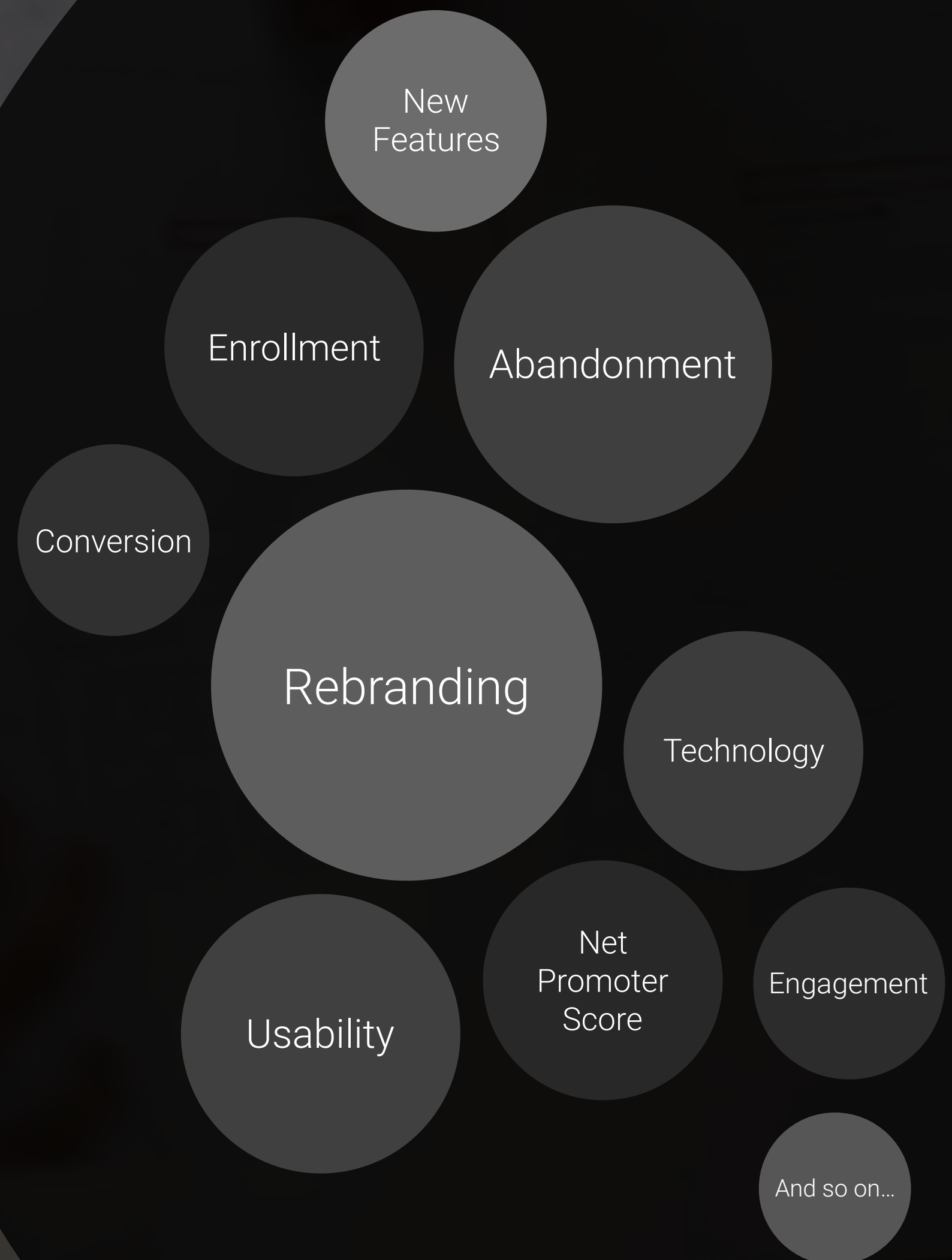






CREATIVE SERVICES

WE USE DESIGN TO
SOLVE PROBLEMS

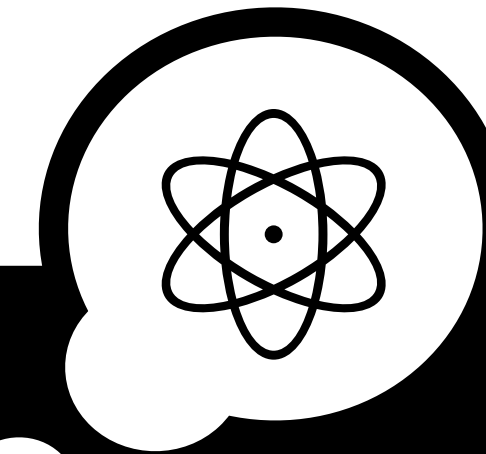


WE BELIEVE THE BEST DESIGNS RESULT FROM
UNDERSTANDING

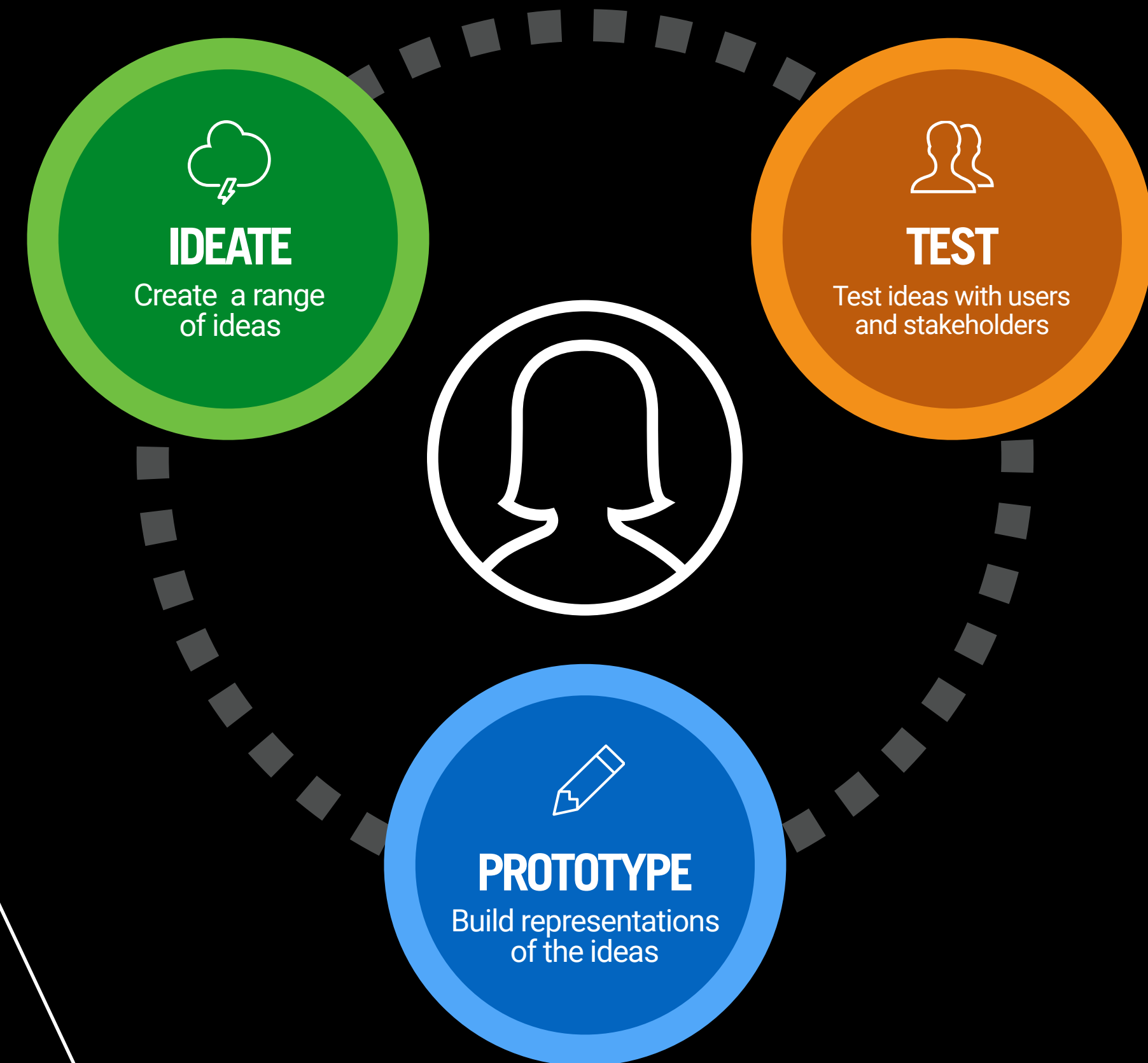
THE **USER** NEEDS
THE **BUSINESS** GOALS
THE **TECHNICAL** CONSTRAINTS



ONCE WE HAVE AN
UNDERSTANDING
AND FORMULATE INSIGHTS



WE FOLLOW A
USER-CENTERED
DESIGN PROCESS



TO CREATE SOLUTIONS



**TO CREATE SOLUTIONS
USERS WANT TO
ENGAGE WITH.**





WHAT WE DO

USER RESEARCH & STRATEGY

Gather and analyze quantitative and qualitative data from users, stakeholders and the marketplace. Glean insights and formulate UX vision.

INFORMATION ARCHITECTURE

Define taxonomy and organization of content within the experience.

EXPERIENCE DESIGN

Create the overall experience including navigation, placement of content, interaction patterns and user flows.

VISUAL DESIGN

Design the look and feel of the experience including branding, fonts, colors, iconography, images and animation.

USABILITY TESTING

Create prototypes and conduct testing with users to improve the experience.



