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HANDSHAKE APP CASE STUDY

The Handshake App is a mock app that was used for the final project in the UX Writers certification course. In this case study I will show you before and after photos of what I was presented and my improvements and my reasoning behind the changes I made.

First I will give you an overview of what the Handshake App is, what it does, and who the primary users are proposed to be.

ABOUT HANDSHAKE

Here's an overview of what the Handshake app does:

- Business Owners use the app to pay freelancers and track the progress of hours worked (paying and tracking)
- Freelancers use the app to bill Business Owners and report progress on a paid project (billing and tracking)
- The app is "shared" by these two user types. Each of these users has a view of one side of the app: one uses it for billing and the other for paying.

Freelancers are the main users. They report billable hours and request payment. Small Business Owners are the secondary users. They can approve hours and send payments to the freelancer.

NOTE: The app does not help business owners find freelancers. It does not help freelancers find clients. It's not intended to be a marketplace app.

HANDSHAKE USER TASKS

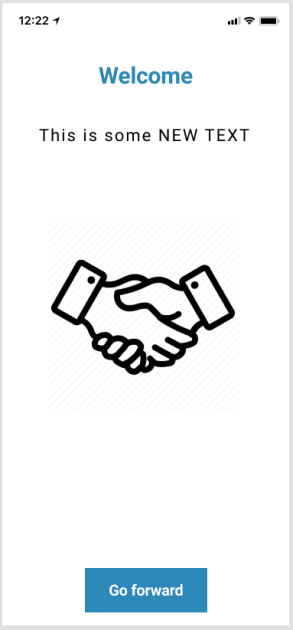
These are the user tasks for Handshake:

Freelancer tasks	Business Owner tasks
• Invite Business Owners to the app • Can create new projects • Propose a budget for a project • Track hours worked • Receive payments from Business Owners • Send invoices to Business Owners	• Invite Freelancers to the app • Can create new projects • Review and accept a budget for a project • See hours tracked against the budget • Send payments to Freelancers
Note: Handshake makes money by collecting a 1% fee from the Freelancer whenever they get paid. Since Freelancers help the company earn money, technically they are the primary users. However, we want to treat both user types equally in our app.	

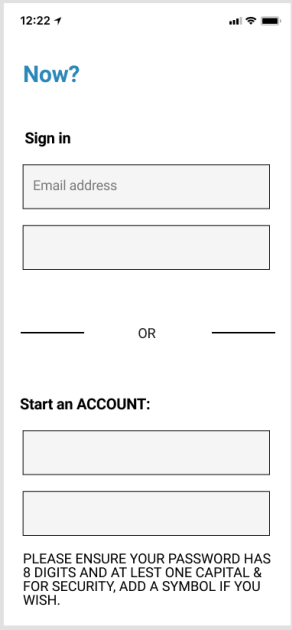
The "Before" examples will be above the "After" examples below.

Intro Screens

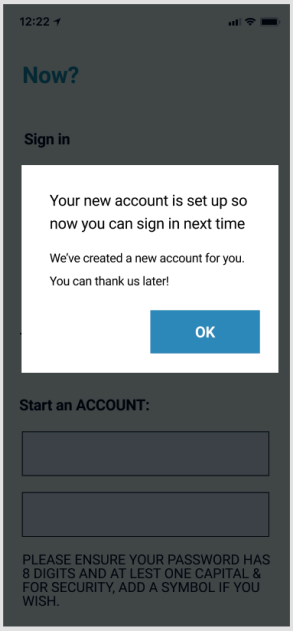
00 Welcome



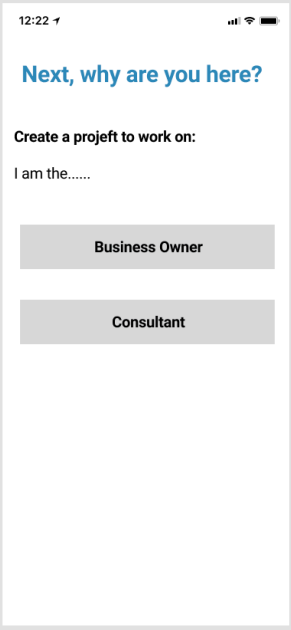
01.1 Create account



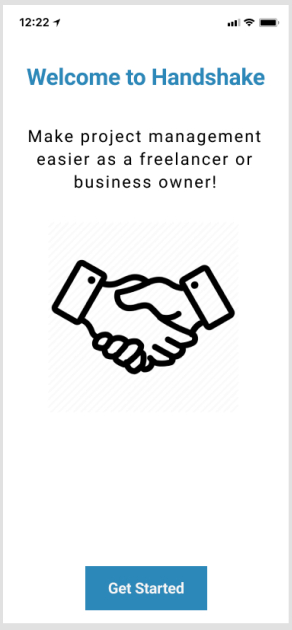
01.2 Confirm account



01.3 Choose role



00 Welcome



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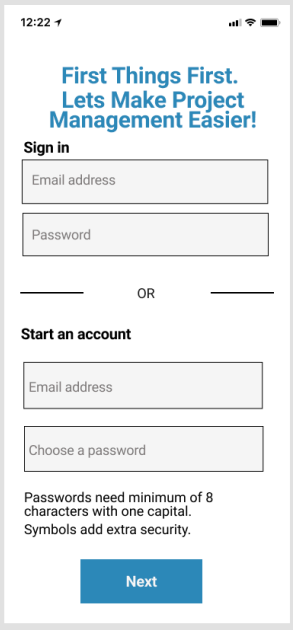

