Explanation of components
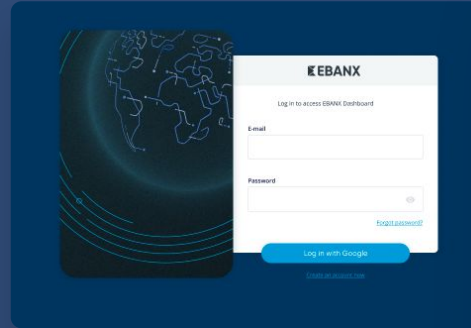
For unique users of the environment, we present the Login with illustrations and different colors.
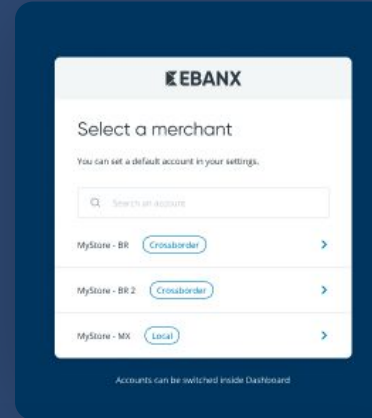
➡️

When changing environments, the Toast component appears informing the user of the switch.

➡️

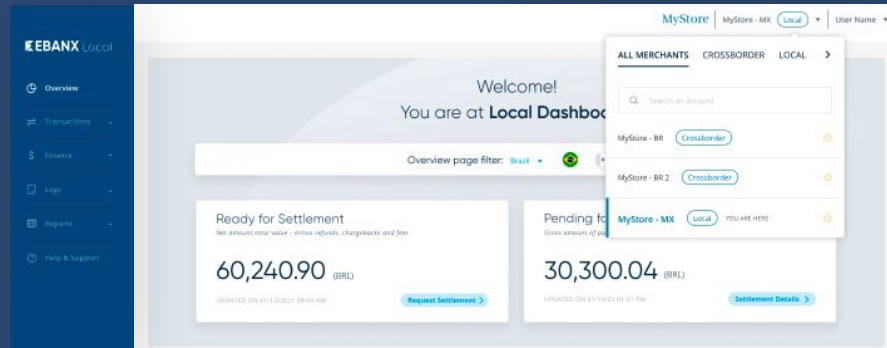The Sidebar has a different blue shade and EBANX logo according to the environment with which the user is interacting.

➡️

Switched to **My Store - BR** (Crossborder)

⬅️

The selection of merchants after login presents Tags informing the environments to which the accounts are linked.
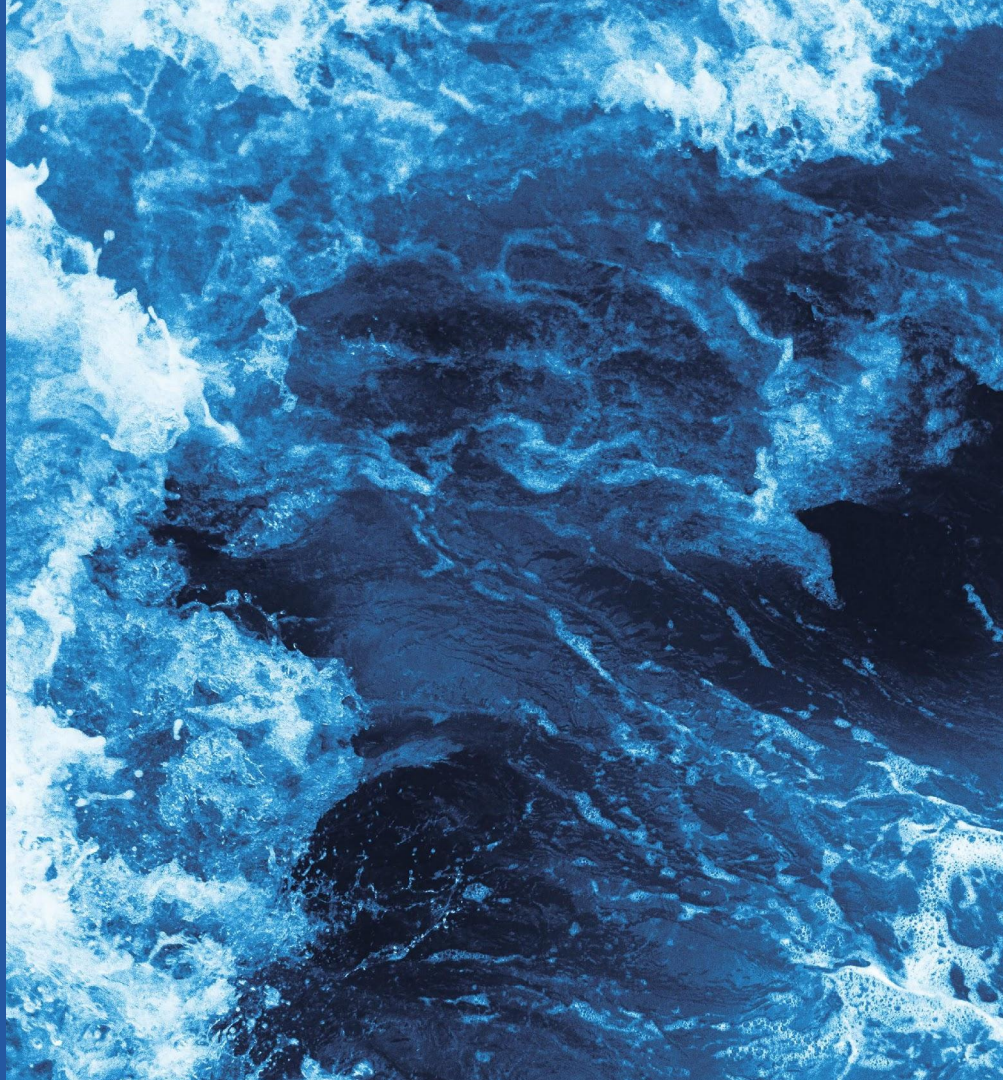
⬅️

