

Yvonne Weng

UX CASE STUDY

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DailyPay

Fintech startup providing the ability for employees to control when they get paid.



Let's Get Started

[Already started? Login to complete your application.](#)

I work for


Search for Company

or

Are you a business?

Offer DailyPay to your employees


[Learn More](#)



Welcome to DailyPay

Need Help? [1-888-991-3646](tel:1-888-991-3646)

Thanks! Your account is almost ready.



What happens next?

- Application Submitted
- Validate Bank Account and Company Bank Info
- Transition to DailyPay

By 1/20/2017, DailyPay will verify if your Bank Account info is valid.

By 1/27/2017 You will receive your last paycheck from your company.

PROJECT GOAL

Redesign the sign up funnel for the employee and the business user to simplify a complex process into a smooth and easy experience.

CHALLENGES

Understand the DailyPay business model and how it is different than a payday advance system.

Consider the different user types and scenarios to create a sign up process that meets all their needs.

Alleviate user hesitations with sharing financial information during the signup process.

Properly set user expectations for an onboarding process that involves manual review.

MY ROLE

- Led client workshops and presentations
- Created UX deliverables such as user flows and wireframes
- Guided the visual designer on the UI and style guide
- Documented functional specs for developer handoff

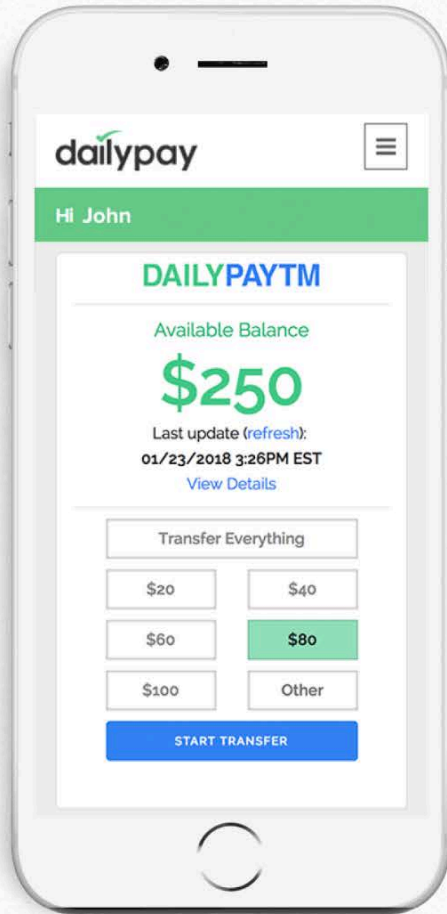
HOW IT WORKS

Employees can join to get paid daily for the wages they've earned. No more waiting for biweekly paychecks - employees can meet their financial goals and pay bills on time.

Employers (businesses) can join to offer daily payments to employees as a company benefit. Works with existing payroll systems and increases employee retention.

Your company cares deeply about your financial well-being

You can now get the money you've earned instantly with a tap of a button.



How does DailyPay work?
For each active work hour, you build an available balance. Transfer these earnings instantly at any time.

How much does it cost?
DailyPay's flat transfer fee is the lowest in the market, starting at \$1.25

What happens on payday?
You receive your full paycheck and any transfers are then deducted automatically. There's nothing to pay back, nothing to do differently.

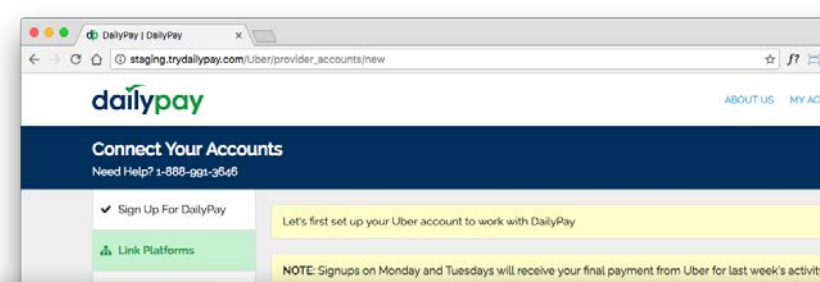
Happy Employees Stay Longer

DailyPay is a technology solution that lets your employees control when they get paid, empowering them to meet financial goals and pay bills on time. Employees who find financial security at your company stay longer, reducing turnover and improving bottom line profits.

