Research Findings and Plan

Accurants is an Enterprise Resource Planning platform that was built with the small-to-midsize business in mind. These businesses often use a number of individual software tools and platforms to run and support their business. The Accurants platform includes offerings across the full spectrum of business operations. The benefit to the business owner is that these tools are seamlessly integrated with each other in order to create efficiencies and gather insights across different workstreams.

Accurants has recently added Inventory and E-Commerce modules to their platform, as well as a POS component to their mobile app, all focused on catering to small-to-mid-sized retail businesses, such as cafés, bookstores, etc. Accurants would like to get new retails users up and running - with their full inventory and POS setup - in 30 minutes or less, in order to provide them with a competitive, valuable experience.

To review the Accurants platform, I performed a cognitive walkthrough of the applications with the client-identified key tasks. During the cognitive walkthrough, I performed all the key tasks and recorded each action while considering the following heuristics: mental model, visibility/hierarchy, mapping/consistency, and feedback.

Research Goals:

We then constructed research protocols for the three contextual inquiries. Here are our established research goals:
- Learn more about how managers or team members use the tools in their environment - (team roles, main context of use, training, cross over, team dynamics or differing needs)
- Gain insight into daily activities and environment to understand pain points, delighters, areas of inefficiency, and general context
- Better understand how well current tools are working, particularly with the key value propositions of Accurants in mind (integration, right fit, inventory, e-commerce) - what is working well, pain points, gaps and opportunity areas
- Gain insight into how Accurants platform might fit into a user's workflow or context. Initial impressions, gaps, benefits, areas of uncertainty, opportunities for improvement

Key Findings:

Through the cognitive walkthrough and contextual inquiries, the research suggested these three key insights:
- The primary setup function is not easily discoverable or navigable

- The visual hierarchy of the menu and toolbars is confusing causing poor navigability
- The flexibility vs usability of the application provides a lot of different features for the users, but so many that the application becomes unusable

Account Setup:

The primary setup function is not easily discoverable or navigable. 3 out 3 participants were unable or had difficulty adding or editing business or personal information to the setting screen. There are multiple ways to get to the settings screen, which is confusing in itself, but most users wanted to click on the profile button in the top right corner of the application, but there is no pathway to the setting screen from the profile button. In addition, the application makes it seem unclear if this information is even necessary in the setup process.

2 out of 3 participants were relatively new business owners within the last 4 years and did not have much experience with running a small business. They expressed feelings of nervousness in taking the first steps in opening a small business. Setting up an account on Accurants is easy; all you have to do is enter your email address and create a password and you are good to go, but where is the question. You are dropped into a complicated interface with multiple menus and tools, with a bunch of graphs with no information, because you haven't even really started the setup process.

Menus and Toolbars:

The visual hierarchy of the menu and toolbars are confusing causing poor navigability. 3 out of 3 participants had trouble navigating the application and completing the assigned tasks. There were a lot of features, with an unclear visual hierarchy of what was most important to the user, instead the features were arranged in alphabetical order in one screen and arranged differently in other toolbars located to the right and left of the main interface.

Features:

The flexibility vs usability of the application provides a lot of different features for the users, but many that the application becomes unusable. 3 out of 3 participants called the application "robust" and said there were a lot of features, more than they probably use. Most users said the application was relaying some sort of information, but was unsure of exactly what. One user when asked what was unclear, replied "Everything!"

User Stories:

As a new small business owner without experience, I want to provide guidance, so the onboarding process is easy and simple, so I can help the user have one less thing to worry about. If the user had a step-by-step process that helps new users populate the necessary information so that Accurants can provide a curated experience for the user. In addition, a guided tour, FAQ, and help resources will all help support the user to be successful.

As a power user with long term goals and dedication to numbers, I want to provide an integrated experience, so that I can provide information that is well organized and can be leveraged to make sound decisions as the business grows. 3 out of 3 participants said that they liked the idea of the "one-stop-shop". They all used different digital tools because there was no one tool that did everything that they needed done and done well. If the user had more to determine what features they want to use and the ability to hide the features they don't, which would increase the usability of the application. Maybe you can create a more integrated experience for users, but decide what levels of users need what functions.

