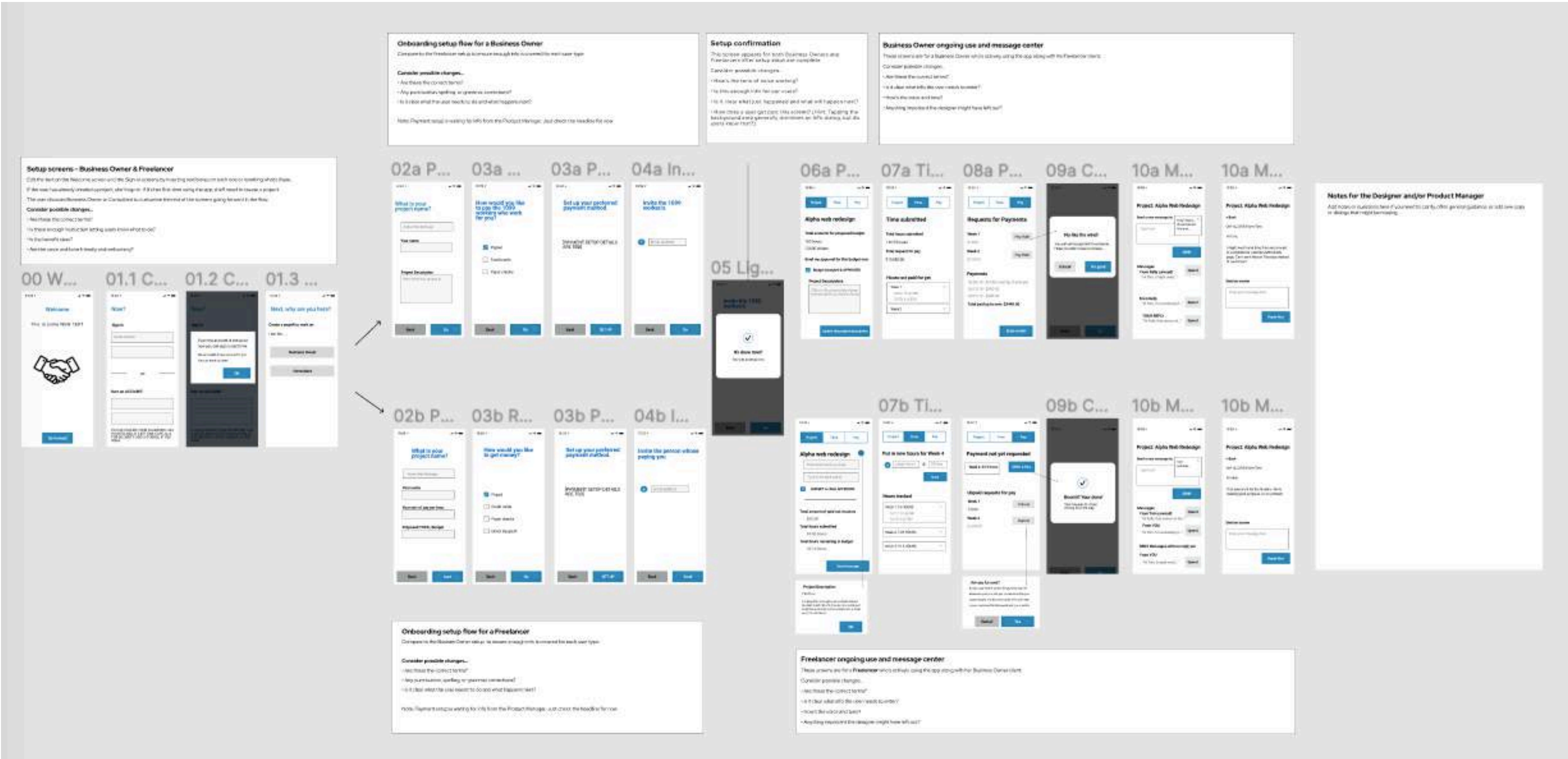
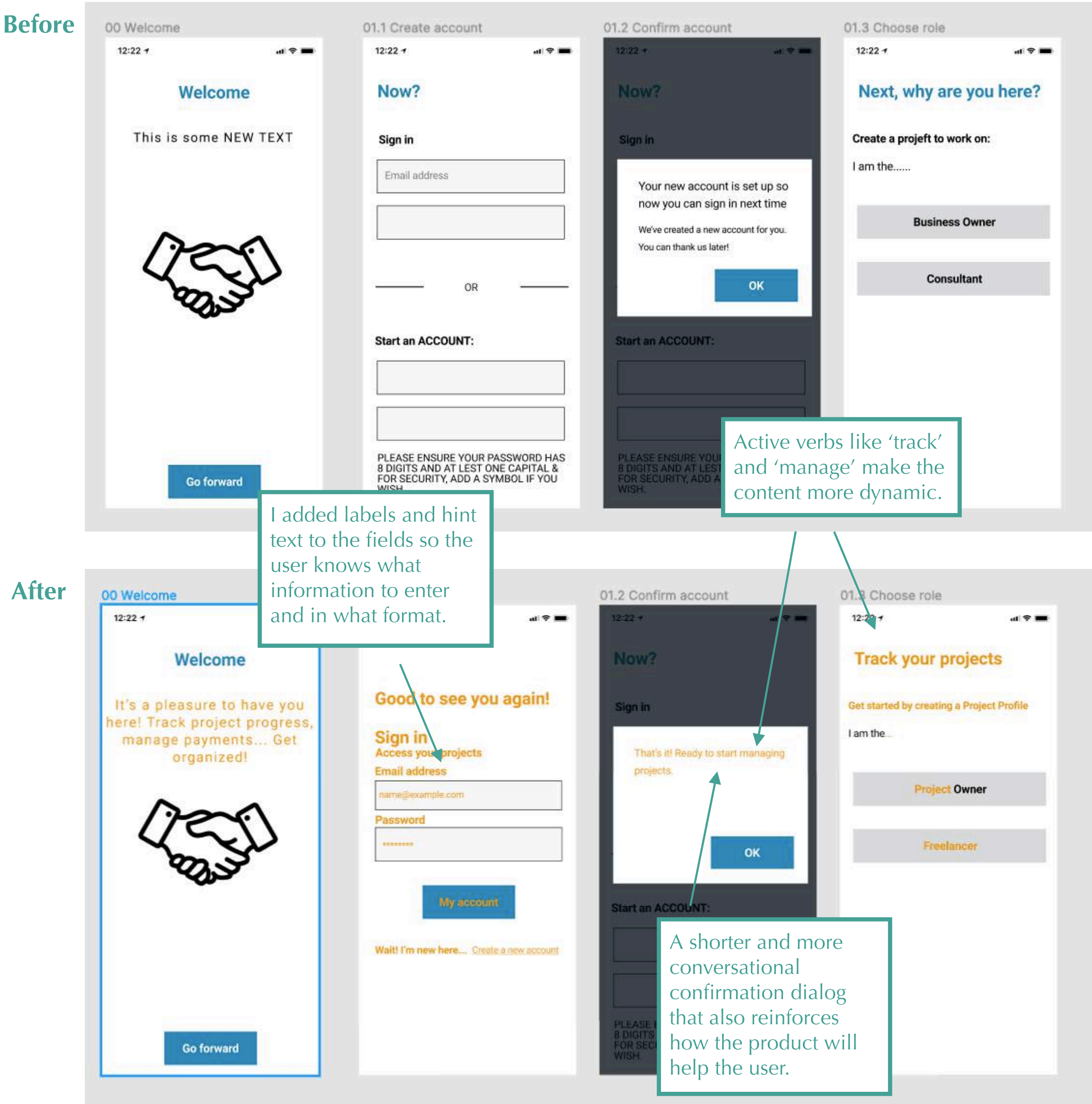
Handshake prototype screens