After Login, within the Dashboard it is possible to change the environment, the Tags are identified at this time too.
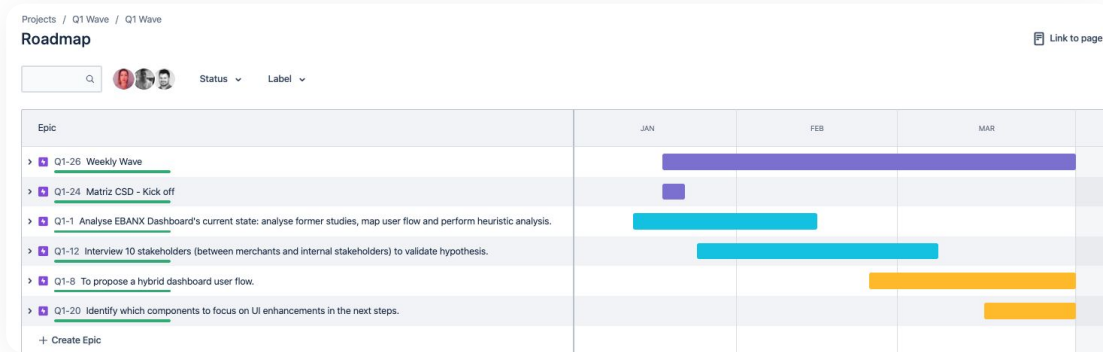
Hybrid Dashboard UX Concept and validate SSO need

SURFED!

Context: Aligned with EBANX strategy to offer unified solutions for global merchants that have local and XB operations all over LATAM, we are aiming for a hybrid dashboard.

Objective: Propose a new dashboard experience flow through a merchant-centric and, internal stakeholders point of view.

Projects / Q1 Wave / Q1 Wave

Roadmap

Link to page

Status ⌄ Label ⌄

Epic		JAN	FEB	MAR	
Q1-26 Weekly Wave					
Q1-24 Matriz CSD - Kick off					
Q1-1 Analyse EBANX Dashboard's current state: analyse former studies, map user flow and perform heuristic analysis.					
Q1-12 Interview 10 stakeholders (between merchants and internal stakeholders) to validate hypothesis.					
Q1-8 To propose a hybrid dashboard user flow.					
Q1-20 Identify which components to focus on UI enhancements in the next steps.					

+ Create Epic

Key Results:

- ● Analyse EBANX Dashboard's current state: analyse former studies, map user flow and perform heuristic analysis.

- ● Interview 10 stakeholders (between merchants and internal stakeholders) to validate hypothesis.

- ● To propose a hybrid dashboard user flow.

- ● Identify which components to focus on UI enhancements in the next steps.

Great job!

- Product Design Wave surfed!

- Entire double diamond process (discover to deliver)

- Measure and make use of product design metrics

- Be part of EBANX ONE strategic goal

- Stakeholders commitment

- Deliveries on schedule

- Good team integration

- Include merchants perspective

- By applying user experience research, have confidence on next wave focus

Learning Experience

What:
The development architecture of MIDs was misunderstood by the team.

How:
There was a gap between the architecture and the feasibility of the first solution.

Why:
We didn't consider the different accounts a Merchant could have inside the operation.

OUTCOME

To include more developers and validate points of the process with IT.