OUR PROCESS





PURPOSE

ASSESS

Current State
Competitive Landscape
Quantitative and Qualitative Data

IDENTIFY

User Needs
Business Goals
Technical Constraints
Opportunities for Differentiation

DELIVER

Summary of Findings and Conclusions



RESEARCH

Understand the problem

RESEARCH METHODS

- 1 PROJECT KICKOFF
- 2 CURRENT STATE AUDIT
- 3 DATA ANALYSIS
- 4 COMPETITIVE ANALYSIS
- 5 STAKEHOLDER INTERVIEWS
- 6 USER INTERVIEWS
- 7 CONTEXTUAL INQUIRIES



RESEARCH METHODS

1 PROJECT KICKOFF

We prepare a list of questions for our initial client meeting to ensure the session is productive and we obtain the information we need to hit the ground running.

2 CURRENT STATE AUDIT

3 DATA ANALYSIS

4 COMPETITIVE ANALYSIS

5 STAKEHOLDER INTERVIEWS

6 USER INTERVIEWS

7 CONTEXTUAL INQUIRIES



RESEARCH METHODS

1 PROJECT KICKOFF

2 CURRENT STATE AUDIT

We conduct an audit to document the existing experience through a user's lens. This helps us identify strengths, weaknesses and establish a baseline to measure against.

3 DATA ANALYSIS

4 COMPETITIVE ANALYSIS

5 STAKEHOLDER INTERVIEWS

6 USER INTERVIEWS

7 CONTEXTUAL INQUIRIES



RESEARCH METHODS

1 PROJECT KICKOFF

2 CURRENT STATE AUDIT

3 DATA ANALYSIS

We evaluate any existing analytics, research and feedback our clients may have to understand user needs, behaviors and trends.

4 COMPETITIVE ANALYSIS

5 STAKEHOLDER INTERVIEWS

6 USER INTERVIEWS

7 CONTEXTUAL INQUIRIES



RESEARCH

Understand the problem

RESEARCH METHODS

1 PROJECT KICKOFF

2 CURRENT STATE AUDIT

3 DATA ANALYSIS

4 COMPETITIVE ANALYSIS

We assess competitive experiences to understand the marketplace and identify opportunities for differentiation.

5 STAKEHOLDER INTERVIEWS

6 USER INTERVIEWS

7 CONTEXTUAL INQUIRIES



RESEARCH METHODS

1 PROJECT KICKOFF

2 CURRENT STATE AUDIT

3 DATA ANALYSIS

4 COMPETITIVE ANALYSIS

5 STAKEHOLDER INTERVIEWS

We interview all stakeholders that will be impacted to understand their business goals and vision for the project.

6 USER INTERVIEWS

7 CONTEXTUAL INQUIRIES



RESEARCH METHODS

- 1 PROJECT KICKOFF
- 2 CURRENT STATE AUDIT
- 3 DATA ANALYSIS
- 4 COMPETITIVE ANALYSIS
- 5 STAKEHOLDER INTERVIEWS
- 6 USER INTERVIEWS
We interview existing users to understand their needs and pain points.
- 7 CONTEXTUAL INQUIRIES



RESEARCH METHODS

- 1 PROJECT KICKOFF
- 2 CURRENT STATE AUDIT
- 3 DATA ANALYSIS
- 4 COMPETITIVE ANALYSIS
- 5 STAKEHOLDER INTERVIEWS
- 6 USER INTERVIEWS
- 7 CONTEXTUAL INQUIRIES

We observe participants using the existing experience in their own environment. This helps us understand how physical surroundings influence their attitudes and actions.



RESEARCH

Understand the problem

OUTCOMES

At the end of this phase, we have a deep understanding of user needs, business goals and technical constraints. We summarize our **findings** and share our **conclusions** with key stakeholders to determine their impact to the overall project.





INSIGHTS
Define a vision
for the solution

PURPOSE

CREATE

A UX vision based on the research

MAP

User needs and business goals to the vision

OBTAIN

Stakeholder alignment on the vision

DELIVER

A creative brief for ideation



INSIGHTS

Define a vision
for the solution

INSIGHTS METHODS

- 1 UX VISION STATEMENT
- 2 PERSONAS
- 3 JOURNEY MAP
- 4 USER FLOWS



INSIGHTS

Define a vision
for the solution

INSIGHTS METHODS

1 UX VISION STATEMENT

We create a vision statement for the project that clearly communicates the essence of the experience we will create, e.g.:

- Evolve from a blog to a destination
- Create the best leaderboard ever

2 PERSONAS

3 JOURNEY MAP

4 USER FLOWS



INSIGHTS
Define a vision
for the solution

INSIGHTS METHODS

1 UX VISION STATEMENT

2 PERSONAS

We develop personas that define the thoughts, behaviors and personalities of the target audience based on our research. We refer to these personas throughout the process to ensure our ideas meet their needs.