In these pages you'll find before and after screenshots of the prototype screens of the fictional Handshake app. These show the edits I made to the content design, changing the existing text to create a smooth, user-centred experience. My challenge was to put myself in the user's shoes and answer the questions they might have at each interaction. The resulting text is the second iteration, improved following comments from a senior writer. As well as making changes to the copy, I included recommendations (see final page) to other people in the design process where I noticed a possible issue for the team to address.



Welcome screens

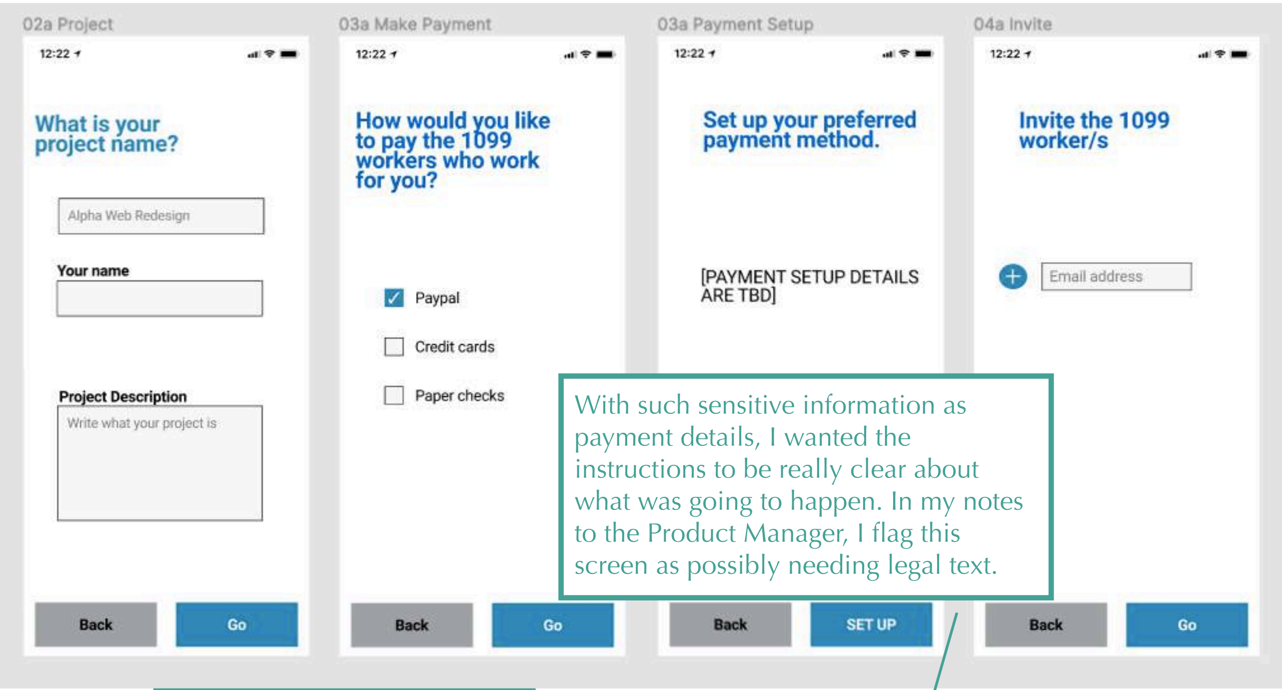
These initial screens introduce the user to the product, but the original content didn't make the desired impression. So I took the opportunity to add brand personality using the product name as a starting point, with friendly and conversational phrases that you might use when giving a warm handshake to a business acquaintance. Structurally, I suggested a separate screen for new users to sign up to keep the function clear and not confuse the user (see new screen on page 9). The final screen introduces terms that will be used throughout the product and the consistent content pattern for the title as outlined in the style guide, instilling confidence that the product will be useful and trustworthy.



Project set-up: business owner

It wasn't clear to the user what they were expected to do nor what would happen when they did it. So I added microcopy and field labels, and edited hint text and button text to reassure the user, make the process transparent, and help them avoid errors. I make recommendations in my notes for the research team to identify possible payment methods used and how they're referred to.