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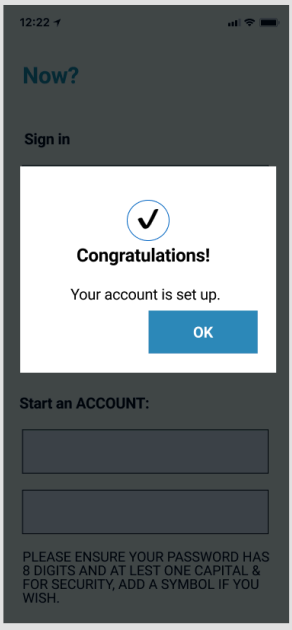

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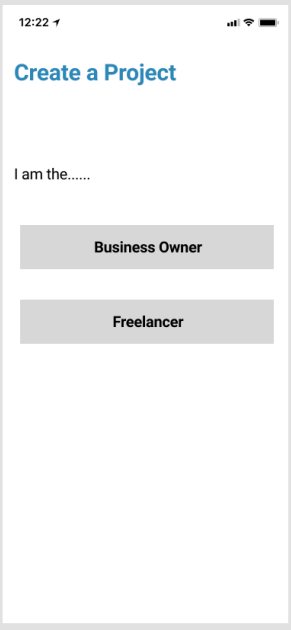


I thought it was important to show the benefits to the user right away.

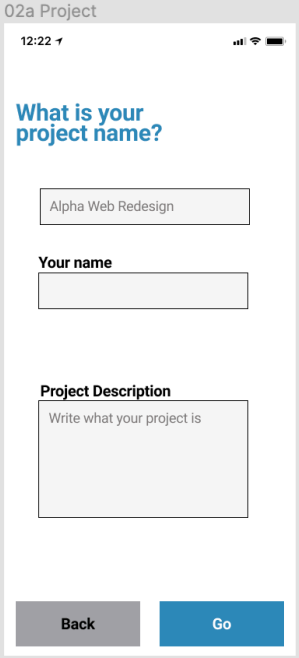
Again, it we want to avoid user drop-off I think it's important to highlight the benefits of the app and make it clear how to proceed.

The initial wording is a little clumsy so I tightened it up. I added a graphic for visual appeal.

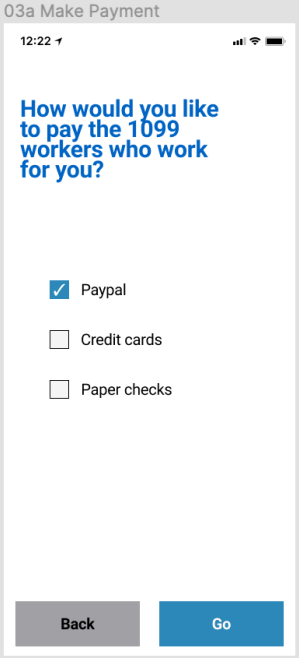
I wanted to clean up this screen to ensure the user is clearly guided along.

