

SubSmart

Subscription Management App

UX Case Study by Andrew Morriss

Project Details

Duration: 6 weeks

Project Type: School Capstone Project

Tools Used: Figma, Miro

My Role: User Research, Wire-frames, Hi-Fidelity Design, Prototypes, User Testing

Skills: User Interviews, Affinity Mapping, Personas, Sketching, Wireframing, Ideation, Visual Design, Prototyping, Usability Testing

Overview

Introduction

Subscription based services are becoming more and more common every year, from simple streaming platforms to software or mailed 'boxes'. Managing all of these subscriptions can be difficult and people can often forget that they're subscribed to some and end up paying for services they no longer need or use. Canceling subscriptions or knowing when some subscriptions renew can also be a struggle. Having a dashboard to manage all of these things in a single place is what the app hopes to accomplish. Through this research the goal is to find what features would be most beneficial to users and who the features will be targeted to.

Problem & Solution

With all these various types of subscriptions and recurring payments, it can be hard to manage finances and keep track of how much you're spending and on what. SubSmart is a service that allows users to manage all of their subscriptions and recurring payments all in one

easy to access place. Currently, SubSmart has a website but is looking to expand into the mobile market with an app. This app is designed to be easier to access and use to reach a wider audience of users. It will function as a dashboard for all of a user's subscriptions while allowing them to better understand what they're spending money on and how to better manage their finances.

My Designer Role

My role in this project was to take the existing concept and features of the website and create a mobile app with all of the same features while also expanding on the apps features and adding new things to reach a wider audience. I was initially tasked with taking some existing research and expanding upon it and conducting user interviews based on the target demographic established by the company through their websites use. My goal was to create an app that is easy to use for any user with enough customizability and features to give more dedicated users additional ways to use the app. The app would provide a basic overview of subscriptions and recurring payments while also allowing users to add custom subscriptions and other notifications for bills or free trials. Users would also be able to see detailed information on their subscriptions, what they spend the most on and how to organize their subscriptions and manage the payments better.

Preparation

Company Style

Before beginning the main phases of the project, I put together a style guide to help speed up the design process. The color palette was chosen from a single color, orange, and then expanded upon by changing the shading and saturation of the base color. Typography was also an important part of the style guide. I chose two different fonts for normal body text and title text, then adjusted their size and spacing to fit various purposes across the app. With these two main design features, I put together sample UI elements that showcased the color and typography which would be used in future designs of the app.

[View Full Style Guide](#)

Competitor Analysis

To get a better understanding of common features and what users may want out of the app, I looked to analyze possible competitors and industry leaders in financial management apps. For competitors, I looked at TrackMySubs, Trim, and Rocket Money. I went through the process of using the apps and looking for features that were similar to what the app was planned to have. After going through each of these competitors I compiled a list of likes/dislikes and what actions were taken to accomplish the similar goals across the three apps. Some of my main takeaways were allowing users to create custom subscription/payment notifications and providing clear information through visuals such as graphs.

Allowing users to link a bank account will populate subscriptions automatically and help them manage existing and future ones, but this auto population may not catch every recurring payment or do it correctly. Allowing users to create their own subscriptions to keep track of on top of this auto population will give users more agency in what they want to keep track of while also keeping this basic for new users to quickly understand. Visual aids are also a good way to quickly display information that the user can instantly understand. This can help them easily understand things such as how much they're spending, what they're spending it on, and how it compares to other payments.

