INTERNSHIP CAPSTONE PRESENTATION
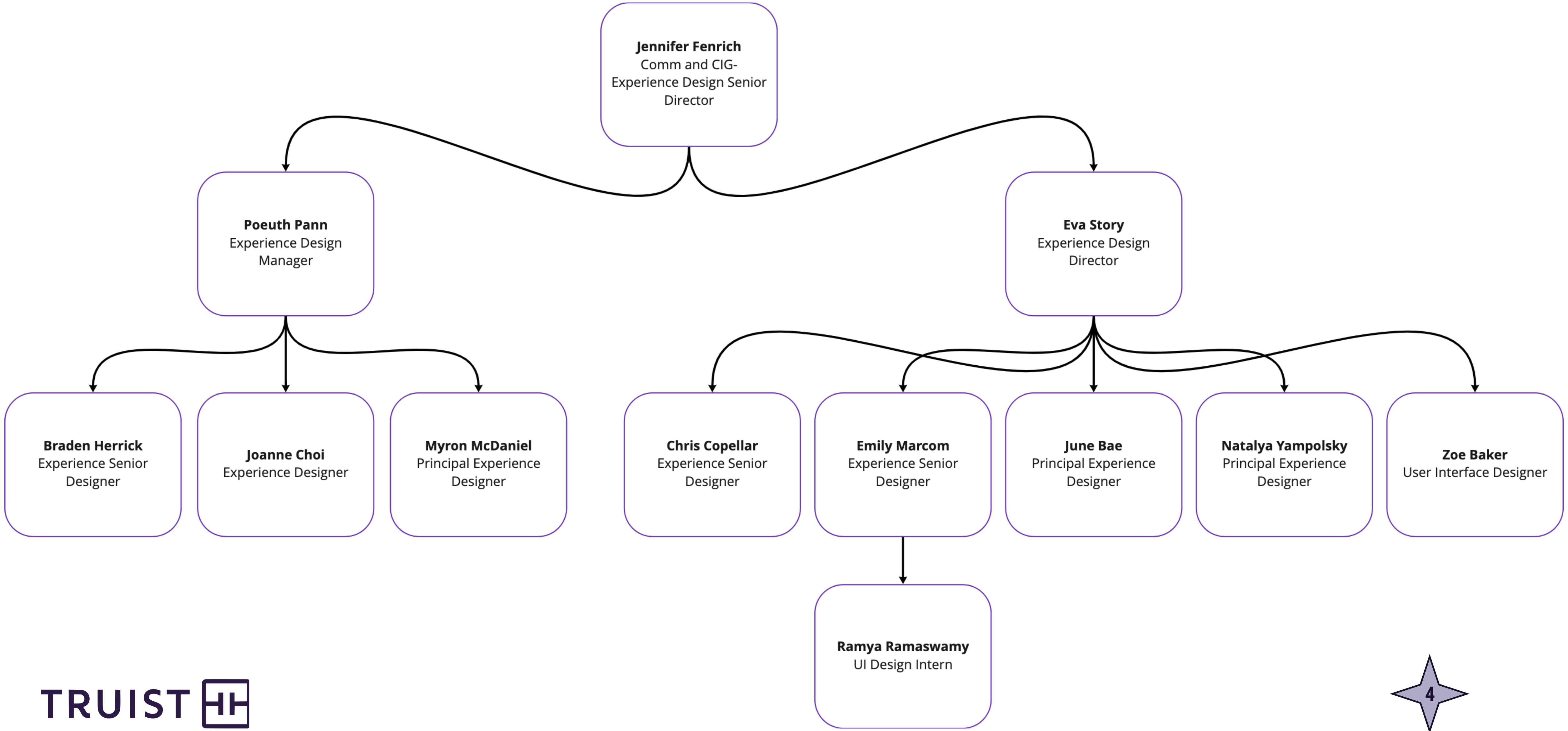
Ramya Ramaswamy

UI Design Intern

TRUIST ⊞

HI! I'M RAMYA!

- Rising junior at the Georgia Institute of Technology
- Computational Media, threads in Interaction Design and Media
- Business Digital Products team focusing on User Interface Design
- Hobbies include dance, baking, and watching reality TV

Jennifer Fenrich
Comm and CIG-Experience Design Senior Director

Poeuth Pann
Experience Design Manager

Eva Story
Experience Design Director

Braden Herrick
Experience Senior Designer

Joanne Choi
Experience Designer

Myron McDaniel
Principal Experience Designer

Chris Copellar
Experience Senior Designer

Emily Marcom
Experience Senior Designer

June Bae
Principal Experience Designer

Natalya Yampolsky
Principal Experience Designer

Zoe Baker
User Interface Designer

Ramya Ramaswamy
UI Design Intern

TRUIST

4

Purpose

Inspire and build better lives and communities

Mission

Clients
Provide distinctive, secure and successful client experiences through touch and technology.

Teammates
Create an inclusive and energizing environment that empowers teammates to learn, grow and have meaningful careers.

Stakeholders
Optimize long-term value for stakeholders through safe, sound and ethical practices.

Values

Trustworthy
We serve with integrity.

Caring
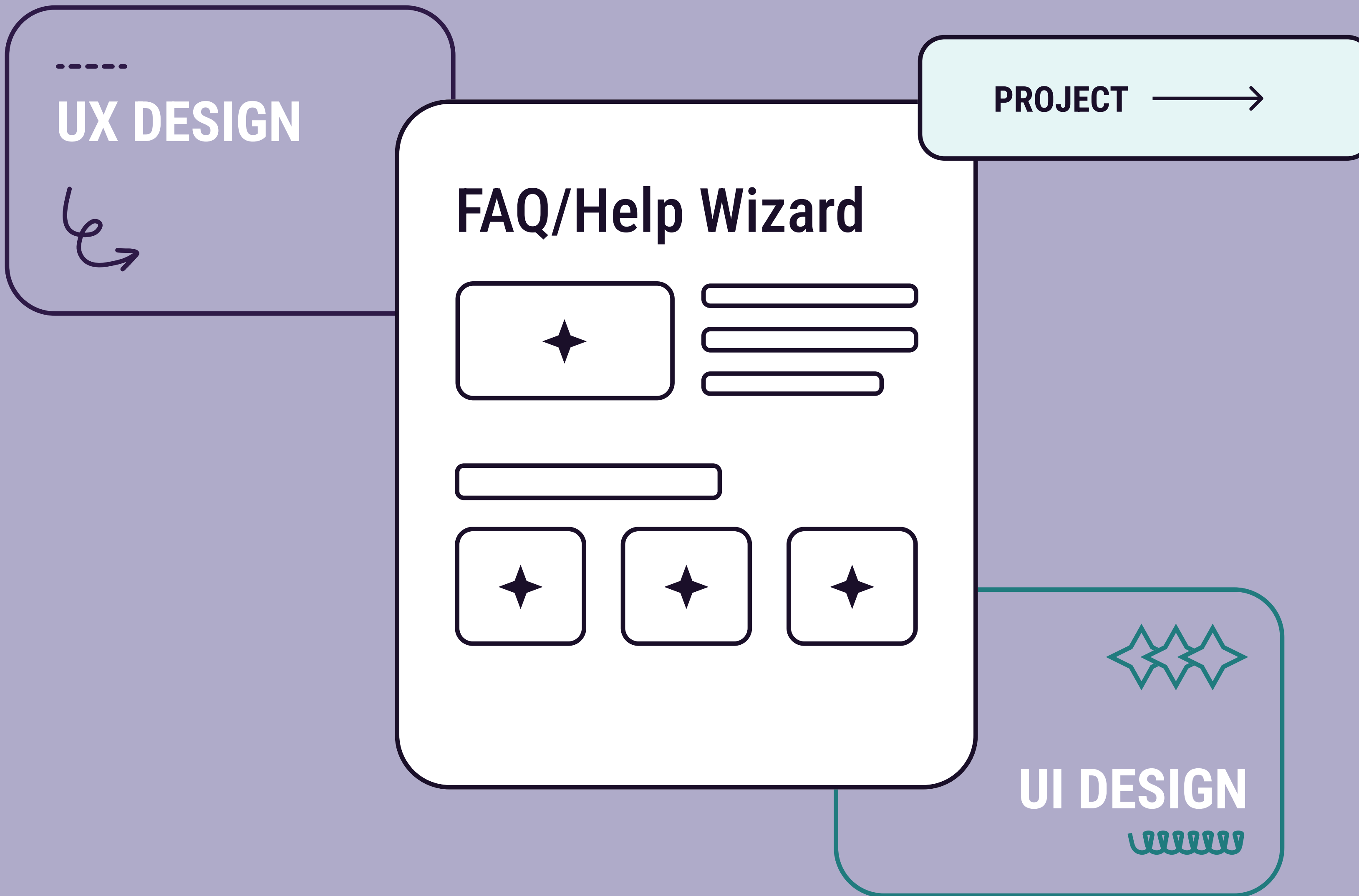Everyone and every moment matters.