Business Owner Flow

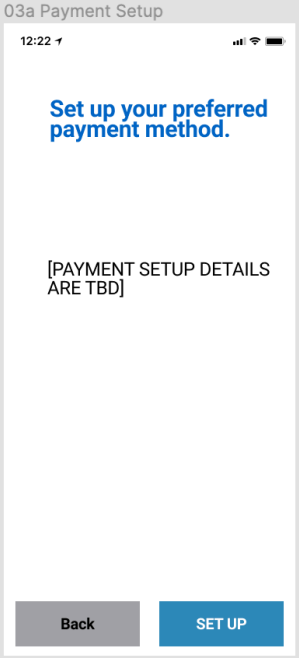
02a Project



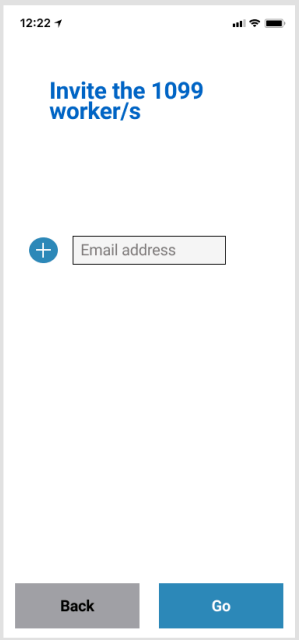
03a Make Payment



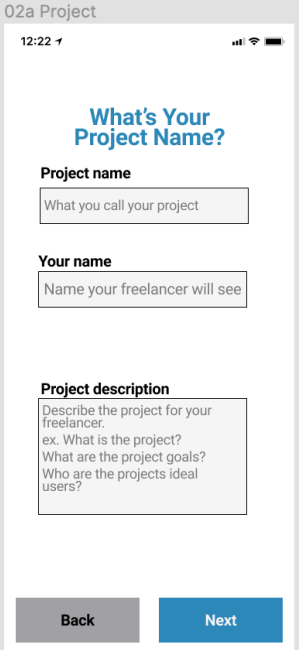
03a Payment Setup



04a Invite



02a Project



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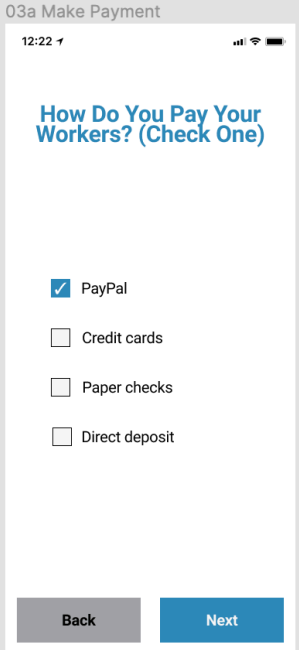
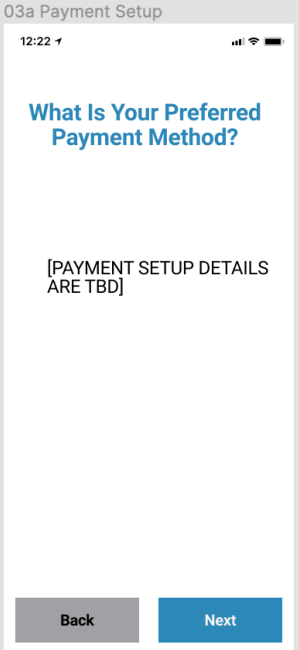
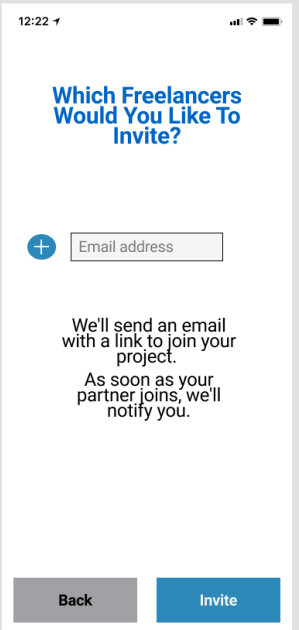
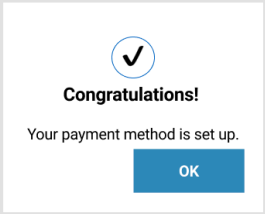


03a Payment Setup



04a Invite





I wanted to clean up the look of the screen and provide some hint text that would to eliminate confusion and guide the user.

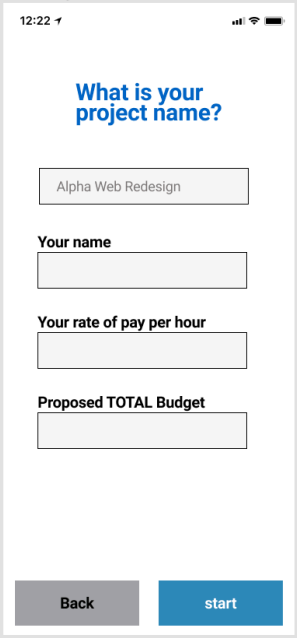
I wanted to clean up the wording in the heading. I also noticed that the freelancer flow included PayPal as a payment option so I included it here.

I thought providing a confirmation message after they set up their payment method was important.

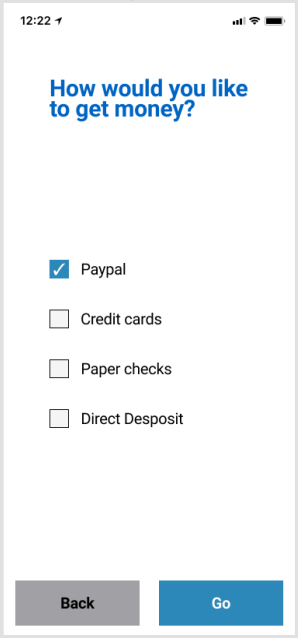
I wanted to maintain consistency in terminology with “Freelancers”. I also added microcopy about the invitation process.