[View Full Competitor Analysis](#)

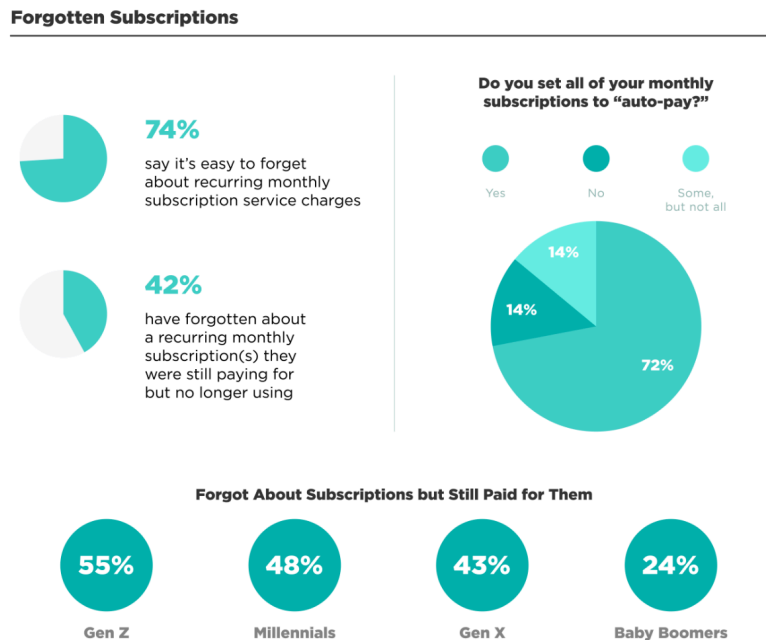
Phase 1 - Discovery

Secondary Research

Subscription based services are becoming more and more common every year, from simple streaming platforms to software or mailed 'boxes'. Managing all of these subscriptions can be difficult and people can often forget that they're subscribed to some and end up paying for services they no longer need or use. Canceling subscriptions or knowing when some subscriptions renew can also be a struggle. Having a dashboard to manage all of these things in a single place is what the app hopes to accomplish. Through this research the goal is to find what features would be most beneficial to users and who the features will be targeted to.

With a base demographic already established before beginning this project, I focused my

research on users subscription habits, types of subscriptions, and how the app could reach a larger demographic. Through this research I discovered a study by *C+R Research* that discovered that 74% of users believe it's easy to forget about subscriptions, with 42% of those users often forgetting about subscriptions and continue to pay for subscriptions they either no longer need or use.



[Image Source](#)

I also looked into the various types of subscriptions, from streaming services to product boxes. I wanted to see if there was a correlation between the type of subscription and how easy it is to forget. While I could not find any information on this subject, it gave me good ideas on how some users may use this app outside of standard subscription services. This is where the idea to also allow users to add notifications for things such as bills or insurance payments.

[View Full Project Research](#)

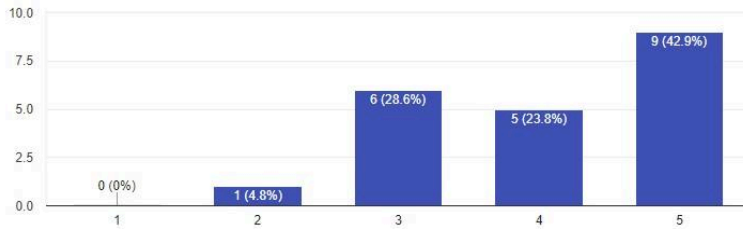
User Interviews

While conducting research, I sent out a survey to roughly thirty people, with twenty-one providing responses. Questions on the survey related to demographics such as gender and age, while gathering information on a respondents values pertaining to what the app would provide. The goal of this survey would be to identify trends in user responses and how they compared to my research, then I would interview a few of these users to gain better insights into their responses and their overall thoughts on the app and its uses.

How important is finance management in your daily life?

Copy

21 responses

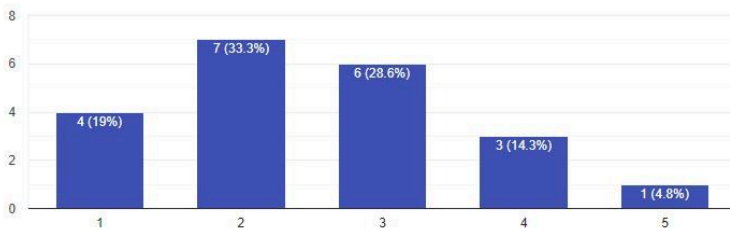


I wanted to initially find how much users valued finance management, with follow up questions asking how well the user believes they accomplish this.