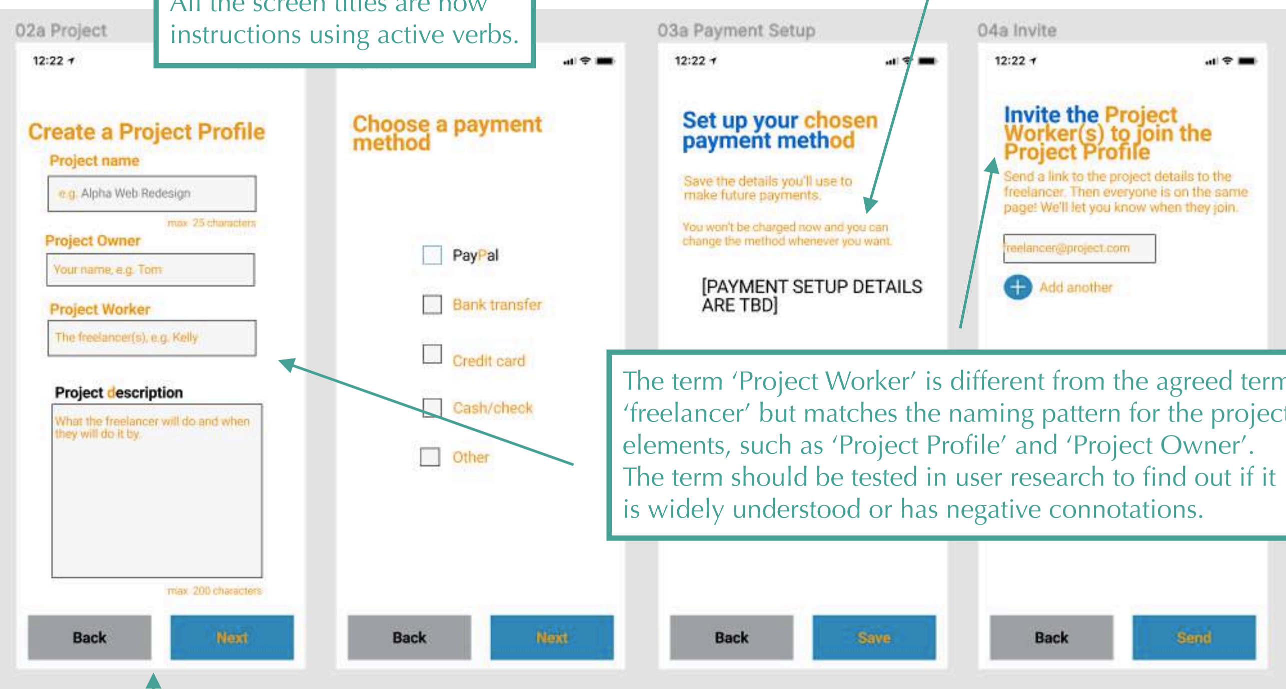
Before



With such sensitive information as payment details, I wanted the instructions to be really clear about what was going to happen. In my notes to the Product Manager, I flag this screen as possibly needing legal text.

After

All the screen titles are now instructions using active verbs.

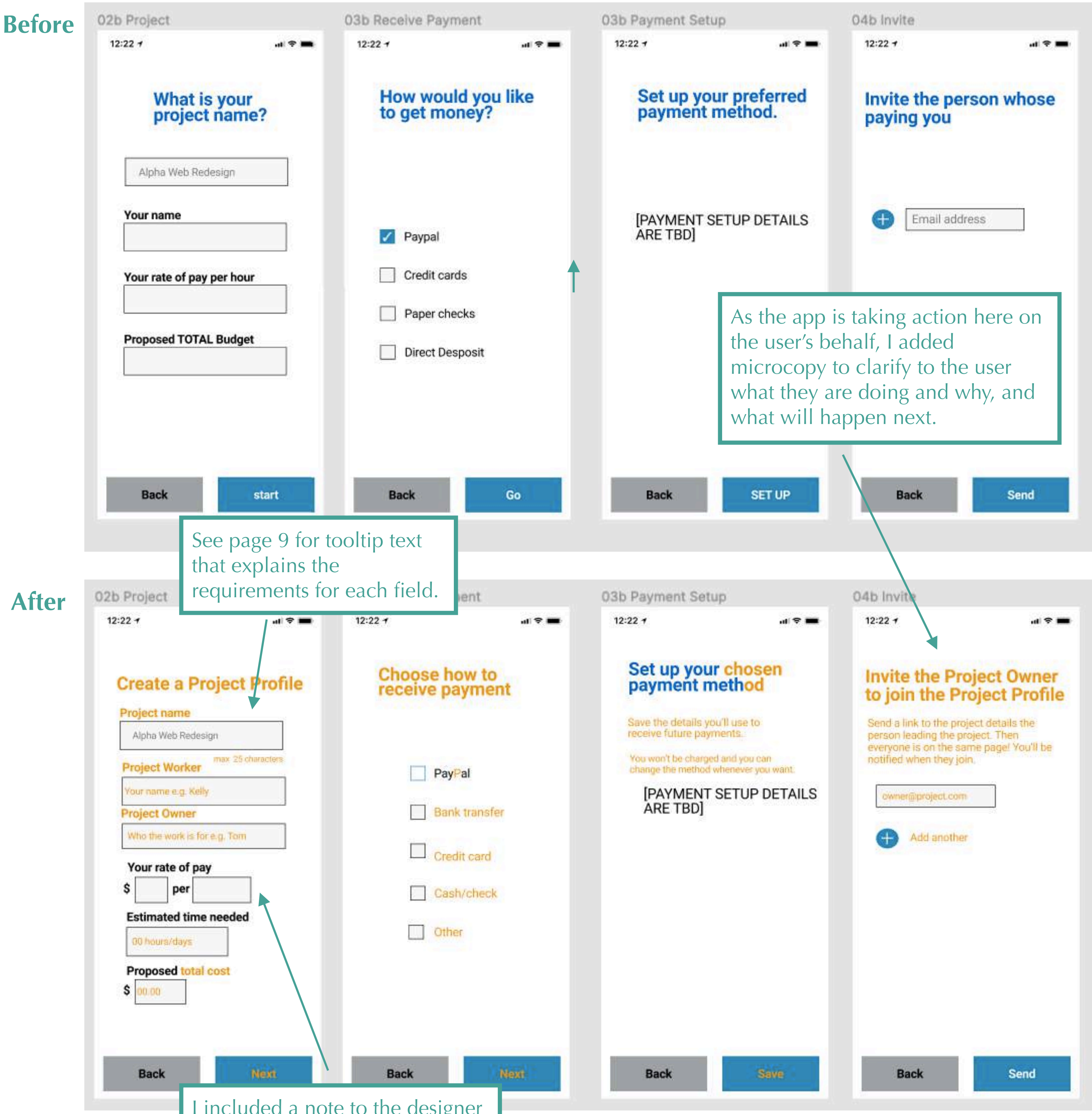


The term 'Project Worker' is different from the agreed term 'freelancer' but matches the naming pattern for the project elements, such as 'Project Profile' and 'Project Owner'. The term should be tested in user research to find out if it is widely understood or has negative connotations.