3 JOURNEY MAP

4 USER FLOWS



INSIGHTS

Define a vision
for the solution

INSIGHTS METHODS

1 UX VISION STATEMENT

2 PERSONAS

3 JOURNEY MAP

We create a future state journey map that visualizes the high-level stages of the new experience through a user's lens. This includes the flow of tasks and information, emotional highs and lows, devices used and points of pain or confusion. This helps us define the experience and identify unmet needs / pain points.

4 USER FLOWS



INSIGHTS

Define a vision
for the solution

INSIGHTS METHODS

1 UX VISION STATEMENT

2 PERSONAS

3 JOURNEY MAP

4 USER FLOWS

We lay out the detailed steps a user must complete to accomplish key tasks. This allows us to map back to the business goals and technical constraints, identify pain points and ensure the pathway to achieve a goal is clear - with the perceived effort meeting user expectations.



INSIGHTS

Define a vision
for the solution

OUTCOMES

At the end of this phase, we've mapped the user needs and business goals to our newly created the UX vision. We obtain stakeholder alignment on the vision and prepare a **Creative Brief** for the team to ideate against.





IDEATE

Create a range
of ideas

PURPOSE

CREATE

A series of ideas that can be tested

DECIDE

Which ideas are best

PREPARE

The best ideas for testing



IDEATE

Create a range
of ideas

IDEATE METHODS

- 1 SKETCHES
- 2 WIREFRAMES
- 3 DESIGN COMPS



IDEATE

Create a range
of ideas

IDEATE METHODS

1 SKETCHES

We create sketches with pen and paper to convey the basic concept of how the experience will behave. The specifics of the user interface are not illustrated - only key elements that will lead users to the desired result.

2 WIREFRAMES

3 DESIGN COMPS



IDEATE

Create a range
of ideas

IDEATE METHODS

1 SKETCHES

2 WIREFRAMES

We refine our sketches in the form of wireframes of varying fidelity to communicate the idea with more precision. Grayscale widgets are created and the sizing, placement and order of elements within the experience are further defined. Wireframes may be created for several devices to ensure the experience is optimal throughout.

3 DESIGN COMPS



IDEATE

Create a range
of ideas

IDEATE METHODS

- 1 SKETCHES
- 2 WIREFRAMES
- 3 DESIGN COMPS

We visually design the wireframes to include branding, fonts, imagery, iconography and other design elements.



IDEATE

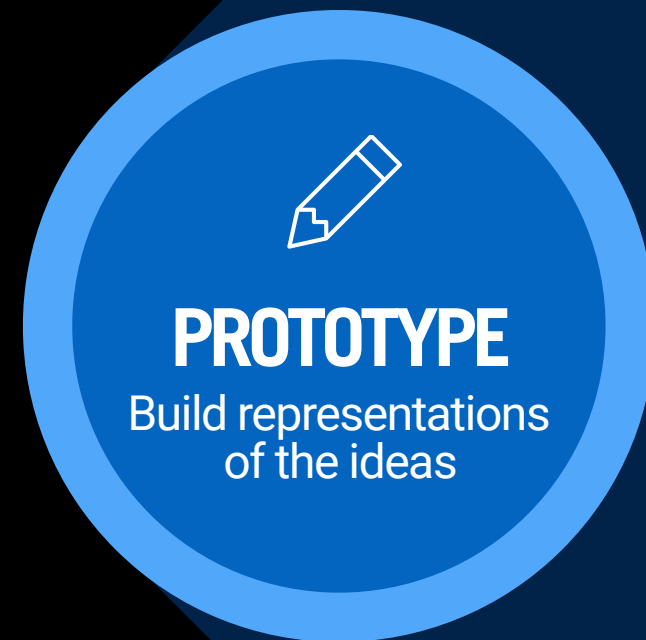
Create a range
of ideas

OUTCOMES

At the end of this phase, we've created several ideas to solve the problem in the form of sketches, wireframes or design comps.

The ideas are reviewed by the team and the best ones are selected for testing. We then identify which user flow(s) we want to prototype and test for each idea.





PURPOSE

CREATE

Versions of the ideas that are "real enough" to obtain feedback from users and stakeholders

DELIVER

A prototype for each idea where at least one key task or user flow can be fully completed by a test participant