[Request Demo](#)

Goals for Redesign

- Educate users and manage expectations
- Reduce hesitation about giving sensitive information
- Accommodate different user types
- Make it easy for non-tech savvy users
- Reduce friction

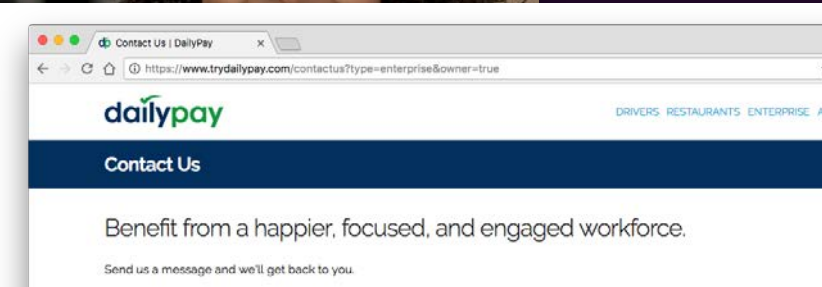


User Recap

1. Clients
 - Drivers
 - Restaurants
 - Contractors
 - Employees

Questions

- What actions trigger businesses to sign up via this flow? (on-site and off-site)
- What manual/offline processes are involved during the sign up?
- What kind of hesitations would business users have during sign up process?
- What are the next steps after this flow (for DailyPay and for user)



KICK OFF & INTAKE WORKSHOP

The DailyPay business model was something that our team struggled to understand at first.

I led a workshop with stakeholders from every department on the client team to properly define the project requirements and objectives.

The workshop involved a thorough discussion (guided by a slide deck) and an interactive sketch session.

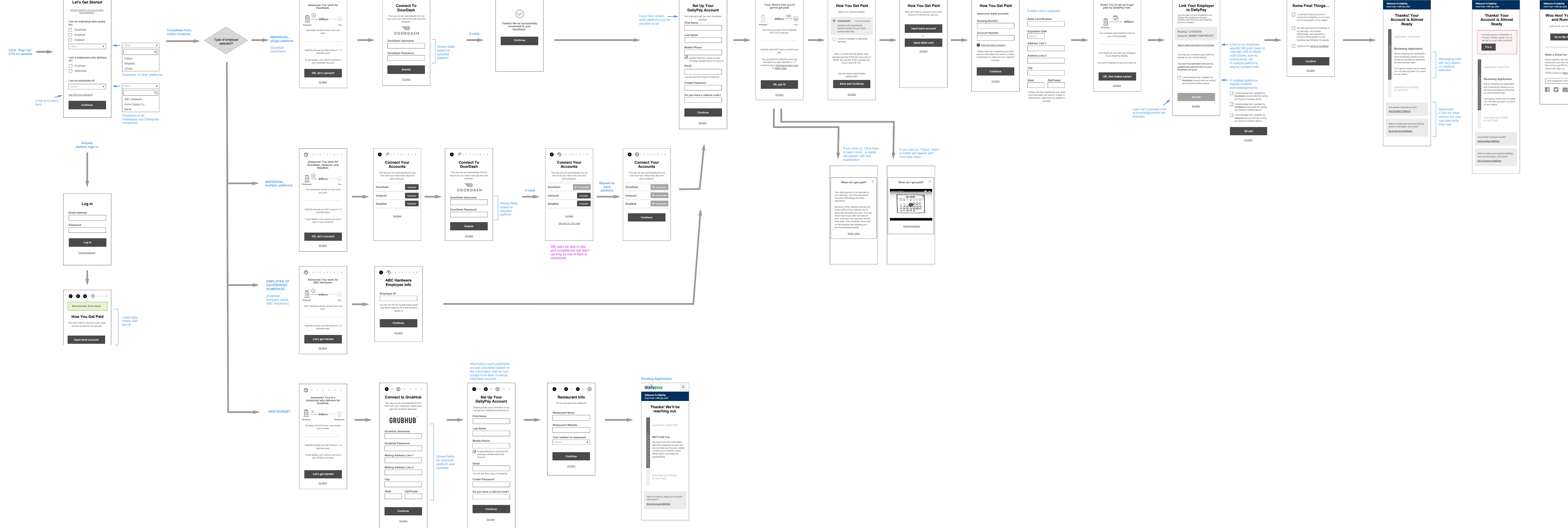


This is me!