One Team
Together, we can accomplish anything.

Success
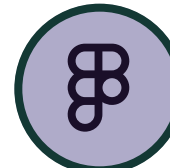When our clients win, we all win.

Happiness
Positive energy changes lives.

TRUIST HH

▲ ABOUT THE PROJECT

- Creating a wizard help solution for displaying information throughout the site.
- Find a better way to surface PDFs hidden in current help screen.

ROLE	TOOLS
UX Research, Interaction Designer, UI Designer	

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AGENDA

STEP 1

COMPETITIVE ANALYSIS

STEP 2

CREATE USER FLOWS AND FLOW CHARTS

STEP 3

CUSTOMER RESEARCH

STEP 4

PROTOTYPE
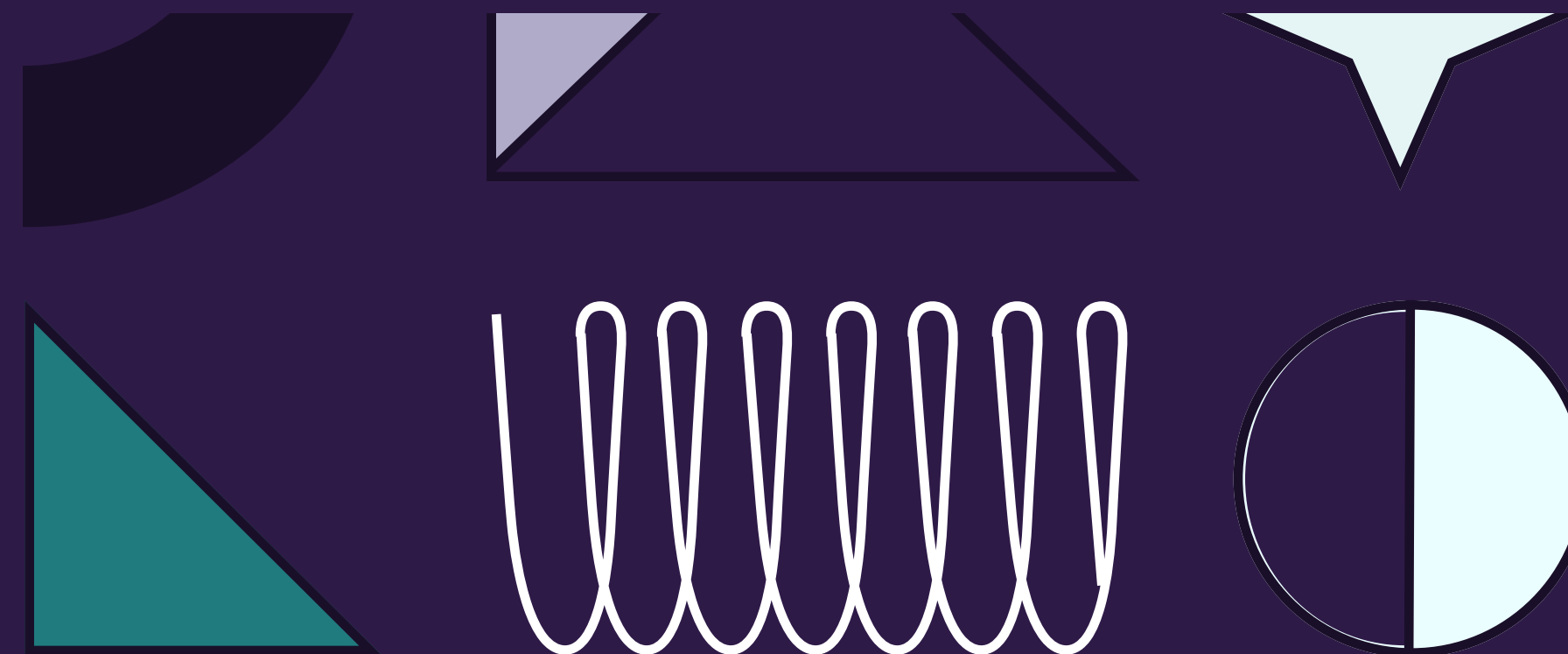
TRUIST

COMPETITIVE ANALYSIS

TRUIST HH

Pro-
small amount of space on screen when closed

Con-
not very visible when collapsed (just the ?)

Click here for more help.

