

# Aurify.me



**A habit tracker to improve personal development – the app will enable you to compete with your past selves or challenge friends.**

The web app allows coaches to access the client's data and to view their current progress as well as historical data. This will let you gain insight, be more impactful and provide real time feedback. Overtime this will help quantify the impact and value of their coaching.

[View prototype](#)

The screenshot displays the Aurify web application interface. At the top, there is a navigation bar with 'Settings' and 'Sign out' options. Below the navigation bar, there is a header for 'Drew Houston' with a birthday of '03/08/1975', a start date of '12/06/2020', and a group of 'Startup Founders'. There is also an 'Edit Profile' button. To the right of the header, there are links for 'Messages', 'Schedule', 'Notes', 'Invoice', 'Resource', and a 'Start Zoom' button.

The main content area is divided into several sections:

- Habit Overview:** Shows various habits with their completion percentages: M 1500 (95%), T 1600 (70%), W 1700 (45%), J 1800 (73%), F 1900 (60%), S 2000 (45%), and S 2100 (0%).
- Current Progress:** Displays progress bars for 'Personal Best' (65%), 'Yesterday' (45%), and 'Today' (70%) across Daily, Weekly, and Monthly metrics.
- Client Insights:** Contains notes from 'Delegate Notes' and 'Active Listening Notes'.
- Goals:** A section titled 'Main focus areas' with goals like 'Develop leadership style' and 'Learn to communicate and delegate more effectively'.
- Program:** Shows a program with a type of 'Leadership Development', 10 sessions, and a status of 'Completed'.
- Meeting Details:** A section for scheduling a meeting on '13/06/2020' at '10:00AM' to '11:30AM' with a reminder set for '15 minutes before'.

## The Overview

Developing a web app for coaches to use on desktop as a work tool during their calls. Their goal is to simplify and combine multiple tools they currently have and track the progress of their clients to provide a tangible output for progress.

Coaching clients and non coaching users can use it to track their current progress on their goals and to also collaborate with friends.

The client had previously started working with a graphic designer and also conducted their own user interviews, but they felt that the current designs were too overwhelming and the tracker wasn't what they wanted. They wanted something that would remove the mental blocks and something that would help their clients to start achieving their goals.

## Research

The main objective was to provide a home for coaches, and to create an effortless dashboard for them to monitor and track results on upcoming goals on their client progression. After hosting multiple user interviews, most of the platforms that the coaches are currently using lack important features such as sending out invitations for progression reviews and also tracking client progressions through out the program.

zoom



NudgeCoach	Coach.logix	Coach.me	Coachmetrix
 The NudgeCoach homepage features a "Create your coaching app." button and icons for users and coaches.	 The Coach.logix homepage shows a woman in a green dress and text about managing coaching practices.	 The Coach.me homepage displays a dashboard with various icons for tasks like messaging, scheduling, and reporting.	 The Coachmetrix homepage includes a "COACHMETRIX" logo and a "COACHMETRIX" button.
<b>Positives</b> <ul style="list-style-type: none"><li>Easy to navigate</li><li>Nice UI homepage</li><li>Chatbot</li><li>Pop up help suggestions</li><li>Free</li><li>Track progression</li><li>Scheduled messaging</li><li>Sent invites to clients</li><li>Leaderboard</li><li>Easy 'share' instructions to send to client</li><li>Can add custom trackers</li><li>Clients can set up their own profiles so coaches don't need to (send a direct invite to download app)</li><li>Instant messaging</li></ul>	<b>Positives</b> <ul style="list-style-type: none"><li>Good sign up options (GoogleMail, Facebook, LinkedIn)</li><li>Nice simple UI</li><li>Help pop ups</li><li>Invoice creation</li><li>Can see reports of all clients (engagement, coachee, sessions, Goals)</li><li>Resource tab</li><li>Can view progression</li><li>Download summary of client</li><li>Free</li><li>Coach evaluation form (survey)</li><li>Automated sessions list</li></ul>	<b>Positives</b> <ul style="list-style-type: none"><li>Nice simple UI</li><li>Can connect with other coaches in the community</li><li>Tools to track client progress</li><li>Marketing services (newsletters)</li><li>Unlock milestones</li><li>Clients can find and hire coaches directly from the platform</li><li>Good community interactions for clients</li></ul>	<b>Positives</b> <ul style="list-style-type: none"><li>Clean UI</li><li>Can learn the demo on Zoom</li><li>Pop up help guide once logged in</li><li>There's already content in the resources tab</li><li>Can create custom discussion templates</li><li>Can create assignments</li><li>download feedback and activity report</li><li>Can add private notes</li><li>Easy to navigate</li></ul>
<b>Negatives</b> <ul style="list-style-type: none"><li>Free version is only limited to 3 clients</li><li>No invoice option</li><li>No rewards/gameification</li><li>No resources tab</li></ul>	<b>Negatives</b> <ul style="list-style-type: none"><li>Free version is only limited to 3 clients</li><li>No instant messaging</li><li>Hard to invoice clients (a lot of steps)</li><li>No rewards/gameification</li></ul>	<b>Negatives</b> <ul style="list-style-type: none"><li>No free trial/demo for coaches</li><li>Have to purchase straight away</li><li>Doesn't say what each packages are</li><li>Confusing to navigate around</li></ul>	<b>Negatives</b> <ul style="list-style-type: none"><li>UI is quite old</li><li>No instant messaging or direct emailing</li><li>No invoice option</li><li>No rewards/gameification</li><li>Very standard dashboard</li></ul>

Creating  
competitors  
negatives to  
positives.