Freelancer Flow

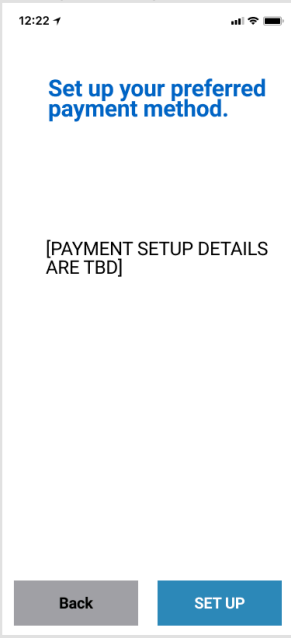
02b Project



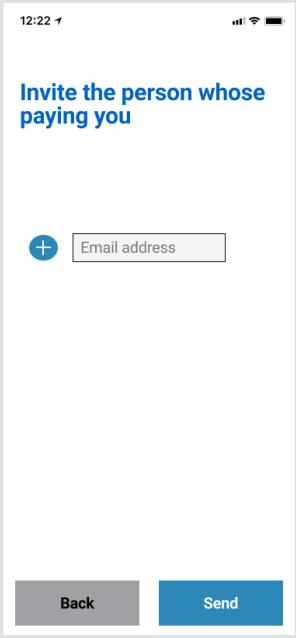
03b Receive Payment



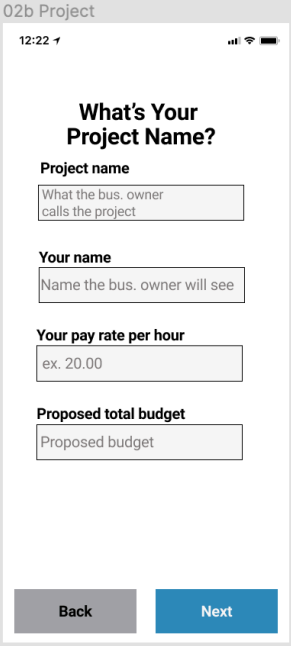
03b Payment Setup



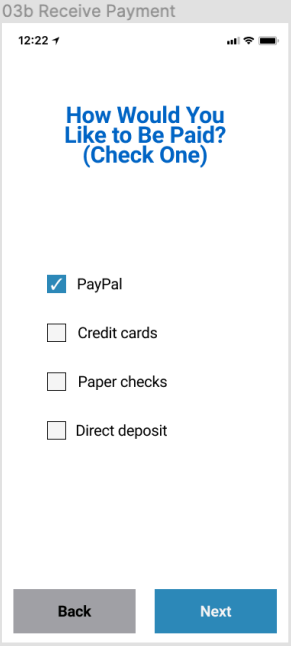
04b Invite



02b Project



03b Receive Payment



03b Payment Setup

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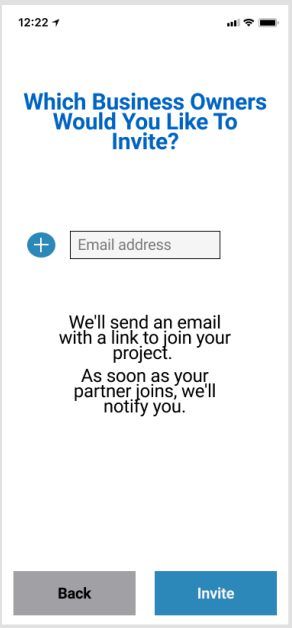
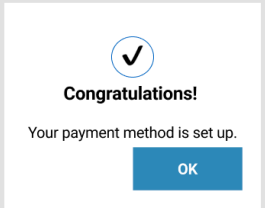




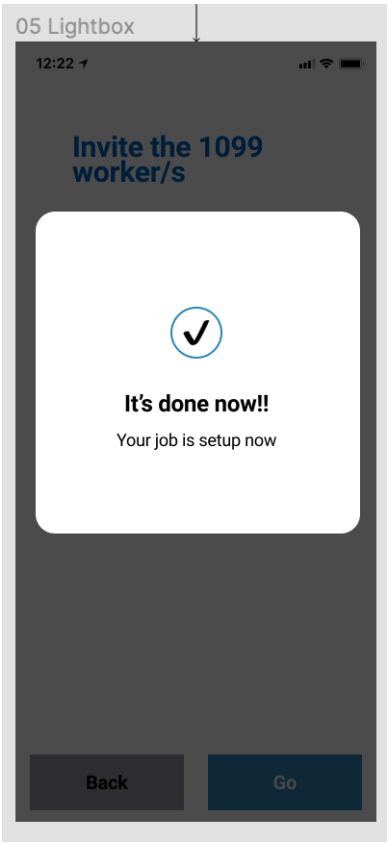
I cleaned up the look of the screen and provided hint text to eliminate confusion and guide the user.

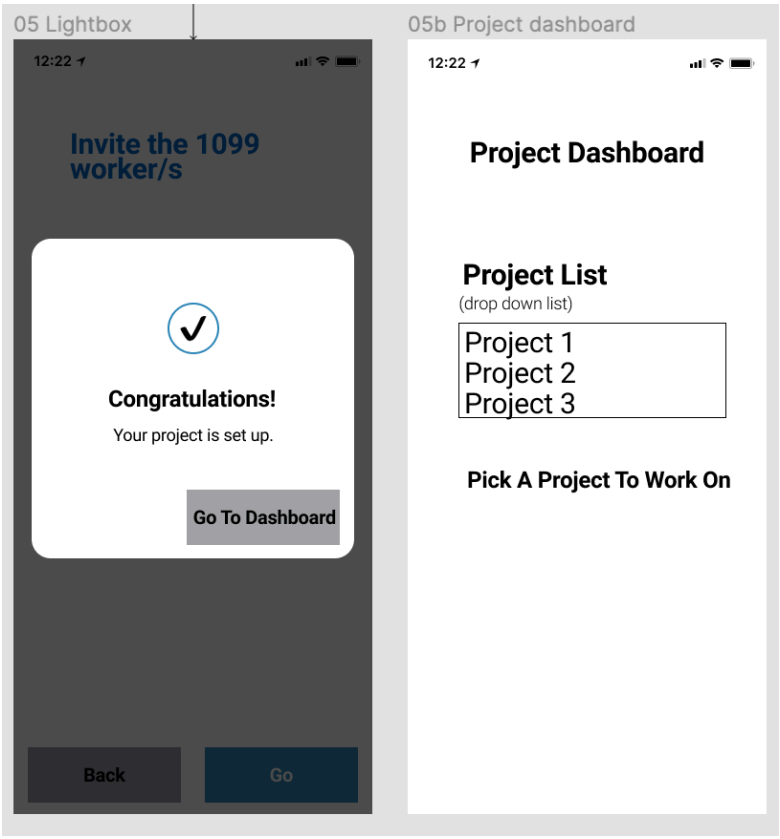
I cleaned up the wording in the heading.

