

Consumer technology is aimed at serving individuals, while enterprise software needs to accommodate large organizations with complex processes.

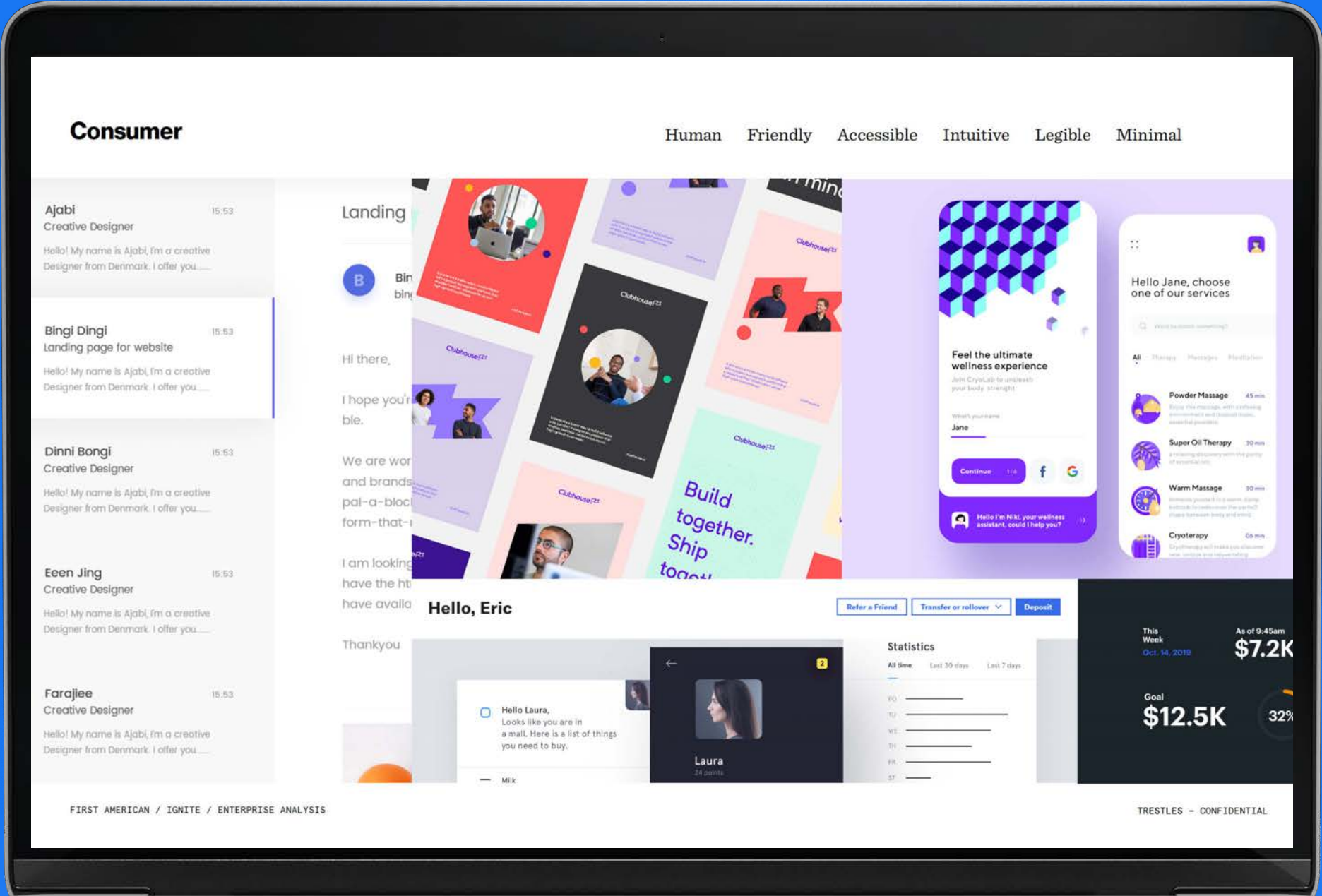
Designing for workflows vs. designing for a specific need

Designing enterprise applications means designing a system of many interconnected workflows. Conversely, consumer apps often focus on addressing a targeted problem or under-met user need.

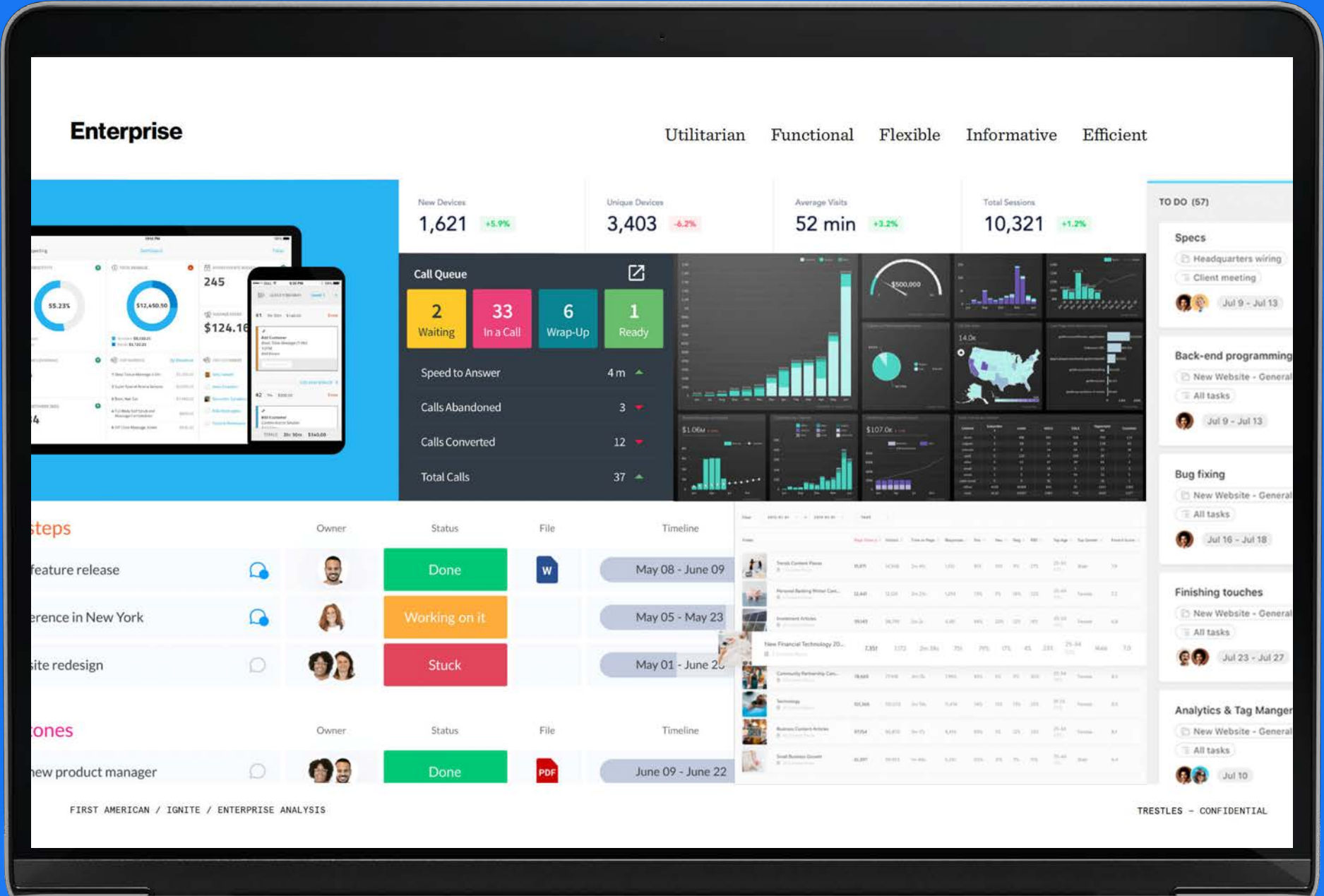
Trading off engagement for efficiency

Consumer applications need to be easily accessible and understandable to retain users. Employees will use enterprise applications day in and day out, so some tradeoffs, like sacrificing some learnability to increase efficiency, might be made.

CONSUMER DESIGN



ENTERPRISE DESIGN



SPACING

ENTERPRISE VS. CONSUMER DESIGN

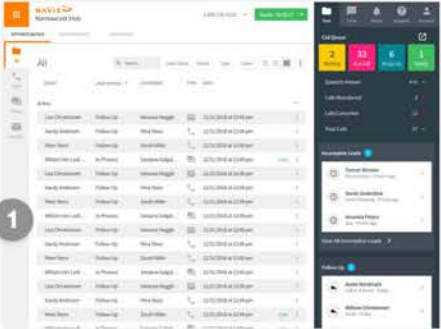
Spacing

- 1 Enterprise tools typically have greater scope and are more complex than consumer applications, so information is usually more dense. Spacing in enterprise tools is tighter than that of consumer tools, but smart use of visual hierarchy can help keep information legible.
- 2 Generous spacing and judicious use of color/type can help consumer applications feel instantly accessible, as it is clear which elements the user should focus on first. Spacing is not as tight to increase ease of use and legibility in consumer apps, where there is usually less data to process.

Enterprise Grow BI



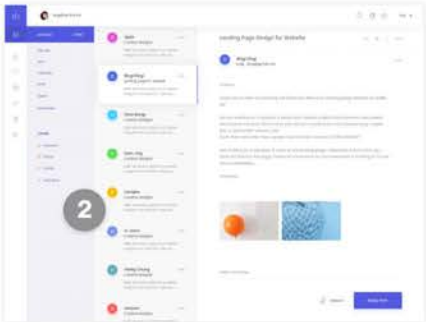
Enterprise Navis



Consumer eBay Seller Portal



Consumer Email app mockup



ENTERPRISE VS. CONSUMER DESIGN

NAVIGATION

ENTERPRISE VS. CONSUMER DESIGN

Navigation

Enterprise Tableau

1

2

3

4

1

When enterprise apps support many features or workflows, organizing nav items into submenus can help users locate features more easily.

2

As the number of nav items increases, categorizing them can help users locate options more quickly.

3

Omitting labels from frequently used navigation items can help save screen space in enterprise apps; this is an option when most users are power users of the app and the learning curve is a less important factor. However, this is not considered a best practice; in this case, it is done because the icons are familiar/easily recognizable.

4

In consumer applications, navigation items are clearly labeled for ease of access, especially for users who only access the app occasionally/only use certain features.