OK

?
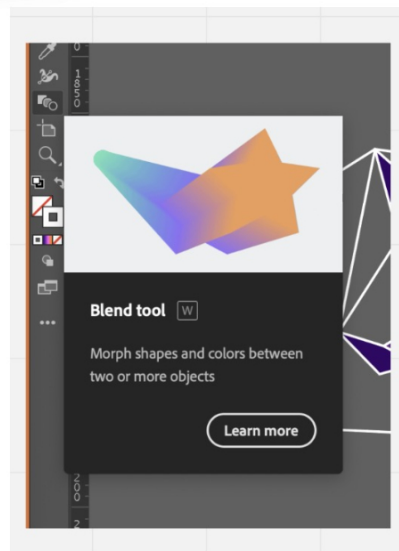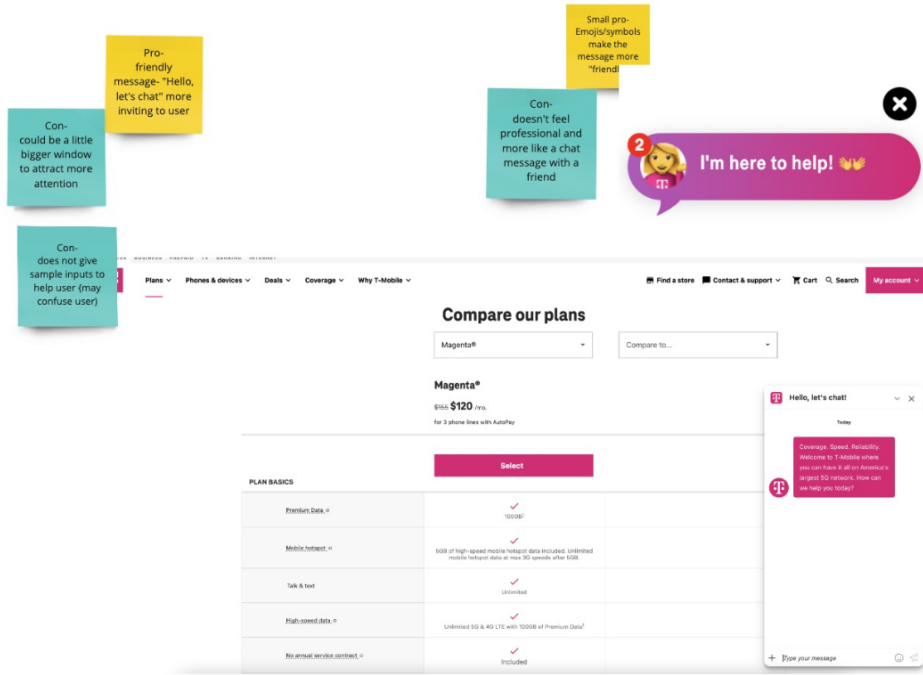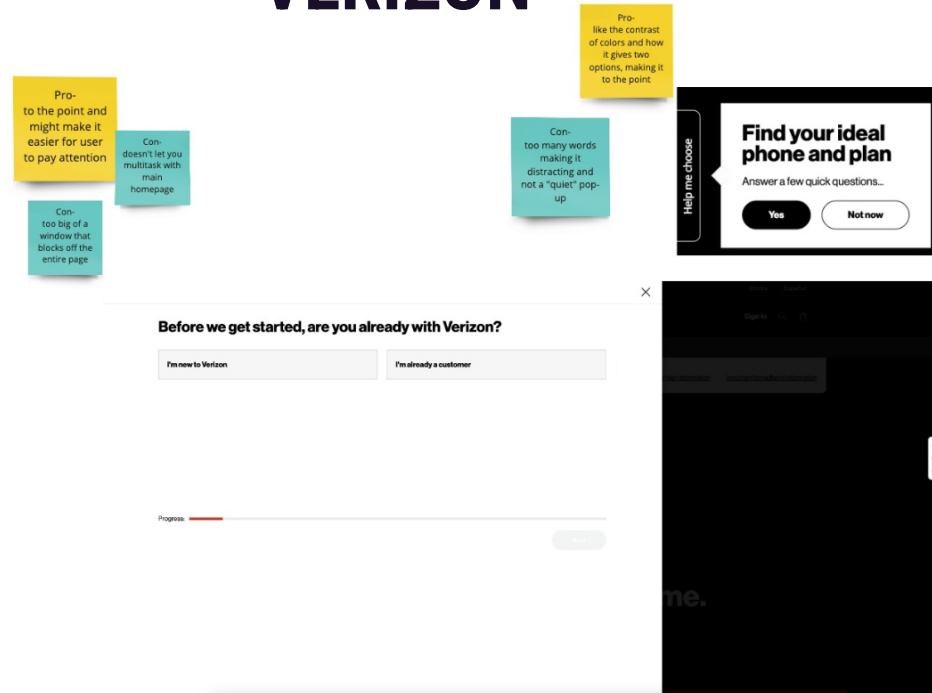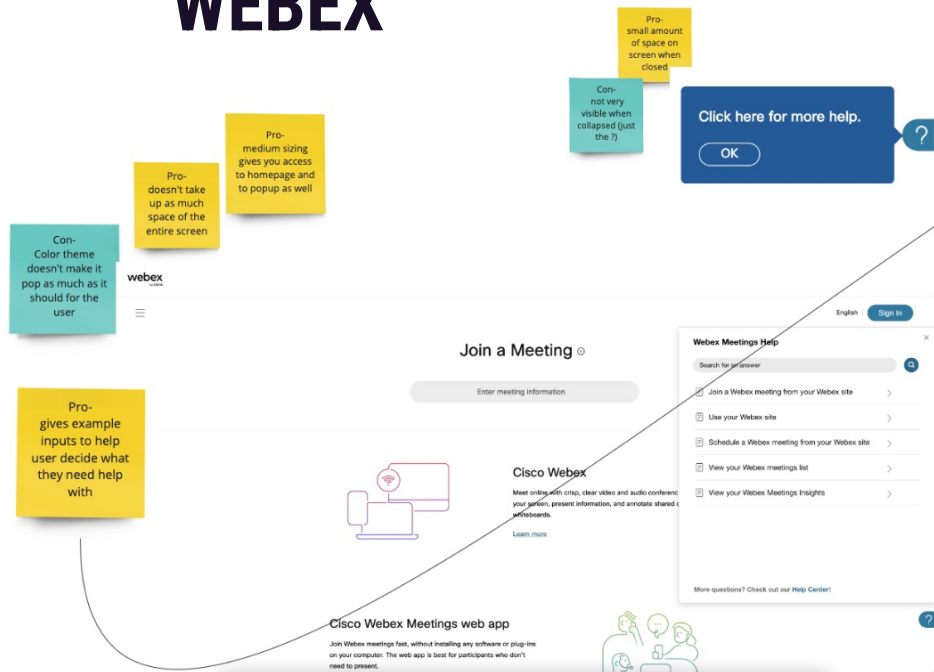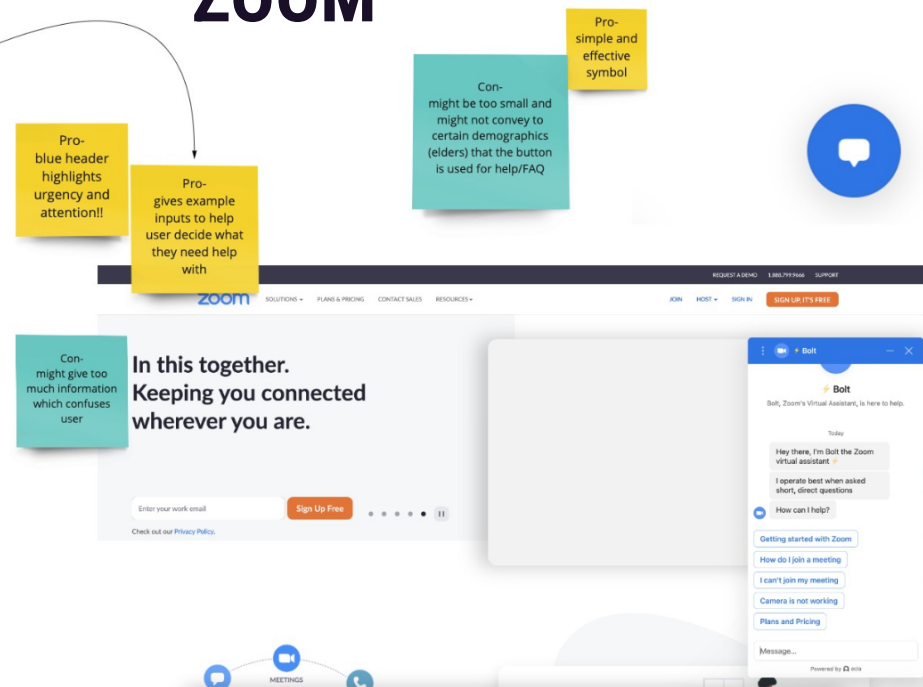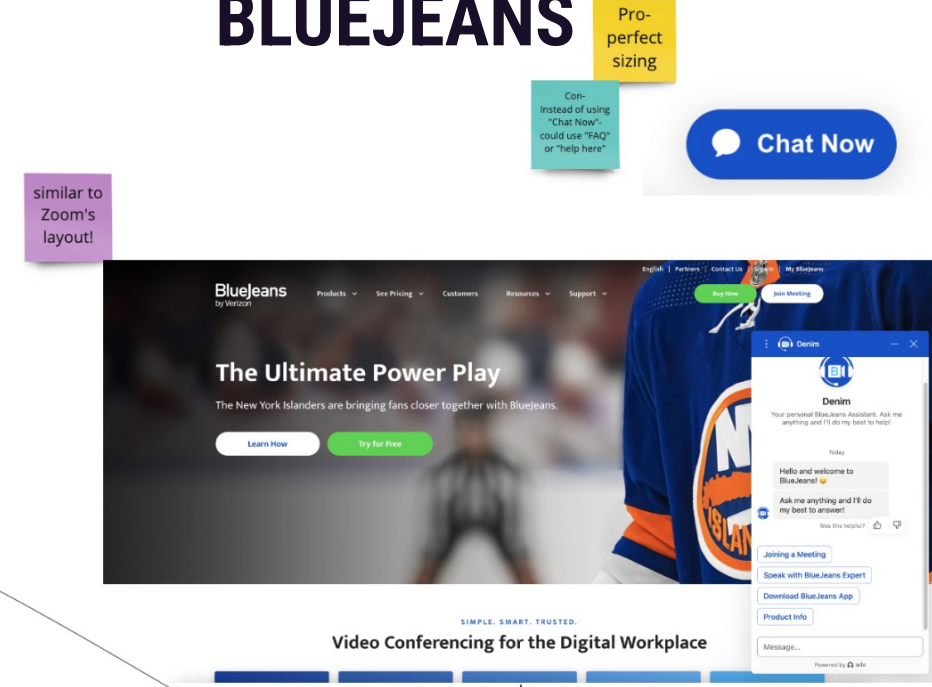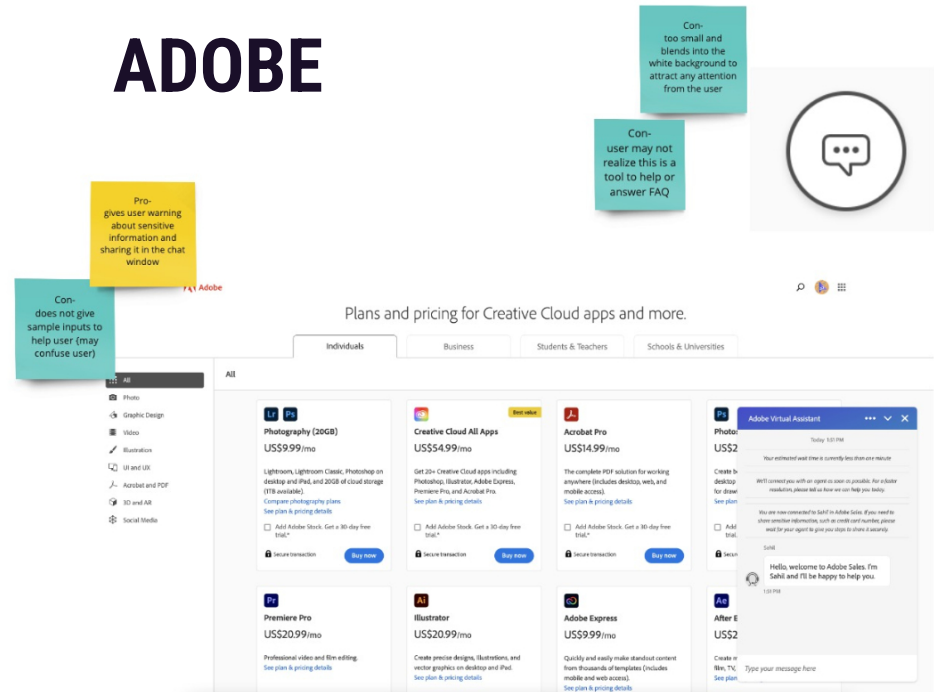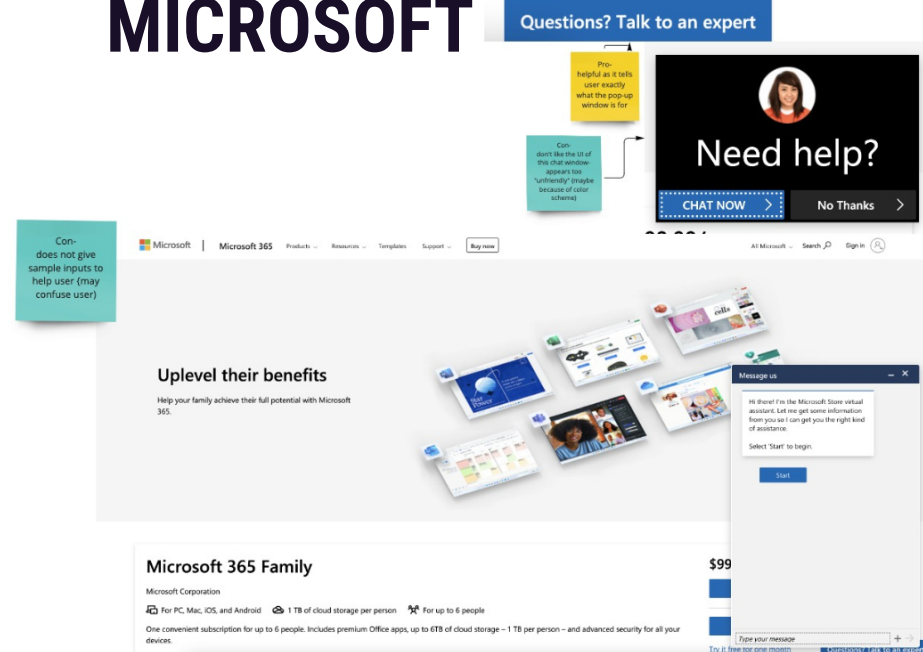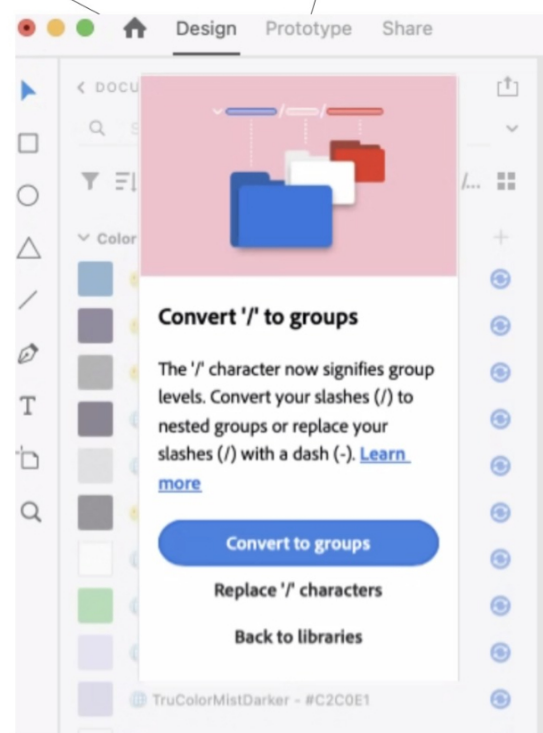
Pro-
medium sizing gives you access to homepage and to popup as well