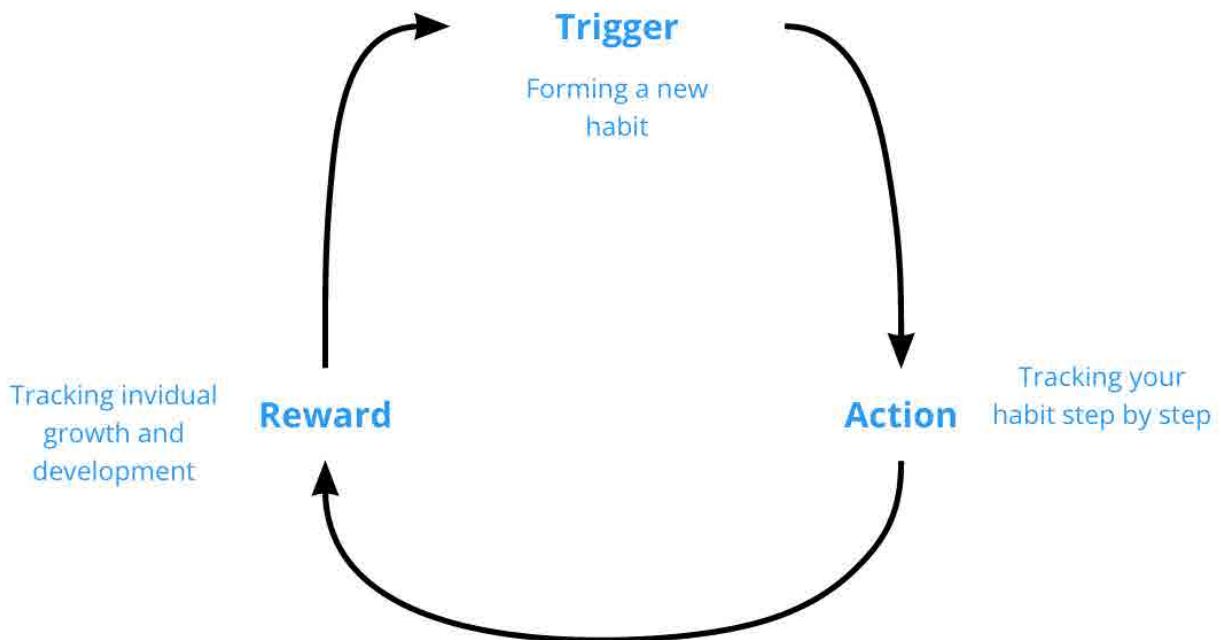
## Empathy Map



## Affinity Map

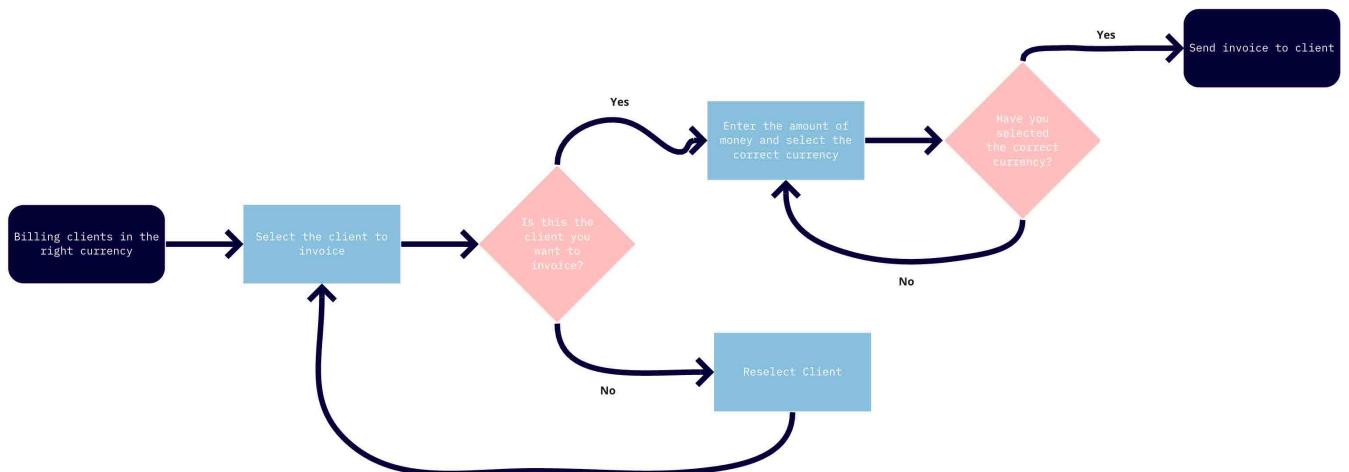


## Retention Loop



## Invoice Userflow

**Goal:** To be able to change the currency and bill clients directly





## User Persona

I want to help and motivate my clients to pursue their goals and progressions!