As in the Business Owner Flow, I thought providing a confirmation message after they set up their payment method was important.

As in the Business Owners Flow, I added microcopy about the invitation process.

Project Confirmation and Dashboard

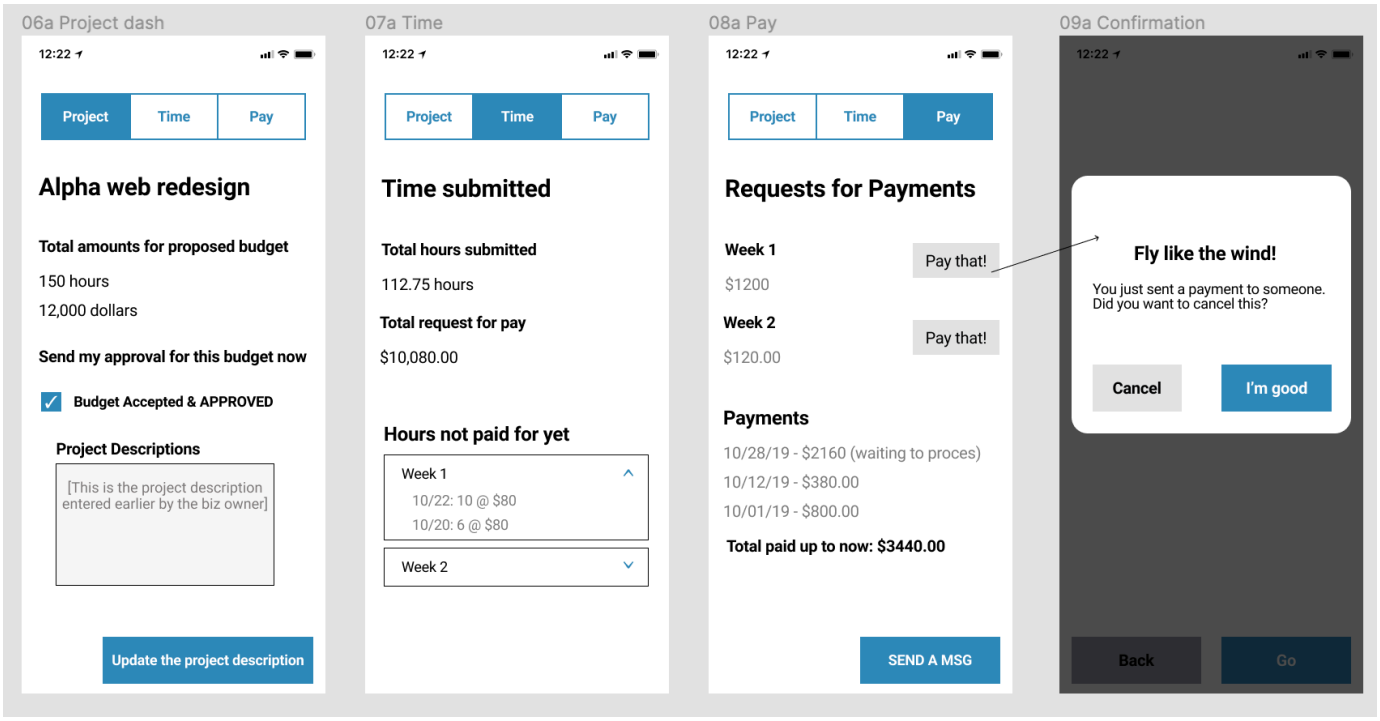


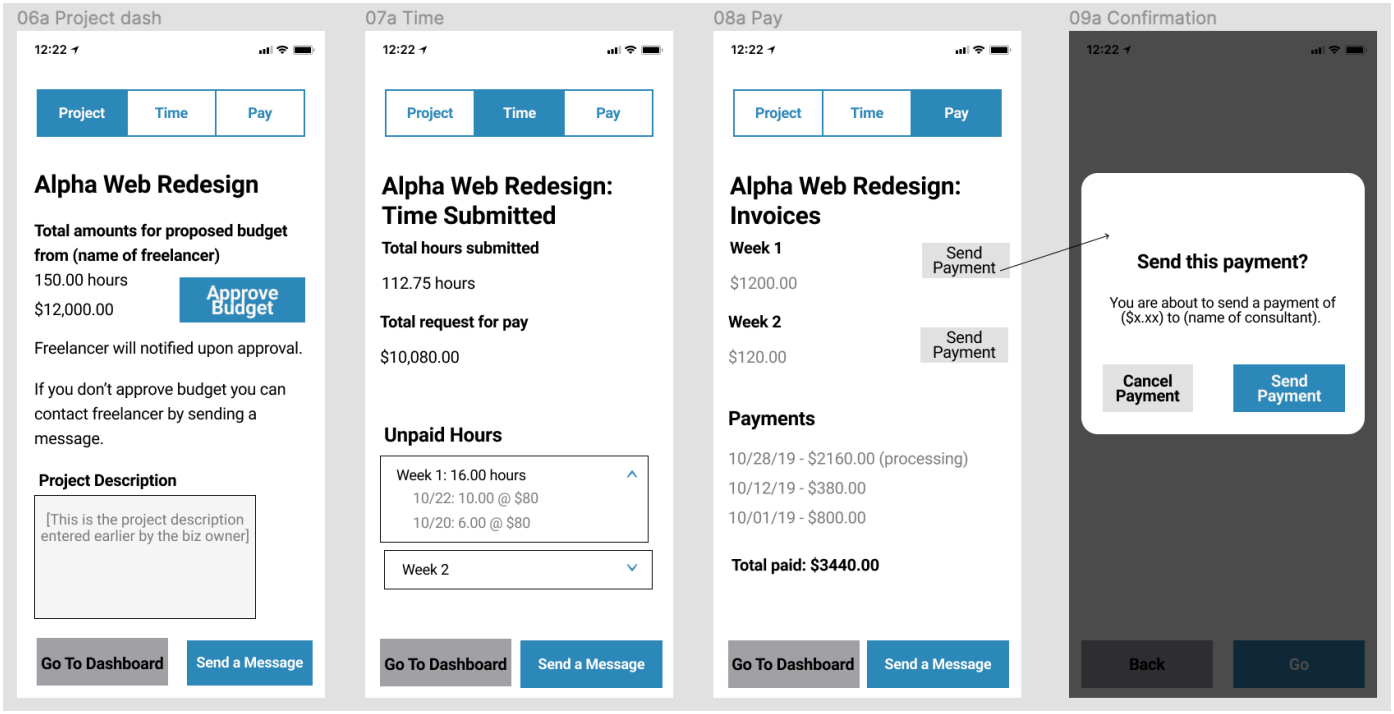


I wanted to maintain consistency in terminology here and also make sure the user knew what to do next.