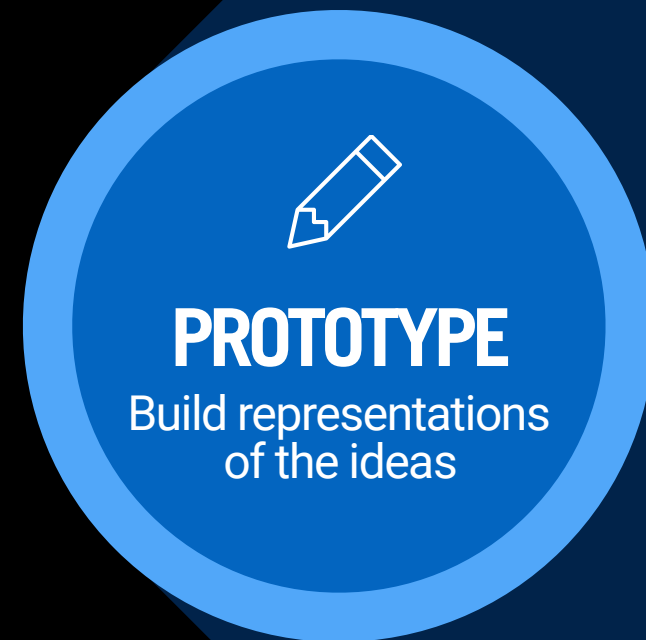


PROTOTYPE

Build representations
of the ideas

PROTOTYPE METHODS

- 1 PAPER
- 2 CLICKABLE WIREFRAMES
- 3 HTML
- 4 KEYNOTE, VIDEO, ETC.



PROTOTYPE METHODS

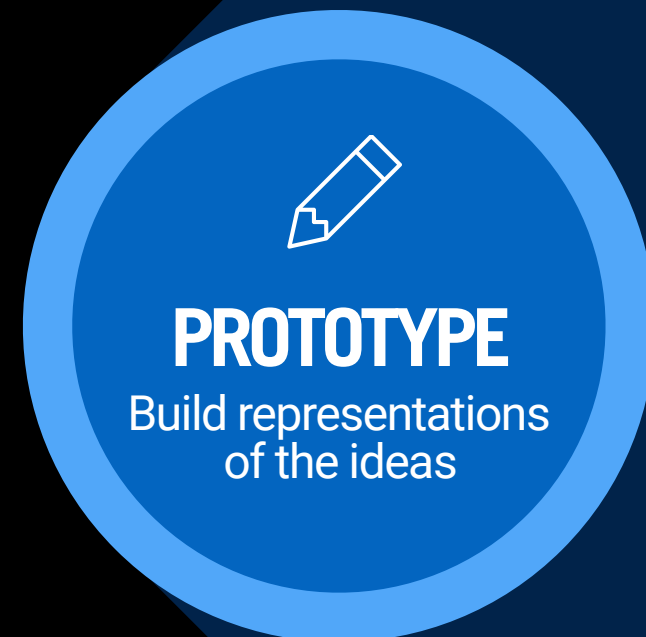
1 PAPER

Paper prototypes are typically used for the first round of testing. We may prepare print-outs of wireframes or simple paper sketches that allow users to complete tasks.

2 CLICKABLE WIREFRAMES

3 HTML

4 KEYNOTE, VIDEO, ETC.



PROTOTYPE METHODS

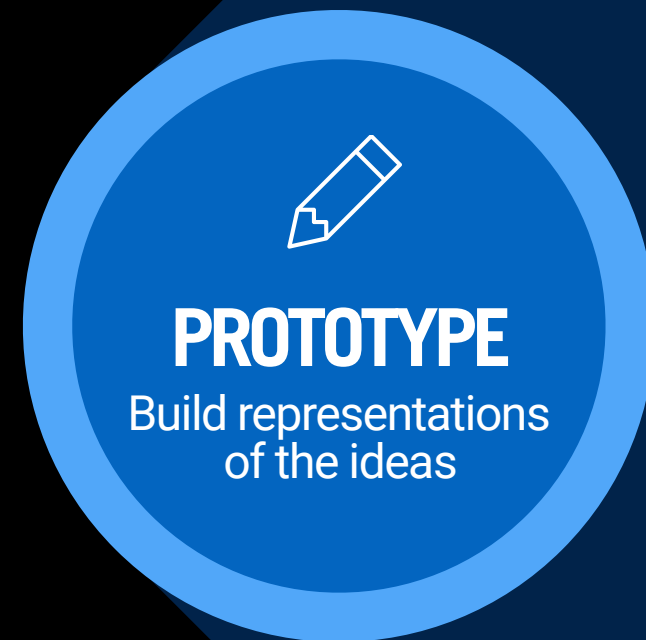
1 PAPER

2 CLICKABLE WIREFRAMES

We usually test with clickable wireframes when the experience is more refined. This version of a prototype allows users to really "feel" the experience.

3 HTML

4 KEYNOTE, VIDEO, ETC.



PROTOTYPE METHODS

1 PAPER

2 CLICKABLE WIREFRAMES

3 HTML

For projects following the agile methodology, html will be created at the end of each sprint that can be used for testing.