The design thinking process

diverging

converging

diverging

converging

Don't know
Could be

Do know
Should be

Analyse EBANX Dashboard's current state:

Interview 10 stakeholders to validate hypothesis

To propose a Hybrid Dashboard user flow

Identify where to focus next (Q2)

Research (discover)

Insight (define)

Ideation (develop)

Prototype (deliver)
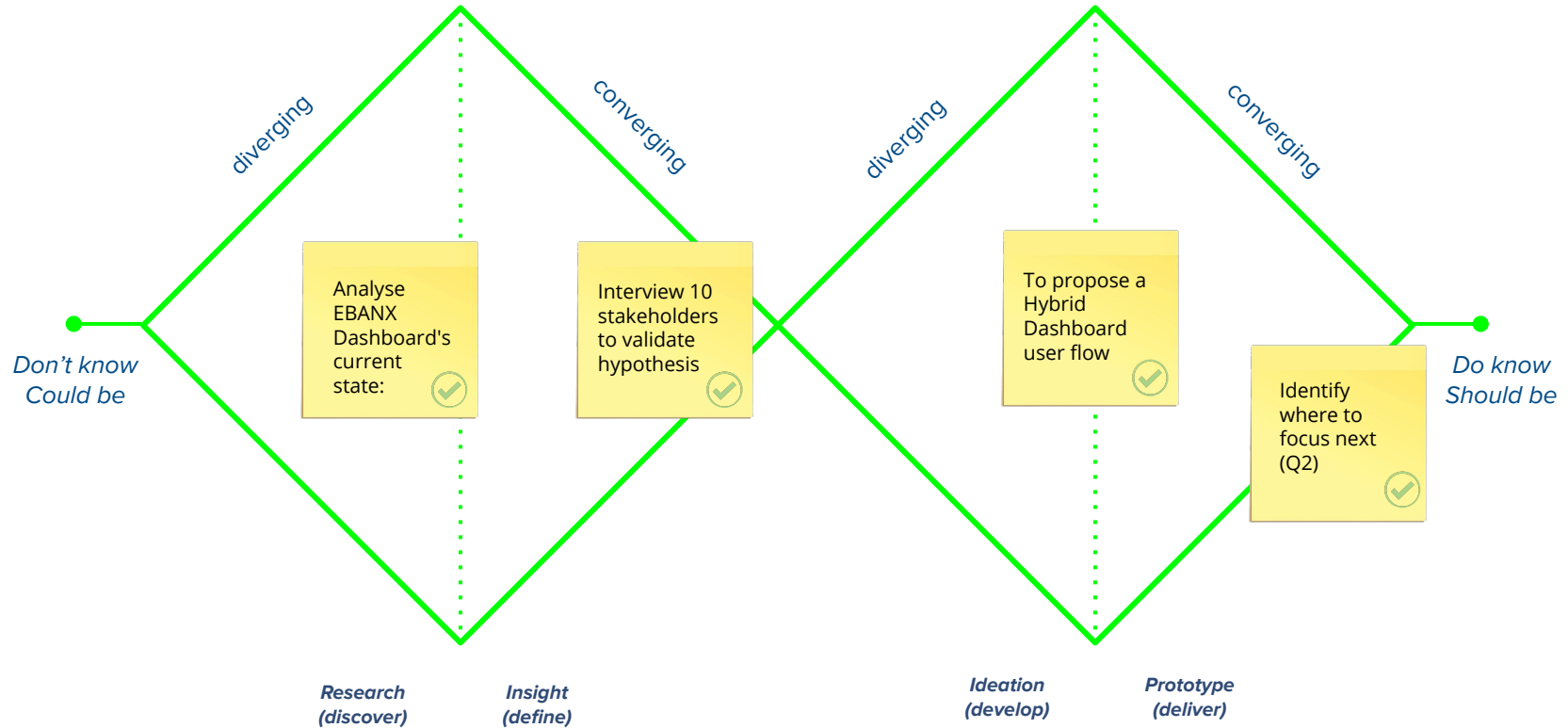
Key Result 1

Analyse EBANX Dashboard's current state:

analyse former studies, map user flow

and perform heuristic analysis.