I thought it was a must to have some sort of Project Dashboard in case the user is working on multiple jobs. The original design didn't have this.

Business Owner Options





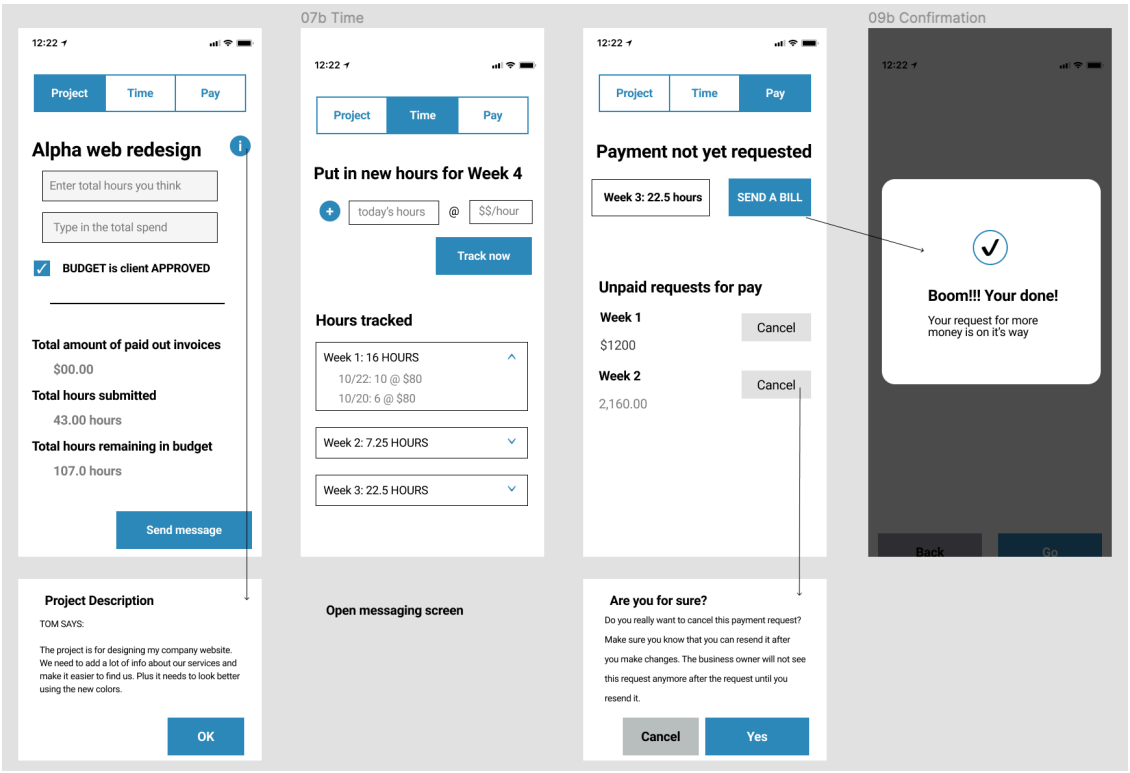
I found the original screen to be confusing. Both the purpose of it and what the user is supposed to do, so I changed the arrangement and added some microcopy to further clarify things.