This screen gathers details that will be used to make the product more useful to the user. See page 9 for tooltip text that explains the requirements for each field.

Project set-up: freelancer

The screens for the freelancer mirror those for the business owner, except for the 'Create a Project Profile' screen. Where the business owner (as the party commissioning the work) includes details on what the project is, the freelancer inputs their rate, the estimated time for the project, and so the proposed total budget. These differences reflect the different contexts and concerns for each user type.



As the app is taking action here on the user's behalf, I added microcopy to clarify to the user what they are doing and why, and what will happen next.

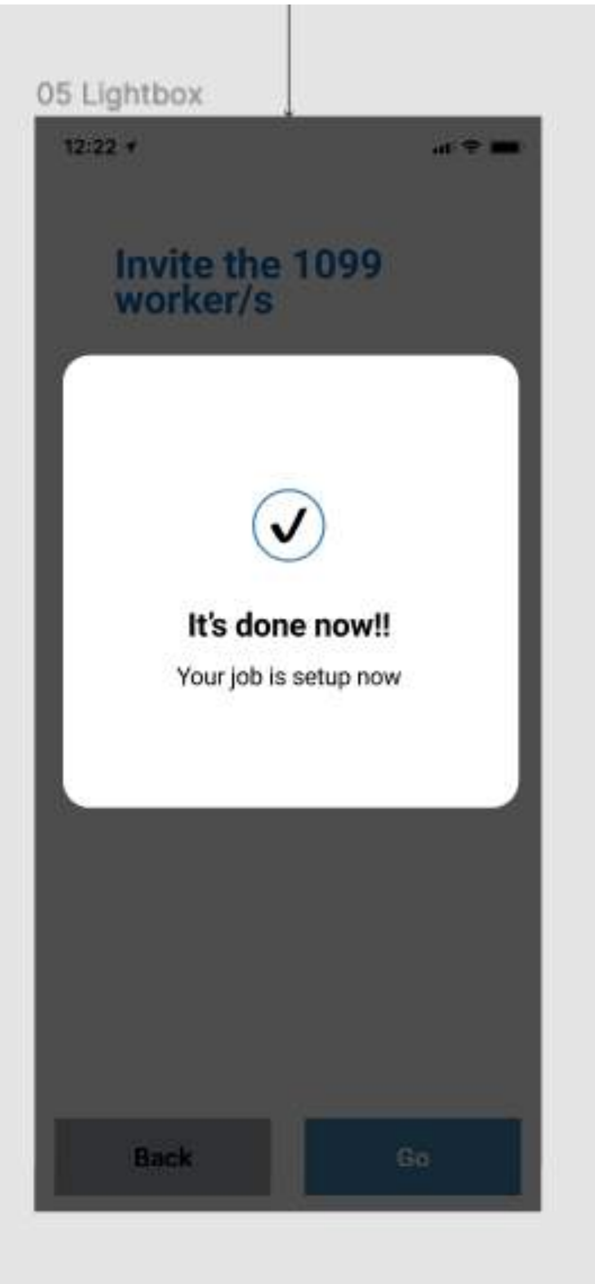
See page 9 for tooltip text that explains the requirements for each field.

I included a note to the designer suggesting a drop-down menu with options of billable elements (such as hour, day, project), and a note for user testing to find out what these might be.