Analyse former studies

Through former studies we decided to focus on the Merchant's firsts steps in the Dashboard with 8 hypothesis to drive interviews.
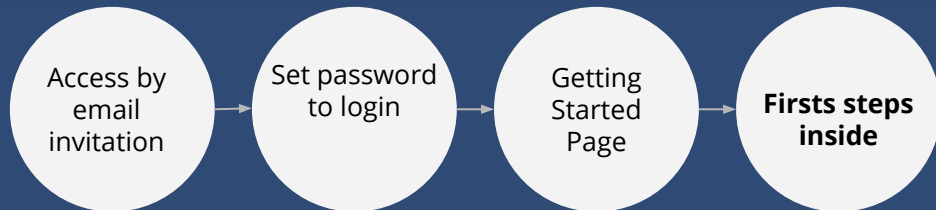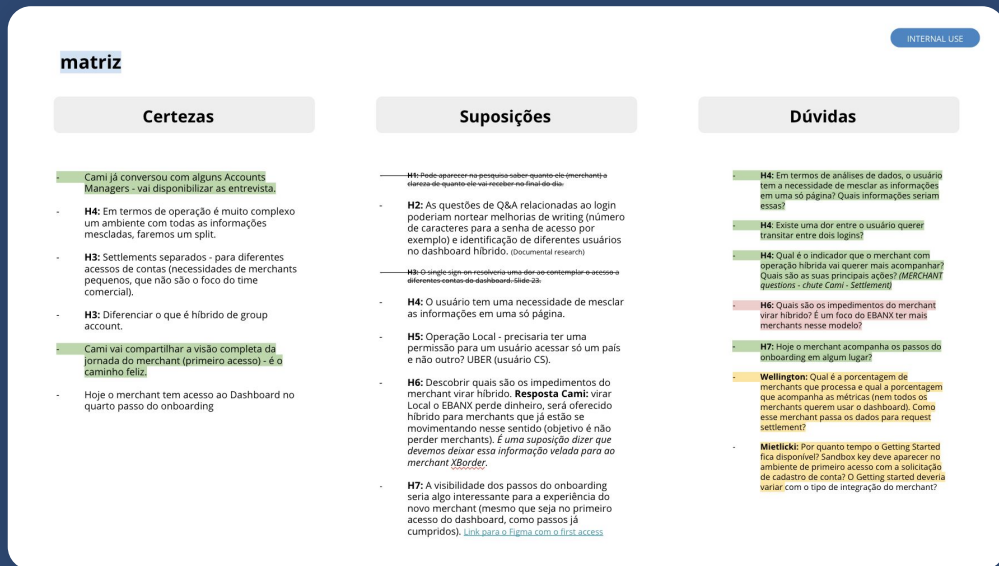
07
Former studies analysed

08
Hypotheses to drive interviews

Former studies analysed:

1. Previews interviews made by PM (Q3-2020)
2. Dashboard Q&A
3. Merchant journey at the Dashboard (on Miro)
4. Shopee Personas (on Miro)
5. Dashboard Data (on Tableau)
6. Analytics Data focused on the Getting Started page
7. Digital Onboarding Blueprint (Connections)

---

matriz

INTERNAL USE

Certezas

- Cami já conversou com alguns Accounts Managers - vai disponibilizar as entrevista.
- **H4:** Em termos de operação é muito complexo um ambiente com todas as informações mescladas, faremos um split.
- **H3:** Settlements separados - para diferentes acessos de contas (necessidades de merchants pequenos, que não são o foco do time comercial).
- **H3:** Diferenciar o que é híbrido de group account.
- Cami vai compartilhar a visão completa da jornada do merchant (primeiro acesso) - é o caminho feliz.
- Hoje o merchant tem acesso ao Dashboard no quarto passo do onboarding

Suposições

- H1: Pode aparecer na pesquisa saber quanto ele (merchant) a clareza de quanto ele vai receber no final do dia.
- **H2:** As questões de Q&A relacionadas ao login poderiam nortear melhorias de writing (número de caracteres para a senha de acesso por exemplo) e identificação de diferentes usuários no dashboard híbrido. (Documental research)
- H3: O single sign on resolveria uma dor ao contemplar o acesso a diferentes contas do dashboard. Slide 23.
- **H4:** O usuário tem uma necessidade de mesclar as informações em uma só página.
- **H5:** Operação Local - precisaria ter uma permissão para um usuário acessar só um país e não outro? UBER (usuário CS).
- **H6:** Descobrir quais são os impedimentos do merchant virar híbrido. **Resposta Cami:** virar Local e EBANX perde dinheiro, será oferecido híbrido para merchants que já estão se movimentando nesse sentido (objetivo é não perder merchants). *É uma suposição dizer que devemos deixar essa informação velada para ao merchant XBorder.*
- **H7:** A visibilidade dos passos do onboarding seria algo interessante para a experiência do novo merchant (mesmo que seja no primeiro acesso do dashboard, como passos já cumpridos). Link para o Figma com o first access

Dúvidas

- **H4:** Em termos de análises de dados, o usuário tem a necessidade de mesclar as informações em uma só página? Quais informações seriam essas?
- **H4:** Existe uma dor entre o usuário querer transitar entre dois logins?
- **H4:** Qual é o indicador que o merchant com operação híbrida vai querer mais acompanhar? Quais são as suas principais ações? *(MERCHANT questions - chute Cami - Settlement)*
- **H6:** Quais são os impedimentos do merchant virar híbrido? É um foco do EBANX ter mais merchants nesse modelo?
- **H7:** Hoje o merchant acompanha os passos do onboarding em algum lugar?
- **Wellington:** Qual é a porcentagem de merchants que processa e qual a porcentagem que acompanha as métricas (nem todos os merchants querem usar o dashboard). Como esse merchant passa os dados para request settlement?
- **Mietlicki:** Por quanto tempo o Getting Started fica disponível? Sandbox key deve aparecer no ambiente de primeiro acesso com a solicitação de cadastro de conta? O Getting started deveria variar com o tipo de integração do merchant?

Access by email invitation → Set password to login → Getting Started Page → **Firsts steps inside**

Map current user flow

Identify where to focus on further studies and which pages to perform a Heuristic Analysis.