FIRST AMERICAN / IGNITE / ENTERPRISE ANALYSIS

TRESTLES - CONFIDENTIAL

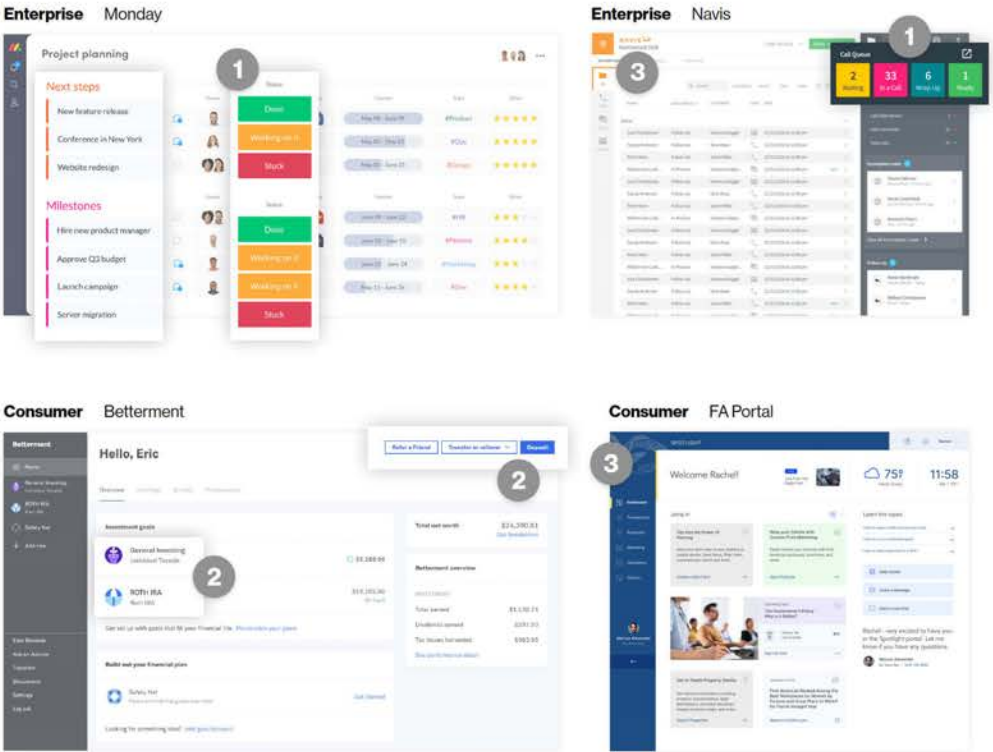
ENTERPRISE VS.
CONSUMER DESIGN

COLOR

ENTERPRISE VS. CONSUMER DESIGN

Color

- 1 In enterprise dashboards, color is an important tool for calling out system status and differentiating dense modules of information. Color is also used to call out system status in consumer products, but to a lesser extent as there is typically less data to communicate.
- 2 In consumer apps, color is used primarily for calls to action and elements that add delight to the experience (for example, illustrations).
- 3 Using key brand colors in important page elements like the primary nav and calls to action helps to create a more cohesive brand experience.



ENTERPRISE VS.
CONSUMER DESIGN

IMAGERY

ENTERPRISE VS. CONSUMER DESIGN

Imagery

Enterprise Tableau



1 Icons can help users recognize and locate tools and nav items, especially when there are many options available.

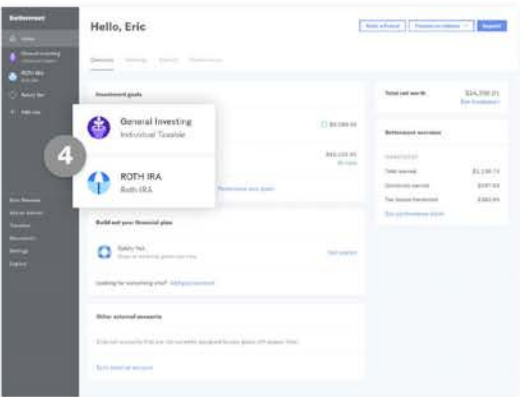
2 Imagery in enterprise dashboards is mostly utilitarian, including visualizations to help users understand data more clearly.

Consumer FA Portal



3 In consumer apps, imagery that is bright and human-focused can help the experience feel more personable. In this case, the image helps draw attention to featured content and make it seem more appealing.

Consumer Betterment



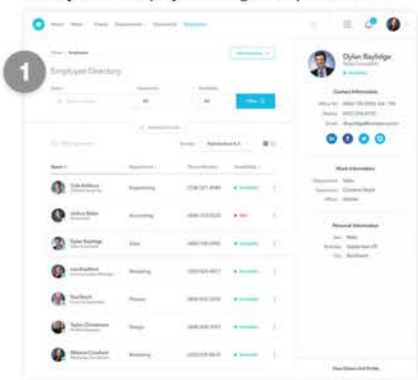
4 Illustrations can also help a consumer experience feel more friendly when there isn't a need for a vast library of icons.

ENTERPRISE VS. CONSUMER DESIGN

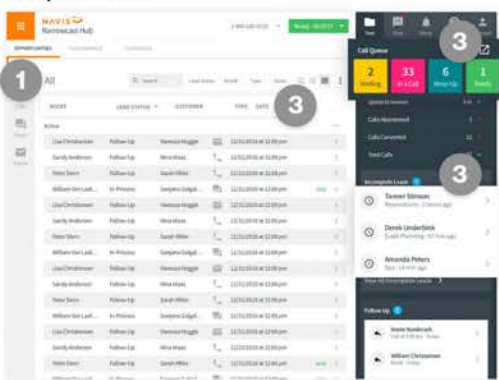
Type

- 1 In enterprise tools, headlines are generally used to inform the user of their current place in the app.
- 2 In consumer apps, bold headlines with friendly copy help the experience feel more human-centered and are not necessarily functional.
- 3 Enterprise apps generally will have a larger selection of type styles (a larger type ramp) in order to maintain visual hierarchy in an information-dense screen.

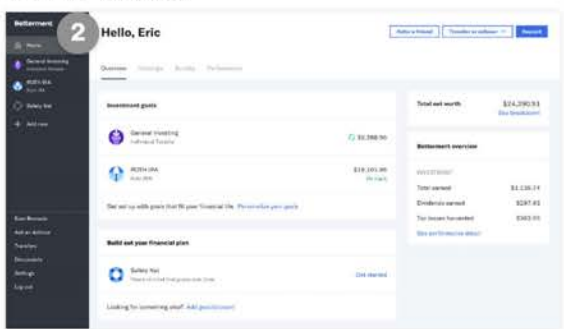
Enterprise Employee management platform



Enterprise Navis



Consumer Betterment



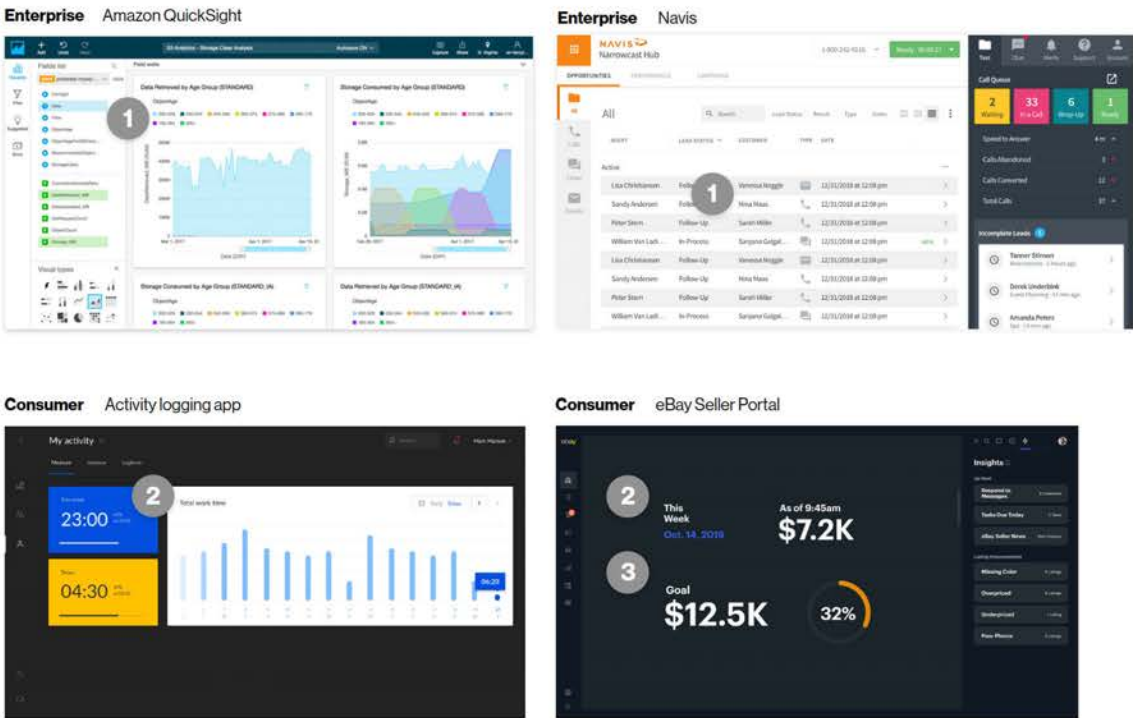
Consumer FA Portal



ENTERPRISE VS. CONSUMER DESIGN

Content

- 1 Enterprise dashboards are usually more information dense as users need to manage simultaneous tasks/workflows/data sets. In this case, exposing more information at once is beneficial for experienced users because they don't have to dig for advanced details.
- 2 Consumer tools tend to expose only the most relevant data in an easy-to-digest, at-a-glance format. More detailed data is usually tucked away in a separate screen or modal.
- 3 In consumer tools, aesthetic appeal can be prioritized over efficiency of use. Keeping the main dashboard minimalistic, readable, and modern-looking takes priority over being able to quickly manage detailed stats and information.



ENTERPRISE VS. CONSUMER DESIGN

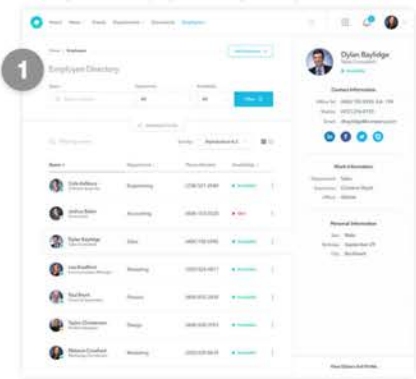
TONE

ENTERPRISE VS. CONSUMER DESIGN

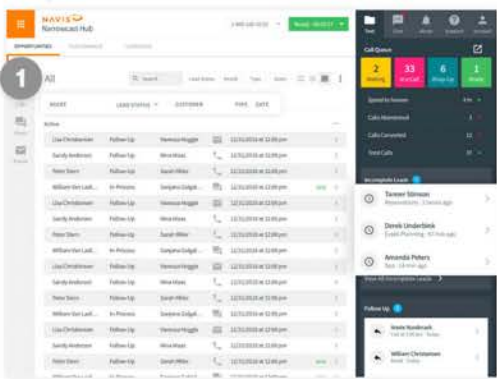
Tone

- 1 In enterprise tools, the tone is simple and concise as the interface takes a backseat to functionality and productivity.
- 2 In consumer apps, a friendly, helpful, and welcoming tone has become the standard. The copywriting and page layouts are set up in such a way that user is easily siphoned through the tool's main flows.

