

# A Step in the Right Direction

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Upgrading EverDriven's Transportation Request Form



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# The Challenge

When 30% of your customers bypass your digital tool and send thousands of requests directly to your internal team for manual processing, you have a business crisis. **The problem? This had been "normal" for so long that the organization no longer saw it as a problem to solve.**

## What Was Actually Happening

- EverDriven's routing team was manually processing thousands of requests that should be self-service
- Large districts were abandoning the form because it didn't scale
- 5-7 minutes per form × hundreds of requests = hours of work for districts
- Previous bulk import feature got <10% adoption because nobody validated it with users

The screenshot shows a web browser displaying the 'EverDriven District Portal' at the URL 'portal.everdriven.com/TransportationRequestForm'. The page title is 'Transportation Request Form' and it is for 'DEMO-Springfield Union School District'. The interface includes a sidebar with navigation links: 'District Trip Tracker', 'Transportation Requests' (active), 'Reports', 'Calendar Upload', 'Users', and 'Resources'. The main content area features a 'Student 1 Information' tab and a '+ Add Student' button. Below this is a search bar labeled 'Search for a Student' and a 'DRAFT LIST' button. The 'Student 1 details' section contains fields for 'Student ID\*', 'First Name\*', 'Date of birth\*' (with a calendar icon), 'Age', 'Grade', and 'Home Addresses'. The 'Home Address' section includes 'Street address\*' and 'Address line 2'. The 'A.M. Pickup Location' section has radio buttons for 'Home Address' (selected) and 'Different Address'. A note at the bottom right states 'Home address = the address at the far le'.

# Understanding the Real Problem

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## The Operational Reality

- 30% of districts bypass the form entirely, forcing routing staff to manually enter thousands of requests.
- One-form-per-trip limitation made it impossible for large districts to use efficiently.
- 5-7 minutes per form × hundreds of requests = hours of unnecessary work.

## What We Needed to Fix

- Create genuine self-service capability to eliminate thousands of manual requests.
- Enable large district adoption through real workflow efficiency.

## Why the Previous Solution Failed

- Bulk import feature built on wrong assumptions (20-minute vs. actual 5-7 minute completion times).
- Only filled 50% of form, still required individual completion.
- <10% adoption because no one asked users what they actually needed.

# The Basics

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## Roles

UX Research, UX/UI Design

## Timeframe

7 Months, April 2023 - November 2023

## Tools

Figma, Miro, QuantumMetric

## The Challenge

Solve fundamental scalability crisis preventing large district adoption while eliminating thousands of manual requests processed by internal routing team.



# Timeline

**Goals:** Eliminate operational burden while creating **genuine self-service capability** for enterprise districts.



**Strategic Context:** April research phase designed to enable July release, ensuring users had improved form functionality ready for school year start.

# Research Methodology

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## Working Within Constraints

Business timeline and resource allocation meant I had to focus on stakeholder interviews within the April research window.

## How I Approached It

- **Cross-Functional Interviews:** 5 departments (Product, Field Operations, Routing, Business Development)
- **Operational Focus:** Manual processing burden, known friction points, adoption barriers
- **Behavioral Analysis:** QuantumMetric data for user interaction patterns and rage-click identification
- **Systematic Synthesis:** Comprehensive findings documentation across operational and user perspectives



# Key Research Findings

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## The Manual Processing Problem

- 30% of districts bypass form entirely, sending requests directly to routing team.
- Thousands of manual entries creating unsustainable operational burden.
- Existing bulk import feature failed (<10% adoption) due to incomplete workflow solution.

## Why Large Districts Can't Use It

- One-form-per-trip limitation impossible for large districts with hundreds/thousands of requests.
- 5-7 minutes per form × volume = hours of work driving digital abandonment.
- Manual process forcing highest-value clients away from platform.

## Interface Problems Making Everything Worse

- Highest platform rage-click rates indicating severe interface problems.
- Confusing microcopy and information organization.
- Lack of progressive disclosure and workflow guidance.