How often have you forgotten to cancel a subscription for whatever reason

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21 responses

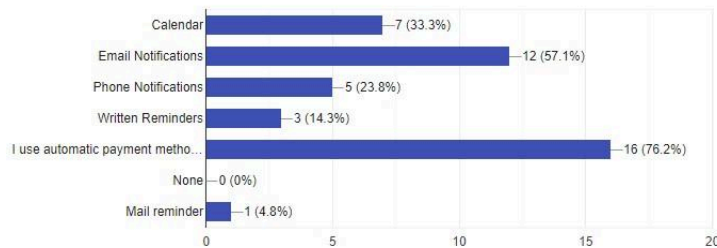


I then questioned users on how often they forget subscriptions and what methods, if any, they use to help them remember these recurring payments.

What methods help you manage your subscriptions or recurring payments?

Copy

21 responses



After this survey, I set up interviews with a few of the participants to gather more insight on the questions in the survey. Most users that were interviewed highly valued finance management, but they did not often keep up with their goals or did not directly manage finances themselves. A few of the users believed that one of the main things that causes them to forget subscriptions or pay for ones they don't need is when it starts as a free trial. This influenced one of the main features of the app which is providing more methods of notifications and allowing users to add free trials to manage and be notified of before the trial ends.

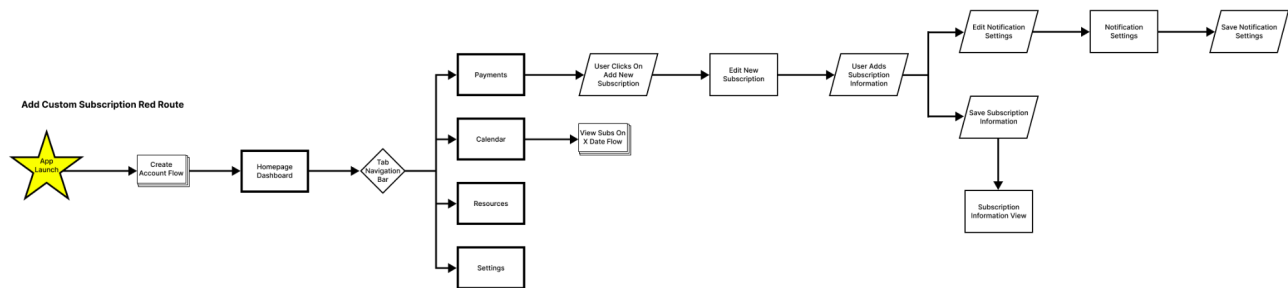
Affinity Mapping

After conducting all the interviews and finishing secondary research, I began putting common themes and talking points from users into an affinity map. I wanted to visualize what were the most common issues and how various features could be used to alleviate these issues.