Pro-
doesn't take up as much space of the entire screen

Pro-
gives example inputs to help user decide what they need help with

English | Sign In

Join a Meeting ⓘ

Webex Meetings Help ✕

Search for an answer 🔍

Con-
Color theme doesn't make it pop as much as it should for the user

Enter meeting information

📄 Join a Webex meeting from your Webex site ›

📄 Use your Webex site ›

📄 Schedule a Webex meeting from your Webex site ›

📄 View your Webex meetings list ›

Cisco Webex

Meet online with crisp, clear video and audio conferenc your screen, present information, and annotate shared whiteboards.

Learn more

📄 View your Webex Meetings Insights ›

TRUIST

More questions? Check out our **Help Center!**
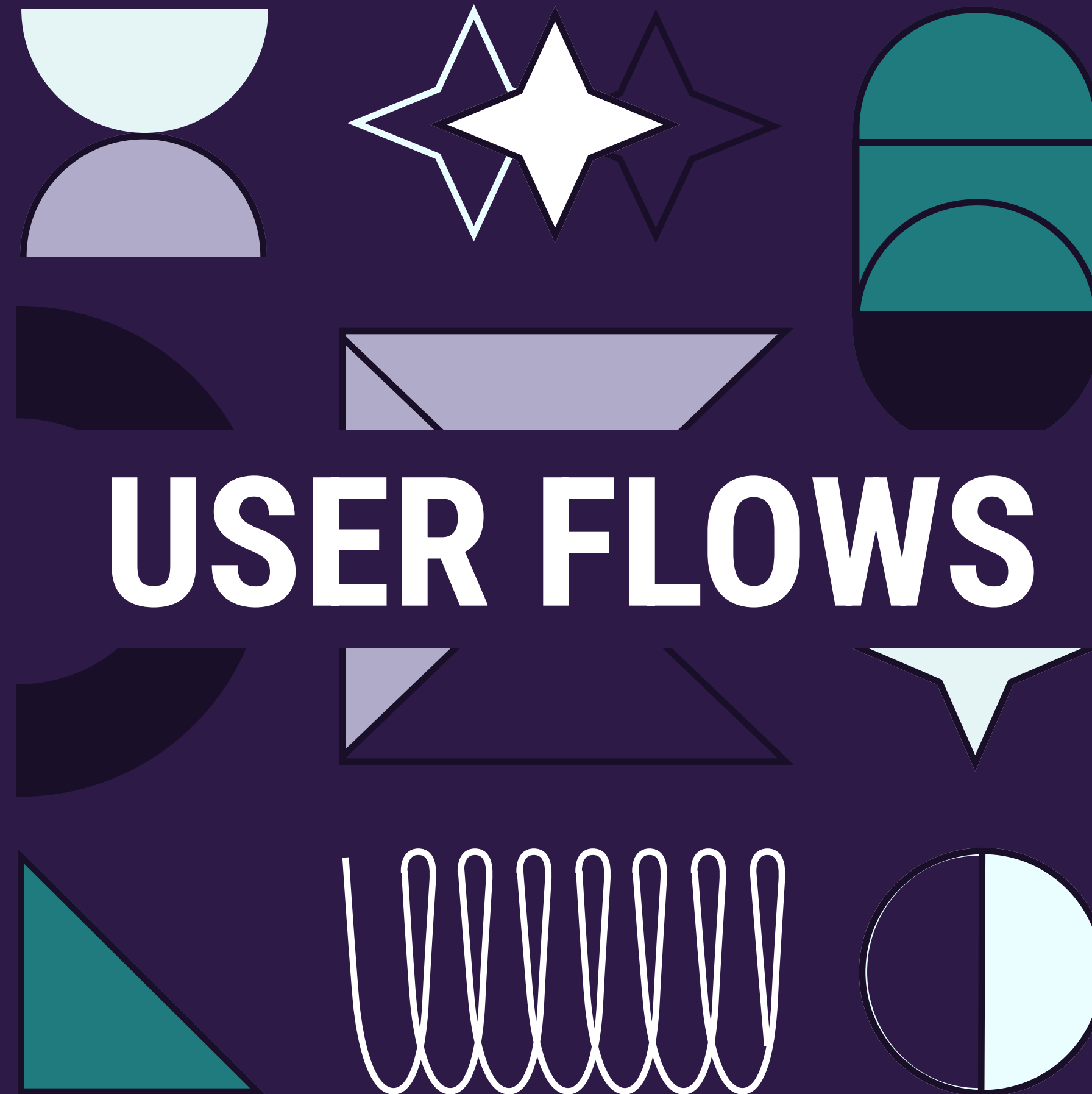
USER FLOWS