# Early Wireframes - 2023

This wireframe shows a form titled "Transportation Requests" with a "Save as Draft" button. Below the title is a navigation bar with tabs: "Student", "School", "Trip Overview", "Trip Details", and "Emergency Contact". The "Student" tab is selected. The form content is a single, narrow column containing the following fields from top to bottom: First Name, Last Name, District Student ID, Grade, Date of Birth, Age, a radio button question "Does this student have a home address?", Parent/Guardian Name, Relationship (a dropdown menu), Phone Number, Alt. Phone Number (Optional), and Email Address.

## Breaking Up the Form

Breaking apart the form to reduce cognitive load and enter information in a flow that makes sense.

This wireframe shows the same "Transportation Requests" form but with a more organized layout. The navigation bar is the same. The form content is divided into sections with better spacing and alignment. The sections are: Start Date and End Date (each with a date input field and a calendar icon), School Days (a table with columns for Sunday through Saturday, each with a checkbox), Dropoff/Pickup Time (a text input field), a radio button question "Is the student's morning pickup location their home address or a different address?", Pickup Address Line 1 (a text input field), Pickup Address Line 2 (Optional) (a text input field), and a row of three fields: City, State (a dropdown menu), and Zip Code (a text input field).

## Better Information Display

Allow districts to see more about students and trips, for a more complete picture of what's going on.

# Final Mockups - 2023

The mockup shows the 'everdriven' app interface for 'Denver Public Schools'. The user is 'Annie Elveberger'. The main heading is 'Transportation Requests'. Below it are tabs: 'Student', 'Contacts', 'Trip Builder', and 'Review'. The 'Student' tab is active. The form is divided into two main sections: 'Basic Information' and 'Additional Information'. 'Basic Information' includes fields for 'First Name\*', 'Last Name\*', 'District Student ID\*', and 'Date of Birth\*'. 'Additional Information' includes a 'Population Type' section with checkboxes for 'McKinney-Vento (MKV)', 'Special Education Services (SPED)', 'Regular Education Services', 'Out of District', 'Exceptional Student Ed. (ESE)', 'Every Student Succeeds Act (ESSA)', and 'Deaf Education Services'. There is also a question 'Does the student have specific transportation needs?' with 'Yes' and 'No' radio buttons. A '+ Add Grade' button is located between the basic and additional information sections.