Phase 2 - Design

User Flow

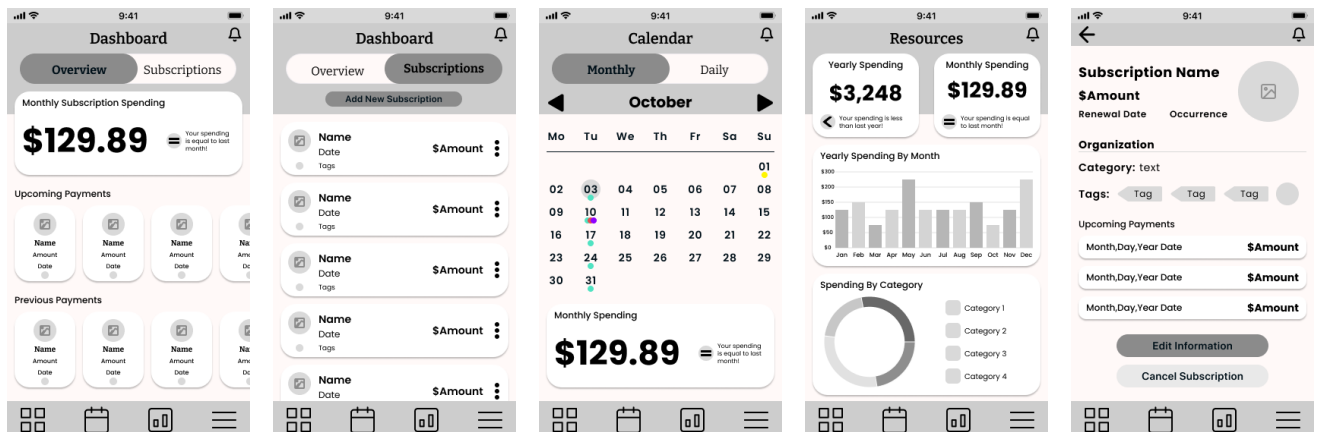
Before designing the UI of the app, I created User Flows that would go through the three 'Red Routes' of the app. These were designed to show the various screens I would need to build to create a functional prototype. The three main 'Red Routes' chosen were as follows: Sign In/Create an account and link a bank account, Add a custom subscription listing, Access the calendar and view daily subscriptions. Below is an example of the add custom subscription red route.



[View Full User Flow](#)

Wireframe Design

Knowing the main screens I would need, I began designing low fidelity wireframes to get a better idea of how things would be laid out. While these would be low fidelity, I still needed them to have enough detail for users to test them in a screen walkthrough for feedback. Some examples of the screens are displayed below with all screens being viewable [here](#).



Phase 3 - Validate

Low-Fidelity Usability Testing

After creating all the necessary wireframes and putting them into a walk-through prototype, I reached out to five users who responded to the initial research survey to schedule usability testing interviews with them.

Feedback:

Most of the feedback revolved around ease of use and adding features to improve readability and usability. For example, users suggested that having filter options on the Payments section would help users sort through all of their subscriptions and allow them to organize them better. Some other complaints were around the calendar and what parts of it could be interacted with. In this version of the prototype, individual days were not clickable to view the subscriptions on those specific days which was something I had already planned on fixing. Other small complaints were around a user's understanding of certain icons or some buttons being too small to interact with.

Solutions:

I added filter options to better organize subscriptions on the payments page, as well as separating the payments page and main dashboard. I also made small changes to the calendar layout and changed the initial screen to show subscriptions for the current day, rather than having the monthly overview viewed first.

