

CASE STUDY

GREENBITS EXPRESS CHECKIN, 2020

SKILLS

- Qualitative research (customer interviews, contextual observation)
- UX design
- Usability testing

TOOLS

- Sketch
- InVision
- Figma

ARTIFACTS

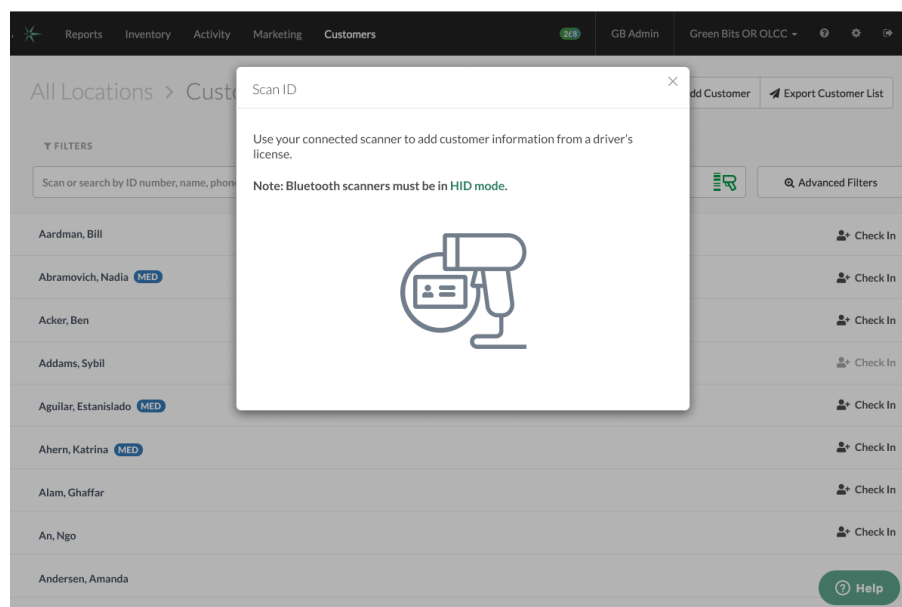
- Clickable prototype
- Point in time historical documentation
- Usability test hypotheses and results

PROBLEM

Greenbits was lagging behind competitors in giving customers the ability to quickly and easily validate shoppers' DOB through their drivers license. This was a major pain point with valuable customers, and while we were already in the beta process with a magstripe swipe solution, we heard that customers wanted more options.

SOLUTION

After identifying gaps in the current solution – only a handful of state IDs could be read on swipe, resistance to buying new hardware, unintuitive flow for adding scanned customer data to their customer database – we determined we would focus on a solution that would only take one to two sprints to implement a fully functional version.



One of the mockups I tested with our customers.

Based on those constraints, I used Sketch to create mockups, and InVision to make a clickable prototype for usability testing. I wrote a test plan, including hypotheses, and a script for remote testing. Then I recruited five test participants from customer who had contacted us regarding their need for a better shopper checkin solution and tested our hypotheses.

1 Likes customer list and queue being combined	2 Wants to make sure that patient information is still immediately available	2 Wants to make sure that he can still check patient info	1 Seemed ambivalent	1 Wants more information visible - has concerns about customer search results being visible when there are lots of people in the queue. Also wants to see more information here, like missing expiration and
2 Knows to click "Check In" to add customer to queue	2	2	1 Wants to see the customer record to confirm details, read notes, before adding to the queue	1 Wants to confirm customer details before checking in - does it look clickable? "I think so"
3 Sees scanner icon in search field as clickable	2	1 "It stands out because it's a different color than anything else on the page"	2 Definitely wants to use a wired USB scanner (cheaper), even though they don't want a lot of wires	2 Expects to be able to scan from anywhere in the BO, like magstripe works "I don't want to have to push a button to be able to scan, I just want to scan"
4 Expects to see CTA to scan		1 Wants more instructive text in the modal	2	0 Wants it to work like magstripe reader (scan from anywhere)
5 Expects existing customer to be checked in upon scan	2	2 Likes this, but also seems to want a way to encourage employees to validate - patient ID would show under name in MI, tho, which would address this concern	0 Wants it to open the customer record so he can review notes, etc, before checking them in. Also sees this as important if there are multiple queues for rec,	2

I used conditional formatting to make the usability test results easily understood by stakeholders and team members.

RESULT

Our team was able to release the new checkin feature to beta customers, when we were able to gather feedback. I learned that there was confusion about which barcode users should scan, the 1d or 2d version, and iterated quickly to change the instructional graphic to reduce user error. We were also able to address edge cases, such as caregiver purchasing – these changes were made in Figma, as the design team changed platforms. The feature is now live with these changes, and checkin has helped Greenbits retain valuable customers as well as appeal to new markets.