Wizard/FAQ window flow chart

Hover over icon for information on current website through a link or pdf download

Link

PDF Download

Needs to find answers to certain questions and/or interact with chat bot

User navigates to help icon

for example: currently on a fraud inspector window

Can click on icon to pull up help window on the side of the window

Enter specifics in search box

Given list of sample questions with links

Choose link

Article 1 with information

Article 2 with information

[Fraud Inspector] Suggestion 1

[Fraud Inspector] Suggestion 2

General Suggestion 1

General Suggestion 2

Read answer to question

Click X at the top right

Click go back to main menu

Chat bot

Interact with chat bot to answer questions

Click X at the top right

Click go back to main menu

Help Link

New tab with help section

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CUSTOMER RESEARCH

TRUIST ⌂

Limited Functionality

Customer Insights

Handle only Basic Inputs

Customer Frustration

Trust

Waste of Time for Customers

Survey Research

Bots and humans excel at different tasks

Where humans win	Where chatbots win
• Answering a variety of questions • Dealing with complex situations • Understanding human emotion	• Answering common questions quickly • Reducing hold times • Quick routing to the right place

TRUIST ⊞

14

◢ WIREFRAMING

DESIGN CRITIQUE

TRUIST | Home | Accounts | Transfer & Pay | Payroll | Fraud Inspector | More ⌄ — Business Account ⌄ | Sign Out

Enroll in Fraud Inspector

Identify and curb potential fraud on your business accounts. Enroll in Fraud Inspector the added protection you need:

Review items
Review your paid check and ACH items from the previous business day with any available images.

Request item reversals
If you suspect fraudulent activity, you can dispute an item by requesting a reversal between 9 am and 2 pm ET.

Get started

BB&T support
1 (999) 999-9999

SunTrust support
1 (999) 999-9999

Truist.com   Help   Customer Service   BB&T Privacy   SunTrust Privacy

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⌂ Equal Housing Lender.

Loans, lines of credit and credit cards are subject to approval

Only deposit products are FDIC insured. Truist Financial Corporation, Member FDIC.

Investment and Insurance Products:
Insurance products and services offered through McGriff Insurance Services, Inc., a subsidiary of Truist Insurance Holdings, Inc., are not a deposit, not FDIC insured, not guaranteed by a bank, not insured by any federal government agency and may go down in value.

Securities, Insurance and Advisory Services are: NOT A DEPOSIT • NOT FDIC-INSURED • NOT GUARANTEED BY A BANK • NOT INSURED BY ANY STATE OR FEDERAL GOVERNMENT AGENCY • MAY GO DOWN IN VALUE

