

CASE STUDY

PayPal Wallet Feature Proposal Design Sprint(s)

Main Goal

Develop a feature within PayPal Wallet similar to "Giving" that streamlines the process of creating and sending group payment requests, social payments, and payment tracking enhancing user convenience and efficiency.

Current digital wallets, including PayPal, do not offer a seamless and interactive way for users to collect, manage, and send group payments or social gifts. This gap leads to stressful coordination efforts and fragmented user experiences when handling shared expenses or group gifting.

Key Objectives

- Develop a feature that streamlines the organization, management, and execution of group payments within PayPal Wallet.
- Create a seamless and interactive solution for social gifting, making it easy for users to collect and manage contributions.
- Implement real-time updates and interactive notifications to keep users informed and engaged throughout the group payment and gifting process.

My Role

Design Manager, UXR Lead

Team

3x 2-person design teams

Timeline

3x 1 week parallel design sprints

The Problem(s)

The Problem: Group Payments

PayPal lacks dedicated features to effectively coordinate multiple contributors, track contributions, and provide real-time updates. As a result users leverage external apps or manual methods, resulting in fragmented and inefficient payment experiences within the application.

How might we...streamline the process of creating and sending group payment requests within PayPal Wallet to enhance user convenience and efficiency?

- What are the primary challenges users face when organizing group payments through digital wallets?
- How can we improve the transparency and accountability of group contributions within PayPal Wallet?
- What features would make it easier for users to manage and track group expenses in real-time?

The Problem: Social Gifting

Sending gifts or pooling funds for group occasions has users navigating through external apps or disjointed methods often encountering challenges in managing contributions and keeping track of group gifting activities.

How might we...create an intuitive and interactive platform within PayPal Wallet that simplifies the process of collecting contributions and coordinating group gifts, enhancing the joy of giving and receiving among friends and family?

- What are the essential elements of a user-friendly interface that fosters collaboration and engagement in group gifting?
- How can we incorporate interactive features that enhance transparency and communication among gift organizers and contributors?
- What tools or functionalities would empower users to customize and personalize their group gifting experiences within PayPal?

The Problem: Real-Time Payment Tracking

Imagine organizing a group payment or managing shared expenses with friends, only to find yourself constantly checking multiple apps or spreadsheets to track who has paid and who still owes. Most of the time users download alternate apps like Venmo, who also have yet to eloquently resolve this issue.

How might we...develop a seamless and reliable real-time payment tracking system within PayPal that enhances transparency and accountability for users involved in group payments or shared expenses?

- What are the critical metrics and insights we need to gather to understand user expectations regarding real-time payment tracking?
- How can we design notifications that are informative yet unobtrusive, keeping users updated without overwhelming them with constant alerts?
- What features or visual cues can we implement to ensure users can easily visualize and understand the status of their contributions and transactions at any given time?

My Responsibilities

As the design manager, my role would involve leading and shaping the design strategy for the integration of these proposed features. This includes overseeing the entire design process from research to implementation, ensuring alignment with business goals and user needs.

- **Design Manager**
 - Conduct workshops with stakeholders and the design team to align on business and user objectives.
 - Prioritize design tasks and ensure a clear, strategic approach to the design sprint.

UXR

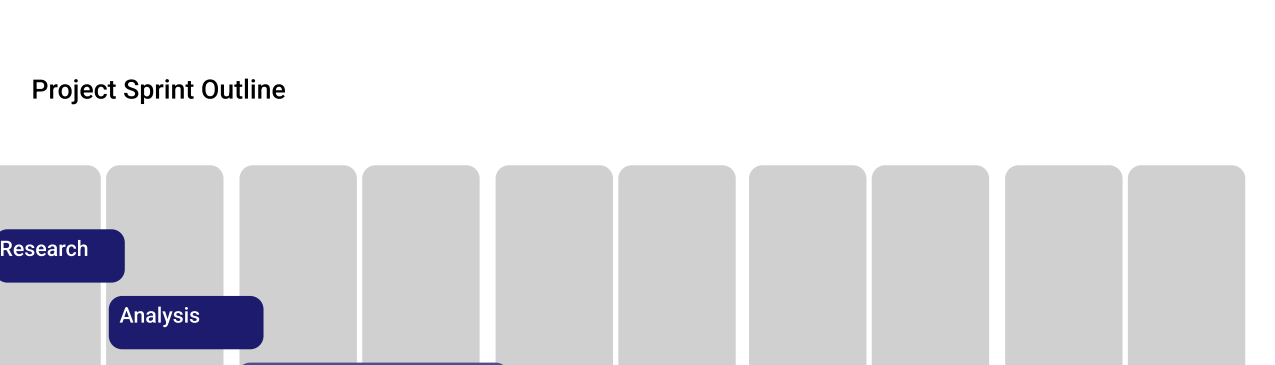
- Lead user research planning and execution.
- Synthesize research findings and validate design concepts through usability testing.