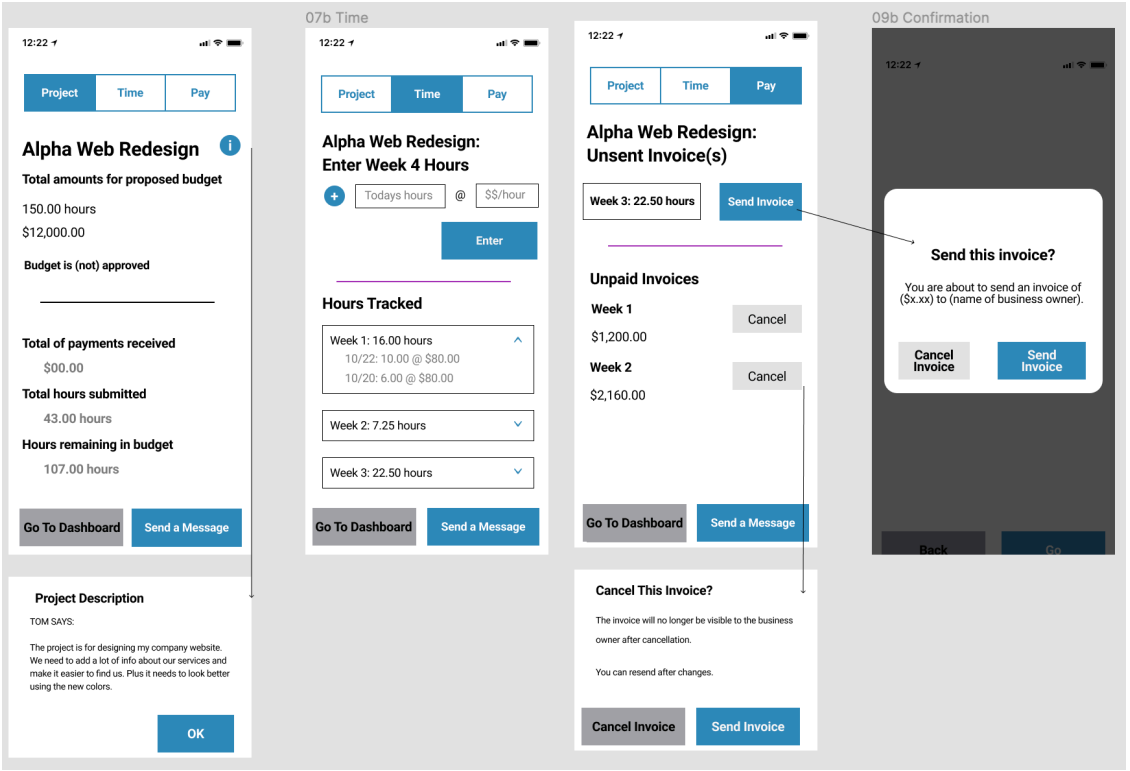
I added the project name to the heading to ensure the user knows which project they're working on. I also added buttons to improve usability.

I changed the copy on the buttons to give it a more professional tone.

I wanted to make sure it was clear as to what they were choosing to do. In that spirit I thought it was important to reiterate to whom they were paying and the amount of the payment.

Freelancer Options





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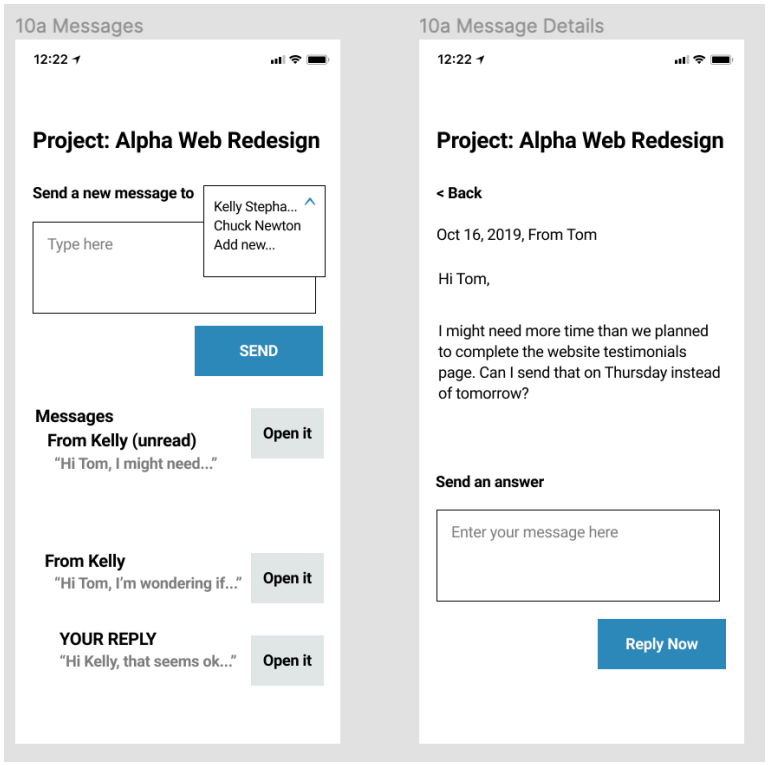
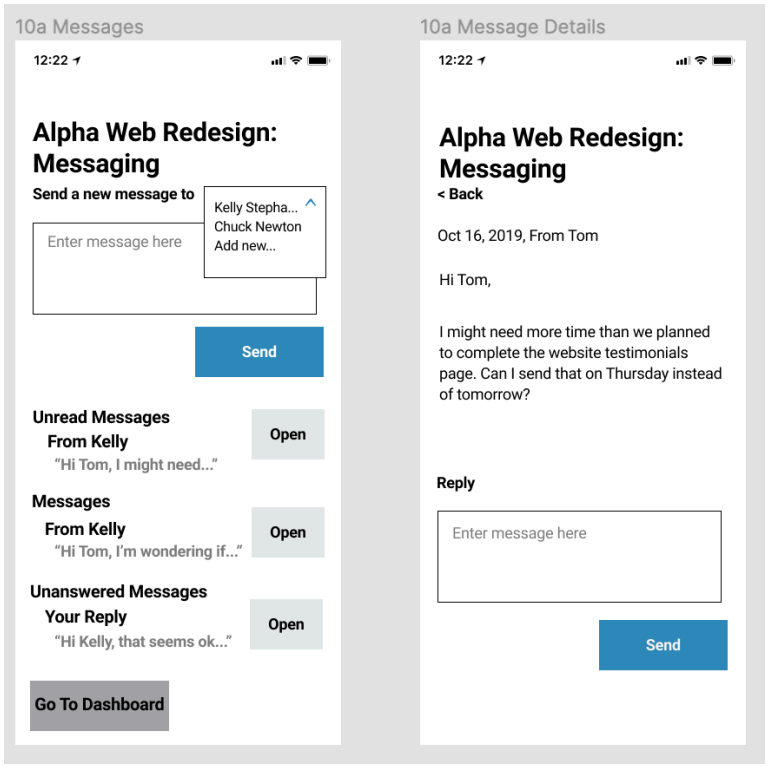
I cleaned up the copy here.