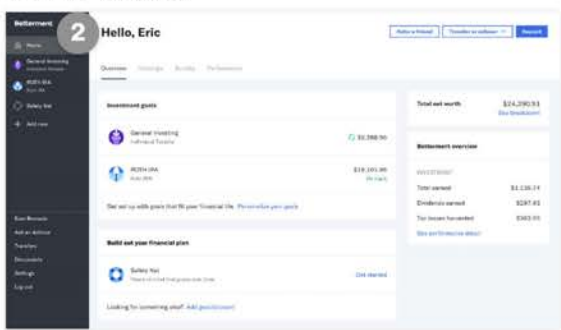
Enterprise Employee management platform



Enterprise Navis



Consumer Betterment



Consumer FA Portal



HEURISTIC EVALUATION

Objectives

01

Better understand the requirements of the Ignite experience.

02

Identify obstacles and opportunities within the Ignite experience.

03

Collect findings that will inform workshop activities and initial design directions.

Evaluation Scale

The following evaluation scale was used when reviewing the current FAST and Ignite experiences:



Good Experience

Tasks are easily accomplished. Terminology/labels are understandable and consistent. The application uses common UI patterns.



Average Experience

The application is at an industry-standard or average level. Tasks are somewhat easy to accomplish but require some user effort. Terminology/labels can be confusing and inconsistent.



Bad Experience

Tasks are problematic or confusing for users. Terminology/labels are difficult to understand and inconsistent. The application uses unusual UI patterns.

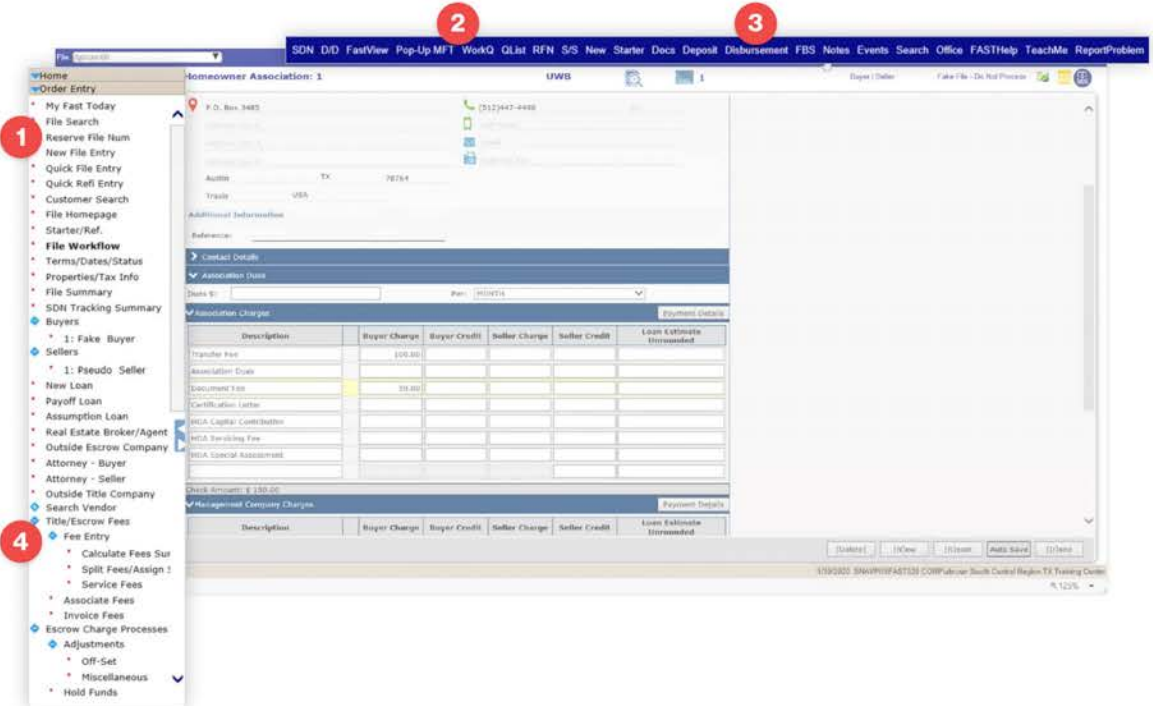
HEURISTIC ONE

Visibility of System Status

HIGH-LEVEL OVERVIEW

Visibility of System Status

- 1 There is no visible indication of progress for a given file, and it is not clear which entry forms are relevant without prior training.
- 2 The top nav contains many disorganized, competing options, making each one difficult to locate.
- 3 When the user enters charges, there is no indication that the corresponding Disbursement form has changed.
- 4 Many entries in the side nav are occluded, and there is no visible search function to locate specific entries. The user needs to either dig for the desired option or have outside documentation open.



Match Between the System and the Real World

Match Between the System and the Real World

- [illegible]

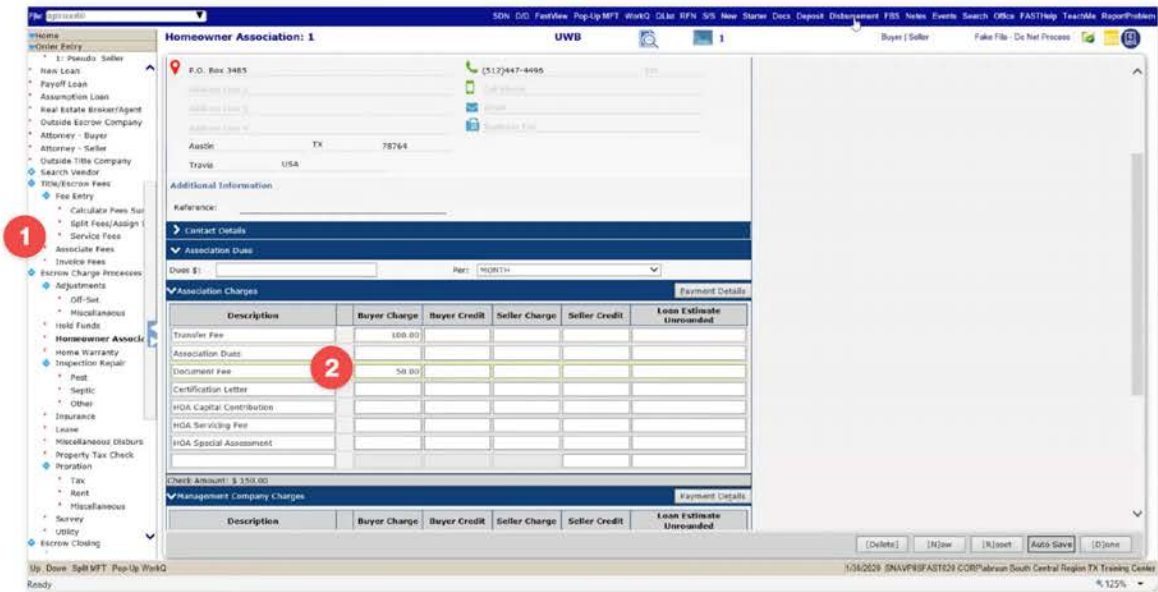
HEURISTIC THREE

User Control and Freedom

HIGH-LEVEL OVERVIEW

User Control and Freedom

- 1 The Order Entry list does not indicate which forms have been previously edited, and it is unclear whether there is a function to quickly return to previously accessed forms.
- 2 If the user fills out the wrong entry form, there is no easy way to undo or transfer the data entry.



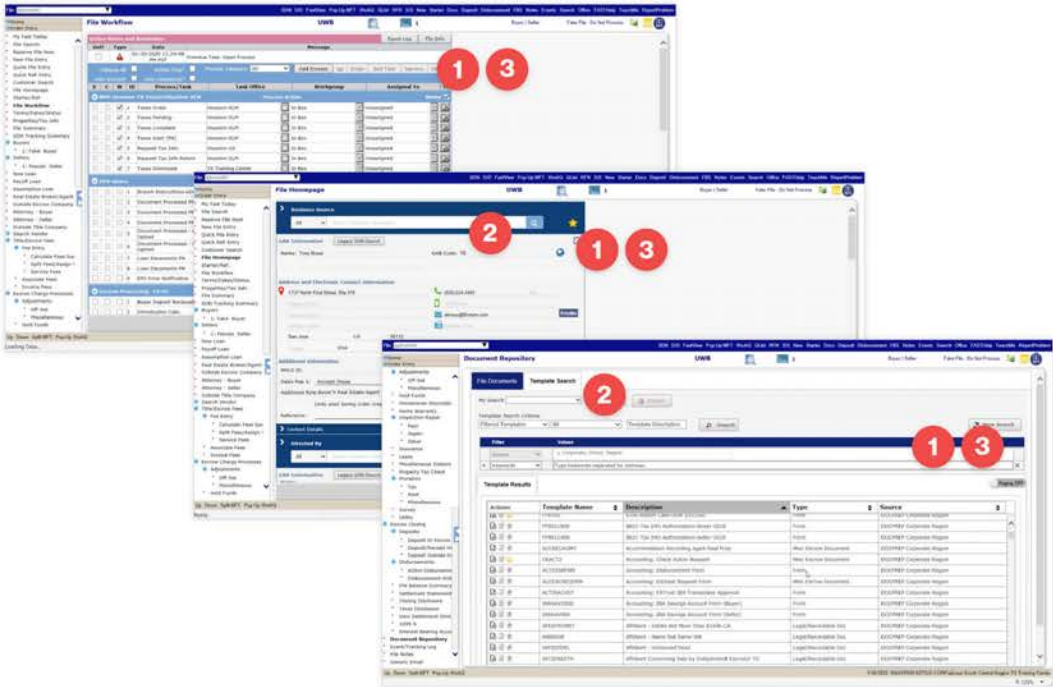
HEURISTIC FOUR

Consistency and Standards

HIGH-LEVEL OVERVIEW

Consistency and Standards

- 1 Forms do not have a consistent structure. When looking for a particular feature, the user cannot rely on page structure to quickly locate it.
- 2 The styling of the search function differs between the File Homepage and the Document Repository. This makes search more difficult to find and can result in confusion and frustration.
- 3 Visual styles such as color and iconography are applied inconsistently across different screens, resulting in a disjointed experience.