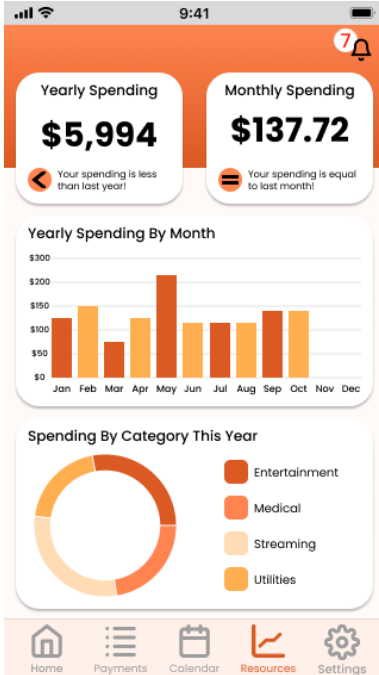
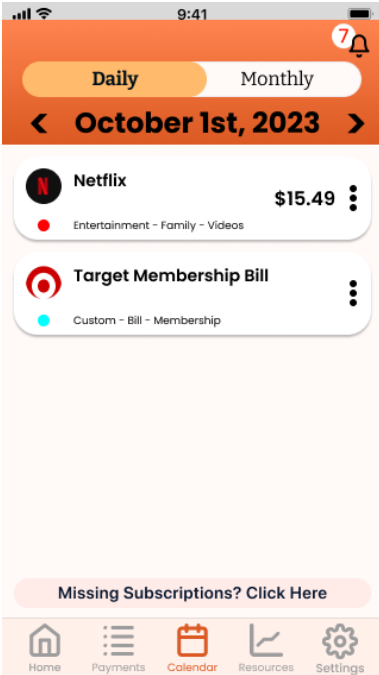
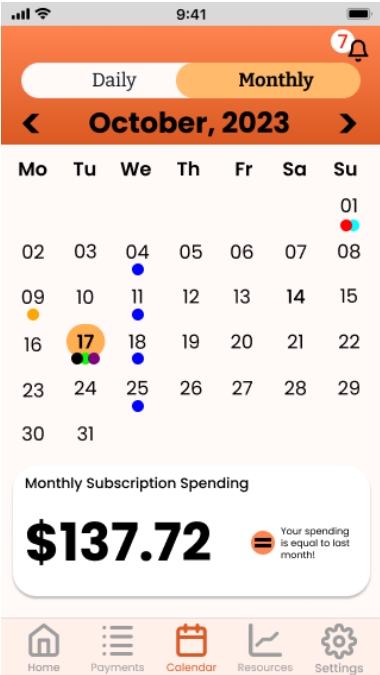
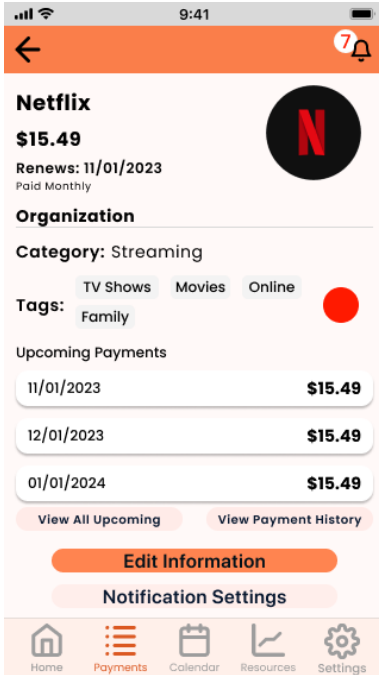
[View Full Usability Testing Findings](#)

Phase 4 - Design

High-Fidelity Design

Taking the feedback from the low fidelity usability test and the style guide created beforehand, I designed high-fidelity mockups of all the screens needed. This included all the main screens in the red routes and any sub-screens or popup menus. These screens were put

together into a Figma prototype with various interactions that would be used for usability testing. Some examples of the first versions of the high-fidelity screens can be seen below:



[View All High Fidelity Screens](#)
[View Full Version 1 Prototype](#)

Phase 5 - Validate

Usability Testing

With the first high fidelity prototype completed, I contacted five users to run usability tests on them. This test would be more in depth than the previous low fidelity prototype test. Users would be able to interact with more things in the design and they would be given more clear directions on what to do. Users would be directed to navigate through the app with three tasks. These tasks were as follows: create a new account and link a bank account, add a custom subscription, and view the subscriptions for a specific date. Once all of the interviews were finished, I put together all the notes taken to get the main points of feedback that should be addressed.

Feedback:

One of the most consistent pieces of feedback was around button/text sizing. Many users thought some buttons were too small and that some text could be too hard to read when viewed on a phone. This was especially apparent on the individual cable listings and the calendar view. Clicking on specific days when viewing the calendar could be difficult and the layout of the calendar was something some users did not like in general. Some users also had issues with the “tags” system for the subscriptions. These tags were often confusing, with many of them overlapping with the categories each subscription was in. Another source of feedback was around the resources page. Some users felt that a lot of the information was redundant when it’s visible on other parts of the app and other parts of the page did not provide enough information to be relevant or useful.