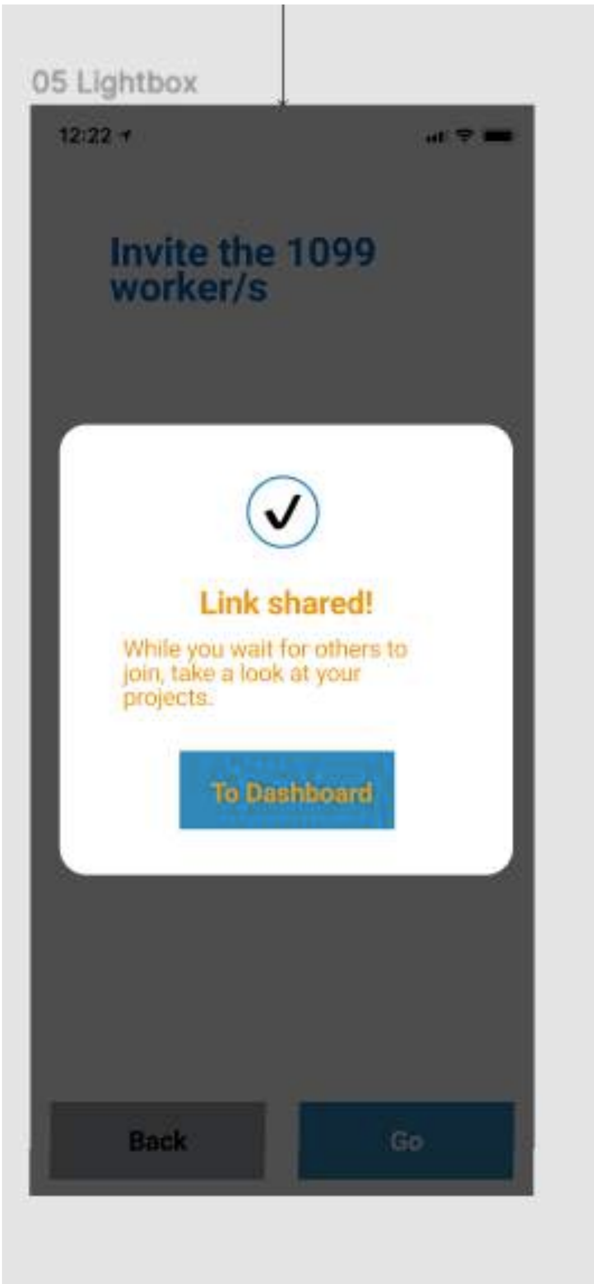
Confirmation screen

The original confirmation screen has a few problems: the heading is unclear (what is it that's been done?) and the double exclamation mark is unnecessary (it doesn't communicate in the authoritative voice we want to put across). The explanation text adds a bit more detail but is incorrect – this screen confirms sending a link to others, not the set up. My edits add a simple explanation of what just happened and, by adding a button, clear instruction on how to move on. I set expectations by providing the next step, and use the opportunity to highlight the app's functionality. In a note to the designer, I suggest adding a close method for the dialog (such as an X in the top right corner).

Before



After



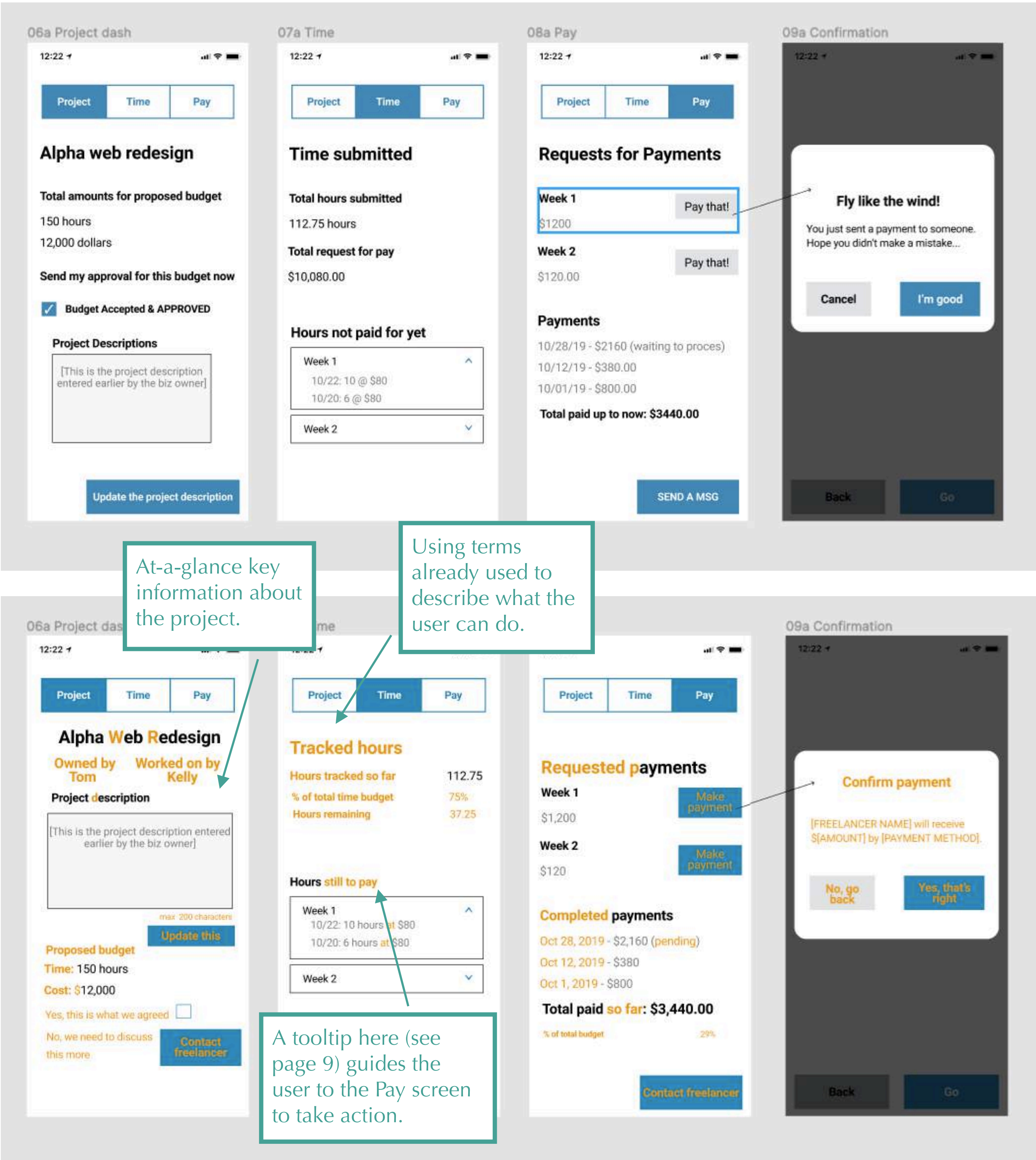
Ongoing use: business owner

These screens contain a lot of information, so it's crucial that the design is clean and the text doesn't confuse or distract. As the user may have questions about the budget approval process, I've added instruction text as tooltips (see page 9). This keeps the screens free from clutter yet still guides the user.

I designed the payment confirmation screen to prevent the user from making a payment in error. I've made the text very plain and quite sparse, with the key information and nothing else, so it can be understood quickly. This way, the user is less likely to make a mistake.