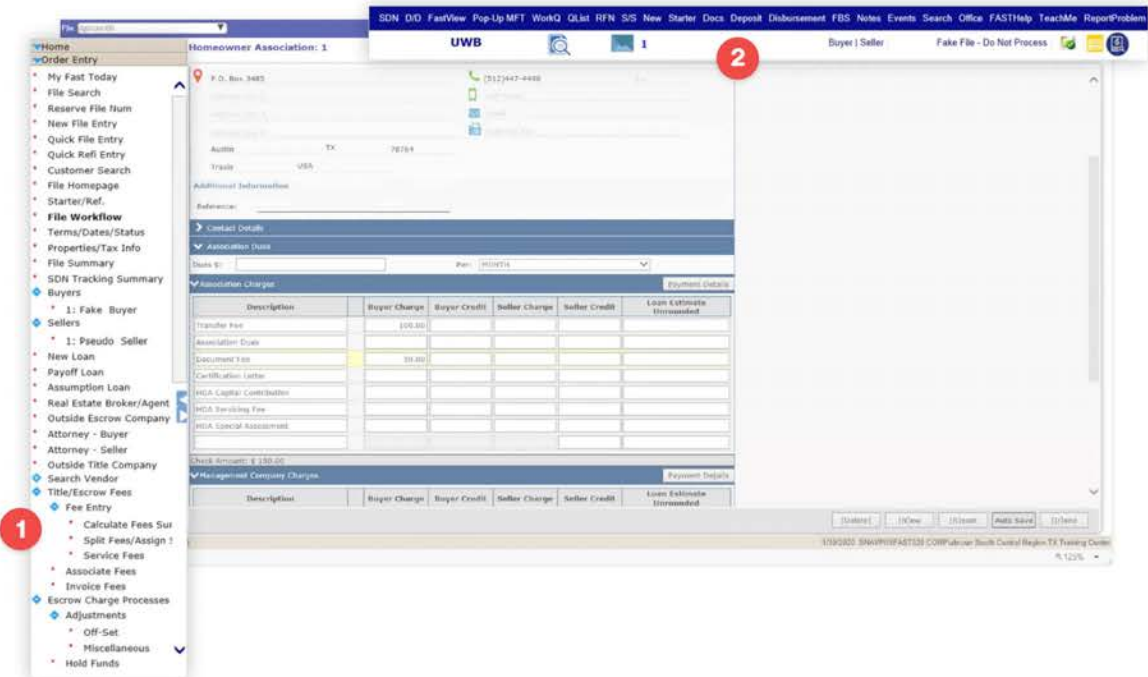
HEURISTIC SIX

Recognition Rather Than Recall

HIGH-LEVEL OVERVIEW

Recognition Rather Than Recall

- 1
- The number of occluded options in the Order Entry list requires the user to recall the location of a form each time they need to access it.
- 2
- The icons and labels in the top navigation are uninformative. Their functions are unclear unless the user has previously accessed them, which increases cognitive load because it forces the user to rely on recall rather than recognition.



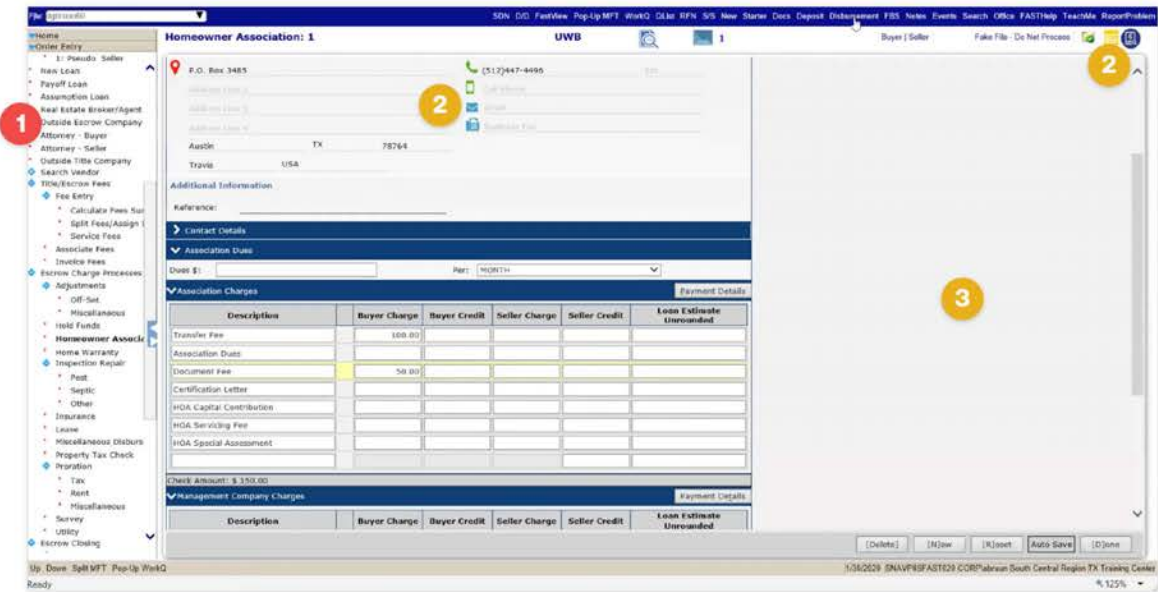
HEURISTIC EIGHT

Aesthetic and Minimalist Design

HIGH-LEVEL OVERVIEW

Aesthetic and Minimalist Design

- 1 Workflows are not tailored to specific roles. Many options are exposed to the user at once, and there is no clearly defined flow between FAST features.
- 2 The use of color in the design is not purposeful, particularly in the iconography. Arbitrary variations in color can pull attention away from the tool's more important features.
- 3 Page content is not responsive to window sizing.



HEURISTIC TEN

Help and Documentation

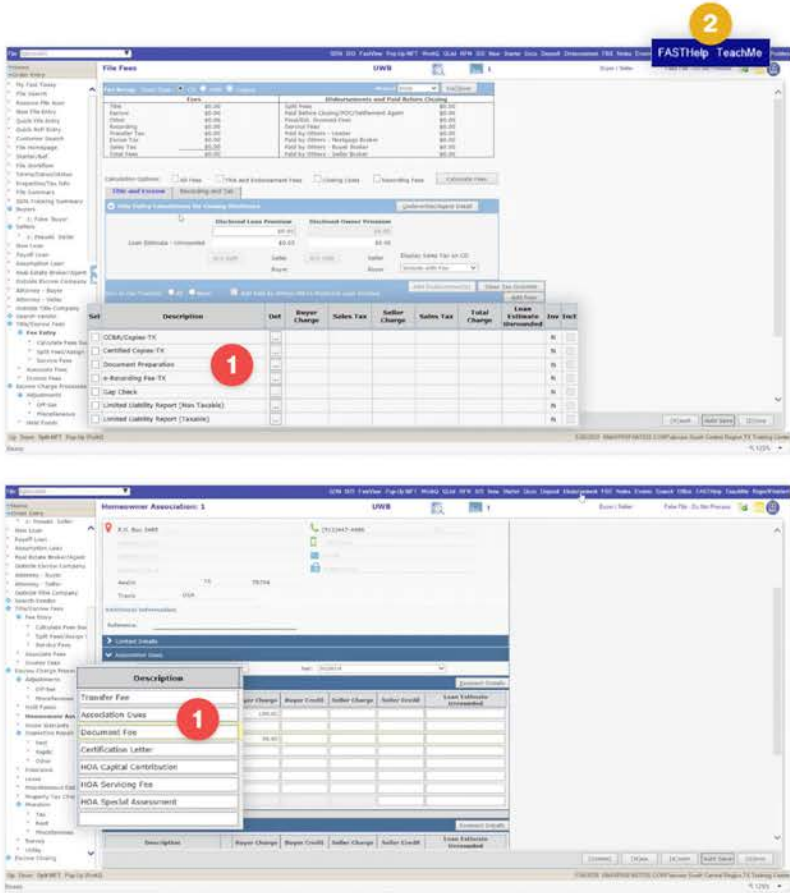
HIGH-LEVEL OVERVIEW

Help and Documentation

- 1

FAST does not provide descriptions or contextual help for the fields that the user is expected to fill out.
- 2

The link to access FASTHelp is difficult to locate among the other top-nav options, and the distinction between FASTHelp and TeachMe is unclear without prior knowledge.



Key Takeaways

Dashboard doesn't present information effectively

The dashboard could benefit from more informative visuals and a clearer information hierarchy to allow users to quickly digest their workload.

File checklist doesn't assist users through transactions

Ignite is a step up from FAST in terms of being able to visualize a file but still requires a lot of system knowledge to operate efficiently. Make help and supplementary info more readily available and automate where possible.

Visuals and interactions are inconsistent

Visuals and interactions need a polish pass to meet contemporary UI standards and to create a cohesive experience.