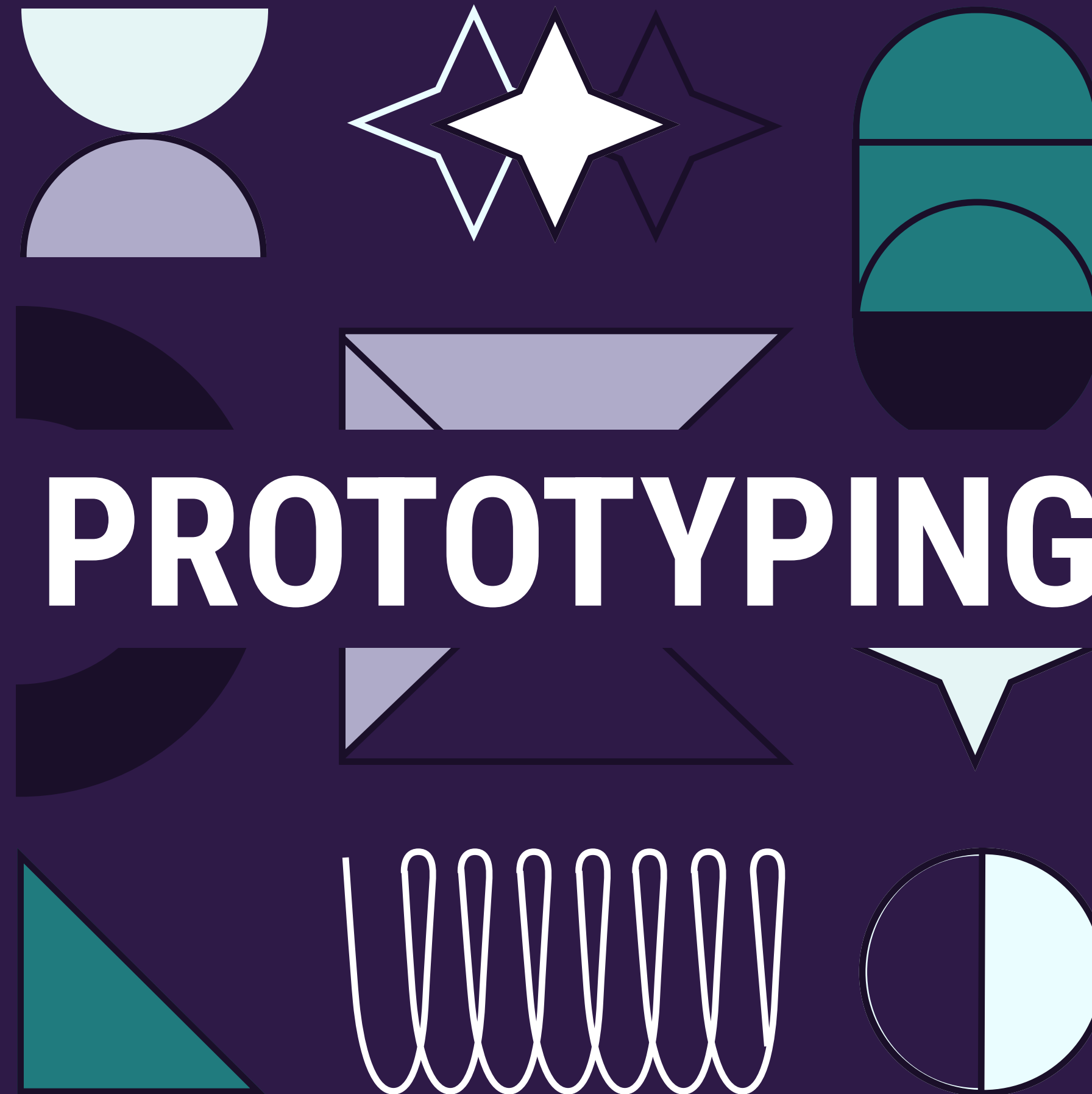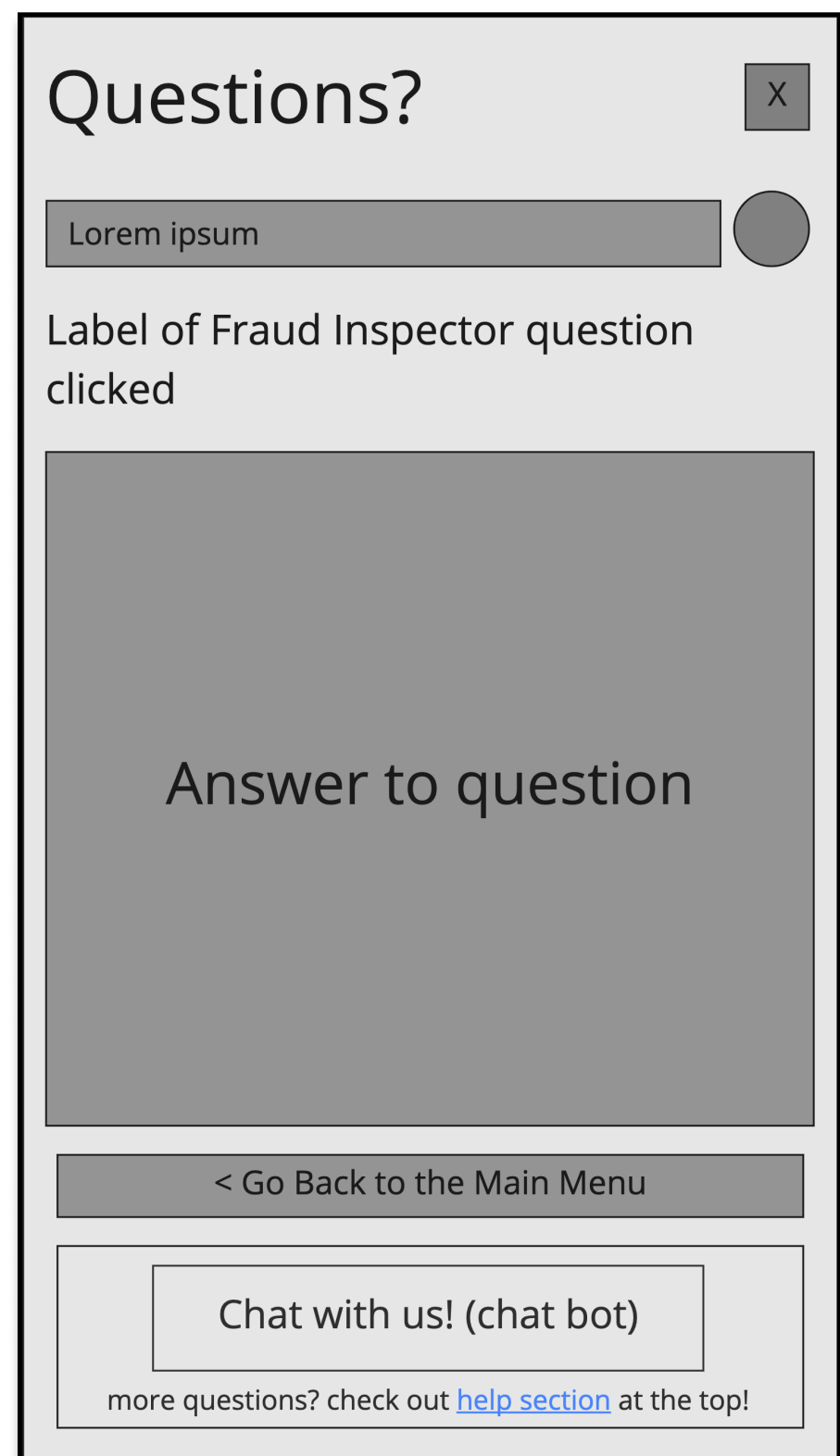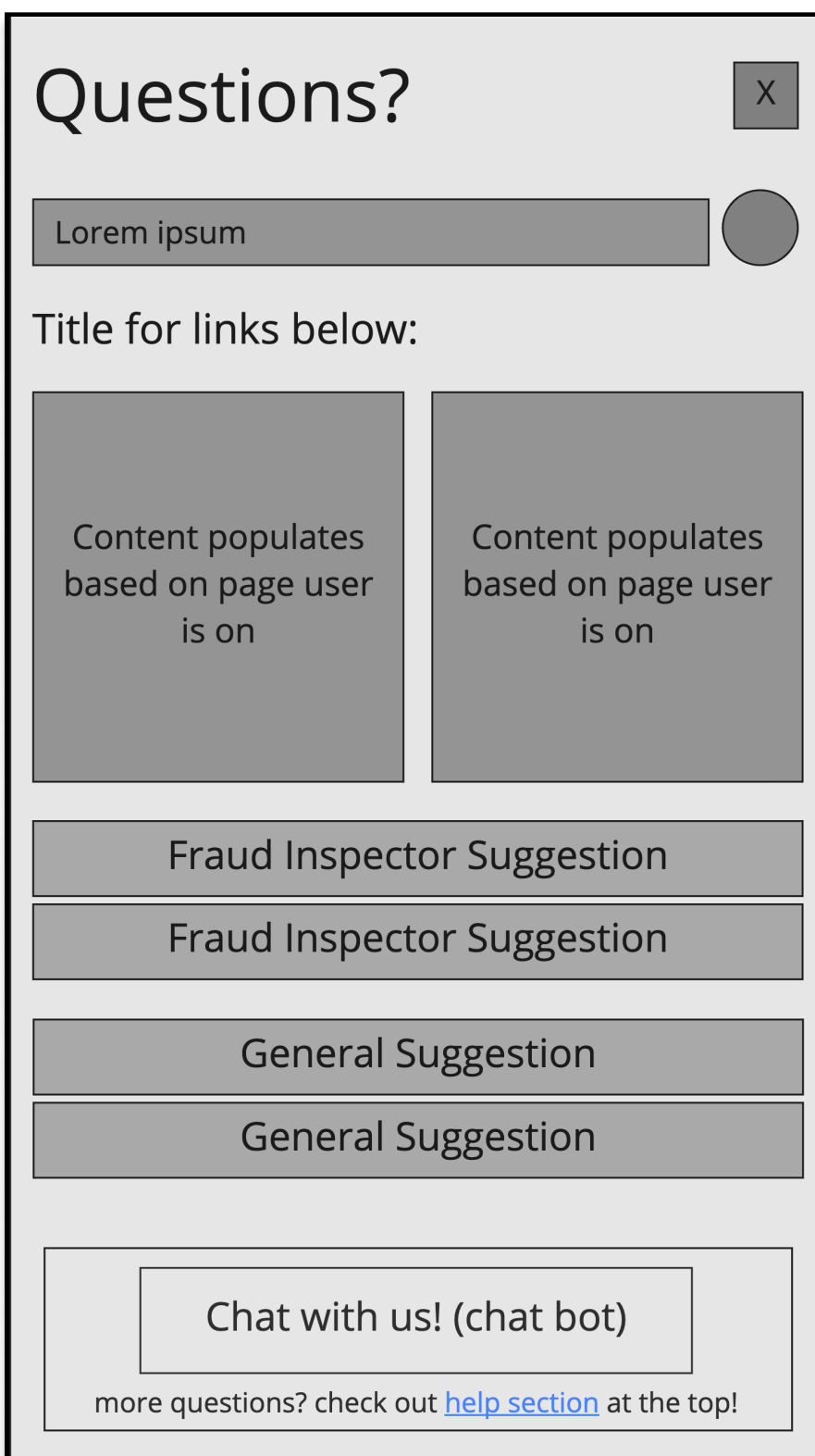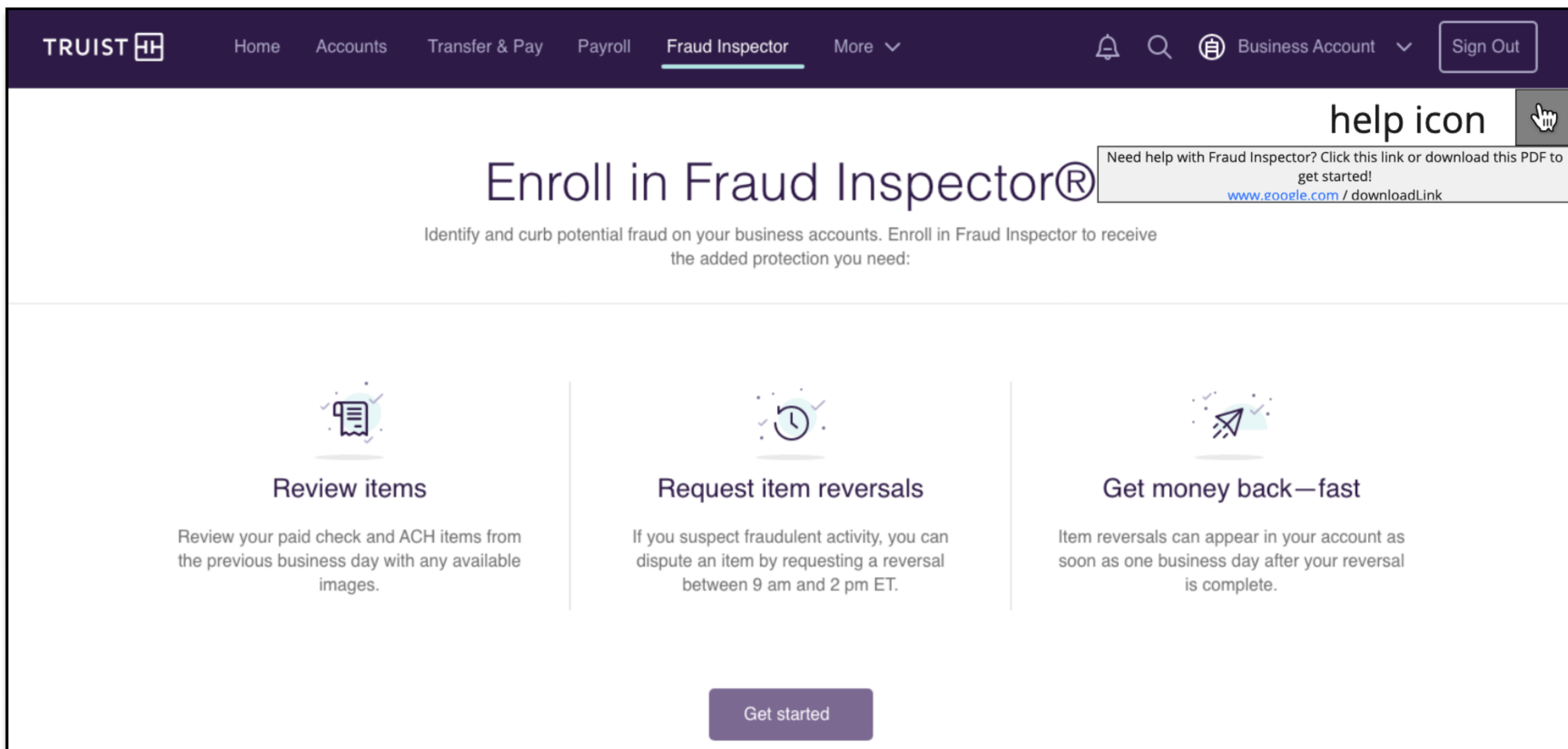**Questions?** X