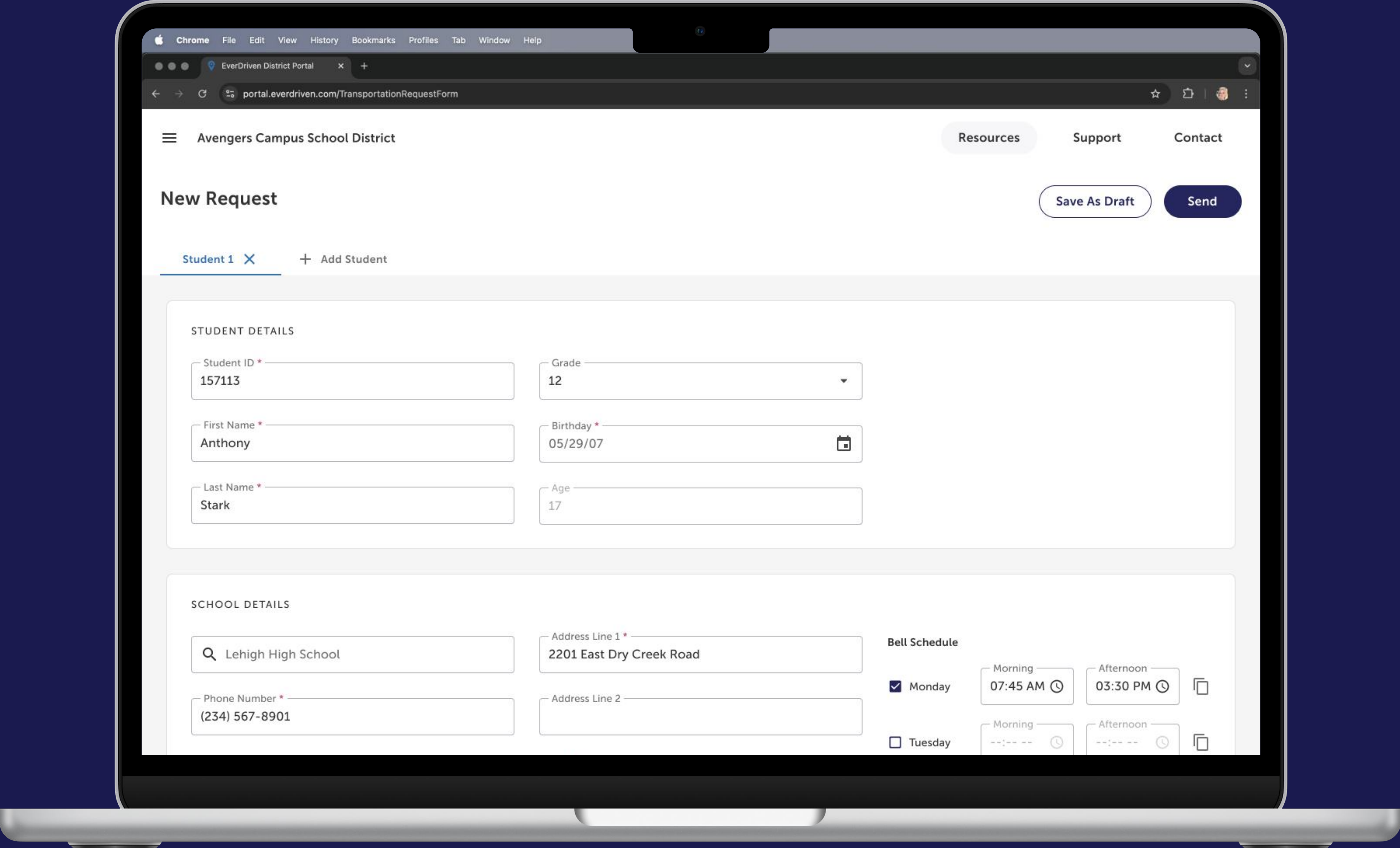
## Adding Context

Adding definitions for population types and various transportation needs may cut down on human error from acronyms or similar-sounding requirements.

The mockup shows the 'everdriven' app interface for 'Denver Public Schools'. The user is 'Annie Elveberger'. The main heading is 'Transportation Requests: John Smith'. Below it are tabs: 'Student', 'Contacts', 'Trip Builder', and 'Review'. The 'Trip Builder' tab is active. The form is divided into two main sections: 'Trip 1 Information' and 'Segment 1'. 'Trip 1 Information' includes a 'Account Number\*' section with radio buttons for '123456', '545678', and '567890'. It also includes a question 'Is this a one-time or recurring trip?' with 'One-Time' and 'Recurring' radio buttons. There are fields for 'Start Date\*' and 'End Date\*', both with date pickers. Below these are 'Trip Days\*' with buttons for 'S', 'M', 'T', 'W', 'Th', 'F', and 'Sa'. The 'Trip Type\*' section has buttons for 'One-Way', 'Roundtrip', and 'Multi-Stop'. 'Segment 1' includes a 'Leaving From\*' field with the address '1234 S Edison St, Denver, CO, 80246' and a 'Going To\*' field with the address 'Springfield Middle School, 2468 S...'. There are also fields for 'Apartment / Unit Number' for both locations.

## Solving the Core Problem

Add trips to different addresses on different days within a single form, instead of filling out a new form for each address.



# What I Learned From This

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## Research Method Reality Check

Having done both approaches (VIP with user research vs. TRF with stakeholder interviews), I experienced firsthand why you can't replace direct user input for complex workflows.

## Recognizing Normalized Problems

I learned to recognize when organizations have normalized inefficiencies that are actually solvable business problems.

## Bad Data Leads to Bad Solutions

Wrong data leads to wrong solutions. The bulk import feature failed because we built it on faulty assumptions instead of talking to users.

## Team Collaboration Matters

Getting developers involved early prevents technical surprises and builds team buy-in for solutions.