Following flows mapped, in order of user experience touch points:

- Email invitation to the Dashboard
- First access account set
- First access modals inside Dashboard
- Getting started page
- User permission settings
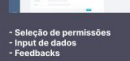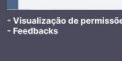- Sign in

Como o merchant chega até aqui?

★ Add User

- Visualização dos perfis
- Filtros
- Feedbacks

Add User

- Edit user
- New Password
- Delete User

Broken responsiviness

- Visualização de permissões
- Feedbacks
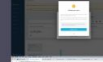
- Seleção de permissões
- Input de dados
- Feedbacks

★ E-mails

★ FIRST ACCESS MODALS

Perform Heuristic Analysis

A heuristic evaluation is a usability inspection method to identify usability problems in the user interface design.

Points of improvement, in order of user flow:

- Invitation email to the Dashboard
- Getting started page
- User permission settings

08

Issues found on First Email Access

28

Issues found on the Getting Started Page

20

Issues found on User Permission Settings

GETTING STARTED

EMAILs

SETTINGS > USER MENU

SETTINGS > USER MENU > CREATE USER

SETTINGS > USER MENU > EDIT USER
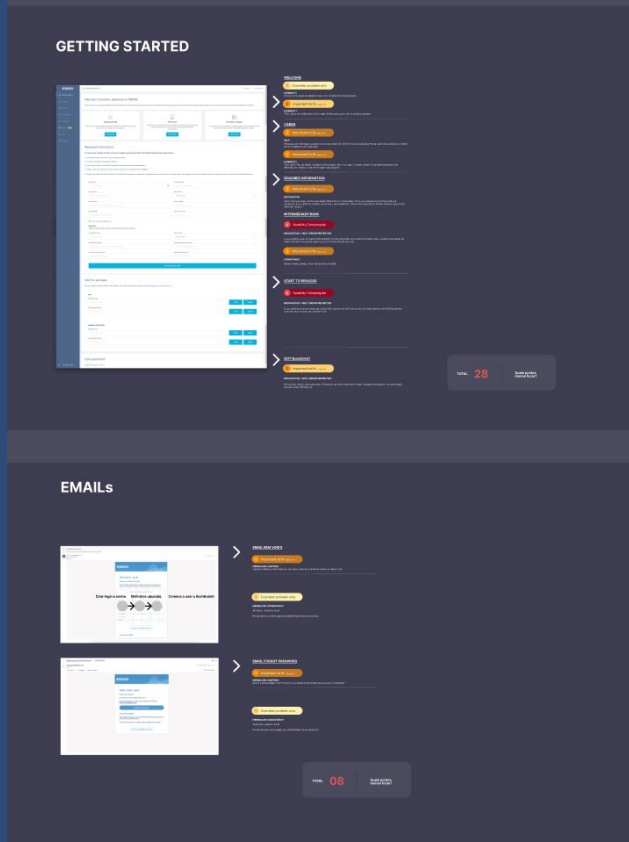
Key Result 2

Interview 10 stakeholders

(between merchants and internal stakeholders)

to validate hypothesis.

Design Research main question:

How do we fit in people's lives?

- How can a SSO propose can improve the experience of a hybrid operation?

- How can a SSO improve the back office's lives?

"Every day we need to alternate between one login to another when it is necessary to consult crossborder data, for example."

Shopee

13
Stakeholders interviewed

02
Hypotheses validated by stakeholders

EBANX

1. André Alain
2. Peixoto
3. Paulo Shargorodsky
4. Stephany
5. Maurício
6. Rosseto
7. Vinícius
8. Luiz
9. Carol
10. Frantic

Shopee

11. Diogo Silva
12. Juliana Longas
13. Wellinton Silva

CSD ENTREVISTAS

CERTEZAS	SUPOSIÇÕES	DÚVIDAS

★ Validar com Merchants   ★ Validar com stakeholders internos

CERTEZAS columns: BUSINESS · ONBOARDING · APRENDIZADO · PERMISSIONAMENTO · VERDADES ABSOLUTAS · ACESSO · FONTE DE DADOS

SUPOSIÇÕES columns: PERMISSIONAMENTO · FONTE DE DADOS · ONBOARDING

DÚVIDAS columns: PERMISSIONAMENTO · OPERAÇÃO · NEGÓCIOS · ONBOARDING

Validated

Test Card

Test Name	HYBRID NAVIGATION BETWEEN OPERATIONS	Deadline	CHOOSE
Assigned to	CHOOSE	Duration	CHOOSE

STEP 1: HYPOTHESIS

We believe that

Is important to have a navigation between those two operations: XB and Local.