I made sure it was clear as to what they were choosing to do. In that spirit I thought it was important to reiterate to whom they were invoicing and the amount.

Business Owner Messaging Screen

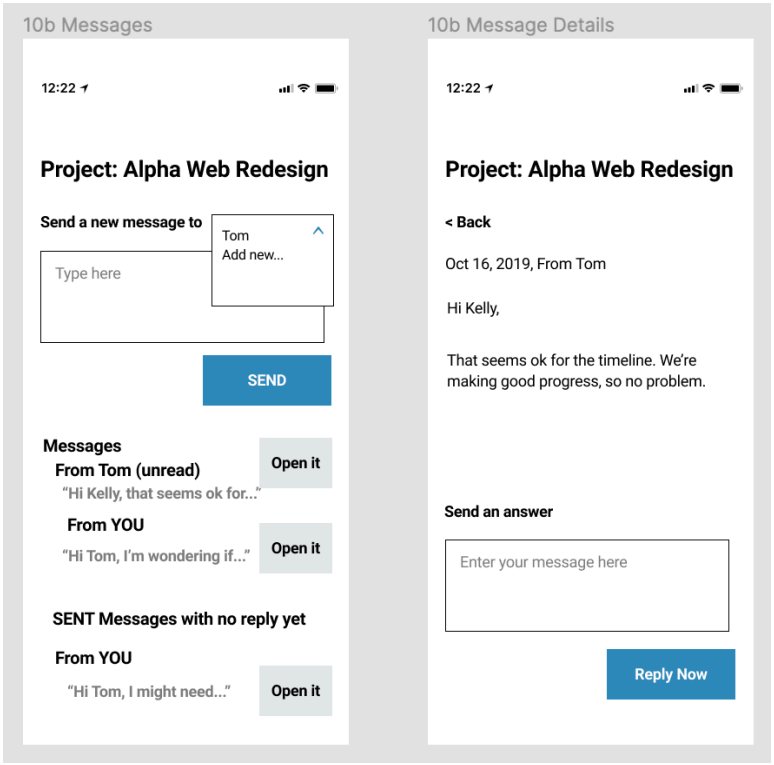


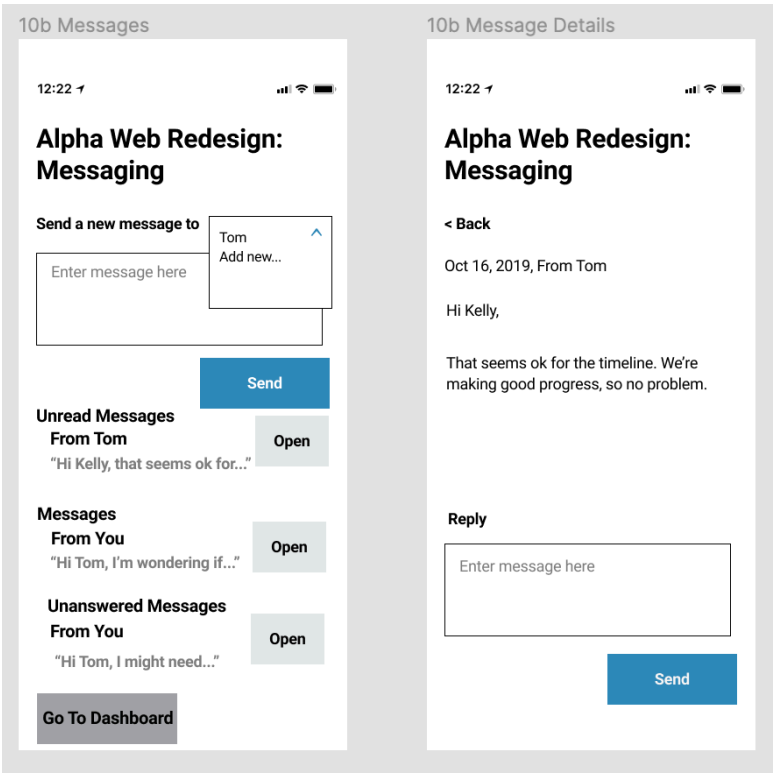


I cleared up the headline, cleaned up the copy and added a button to improve functionality.

I wanted to maintain consistency in terminology with the button copy.

Freelancer Messaging Screen





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