### User Scenario

Katie is a passionate coach who gives her all in teaching her clients. She has a lot of trouble in keeping up with her emails and managing her clients' progressions weekly. She is frustrated by the fact that no matter how many coaching sessions she does a day, she still spends a lot of time creating and forming the admin work.

### Katie, 45

#### Occupation:

Career Coach

#### Status:

Married

#### Location:

California

#### Goals

- To manage her clients in one system
- Searching for new platforms to be more effective in serving her clients better
- To have a tangible output for progression

#### Needs

A system where she can store all her client details to manage and track their goals and productivity.

#### Frustrations/Challenges

She's currently having a hard time to keep track of her emails and responding them promptly. Her clients are not being responsive on their progression because there isn't a good tracking system or reminders to motivate them.



# Results

After the user testing, most of the users found the web app very intuitive and easy to use. They loved that they could see all their clients on one dashboard and how they could easily track each progress. The final recommendations for the client was to avoid complex UI design and to keep it simple for their users, too much tabs and buttons can easily complicate their user.

The new features included in the web app that was:

- **Integrated Zoom calls**
- **Voice note function for quick and easy communication**
- **An attachment feature for images and documents**
- **A 'start' date so the coaches know when the the client anniversaries are**
- **A 'Reports' section to download the latest activities and individual reports**

The image displays three separate screenshots of the Aurify web application, each highlighting a different feature:

- Leadership Board:** This screenshot shows a sidebar menu on the left with "All Clients" and "Groups" options. The main area is titled "Startup Founders" and includes sections for "Tools", "Programs", "Resource", "Forms", and "Reports". On the right, there's a "Leaderboard" section showing profiles for Drew Houston, Joel Karpasoff, John Metcalf, Alexis Ohanian, Kat Matanac, and Jessica Richman. A "Add comment..." input field is at the bottom.
- Calendar Invites:** This screenshot shows a sidebar menu with "All Clients" and "Groups" options. The main area is titled "Drew Houston" and includes sections for "Tools", "Programs", "Resource", "Forms", and "Reports". It features a "Select date" calendar for June 2020, a "Main focus area" section with goals like "Develop leadership style" and "Learn to communicate and delegate more effectively", and a "Goals" section with progress bars for Personal Best (65%), Yesterday (45%), and Today (70%).
- Invoice:** This screenshot shows a sidebar menu with "All Clients" and "Groups" options. The main area is titled "Drew Houston" and includes sections for "Tools", "Programs", "Resource", "Forms", and "Reports". It shows an "Invoice" section with a breakdown of charges: \$1,500 for Coaching (Description of item), \$600 for Coaching (Description of item), and a Total of \$2,100. A "Clients Overview" button is at the bottom.

## Final Tweaks

Although these were positive feedback, there were some changes to be made to fit into both the users and clients needs. Some found that the dashboard was overloaded with information and some found that the radial graphs on the individual client pages were a bit confusing. The client wanted their users to immediately see what to focus on within a client session, being able to pull up and look at just the progression an hour before their next session was key.

The final design shows how well the client is doing each day of the week – the percentages on each radial graph is multiplied from the client's habit overview, you can view this under Daily, Weekly or Monthly.

First Draft

This screenshot shows the initial version of the Aurify dashboard. It features a sidebar on the left with navigation links for All Clients, Groups, Messages, Programs, Resource, Forms, and Reports. The main area has several sections: 'Habit Overview' with four circular progress bars; 'Delegate', 'Read', 'Write', and 'Gym' sections with bar charts; and a 'Client Insights' section with notes about delegation and active listening.

Second Draft

This screenshot shows the second iteration of the dashboard. The layout is more organized, with the sidebar on the left and the main content area on the right. The 'Habit Overview' section is simplified, and the 'Client Insights' section is removed, leaving only the notes from the original version.

Final

This screenshot shows the final version of the dashboard. It has a clean, modern look with a large central area for client details and a simplified 'Habit Overview' section. The 'Client Insights' section is also present here, maintaining the notes from the previous versions.

## Full client testimonials

Our startup engaged Michelle to help with the UX design of our web application and from the start she was fantastic to work with. She led us through various stages of the UX process and was incredibly insightful throughout the entire process. Her background in branding helped us improve our branding and we were delighted with the end result of working with her. If you are looking for help with your UX, I'd highly recommend working with Michelle.



**Rey Castellanos**  
Co-Founder at Aurify.me

We worked with Michelle on our start up and she was able to take it from an idea with some stuff we had scribbled down effectively on a napkin to something we were proud to show potential clients. She made our ideas beautiful and functional. I highly recommend working with her if you have the opportunity!



**Paul Endelman**  
Co-Founder at Aurify.me

**Thank you.**

[Back to portfolio](#)