STAKEHOLDER INTERVIEWS

STAKEHOLDER INTERVIEWS

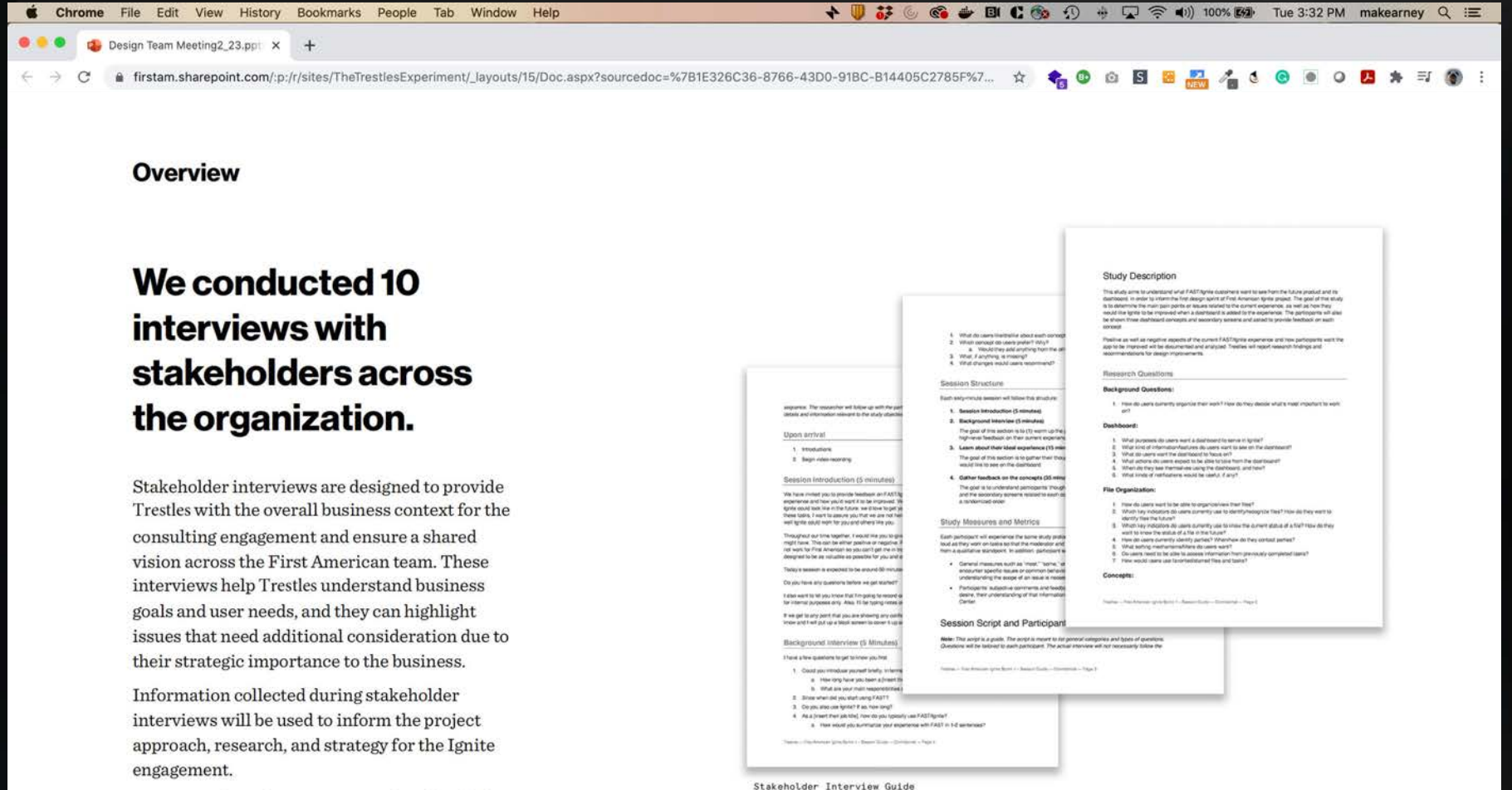
Overview

We conducted 10 interviews with stakeholders across the organization.

Stakeholder interviews are designed to provide Trestles with the overall business context for the consulting engagement and ensure a shared vision across the First American team. These interviews help Trestles understand business goals and user needs, and they can highlight issues that need additional consideration due to their strategic importance to the business.

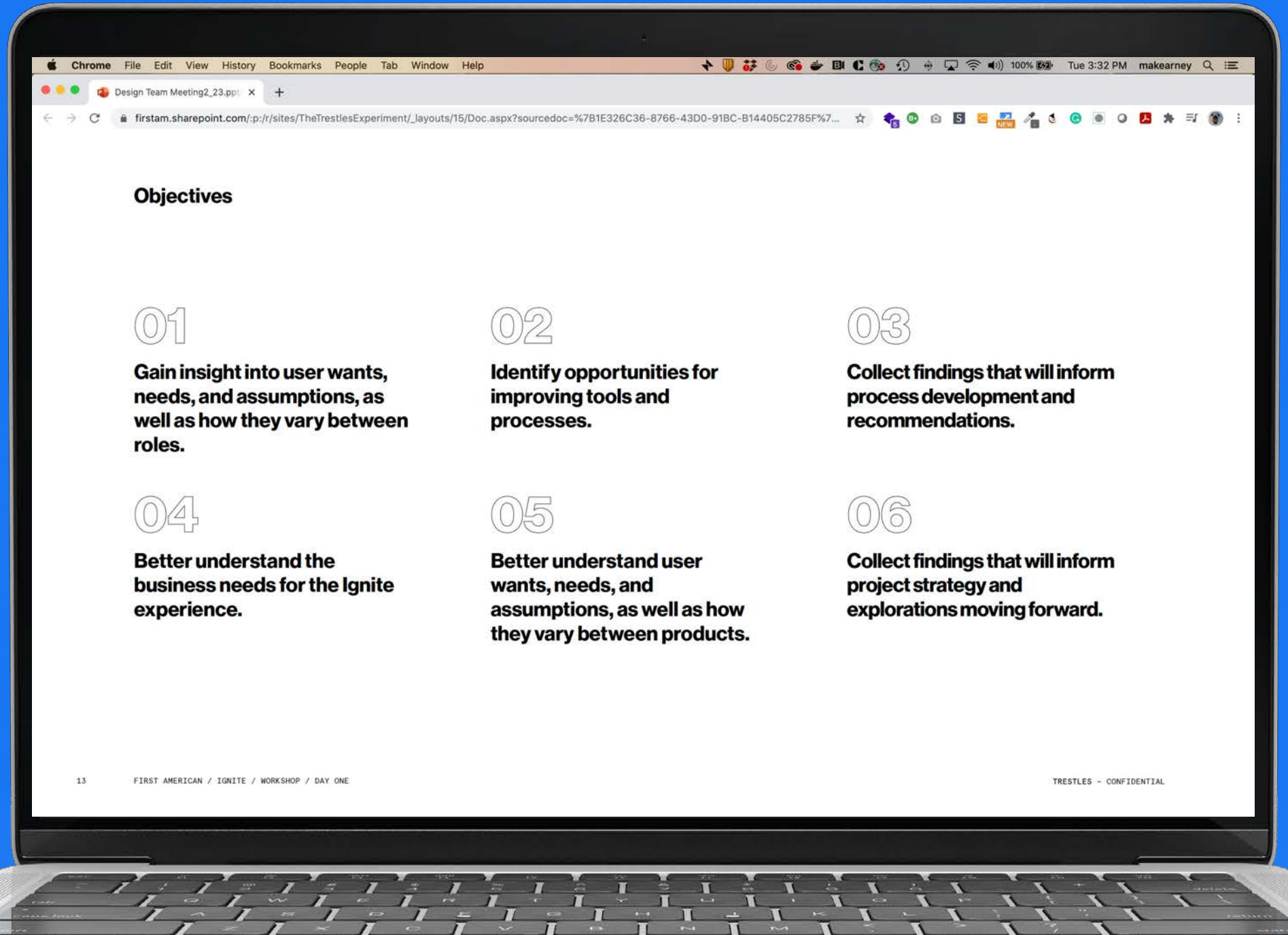
Information collected during stakeholder interviews will be used to inform the project approach, research, and strategy for the Ignite engagement.

Interviews lasted 60 minutes each and took place between February 3 and February 14, 2020.



Stakeholder Interview Guide

STAKEHOLDER INTERVIEWS



DESIGN THINKING WORKSHOPS

WORKSHOP GOALS

Due in large part to the history of being an engineering-driven organization, the stakeholders were not familiar with the process of participating in workshops to align on design exploration as it pertains to business objectives. We set out on a mission of cocreation by inviting the business to build the product with us.

Today's Goals

01

Recap key opportunities and design principles, then review enterprise design analysis.

02

Collaboratively brainstorm and prioritize potential solutions based on key opportunities.

03

Align on next steps and action items moving into planning and strategy.

FAVORITE QUOTE

Once our initial stakeholder interviews had concluded we were able to better understand the challenges the business and engineering team had faced with this product for nearly two decades. This quote refers to building atop a live product that is responsible for 80% of our revenue.

“We are driving a car while trying to change the engine. There’s just inherent danger in that.”

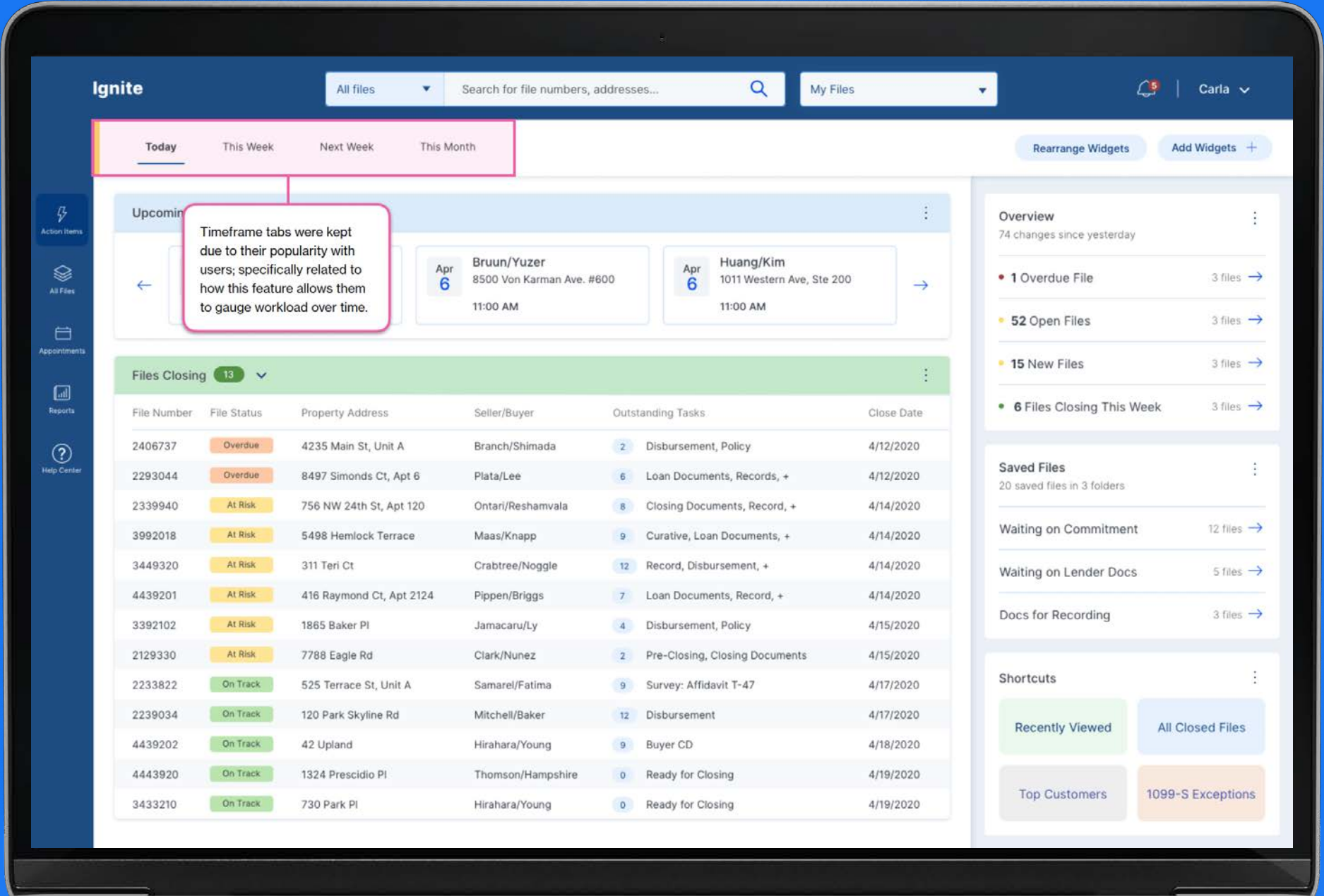
What You Are Worried About
Stakeholder 3