Solutions:

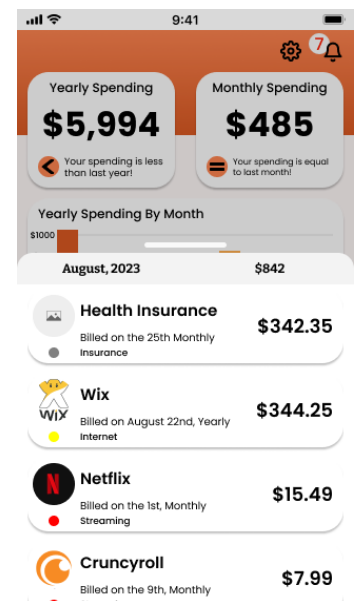
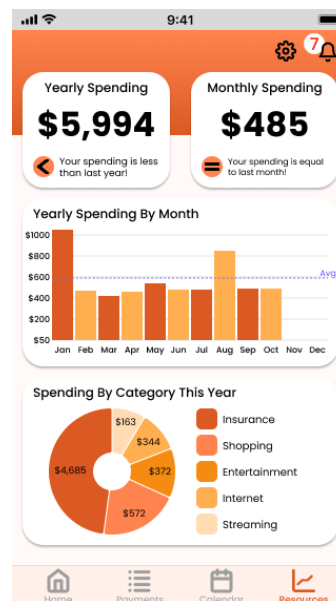
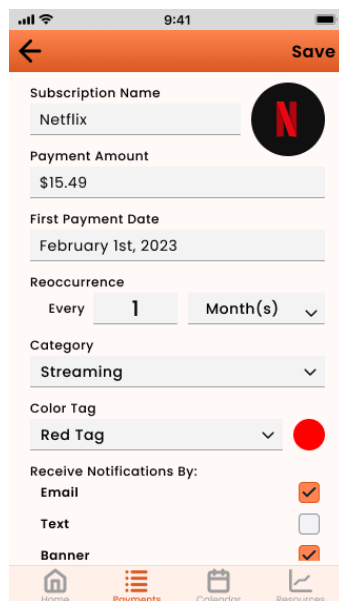
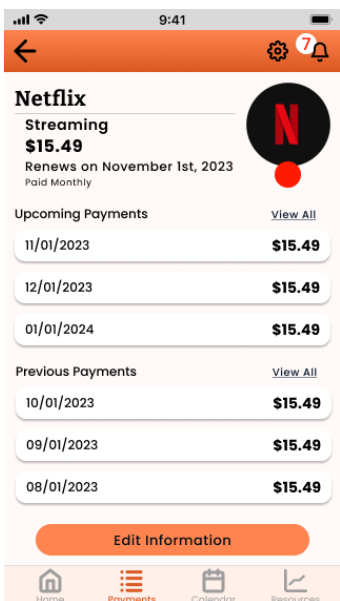
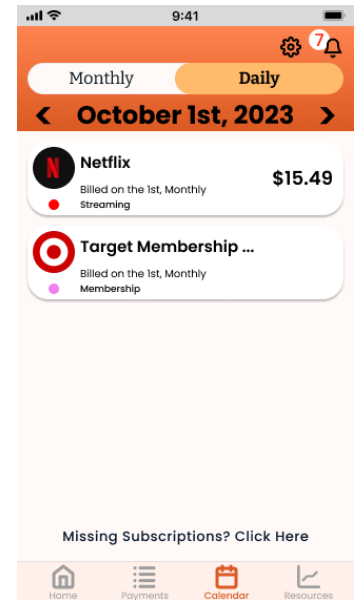
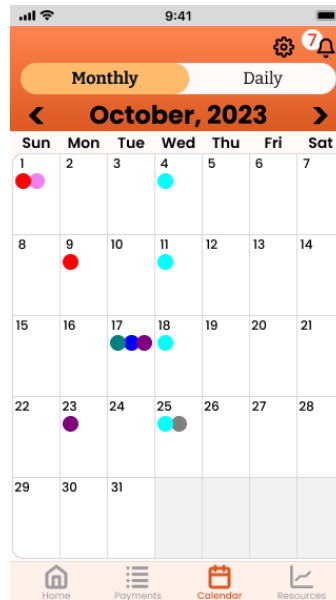
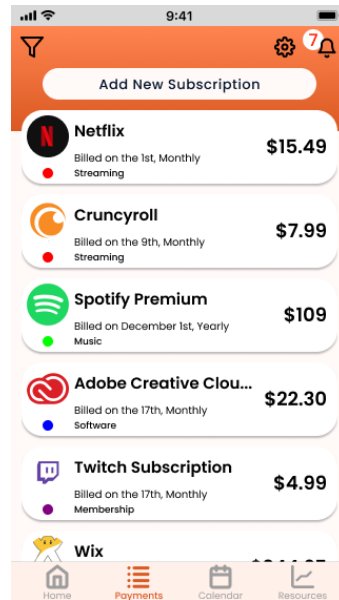
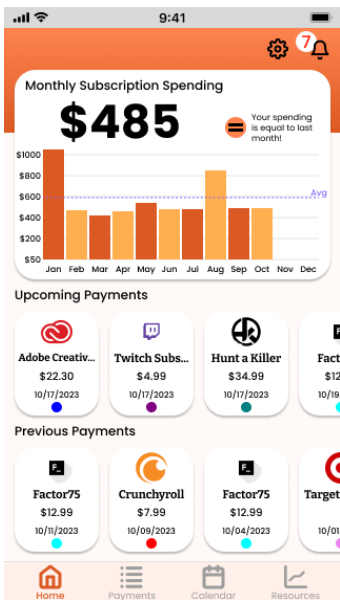
To start, I went through and adjusted button/text sizing to be more consistent and to fit industry standards. I then changed the design of the calendar to better display each day and to allow for each day to be easier to click on. Along with this I tidied up the subscription information view pages by removing the tags system and improving the layout and amount of information displayed. I also spent time modifying the designs of the resources page to better display accurate information, while giving users more ability to go into details on what's displayed. I did this by allowing users to interact with individual parts of the graphs to view subscriptions and more detailed information on spending through a popup.