CLIENT Wireflows V2

Focusing on functionality and technical requirements

General note: When a user tries to leave the page at any step, trigger an "Are you sure?" message in a popup.



USER FLOWS / WIREFRAMES

Armed with ideas from the workshop, we worked through multiple iterations of high fidelity user flows (or "wireflows") to explore different approaches to the sign up funnel.

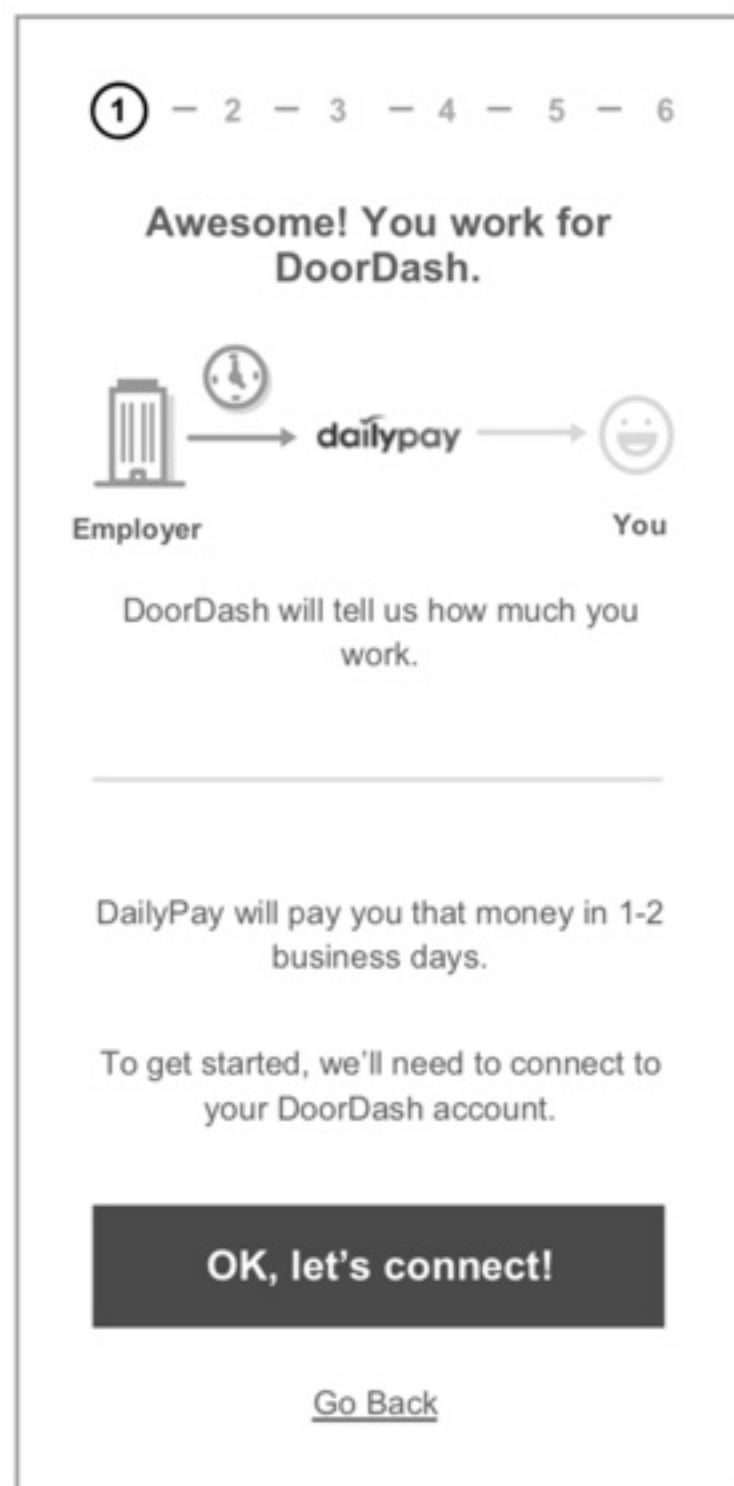
The platform is a responsive web app, and since the core employee user primarily uses mobile devices, we designed mobile-first.