Before

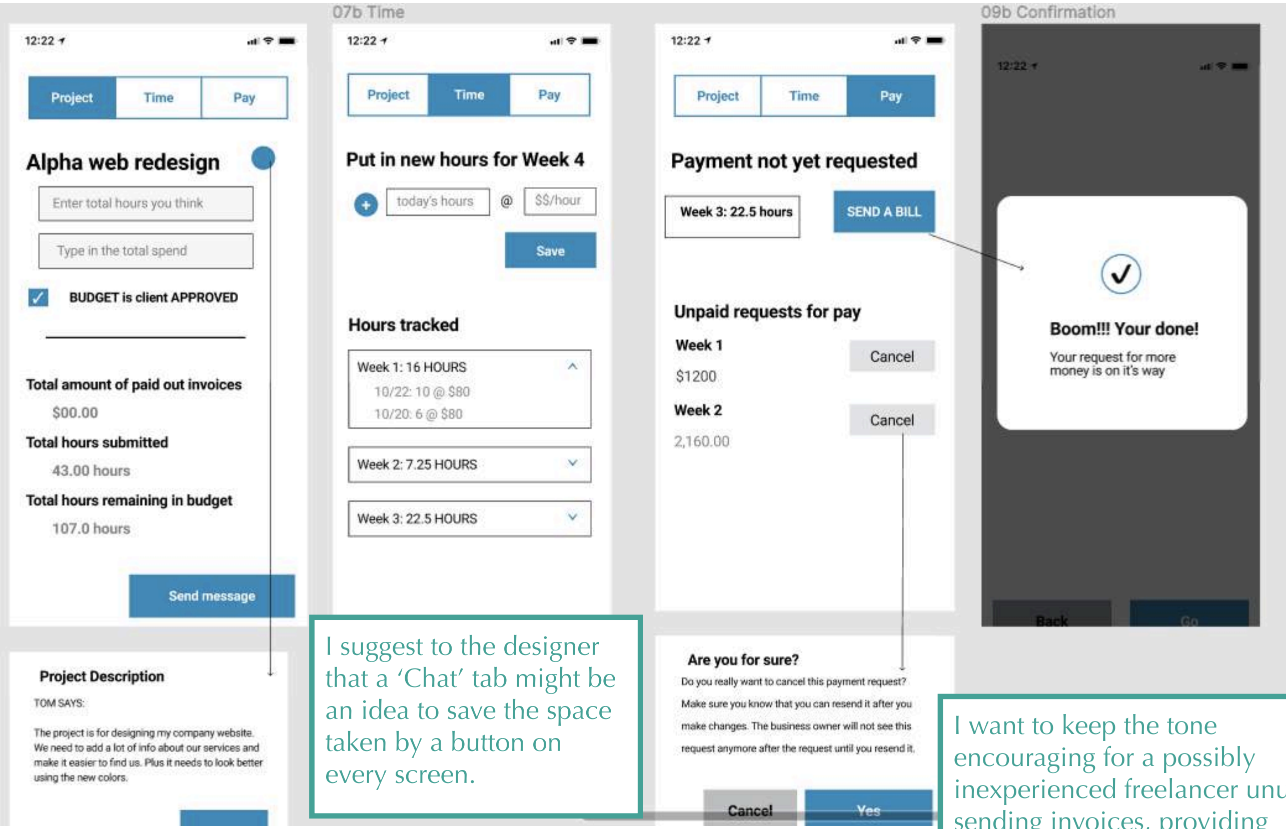
After



Ongoing use: freelancer

These screens mirror those for the business owner, but from the freelancer's perspective. So the actions and the information to input are quite different, although the tone, use of terminology, and workflow remain the same. The biggest difference is asking for payment instead of making payment, which feels a bit less risky for the user. Still, I am careful to make the text in the confirmation screen clear.

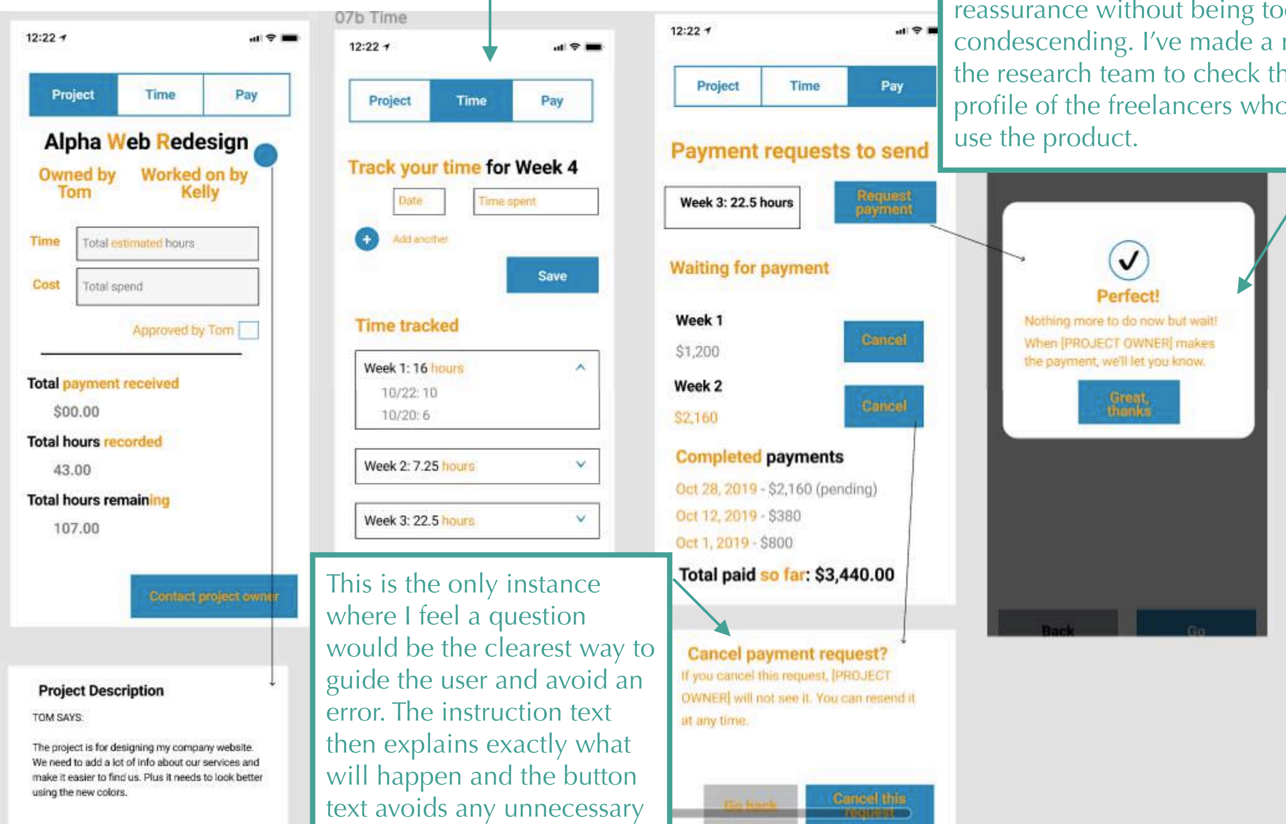
Before



I suggest to the designer that a 'Chat' tab might be an idea to save the space taken by a button on every screen.