Critical ⚠ ⚠

STEP 2: TEST

To verify that, we will

- Run a crazy 8's dynamic
- Prototype the most voted propose
- Give a task to validate (with the merchants and stakeholders)

Test Cost 📋 Data Reliability 👍 👍

STEP 3: METRIC

And measure

- System Usability Scale
Qualitative question (suggestions)

Time Required 🕐 🕐

STEP 4: CRITERIA

We are right if

The merchants see value and a profile that will use those navigation. Should be the admin profile.

✓

SSO is a must have

Q1 delivery focused on

⭐

How?

The navigation between crossborder and local environments must be clear and smooth

---

"SSO is important to offer the user a fluid experience through different contexts"

André Allain

"SSO is essential to avoid switching between two logins"

Carol Shu

Validated

"User settings are necessary to define what the user can and can not view or edit."
Vinicius Ferreira

"Permissions by country it's essential for big merchants because they have specialized teams. These settings can avoid mistakes related to chargebacks, or even access to restricted/confidential information."
André Alain

Who?

User permission is a very important setting for merchants

Needs more user research

"Today we offer a split view. Integrate that into one dashboard would be a 'one stop shop' - the experience of one view and navigate through different countries. But I know there are issues about currency visualization."
Paulo Shargorodsky

Data?

Currency visualisation (USD vs Local currency). The need of both in data visualisation isn't clear yet.

Key Result 3

To propose a hybrid dashboard user flow.

04

Benchmarks made

Objectives
To understand patterns and practices on products with similar interactions of:

1. Context navigation
2. User permissions

Which ones:
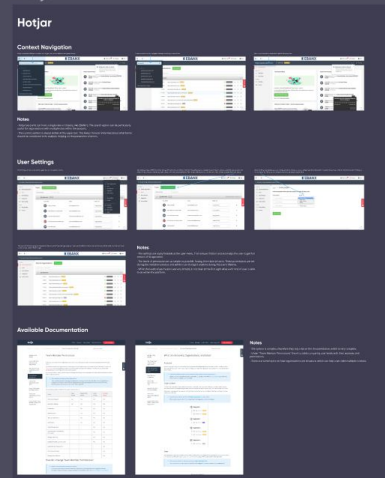- Stripe
- Google Analytics
- Facebook Business
- Hotjar

Context navigation:
- How to navigate through different contexts (accounts, views, etc)?
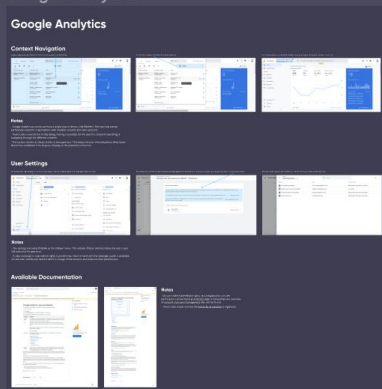- How complex is the interaction?
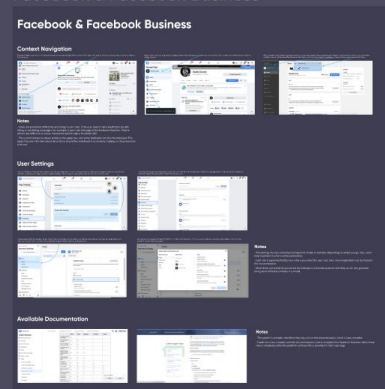- How visible is the state for the user?