4 KEYNOTE, VIDEO, ETC.



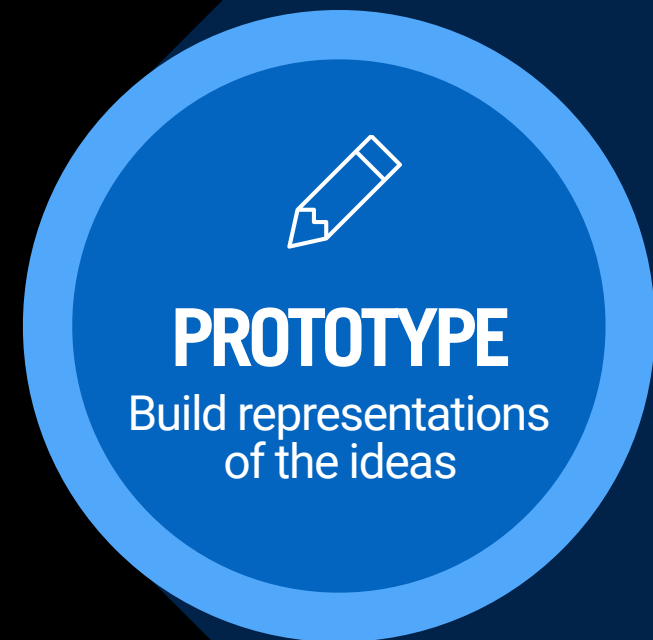
PROTOTYPE

Build representations
of the ideas

PROTOTYPE METHODS

- 1 PAPER
- 2 CLICKABLE WIREFRAMES
- 3 HTML
- 4 KEYNOTE, VIDEO, ETC.

Depending on the experience and interactions we're testing, we may prototype with animation or video.



OUTCOMES

At the end of this phase we've developed prototypes that can be tested with existing users, potential users and stakeholders.





TEST

Test ideas with users
and stakeholders

PURPOSE

CREATE

A usability testing and recruitment plan

CONDUCT

Testing and stakeholder review

DELIVER

Test results and recommendations

OBTAIN

Stakeholder agreement on which idea to move forward



TEST

Test ideas with users
and stakeholders

TEST METHODS

- 1 **USABILITY TEST PLAN**
- 2 **FIRST CLICK TESTING**
- 3 **IN-PERSON MODERATED TESTING**
- 4 **REMOTE MODERATED TESTING**
- 5 **REMOTE UNMODERATED TESTING**
- 6 **FOCUS GROUP**



TEST

Test ideas with users
and stakeholders

TEST METHODS

1 USABILITY TEST PLAN

We define the type of testing we're going to conduct, the overall goals, the tasks we will ask users to complete, how we'll recruit participants and how we will capture the results.

2 FIRST CLICK TESTING

3 IN-PERSON MODERATED TESTING

4 REMOTE MODERATED TESTING

5 REMOTE UNMODERATED TESTING

6 FOCUS GROUP



TEST

Test ideas with users
and stakeholders

TEST METHODS

1 USABILITY TEST PLAN

2 FIRST CLICK TESTING

We use first click testing to determine where a participant would click first on an interface to complete their intended task. This can be done in person or remotely online.

3 IN-PERSON MODERATED TESTING

4 REMOTE MODERATED TESTING

5 REMOTE UNMODERATED TESTING

6 FOCUS GROUP



TEST

Test ideas with users
and stakeholders

TEST METHODS

1 USABILITY TEST PLAN

2 FIRST CLICK TESTING

3 IN-PERSON MODERATED TESTING

We sit one on one with participants and watch them completing tasks. This allows us to ask questions and observe their facial reactions.

4 REMOTE MODERATED TESTING

5 REMOTE UNMODERATED TESTING

6 FOCUS GROUP



TEST

Test ideas with users
and stakeholders

TEST METHODS

1 USABILITY TEST PLAN

2 FIRST CLICK TESTING

3 IN-PERSON MODERATED TESTING

4 REMOTE MODERATED TESTING

We conduct one on one testing with participants remotely and watch them complete tasks through a web conference. While we're unable to see their facial reactions, we can ask follow-up questions.

5 REMOTE UNMODERATED TESTING

6 FOCUS GROUP



TEST

Test ideas with users
and stakeholders

TEST METHODS

- 1 **USABILITY TEST PLAN**
- 2 **FIRST CLICK TESTING**
- 3 **IN-PERSON MODERATED TESTING**
- 4 **REMOTE MODERATED TESTING**
- 5 **REMOTE UNMODERATED TESTING**

We setup online usability tests where users complete the study on their own computer, without any contact from us. Their session is recorded so we can view the results.

- 6 **FOCUS GROUP**



TEST

Test ideas with users
and stakeholders

TEST METHODS

- 1 **USABILITY TEST PLAN**
- 2 **FIRST CLICK TESTING**
- 3 **IN-PERSON MODERATED TESTING**
- 4 **REMOTE MODERATED TESTING**
- 5 **REMOTE UNMODERATED TESTING**
- 6 **FOCUS GROUP**

We conduct focus groups with up to 10 participants, usually stakeholders, to learn their opinions and reactions to the prototype.