Lorem ipsum

Title for links below:

Content populates based on page user is on | Content populates based on page user is on

Fraud Inspector Suggestion
Fraud Inspector Suggestion
General Suggestion
General Suggestion

Chat with us! (chat bot)

more questions? check out help section!

Sticky notes:

PP2 — Overall I like this approach the best. info is served up with related / most asked questions would be nice. Search i really helpful too.

BH2 - I prefer the flyout option as opposed to a full page in a new tab. Keeps the user focused

Would the content for these page live in the Quick reference guide? (QRG)

EM1: What's the intended difference in content between the square and rectangle options?

BH1 - Should "More questions" section be higher on the page or more discoverable?

CC2 since this includes a link what would be the interaction? Popup/tool tip? and kind of confusing with it mentioning to refer back to top when there is a link?

EM2: How would we decide what help items showed up in this help panel vs a separate help section? Are they different?

Organized Feedback

CONTENT

Would the content for these page live in the Quick reference guide? (QRG)

ES1: How much content is generally in these sections? is the side panel enough or should it live on its own page?

EM1: What's the intended difference in content between the square and rectangle options?

EM4: would this page incorporate items from current 'help & support' page? (call us, find us, inbox)

EM3: Would content on these pages be shown on screen/hidden/collapsible or link to a new view/help page like the side sheet?

COMPLIMENTS

PP2 — Overall I like this approach the best. info is served up with related / most asked questions would be nice. Search i really helpful too.

BH2 - I prefer the flyout option as opposed to a full page in a new tab. Keeps the user focused

Help icon/Location

ES3: is the best placement for this or should this move down on the right side? will i accidently hit sign out?

cc1 Q on interaction/behavior of help. is this a static help icon or will it float as user scrolls to keep on screen at all times?

PP3 — This works for genaral Help/FAQ but may be hidden and not contextual to users' needs

PP1 — This is great for PDFs and is contextual to page itself. I like that it is in the upper right hand as it could be a consistent way to show all Help / FAQ

More questions area

BH1 - Should "More questions" section be higher on the page or more discoverable?

CC2 since this includes a link what would be the interaction? Popup/tool tip? and kind of confusing with it mentioning to refer back to top when there is a link?

EM2: How would we decide what help items showed up in this help panel vs a separate help section? Are they different?

ES2: where is the help section at the top? am i not technically in the help section or does this content also live somewhere else?

FINAL DESIGN

TRUIST

DESIGN PROCESS

Questions? [X]

Lorem ipsum ⬤

Title for links below:

Content populates based on page user is on	Content populates based on page user is on

Fraud Inspector Suggestion

Fraud Inspector Suggestion

General Suggestion

General Suggestion

Chat with us! (chat bot)

more questions? check out help section at the top!

How can we help? ✕

[ ] 🔍

Browse our walk-throughs

Enroll your company
Need to be a Business Owner or a Full Access Admin

Click here →

Add or remove accounts
Need to be a Business Owner or a Full Access Admin

Click here →

Review items in Fraud Inspector ›

Enroll in wire services ›

Chat with us

Didn't find your answer? Check out Help and Support.

How can we help? ✕

[ ] 🔍

Browse our walk-throughs

Enrolling your company in Fraud Inspector
The Business Owner or Full Access Admin can enroll in Fraud Inspector.

Click here →

Add or remove accounts in Fraud Inspector
The Business Owner or Full Access Admin can add or remove accounts.

Click here →

Reviewing items in Fraud Inspector
The Business Owner or Full Access Admin entitles users for Fraud.

Click here →

Submit return requests in Fraud Inspector
Select the return reason for each item you deem fraudulent.

Click here →

Chat with us

Didn't find your answer? Check out Help and Support.

TRUIST ⊞

19

◢ FINAL DESIGN

TRUIST ⊞   Home   Accounts   Transfer & Pay   Payroll   **Fraud Inspector**   More ⌄   🔔 🔍 ⊞ Business Account ⌄ | Sign Out |

32

? 32

Enroll in Fraud Inspector®

Identify and curb potential fraud on your business accounts. Enroll in Fraud Inspector to receive the added protection you need:

Review items

Review your paid check and ACH items from the previous business day with any available images.

Request item reversals

If you suspect fraudulent activity, you can dispute an item by requesting a reversal between 9 am and 2 pm ET.

Get money back—fast

Item reversals can appear in your account as soon as one business day after your reversal is complete.

Get started

TRUIST ⊞

20

◢ **FINAL DESIGN**

Screen 1

How can we help?

[   ] 🔍

Browse our walk-throughs

🗄
Enrolling your company in Fraud Inspector
The Business Owner or Full Access Admin can enroll in Fraud Inspector.
Click here →

🗄
Add or remove accounts in Fraud Inspector
The Business Owner or Full Access Admin can add or remove accounts.
Click here →

🗄
Reviewing items in Fraud Inspector
The Business Owner or Full Access Admin entitles users for Fraud.
Click here →

🗄
Submit return requests in Fraud Inspector
Select the return reason for each item you deem fraudulent.
Click here →

[Chat with us]

Didn't find your answer? Check out Help and Support.

Screen 2

How can we help?

[   ] 🔍

Browse our walk-throughs

← **Main Menu**

Enroll your company
Need to be a Business Owner or a Full Access Admin

1. Select Fraud Inspector from the top navigation in Truist Online Banking. Based on other features you have, Fraud Inspector may be listed under More v .
2. Click Get Started.
3. Review the Terms and Conditions, clicking the checkbox to indicate you've read and agree to them.
4. Click Continue.
5. You are presented with the accounts that are eligible for Fraud Inspector. Select the accounts you want to monitor, then click Enroll now. To enroll in Fraud Inspector, you must select at least one account for monitoring
6. A success message displays.

[Chat with us]

Didn't find your answer? Check out Help and Support.

Screen 3

How can we help?

[Enroll account   ] 🔍

← **Main Menu**

Search results

Enrolling your company in Fraud Inspector
The Business Owner or Full Access Admin can **enroll** in Fraud Inspector. To **enroll** your company to Fraud Inspector for the first time:

Adding or removing accounts in Fraud Inspector
From Online Banking: 1. Click Fraud Inspector. 2. Click Manage **enrollment**. 3. Select the accounts to monitor or de-select accounts to remove, then click Save.

Reviewing items in Fraud Inspector
You'll see a summary of the items to review for the current day, including: Number of items available to review for each account **enrolled** in Fraud Inspector

[Chat with us]

Didn't find your answer? Check out Help and Support.

