



| Case Study

Metadata	Metadata Input
Project Name	Funnela CRM Web App
Project Tagline	CRM application satisfy the needs of a broad group of users
Project Summary	Funnela is a Customer Relationship Management (CRM) Web App for small and midsize businesses. Operating in the Software as a Service model (SaaS). Funnela collects all customer information in one place, supporting the process of communication with the client and sales process. Team collaboration is easy with a seamless user interface. My role was to research, redesign existing apps from scratch and test all UIs related to the project. I collaborated with product specialists and engineering to launch this project.
Company/Client Name	Flux Sp. z o.o
Project Date or Time Frame	11/2015 - 03/2016
Your Major Tasks & Responsibilities	Develop the consistent UI/UX to showcase to investors
Platforms	Web App
Design Tools / UX Methods Used	Illustrator, Sketch, UXpin
Key Performance Metrics	Engagement Time, Reducing Pain Points,
Team Members & Collaborators	UI/UX Designer: Maria Melerowicz (me), Product Specialist: Bartosz Gumowski, Technical Lead: Wiktor Latanowicz,
Link to Final Project	http://funnela.pl/crm/

PROCESS

Design Stage	Deliverable	What I did:
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Define	Business Goal	I Offered users new consisten web apps and thanks that increase engagement and sell more premium accounts.
Define	Users Goal	I Produce designs with the confidence that users would enjoy and understand it.
Discovery	User Research	I did interviews in order to learn about a broad group of users. The largest target group was aged 40-55 and computer maintenance level was elementary. Every changes in the structure of existing webapp should be minimal to prevent confusion and keep increasing curve learning on the same level.
Discovery	Competitive research	The personal finance SaaS space is a crowded one, so I conducted research on the top 5 most relevant competitors.
Design	Wireframes of	I prefer starting out with low-fidelity wireframes to think through the structure of web pages. I used UXpin to iterate through the design process.
Design	Prototypes	Seeing is believing, and user flows finally “clicked” for the client after I had them play with my UXpin prototype. I also present hi-fidelity mockups made in Sketch to represent consistent design on all views.

LEARNINGS

- I learned about the needs of a mature target group of users and the process of creating a Web App. It was my first, really complex and individual commerce project. I have got 5 grey hairs more but also a lot of fun.
- During the user research process, I was genuinely surprised to see how many users working with app on “autopilot”, clicking on the highlighted buttons don't even read text on them.
- The project had many challenges, but the most difficult piece was completely redesign existing app with a big amount of active users to not disappoint or confuse them.
- While the whole project was a huge learning experience, I especially loved iterating on designs and testing those new designs on users. Development and brainstorming with the dev team was also very instructive.