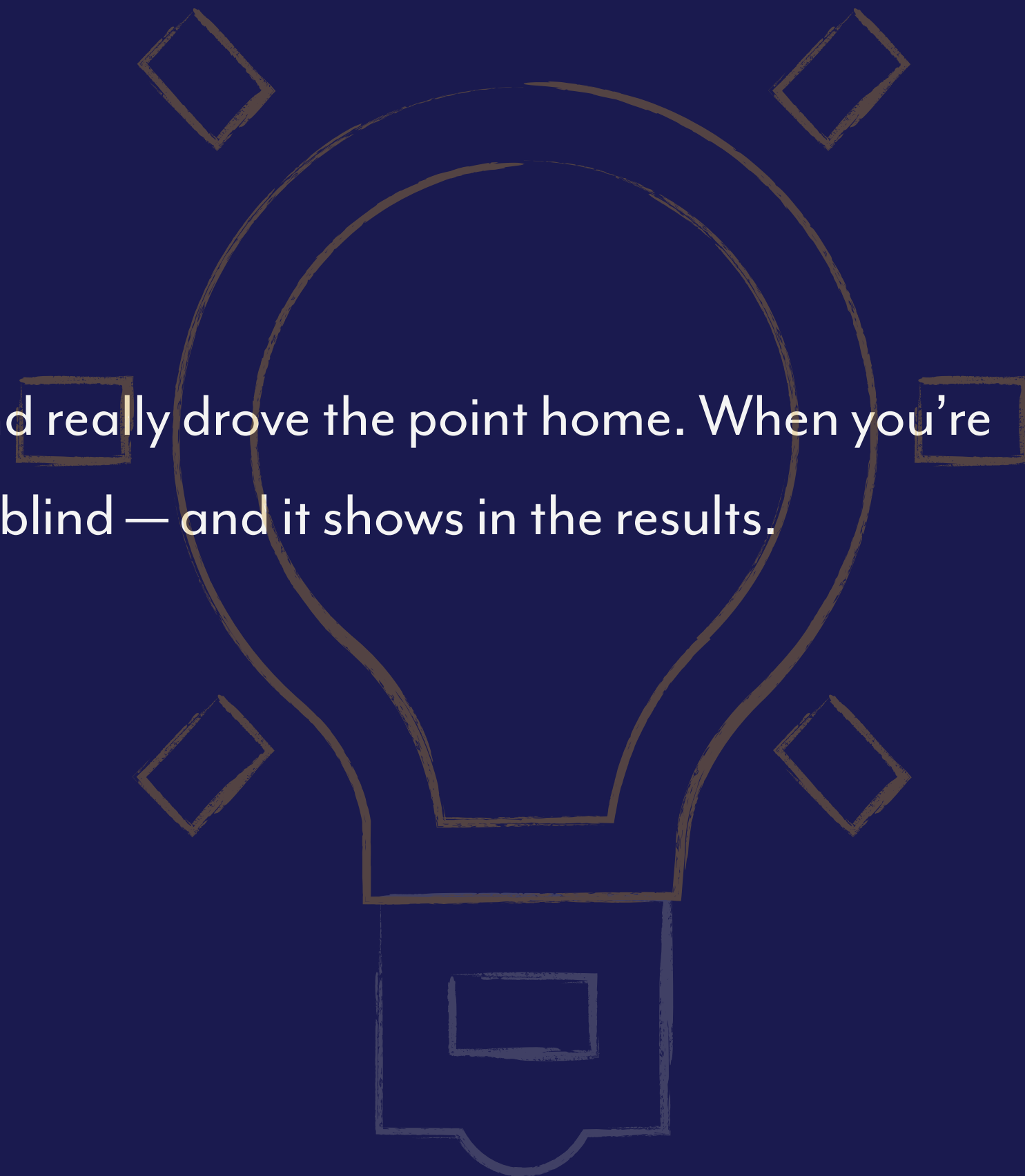
# The Reality Check

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- **VIP App (user research):** 75% wait time improvement.
- **TRF Project (stakeholder-focused constraints):** Project got canceled.
- **Previous bulk import (built on assumptions):** Less than 10% of people used it.

## What This Taught Me

I already knew user research was important, but experiencing the difference firsthand really drove the point home. When you're working under constraints and can't talk to users directly, you're basically designing blind — and it shows in the results.



# Want to Learn More?

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Head on over to the [Contact](#) page. I'd love to chat!