I want to keep the tone encouraging for a possibly inexperienced freelancer unused to sending invoices, providing reassurance without being too condescending. I've made a note to the research team to check the profile of the freelancers who will use the product.

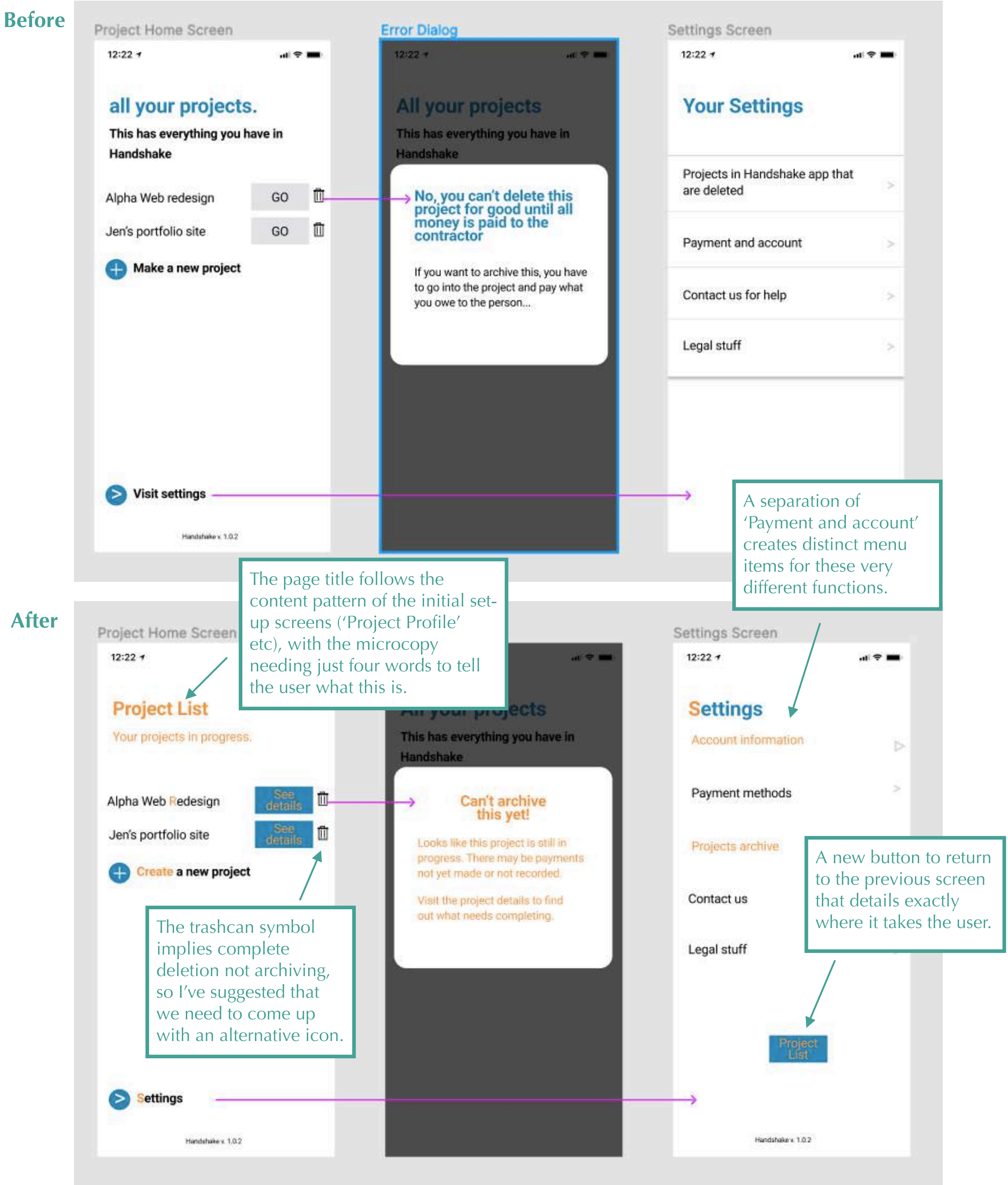
After



This is the only instance where I feel a question would be the clearest way to guide the user and avoid an error. The instruction text then explains exactly what will happen and the button text avoids any unnecessary cognitive load by making the actions explicit.