FEATURE REFINEMENT

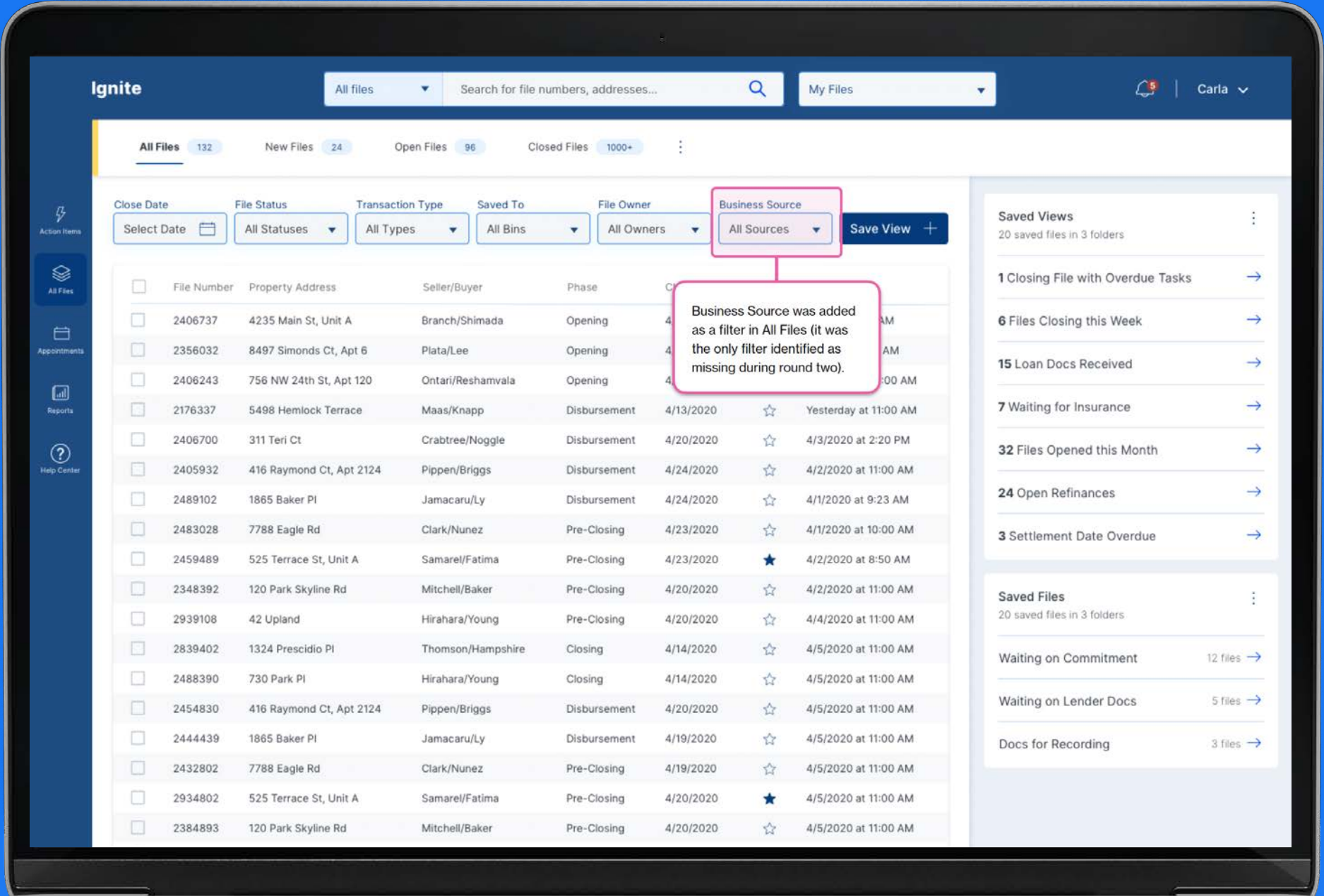
FEATURE
REFINEMENT

DASHBOARD



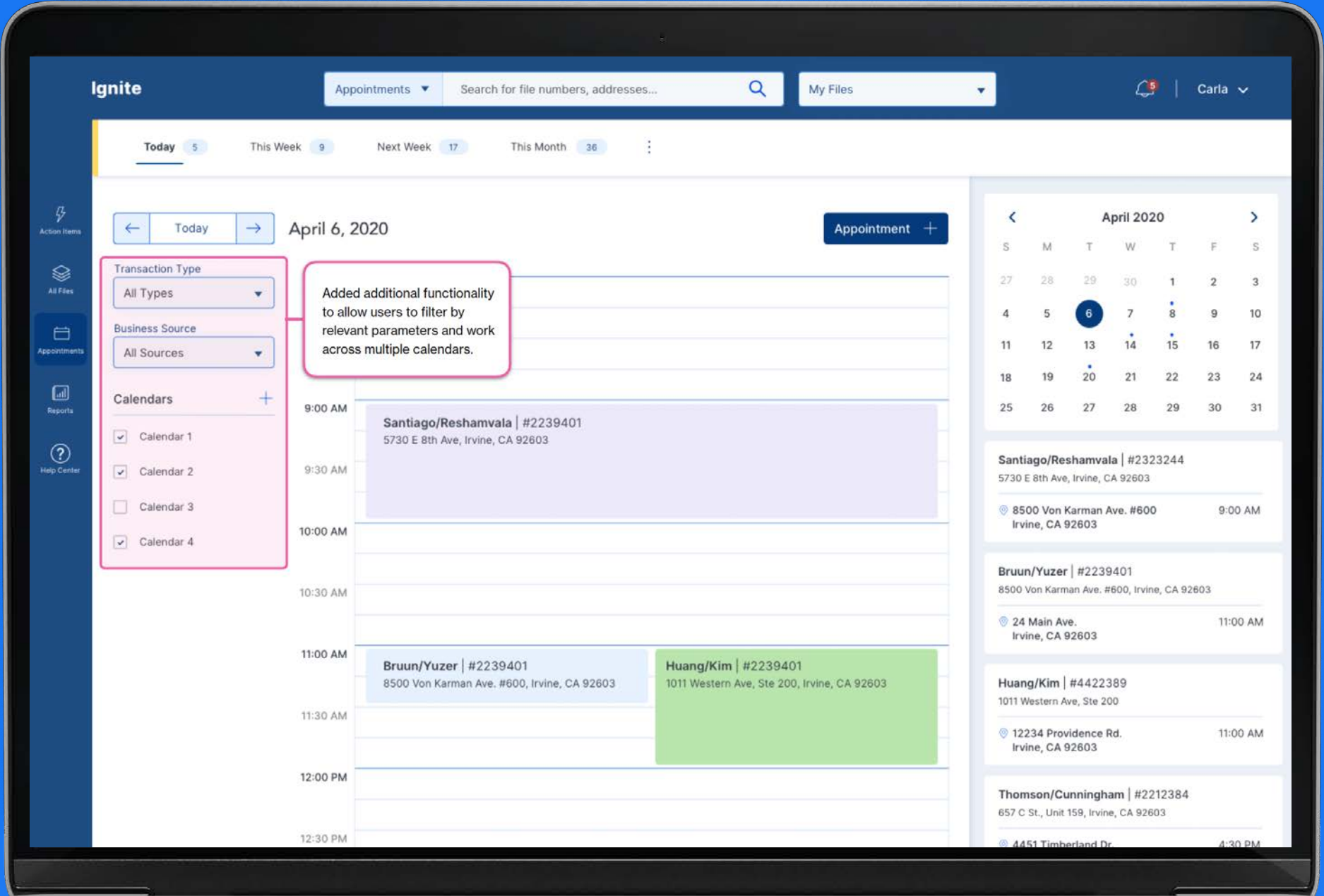
FEATURE
REFINEMENT

ALL FILES



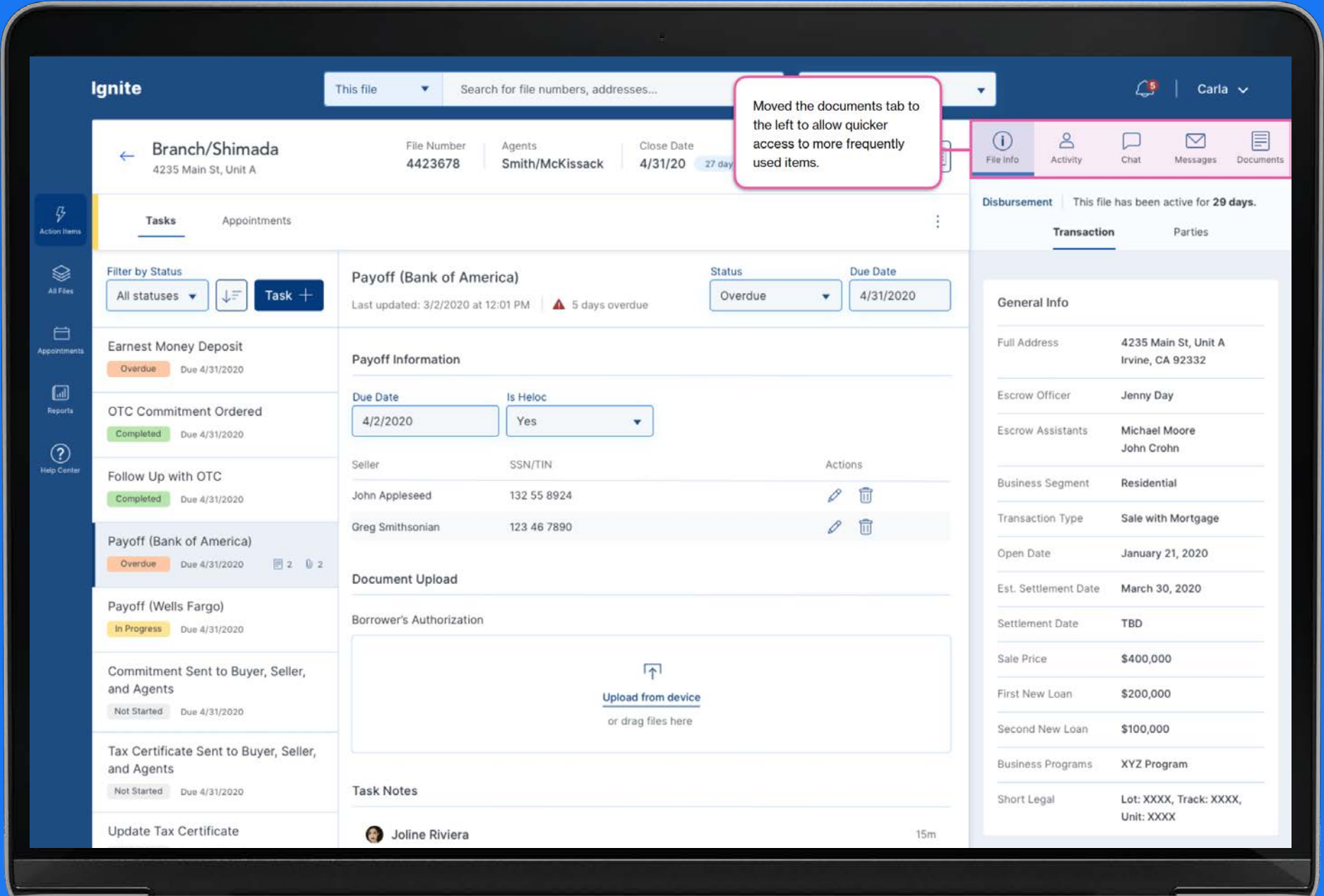
FEATURE
REFINEMENT