TEST

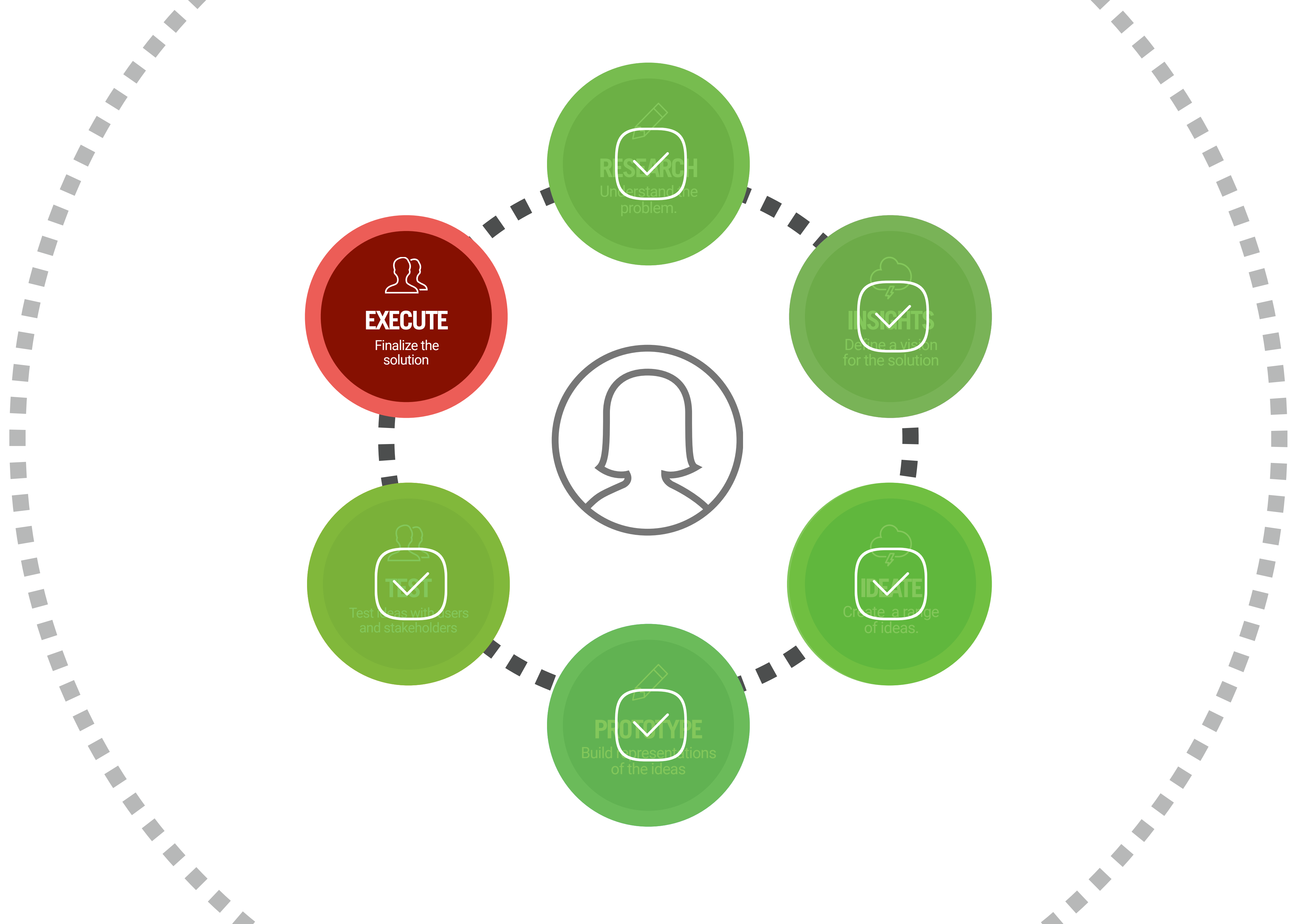
Test ideas with users
and stakeholders

OUTCOMES

At the end of this phase, we've tested our prototypes and prepared a **report outlining our findings and recommendations.**

If improvements are needed, we go back to the ideate phase.

If improvements are not needed, we obtain business and technology alignment on which idea(s) to move forward.