Error dialogue

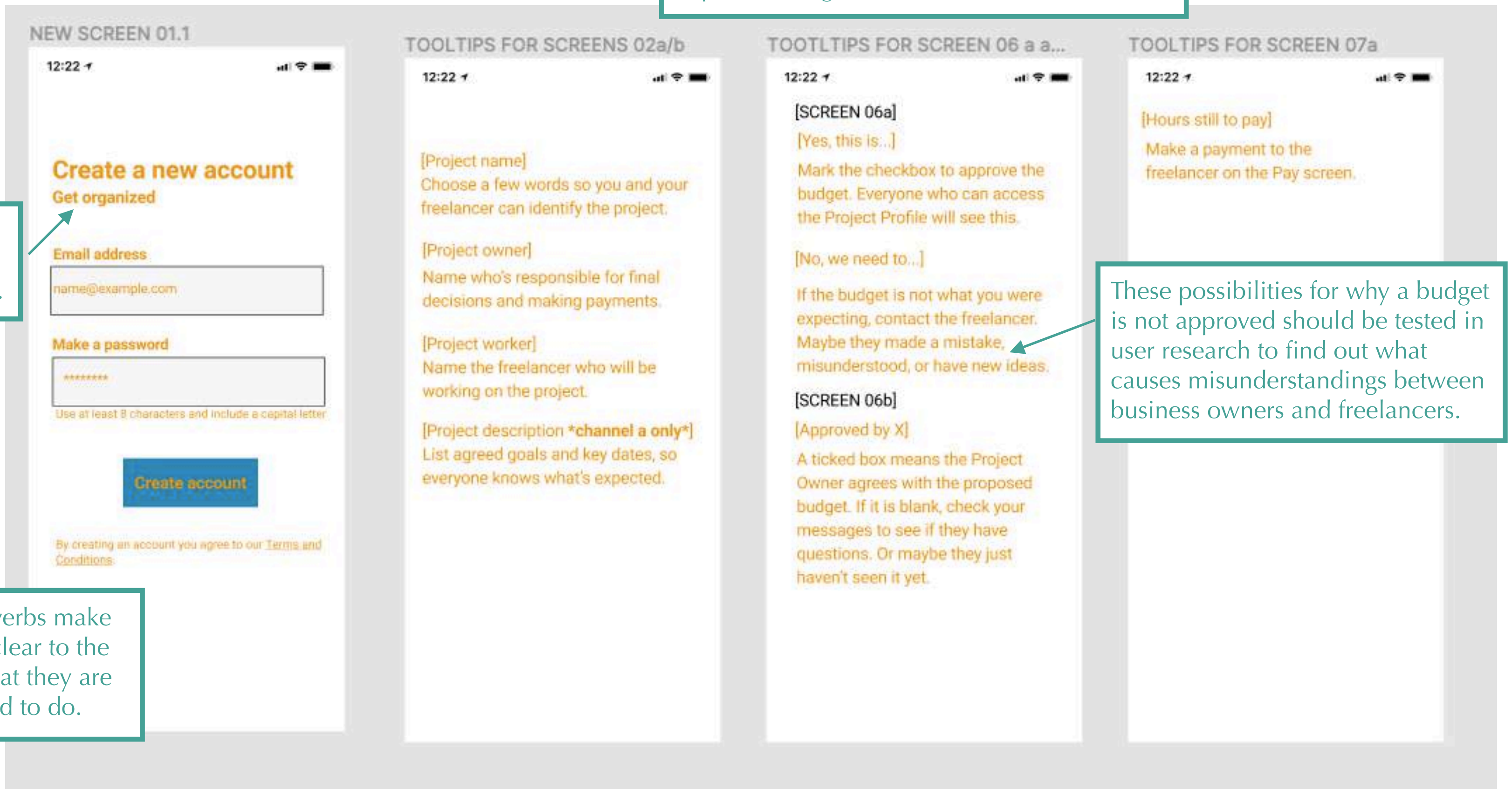
Aside from small changes to follow content patterns and style guidelines, the key screen to edit here is the error dialogue. I've ensured that the text explains what the error is and why it might have happened, and then guides the user to take action to solve the problem. In my notes to the designer, I point out that the dialog box needs a close method, perhaps an X in the top right corner.



Suggested new content

A new screen for a new user, noted in the Welcome section, and Tooltip text for setting up the Project Profile, the Budget Approval process, and to connect the information on time spent to the ability to pay.

Following the content pattern of verbs in the imperative to give clear instructions.



Reinforcing the value of the product's functions.

These possibilities for why a budget is not approved should be tested in user research to find out what causes misunderstandings between business owners and freelancers.

Active verbs make it very clear to the user what they are expected to do.

Notes

Notes for the Designer and/or Product Manager

01.1

Existing and new users on the same screen is confusing. Create a new screen for account creation (see next page), to include Legal text (check with Legal team for wording) and link to T&C.

01.2 Confirm account

Appears after the new Create account screen. Existing user Sign in screen goes direct to Project dash 06 a/b. We need to revisit the flow for new and returning users, to include ability to manage several projects at once, and add a new project profile from the Dashboard.

02a/b

See new Tooltips (Page 5) for this screen, for each field.

02b

Add a drop down box after 'per' in Your rate of pay, to list the options determined in User research (e.g. 'hour', 'day', 'page')

03a/b

Make all check boxes blank.

See notes for Research Check payment method terminology and what is used.

Legal text needed? Details are secure and payment is not taken now.

06a

Budget approval process – see new Tooltips (page 5)

Is the 'project description' box imported from 2a editable?

07a

Add new fields with more information, e.g. hours recorded as a % of those agreed, number of hours remaining. Is it possible to show this graphically?

New Tooltip (see Page 5) guiding user to make payments that are outstanding.

07b

See notes to Research To find out how freelancers charge – by hour, by day, by deliverable?

Can this screen change depending on the rate information given in screen 02b?

For the 'date' field, add a calendar to select from.

08b

Add 'Completed payments' information – copy from 08a.

General – screens 6-8a/b

Add Chat tab to Project Profile screens.

?? What happens if the freelancer and the business owner choose different payment methods?

If Research finds that work is charged in other ways than per hour, we need to have a fresh look at the flow for both users.

Chat screens 10a/b

Is it possible to redesign these so they are more graphical and the layout resembles chat applications that users are already familiar with?

Notes to Research

Find out from freelancers:

- How do they charge for their work, in what increments (per hour, day, page...)? (screens 02b and 07b)
- Do they need to know the budget has been approved by the project owner? (screen 06b)
- How long have they been workng freelance? (Tone for screen 09b)

Terminology to check with all users:

- Is it clear what a 'Project Profile' might contain?
- When charging for work or paying for work done, it it 'invoicing', 'billing', or 'requesting payment'?
- What payment methods are used and what do users call them?

Possible Error messages

- Too many characters for field (screens 2a/b): "Too many characters. Make it shorter."
- Wrong digits entered for payment method (screen 03): to be written when required fields are known
- Something other than an email address entered (screen 04a/b): "This isn't an email address"
- Something other than numbers entered in Cost and Time fields (screen 06b): "Enter only numbers"
- Something other than numbers entered in Time spent field (screen 07b): Enter only numbers"