A unique challenge was the different employee scenarios where requirements varied based on what platform the employee earned wages on.

We architected each path to ensure that we can create a workflow and design system that serves every scenario.

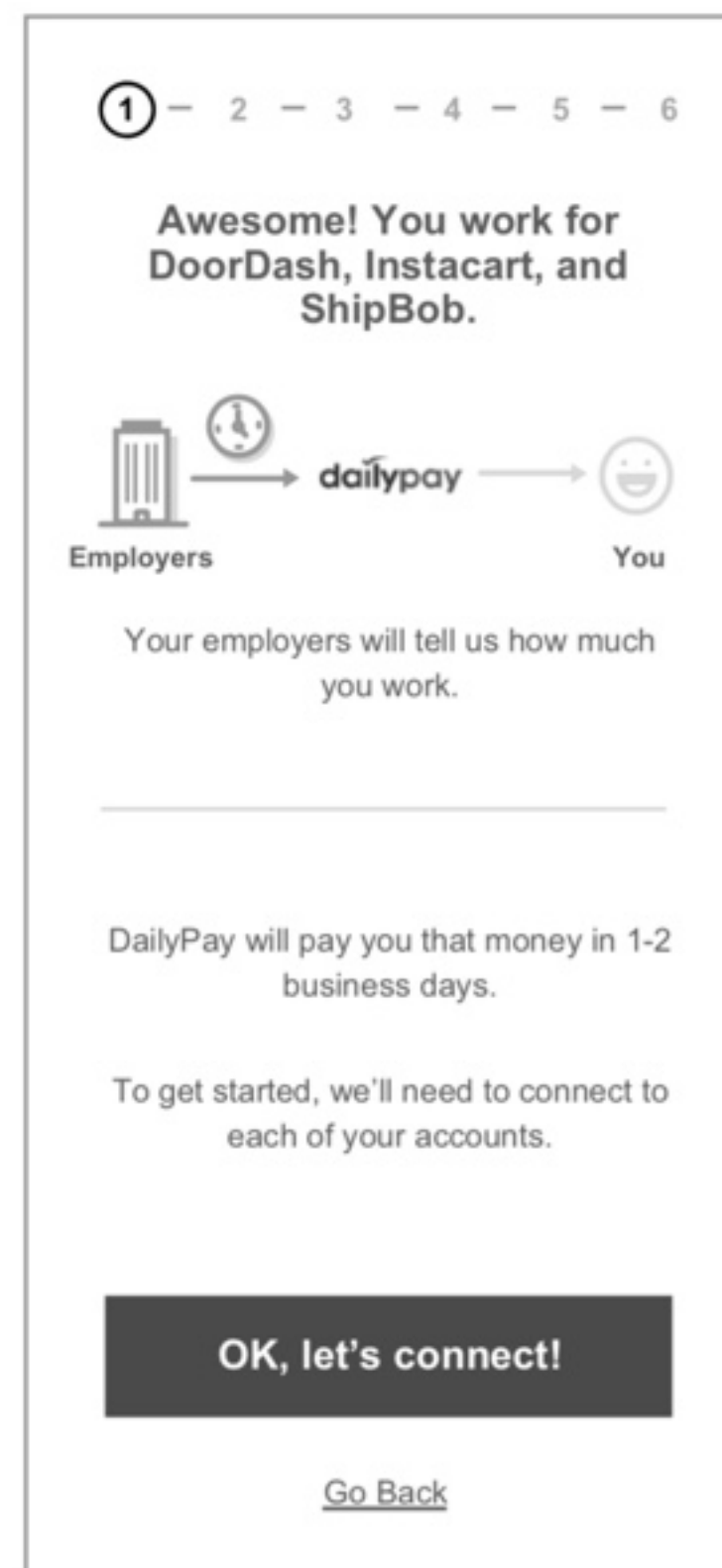
INDIVIDUAL, SINGLE PLATFORM

(i.e. DoorDash)