TRUIST ⊞

20

GOING FORWARD

◢ NEXT STEPS

STEP 1

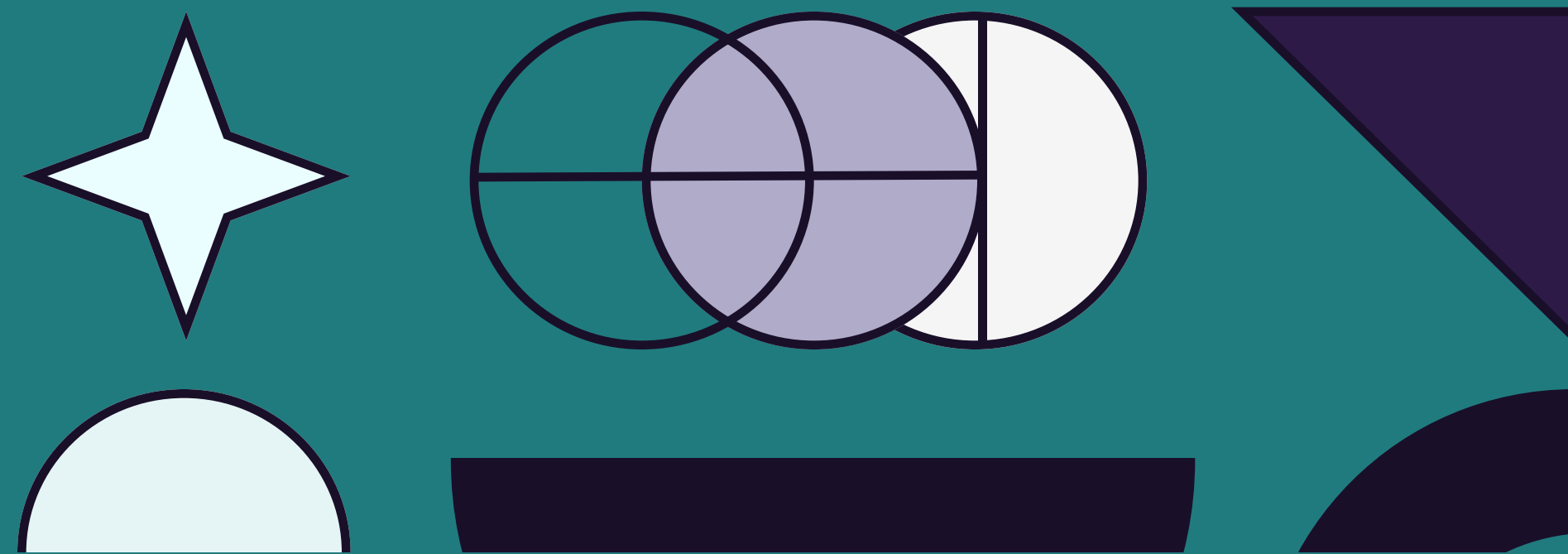The ability to toggle between open window and fly out.

STEP 2

Should help icon be static or hover on the page as the user scrolls on the page?
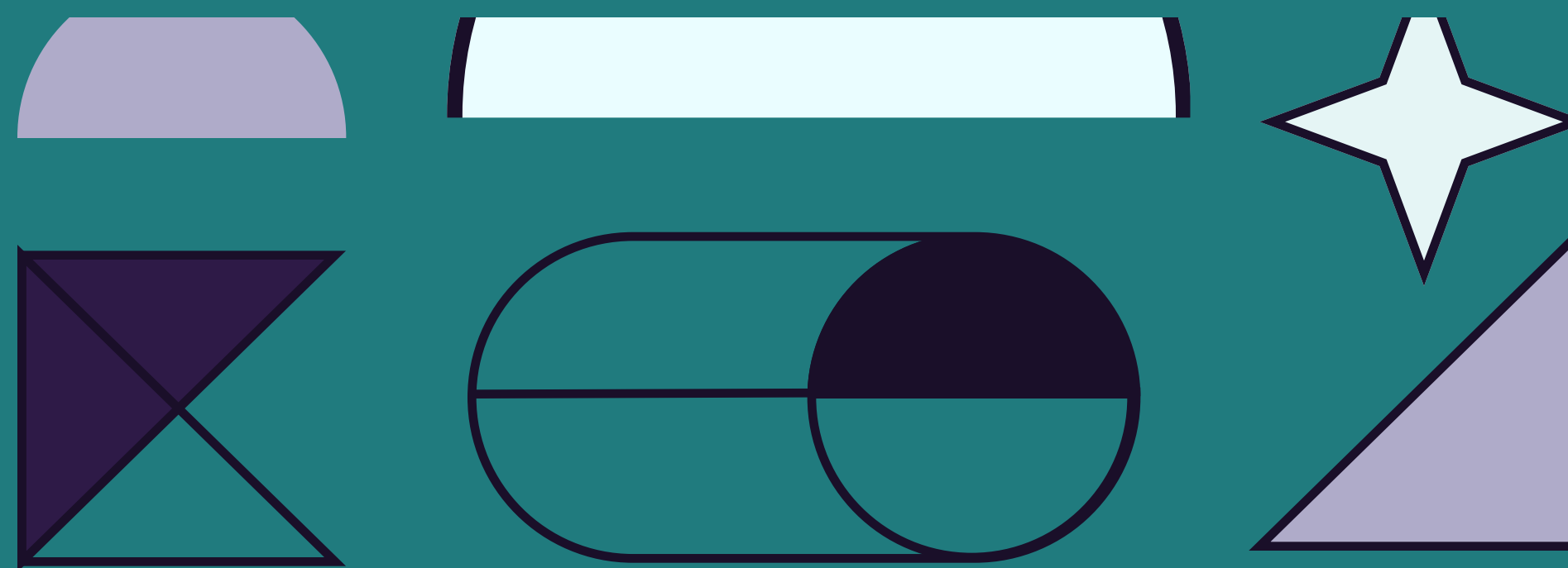
(Additional functionality)

STEP 3

The amount of content that would appear in the search bar.

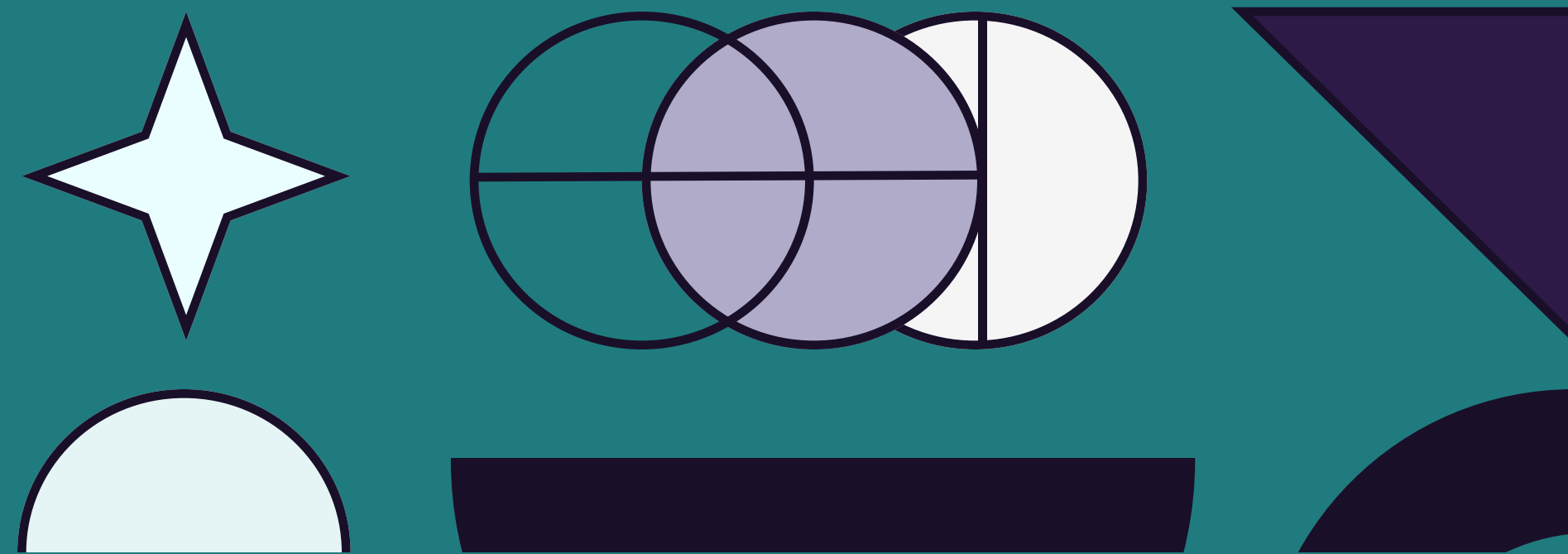(Small -> bigger)

TRUIST ⊞

REFLECTIONS

TRUIST

THANK YOU!!

EMILY
MARCOM

EVA
STORY

TEAM
SCRUMSHINE

HENRIETTA
DWOMOH-APPIAH

MENTORS &
ATL SQUAD

TRUIST
INTERNS

Q & A

TRUIST