APPOINTMENTS



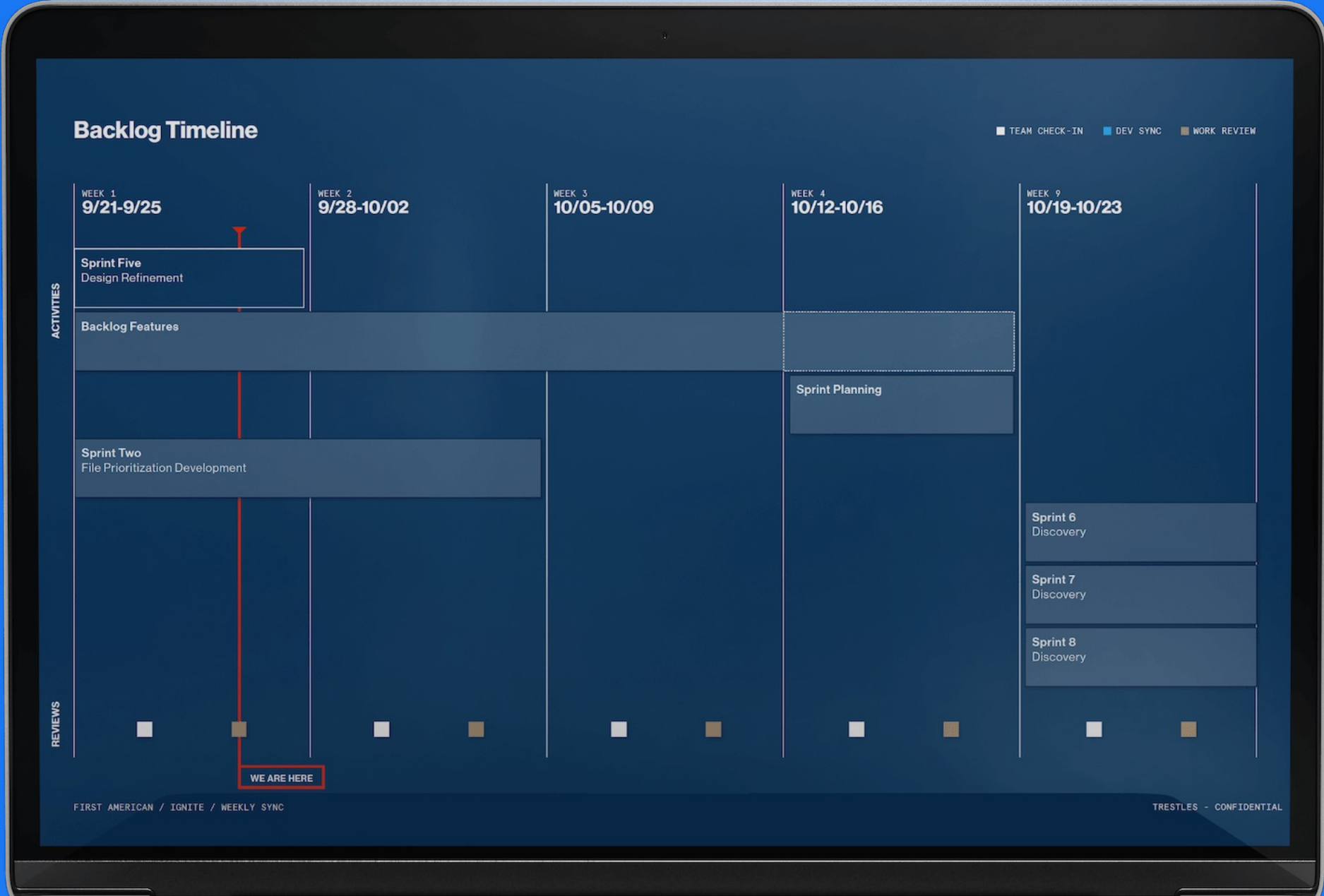
FEATURE
REFINEMENT

FILE/TASK VIEW



FEATURE
REFINEMENT

BACKLOG TIMELINE



Next Steps

Sprint 2 - In Development

Sprint 5 - Approvals (9/24)

Sprint 4 & 5 - Hand off to Dev (10/1)