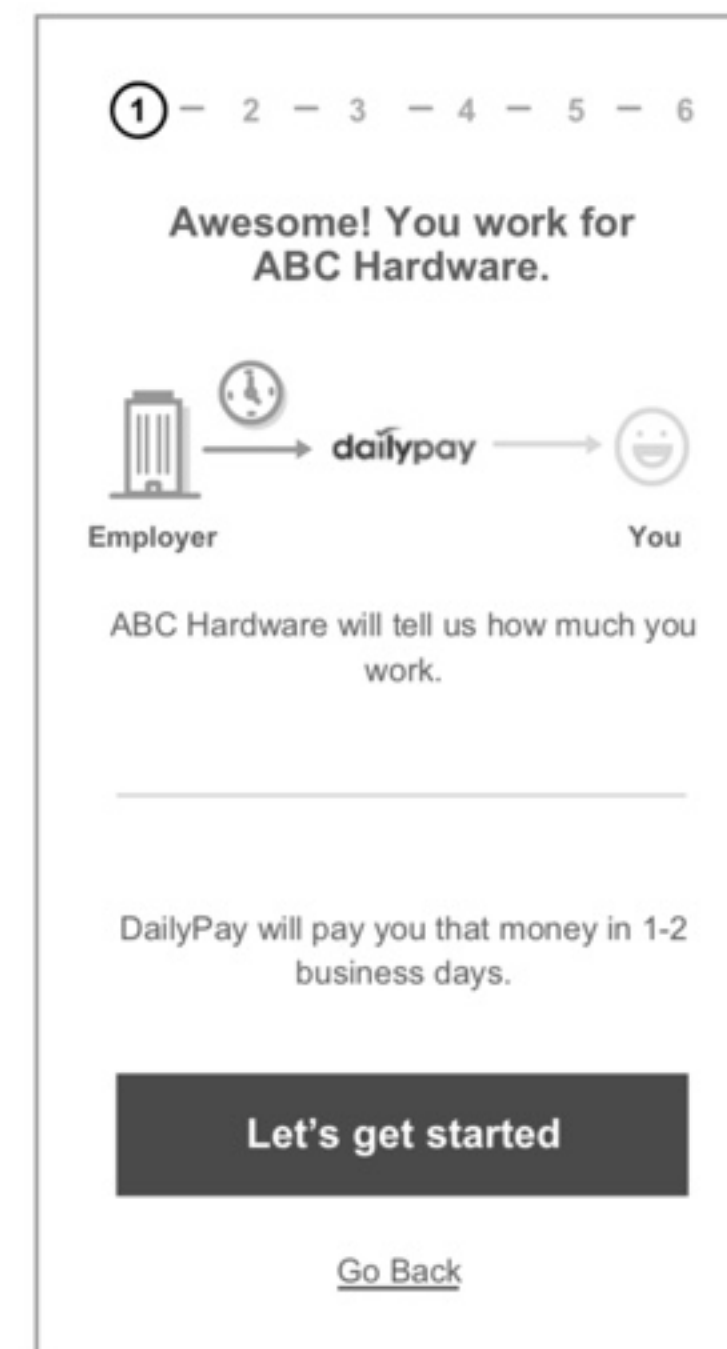
INDIVIDUAL, MULTIPLE PLATFORMS

(i.e. DoorDash, Instacart, and ShipBob)