[View Full Usability Testing Findings](#)

Phase 6 - Iterate

High-Fidelity Design

With all of the feedback from the previous phase of usability testing, I changed and redesigned a lot of the screens to incorporate this feedback along with some other smaller changes. Some examples of the redesigned screens can be seen below:



[View All High Fidelity Screens](#)

[View Full Version 2 Prototype](#)

Conclusion

Future Iterations

For future iterations of the app I would continue to improve the layout of the UI and the clarity of some buttons. I would also work on making layouts more consistent across various pages. For example, the Add New Subscription button appears at the top of the screen but similar buttons on following screens are at the bottom. These minor inconsistencies can make it harder to use the app in some cases and make the app seem less polished or complete. Improving features such as the resources page by adding more visual aid options and fully building out every interaction in the settings page would improve app usability as well.

Reflection

I learned a lot from this project, building the app from an existing product with existing research behind it made things easier to start. I think this also can reflect more real world scenarios where I may be working on a project with an already existing product or jumping into a project part way through it. Breaking the project down into phases of work also made it easier to manage my time effectively and to have set “sprints” for when things should be done also reflects a real work environment more. I continued to improve at using apps such as Figma which will help speed up work and make things more comfortable to use. I also continued to learn more about the design process and to get a better feeling of working with deadlines, even if those deadlines were self imposed. Overall, I gained valuable experience that I hope to continue to improve with for all future projects I work on.