Stripe
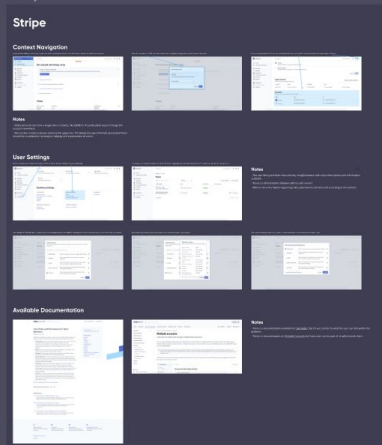
Hotjar

Wrap-up & Learnings

Google Analytics

Facebook & Facebook Business

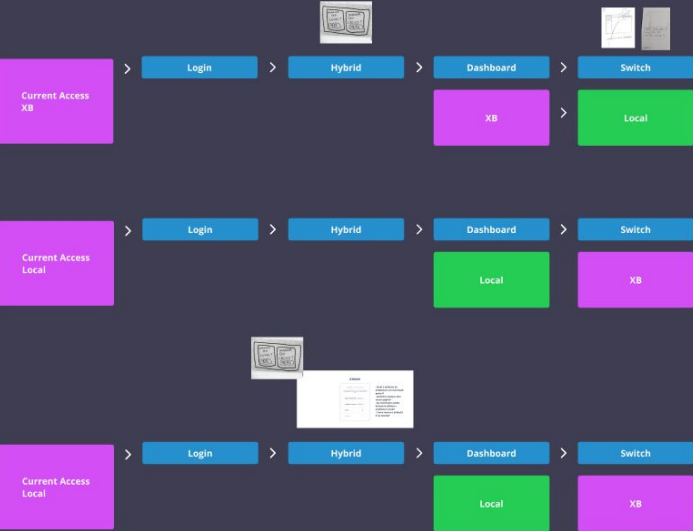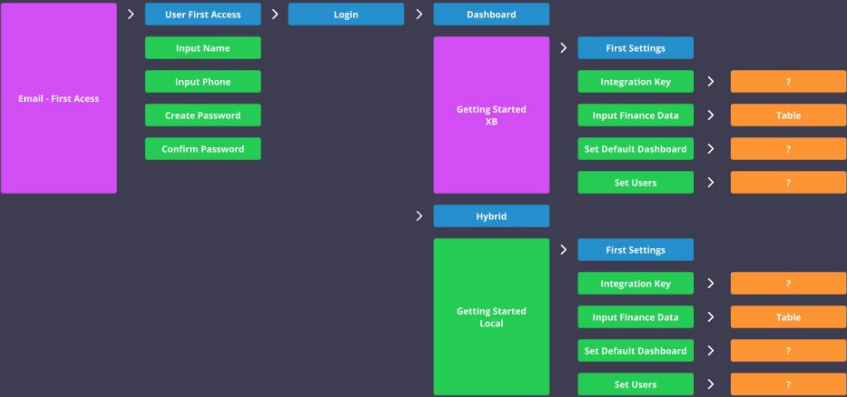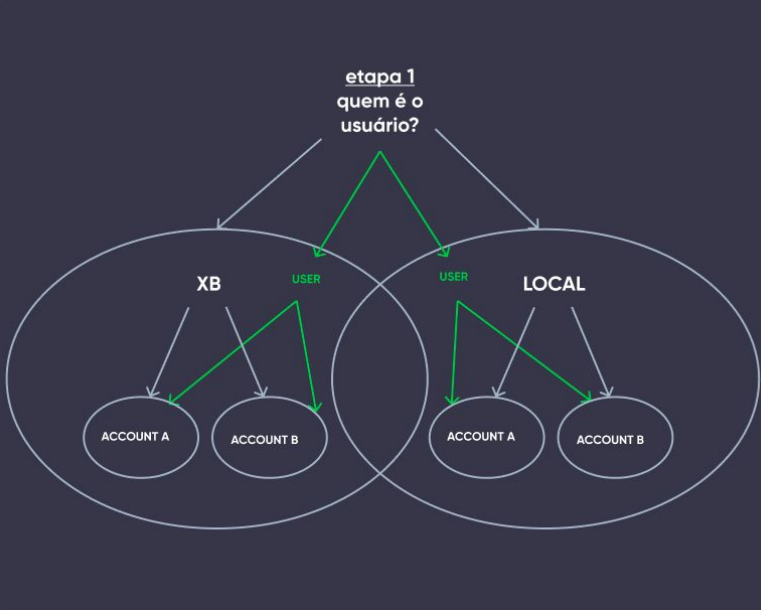# 07

Participants
On Crazy 8's

Crazy 8's is a core Design Sprint method. It is a fast sketching exercise that challenges people to sketch eight distinct ideas in eight minutes.

The goal is to push beyond your first idea, frequently the least innovative, and to generate a wide variety of solutions to your challenge.

After analyzing the results and feasibility of the solutions, the direction to prototype the new flow was voted by the team.

Information architecture & user flow

etapa 1
quem é o usuário?

XB   USER   USER   LOCAL

ACCOUNT A   ACCOUNT B   ACCOUNT A   ACCOUNT B

Email - First Acess → User First Access → Login → Dashboard

Input Name
Input Phone
Create Password
Confirm Password

Getting Started XB → First Settings

Integration Key → ?
Input Finance Data → Table
Set Default Dashboard → ?
Set Users → ?

Hybrid

Getting Started Local → First Settings

Integration Key → ?
Input Finance Data → Table
Set Default Dashboard → ?
Set Users → ?

Current Access XB → Login → Hybrid → Dashboard → Switch

XB   Local

Current Access Local → Login → Hybrid → Dashboard → Switch

Local   XB

Current Access Local → Login → Hybrid → Dashboard → Switch

Local   XB

"It is a must have to understand which environment the user has, a visual element to show the Dashboard operation he is logged in"