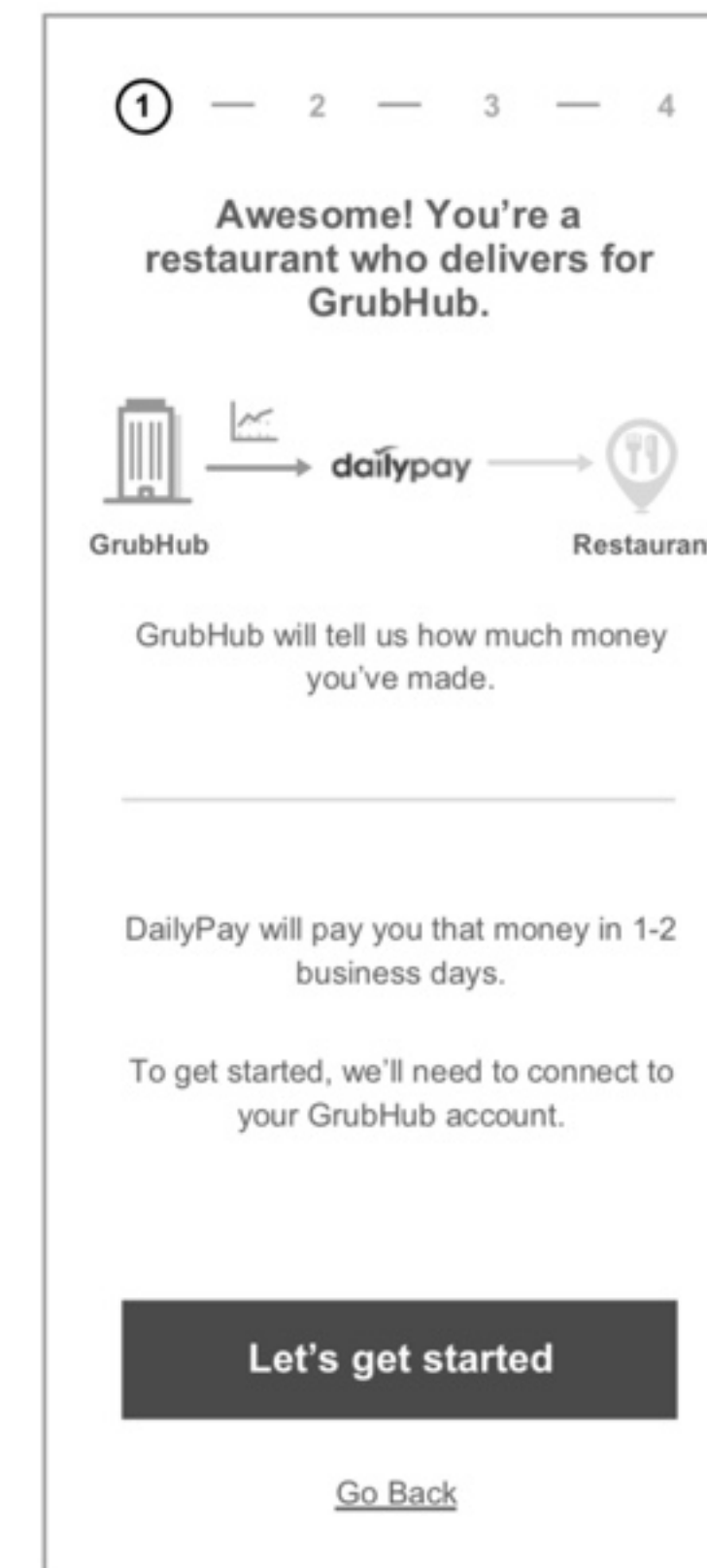
EMPLOYEE OF ENTERPRISE/HOMEBASE

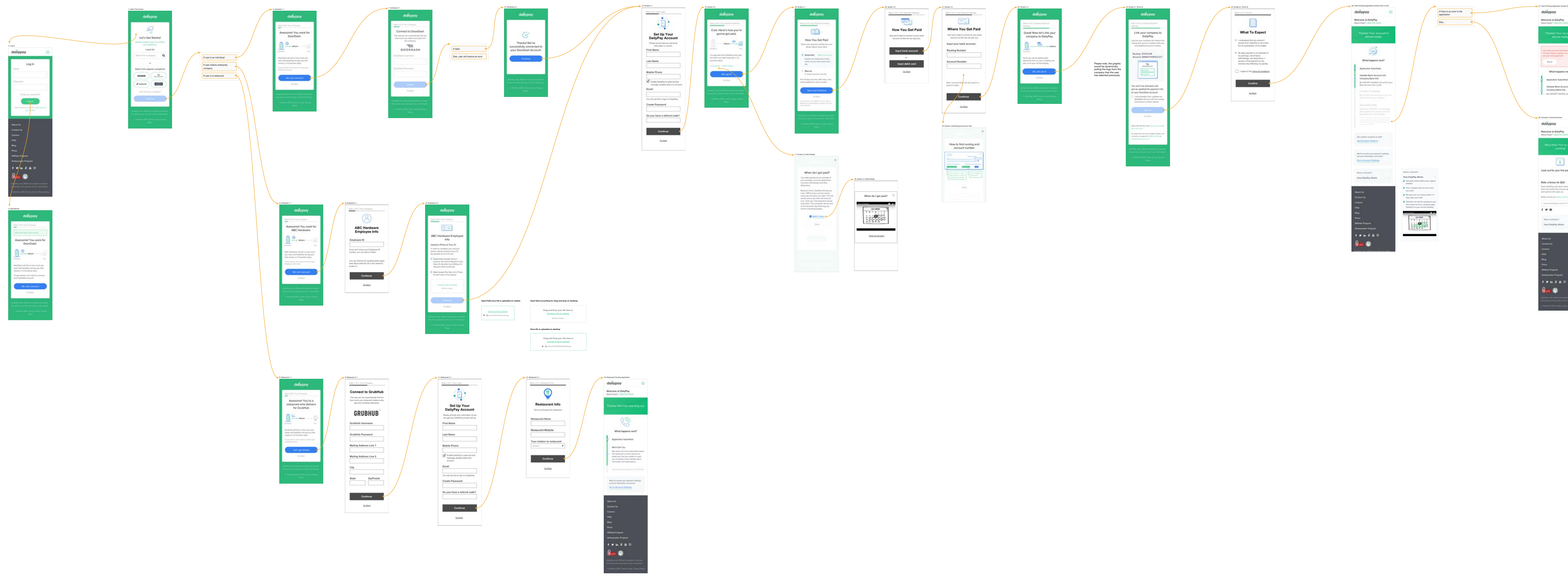
(Example company name: ABC Hardware)



RESTAURANT

(An "employee" of delivery platforms like GrubHub)





UI & STYLES

Due to the detailed wireframes and accelerated project timeline, there was no need to create a full visual prototype.

I worked with a visual designer to create a thorough style guide and key page mockups to demonstrate the styles.

The style guide and design files were then handed off to the client's development team for implementation.



Let's Get Started

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I work for

or

Are you a business?

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Learn More

DailyPay uses 256-bit encryption to protect the privacy and security of your information.

© DailyPay 2018

Awesome! You work for ABC Health Care (Fundamental).



With **DailyPay**, you can now control when you get paid



892 of your coworkers are currently using DailyPay!

Continue

DailyPay uses 256-bit encryption to protect the privacy and security of your information.

© DailyPay 2018

First, let's see if **ABC Health Care (Fundamental)** already created your account



First Name

Last Name

Phone Number

Email

Employee ID (optional)

Find My Account

Already have an account? [login here](#)

DailyPay uses 256-bit encryption to protect the privacy and security of your information.

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Transition to DailyPay

By 1/27/2017 You will receive your last paycheck from your company.

Start Getting Paid

Starting at 1/30/2017*, you can begin getting paid every day you work. (12 days before the next payday!)

*Please note this is the first day (company) can activate your account, times may vary. We will send you an alert the moment your account is activated.



DailyPay Business Application

[Not a business? Get paid with DailyPay.](#)

You're on your way to a happier, more engaged workforce! In order to get you set up on DailyPay, we need to collect some information from you.

You should have the following on hand:

- ✓ Business details like EIN
- ✓ Financial Statements
- ✓ CSV Samples of [specific info]

[Start Application](#)

[Already started? Login to complete your application.](#)

DailyPay uses 256-bit encryption to protect the privacy and security of your information.

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Desktop styles were also established, especially for the employer (business) user signup funnel, since those users tend to use desktop devices.



Step 3 of 6: Payroll Info



Payroll and Hour Tracking

Tell us more about how you are tracking and paying your employees.

Payroll Provider

Select

Payroll Period Type

Select

Timezone of Payroll

Select

Current Pay Period Start Date and Time

2/01/2017 1:00 PM

Current Pay Period End Date and Time

2/15/2017 1:00 PM

Payroll Payment Date

Select

System of Hour Tracking

Select

Thank You

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