Tools

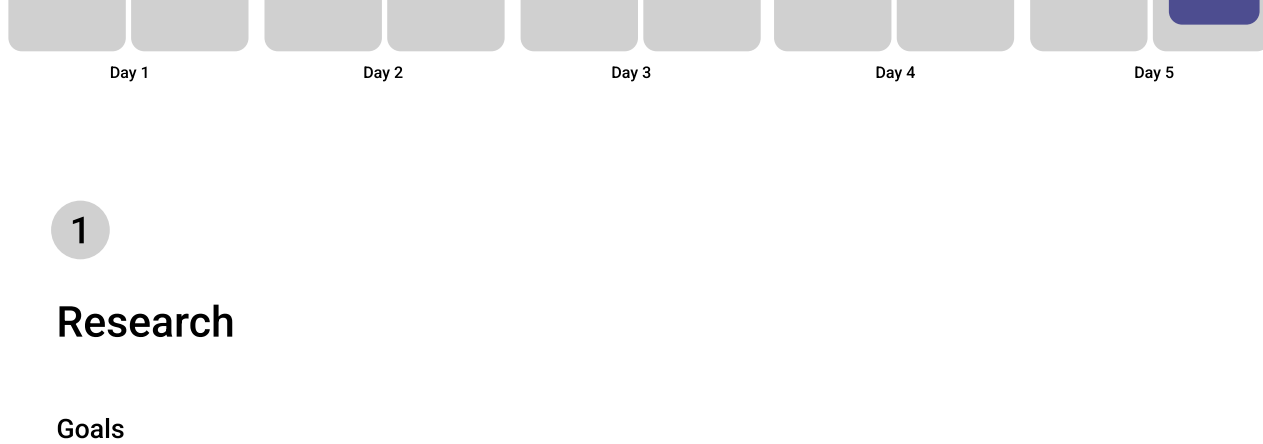


The Process

The design process involved thorough user research, persona development, competitive analysis, and iterative design and testing. These steps were crucial in crafting an intuitive and cohesive user experience for the new features.



Project Sprint Outline



1 Research

Goals

- 1 Understand user needs and expectations for managing group payments and social gifting.
- 2 Identify pain points in the current process of tracking payments.
- 3 Gather insights for designing intuitive and seamless user interfaces for these features.

User Interviews

We'd conduct interviews with a diverse group of users to understand their experiences and needs related to group payments, gifting, and payment tracking. Example questions for each feature session included:

- 1 How do you currently manage group payments? What application or service do you currently use to manage group payments?
- 2 What challenges do you face when sending or receiving social gifts? What application or service do you currently use to send or receive social gifts?
- 3 How do you track your payments and what improvements would you like to see?

These interviews will shed light on the user need for an integrated solution that simplifies group payments and provides clear payment tracking.

2 Survey

We'd then distribute surveys to a broad audience to validate interview findings and gather additional insights into user preferences and behaviors.

Sample questions for feature surveys:

- 1 What features are most important to you when managing group payments?
- 2 How do you prefer to send and receive gifts within a digital wallet?

2 Analysis

The next step would be to analyze the collected data to identify common themes and user needs. Here's some hypothetical data we might see from our research phase:

User Preferences:

- Easy setup and management of group payments.
- Personalized and intuitive social gifting options.
- Clear and real-time payment tracking.

Competitor Insights:

- Simplified user onboarding processes.
- Enhanced search and filter capabilities.
- Improved presentation and tracking of transactions.

3 Design

The initial design process may include:

- Flow Diagram
- Refining Navigation Structures
- Rough Sketching
- Detailed Sketching
- Prototype
- Annotated Wireframes

Flow Diagram

We'd continue the sprint by mapping out high-level flows for each feature to ensure a smooth user journey from start to finish. These diagrams are iteratively refined based on feedback.

Sketching the UI

We'd then use the flow diagrams as a foundation to draft initial UI sketches. These sketches are reviewed and refined with stakeholders before moving to digital prototypes

Rough Sketching

Rapid prototyping allowed us to quickly test and iterate on our concepts, focusing on validating the design logic and user flow.

Detailed Sketching

Detailed sketches helped us explore and finalize the user journey, making necessary adjustments before creating digital prototypes.

4 Prototype

We'd begin transitioning to digital prototypes that bring our designs to life. This phase involved creating both mid-fidelity and high-fidelity prototypes to test and validate our concepts.

Pro tip: Figma file structure

*Maintaining clean and organized Figma files would aid in smooth collaboration and easy navigation for all stakeholders involved in the project.

Interactive Prototype

We'd leveraged this method to validate the low-fi designs to help determine the level of detail to incorporate with the goal of satisfying our team and stakeholders.

The interactive prototype is essential for validating our designs with users and stakeholders, incorporating feedback, and making necessary adjustments.

Annotated Wireframes

Detailed wireframes documented the functionality and interaction of each screen, providing clear guidance for the development team.

5 Testing

Usability testing would be required to validate the effectiveness and user-friendliness of the prototypes.

The objectives of testing the prototype:

- Gather insights on user interactions with the new features.
- Ensure alignment with user expectations and business goals.
- Validate the design against predefined criteria.
- Identify areas for improvement based on user feedback.

Participants were asked to complete tasks related to group payments, social gifting, and payment tracking to identify any issues or areas for improvement.

6 Conclusions

Expected Outcomes

- Simplified setup and management of group payments.
- Intuitive and engaging social gifting options.
- Clear and real-time tracking of transactions.

Keys to Success

- User feedback will be invaluable in refining and validating design concepts.
- Simple and intuitive design elements will greatly enhance the user experience.
- Continuous collaboration with development teams is essential for technical feasibility.

Developer Handoff

A comprehensive report and regular cross-functional team syncs will ensure smooth communication and implementation of the final designs.