Rosetto

The solution flow
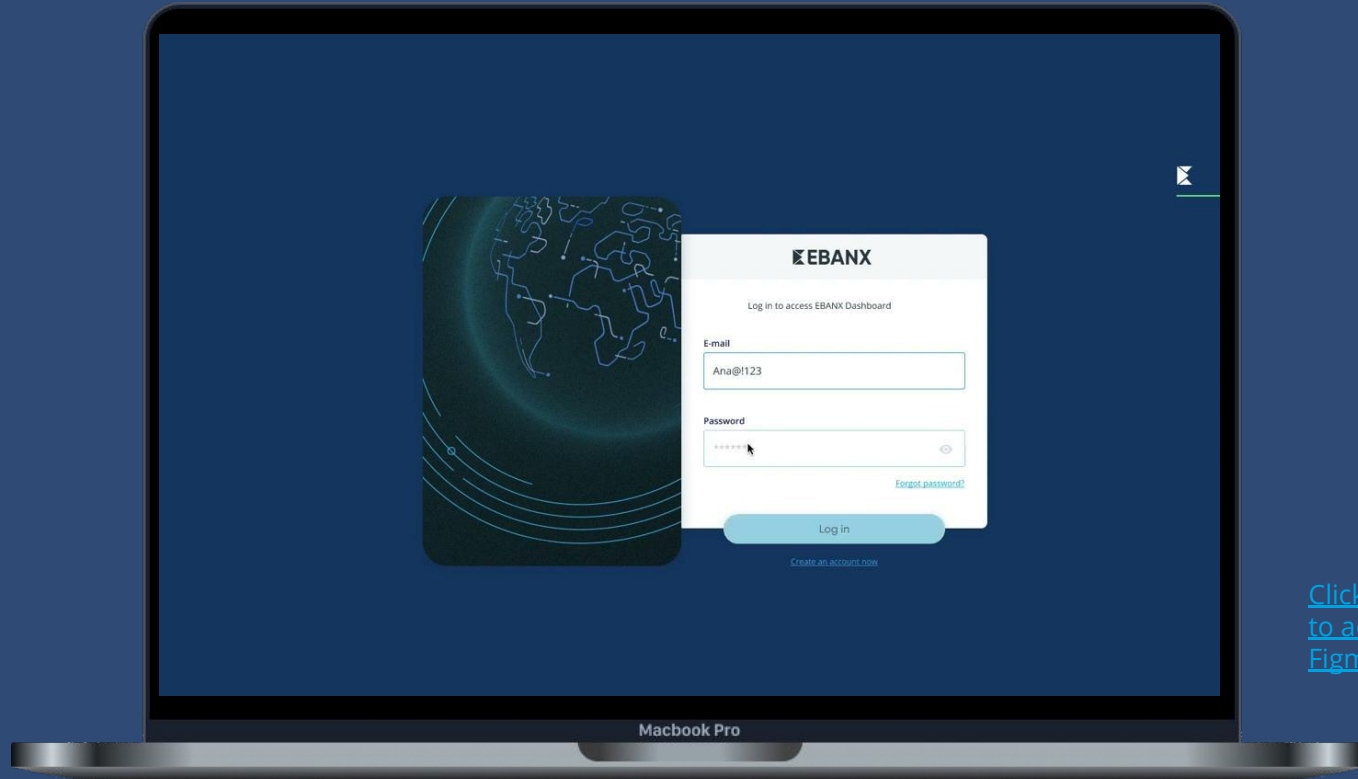
Click here to access the Figma prototype

Design Metrics - SUS (System Usability Scale)

B2B Product Design Metrics | System Usability Scale

SCORE INDIVIDUAL POR PROJETO

Filtrar projeto ▾

Project ▾	SCORE	OCORRÊNCIAS
SSO	77.5	1
SSO	95	1
SSO	92.5	1
SSO	87.5	1
SSO	90	1
Overview Page	72.5	2
Overview Page	77.5	1
Overview Page	75	1
Overview Page	80	1

1 - 9 / 9 ‹ ›

PORCENTAGEM DE RESPOSTAS POR PROJETO

50% 50%

● SSO
● Overview Page

Total de Participantes
10

Projetos
2

SUS média total
82

-60 | Inaceitável
60-70 | Ok
70-80 | Bom
80-90 | Excelente
+90 | Melhor usabilidade possível

SCORE - MÉDIA POR PROJETO

■ SCORE

SSO
Overvi...

0 20 40 60 80 100
SCORE
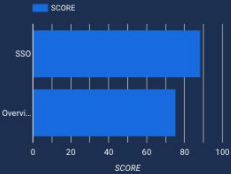
88.5

SSO
System Usability
Scale Score

Excellent

Product Metrics
Suggested events to track

- Time to buffer environments

  Why: the instability may affect the experience

- Search field at the "Select a Merchant" page

  Why: discover if the user is using this field

- User flow after switching

  Why: which is the "job to be" done after switching accounts

- Hotjar: header heatmap of the environment switches

  Why: how many times the user is clicking to switch

- Hotjar: open field to the user evaluate the switch solution

  Why: measuring the user satisfaction and get qualitative data

Key Result 4

Identify which components to focus on UI enhancements in the next steps.

"SSO it's important for Amazon, for example. The admin must have the control of the SSO visualization and user settings to carefully exhibit information and data to controlled users."

Peixoto

In the next step use design metrics to reduce Heuristics points

08	**28**	**20**
Issues found on First Email Access	Issues found on the Getting Started Page	Issues found on User Permission Settings

Q2 2021

THANK YOU

productb2b@ebanx.com