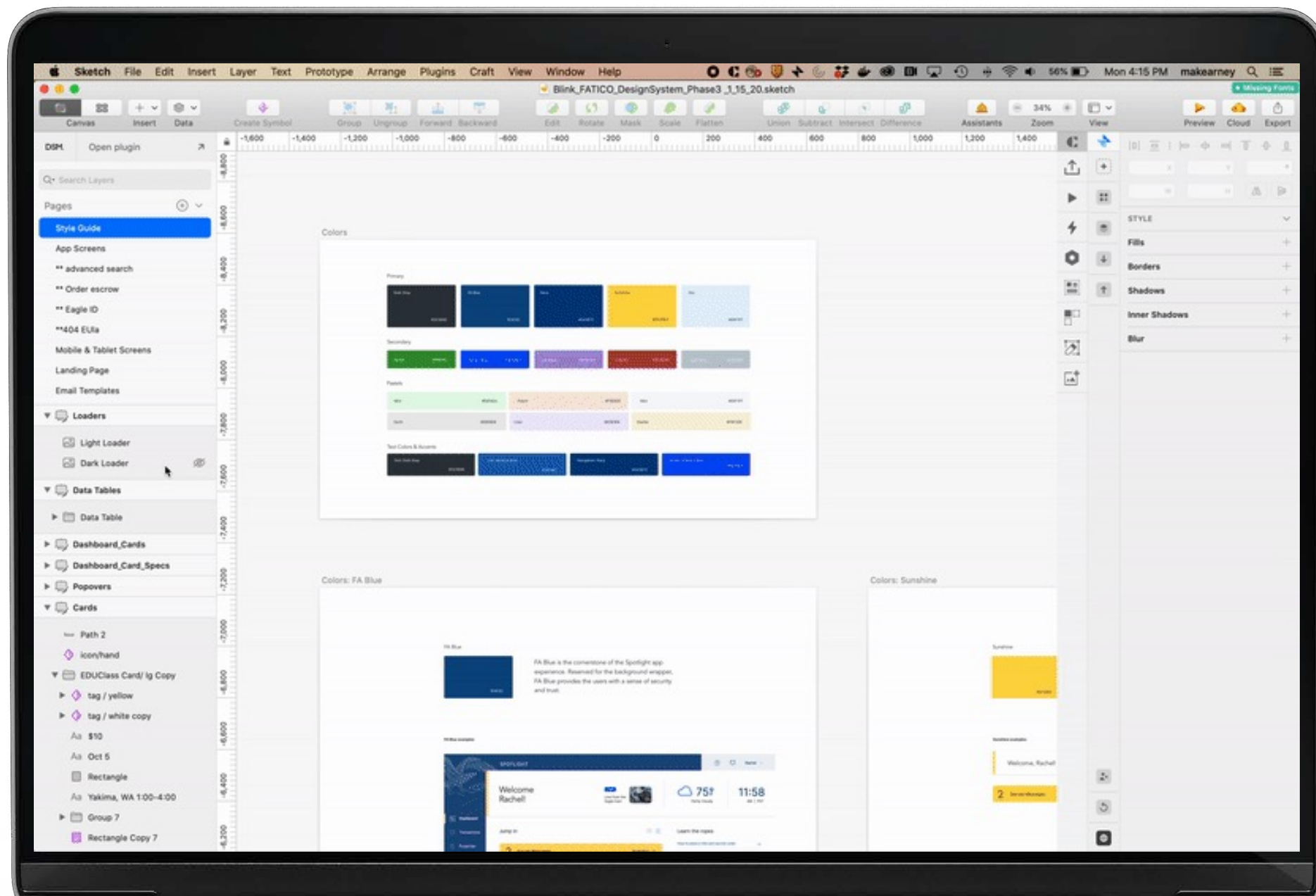
Continue Feature Backlog Work

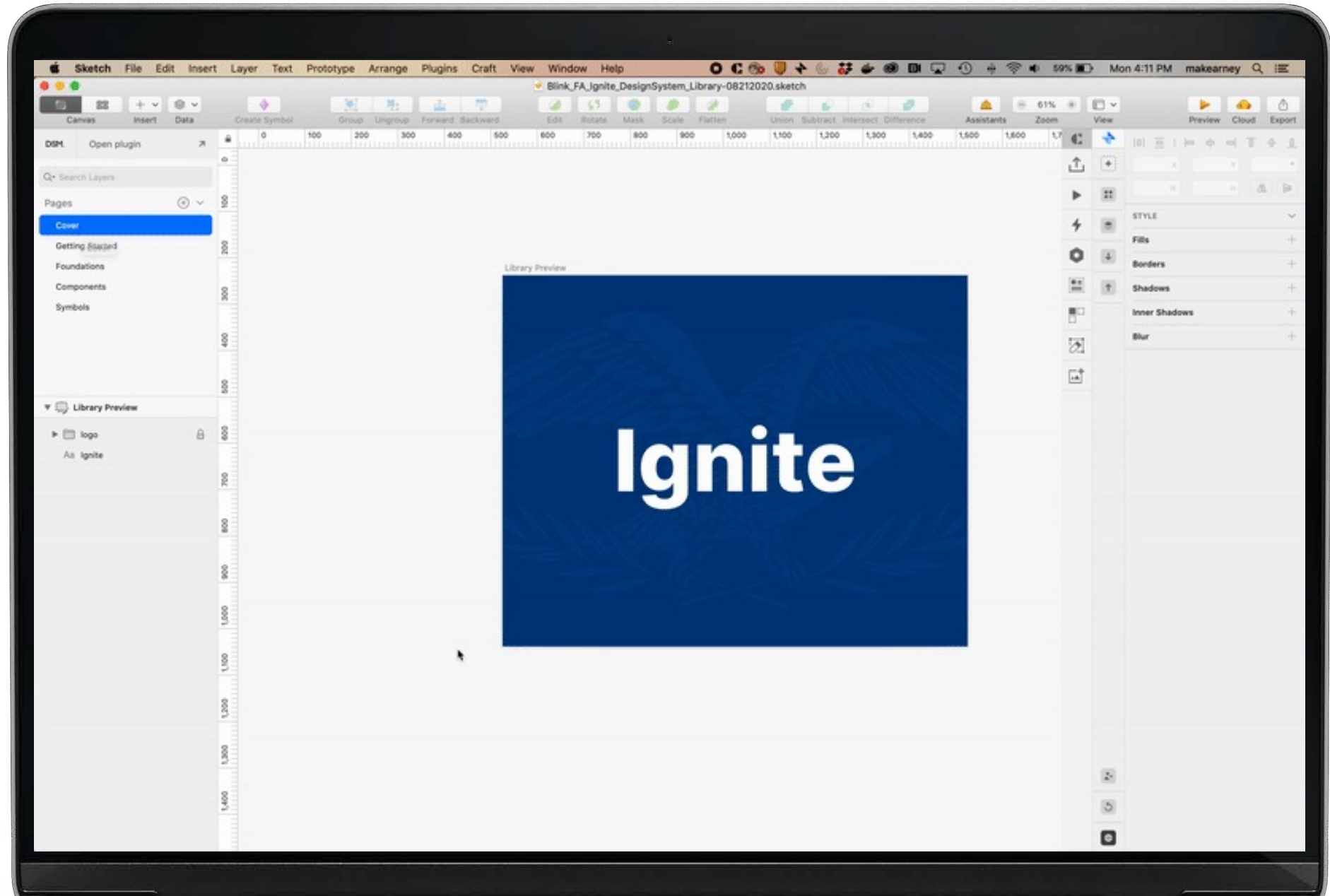
Sprint Planning

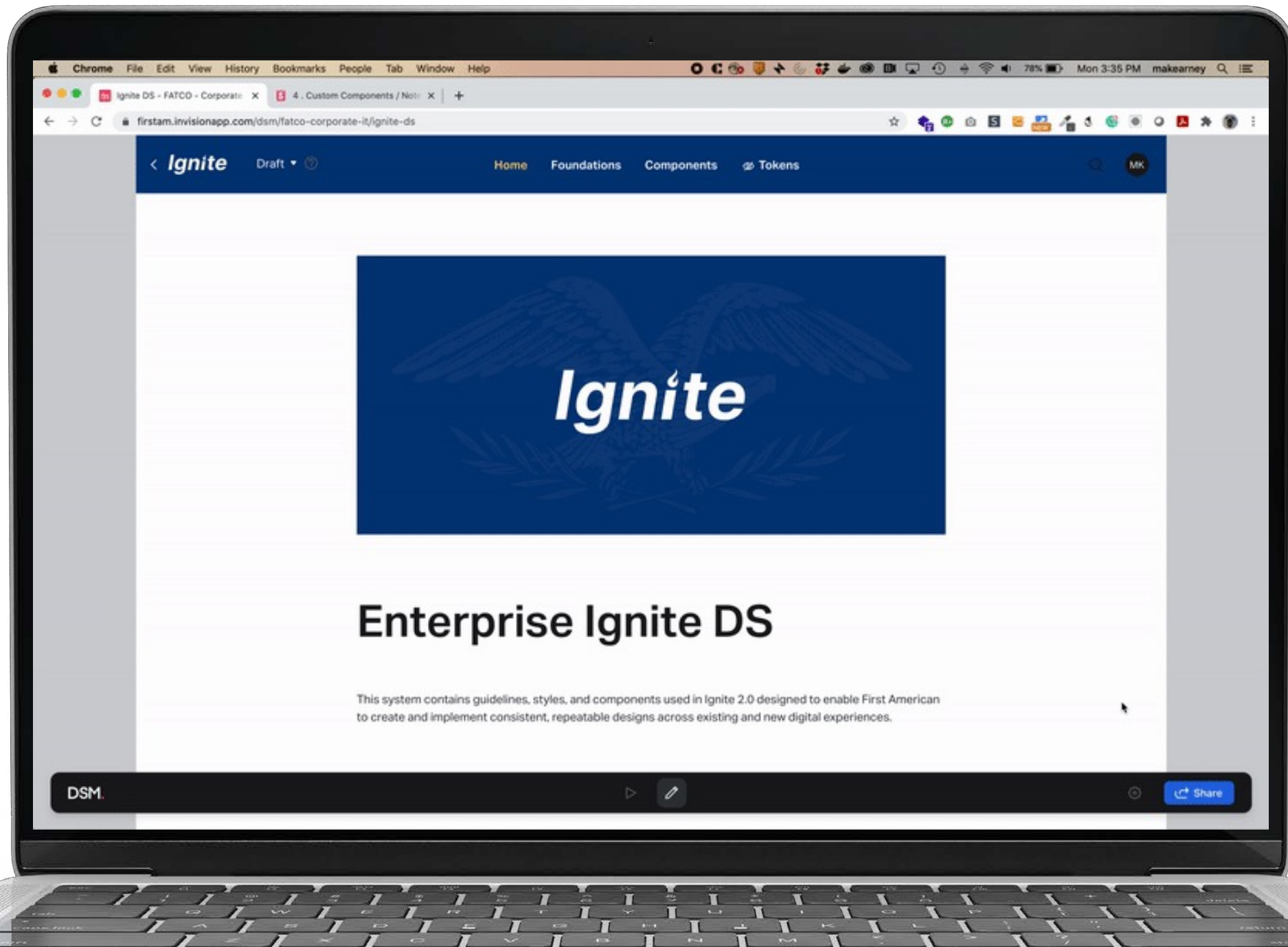
DESIGN SYSTEMS

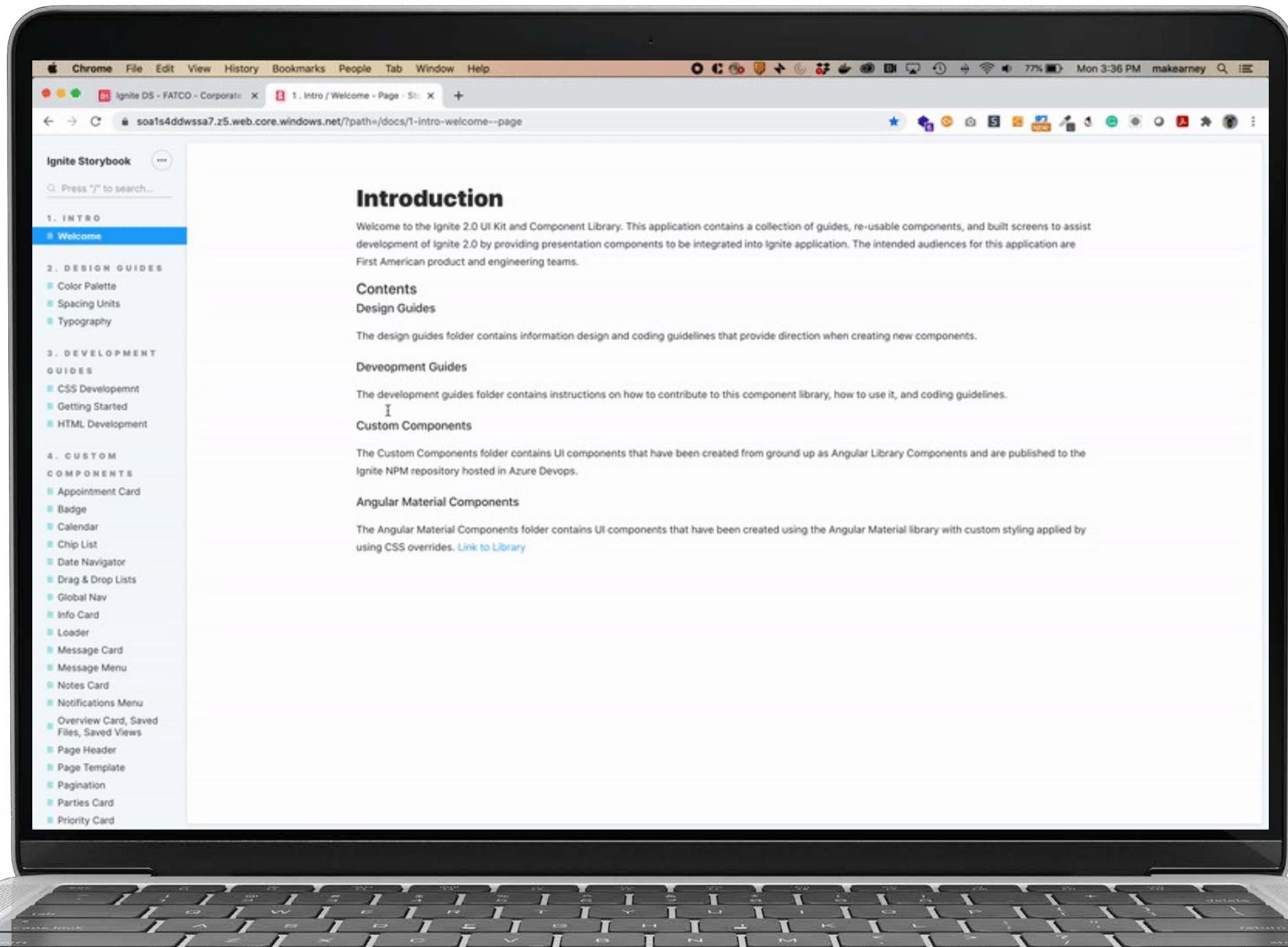


UI DESIGN









QUALITATIVE



QUANTITATIVE



DESIGN, PROTOTYPING, AND DESIGN SYSTEM