<u>User Scenarios:</u>

Bob is a new small owner without experience. He has some experience with computers, but all and all he is about the set off on a new adventure. He is looking to the future and understands a business platform now could be the key to success later. He stumbles upon Accurants, a business platform that can help him do just that. He starts by creating an account. It is simple and easy, all he needs is an email and password and he is off to the races. He is greeted by a friendly welcome screen with a short intro about what Accurants can do for Bob. Accurants want to create a curated experience for Bob, so it provides only the tools that he needs and none of the tools he doesn't. Accurants asks a series of questions to get to know Bob and his small business. Is your business a retail store, online store, restaurant, or other services. How big is your business? Do you have employees? Have you used any other software? Do you want to import data? At the end of the setup process, Accurants know who Bob is, what Bob is selling, and what Bob needs to be successful. The features he doesn't need right away are hidden from view. There are no charts of website traffic or sales, because he hasn't set that up yet, but Accurants knows he might want to do that and has a recommendation with step-by-step instructions on how Bob can get there.
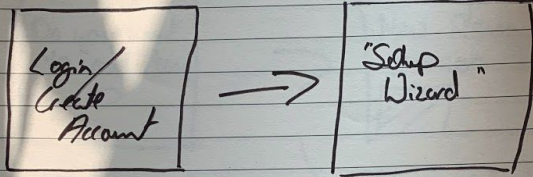
Jane has owned her business for 10 years. She has used a lot of different tools, both digital and analog. She also does all of her own accounting through Quickbooks, so she has a lot of experience working with computers and computer software. She is looking to update her digital tools and save herself some time. She is looking for an all-in-one tool that makes her life a little bit easier. Accurants is the tool for her. It offers a ton of features, all of the features that she

wants and plus more. She likes that it is robust, but also wants to be able to see things at a quick glance to help her day-to-day workflow. Accurants allows her to simply hide the features and fields that she is not using while providing quick access to them if she changes her mind. Jane quickly enters new items with all the fields that make sense for her and her business and hides the fields that do not apply. Accurants remembers what Jane likes, so the next time she enters an item, it is the way she likes it. Jane knows what she wants and what she doesn't and wants to have the ability to fully customize Accurants to fit her workflow, not the other way around.
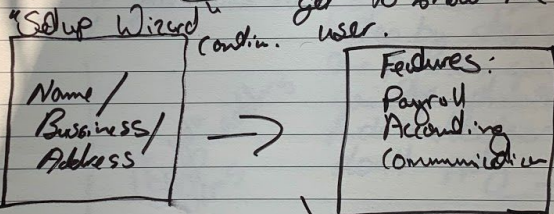
Recommendations:
- Create a "setup wizard" to help the onboarding process with new users. A step-by-step process where Accurants can gather information about you to customize your experiences
- Allow users to hide features and fields they are not using. In combination with the setup process, allow users to remove areas that are not relevant to them or provide help documentation to help them setup that area.
- Reduce the number of menus and toolbars. Create a unifying area that clearly lays out all the features and functions, ordered from what is most used/important to the specific user.

Accounts Screen Flow

```
┌─────────────┐          ┌─────────────┐
│  Login/     │          │  "Setup     │
│  Create     │   ──→    │   Wizard"   │
│  Account    │          │             │
└─────────────┘          └─────────────┘
```

The setup wizard asks question so get to know the user.

```
"Setup Wizard"  (contin.)
┌─────────────┐          ┌─────────────┐
│  Name/      │          │  Features:  │
│  Business/  │   ──→    │  Payroll    │
│  Address    │          │  Accounting │
│             │          │ Communication│
└─────────────┘          └─────────────┘
```

It collect info about the user: name, business, address to populate the necessary screens.

It would ask you want features that you use and make more relevant recommendations later.

Inventory Add

Do you want to add items?

Add inventory items is a key feature and it would ask you if you want to do it.

If you add/skip items.

Step-by-Step

New Item screen

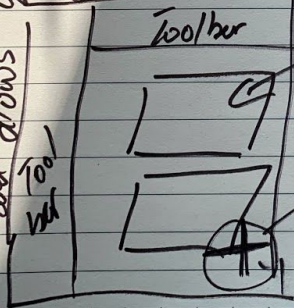**It would bring you to the add item screen and walk you step by step through the process, giving you the option to hide fields that don't apply.**

Dashboard

Toolbar

Tool bar

One too I bar lists the features and use and the other lists all the stuff you don't.

Customize info base on the features you wanted to use.

Large + button so you can add stuff quickly.

Micro interaction
of new item screen

"Add product type"

"Add tax"

↑ Currently interacting
with these buttons
cause the input data
to be erased.
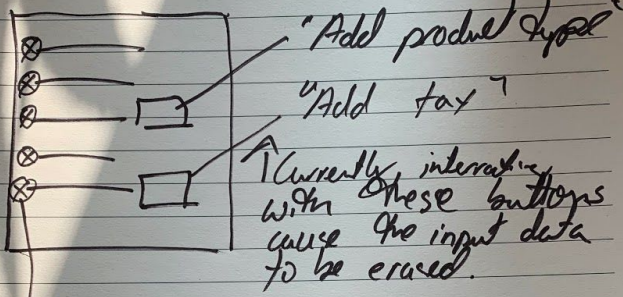
Option to hide fields that
do not apply to the business.