EXECUTE

Finalize the
solution

PURPOSE

CREATE

The final assets needed for the build

CONDUCT

UAT testing

ENSURE

The final experience aligns to the UX vision



EXECUTE

Finalize the
solution

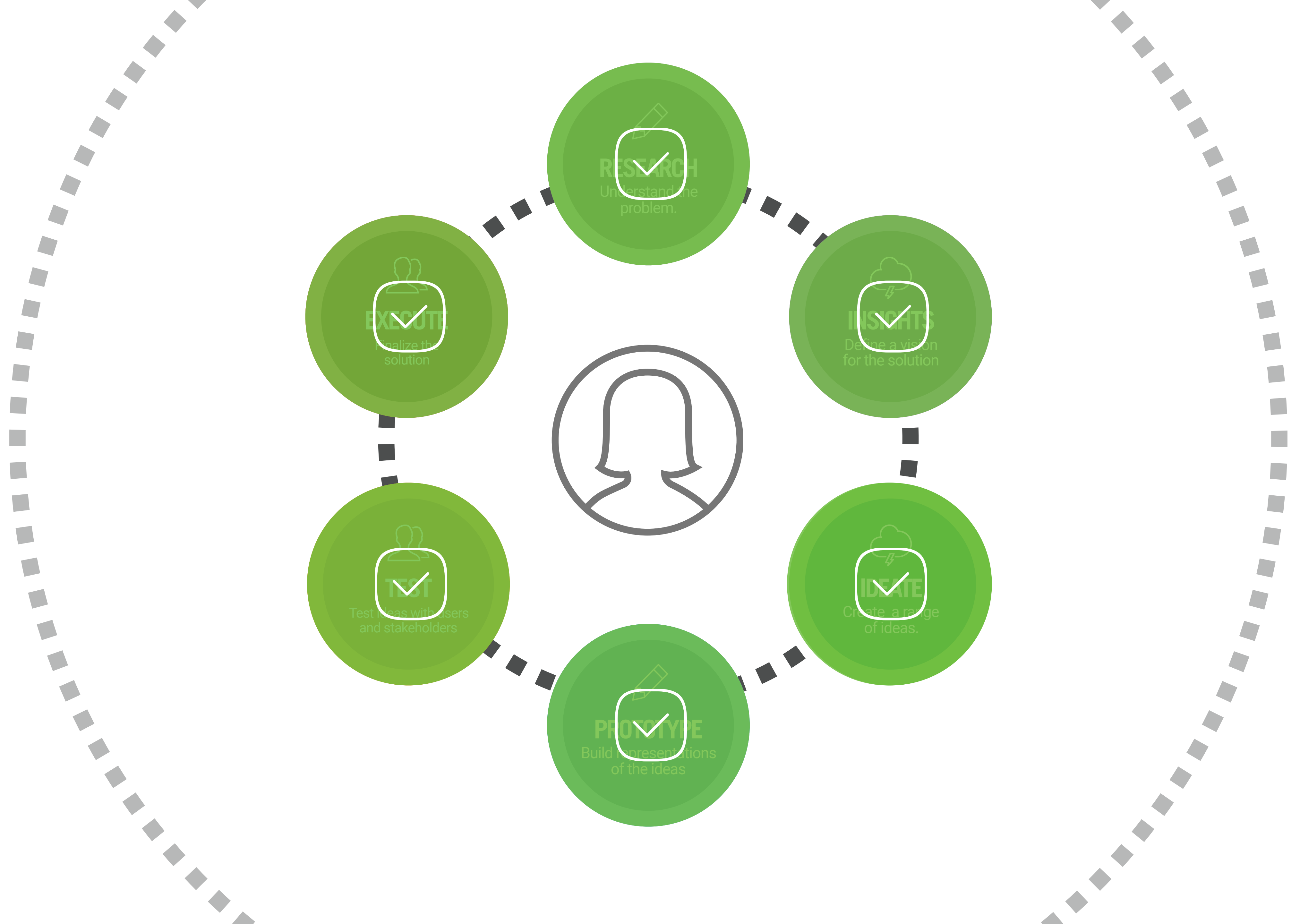
OUTCOMES

Depending on the experience we're creating and overall process, we may further define the idea for our technology partners through:

- Wireframes with annotations
- User flows and/or a site map
- Annotated creative
- Photoshop files
- A style guide

We'll also conduct UAT testing to ensure the final deliverable meets our vision.

At the end of this phase, we've delivered a usable, desired experience that solves the problem identified during our research.





NOTE:

**THIS PRESENTATION DETAILS OUR END-TO-END CREATIVE PROCESS.
SINCE EVERY ENGAGEMENT IS UNIQUE, THIS PROCESS CAN BE
TAILORED TO MEET SPECIFIC PROJECT GOALS AND SCOPE.**

APPENDIX

EXAMPLES AND TEMPLATES

PROJECT KICKOFF CHECKLIST

The purpose of the CS Project Kickoff Checklist is to gather and document UX and visual design requirements that can be referred to later in the project lifecycle.

The checklist should be used by UX and Visual Design team members at the initial client meeting to help guide the conversation and ensure we obtain the information needed to hit the ground running. Since every project is unique, this document may not include all relevant questions and should be modified as needed.

Creative Services Project Kickoff Checklist

Version 1.0



Project Overview

1. What are the primary goals for the project?
2. Who is the competition?
3. How will we measure success?
4. Is there any existing data we can use (e.g. customer feedback, research, analytics, call center data)?
5. Are there any technical constraints we should be aware of?

Target Audience

1. Who are the primary and secondary users?
2. How would you describe them (e.g. demographics, technical abilities)?
3. What device(s) will they use to interact with the experience (e.g. phone, computer)?

User Needs

1. How will users find/access the experience?
2. What tasks will primary and secondary users complete?
3. Which tasks are the most important to these users?
4. Which features/pages will users engage with the most?
5. Are there any known “pain points” within the existing experience?
6. How often will users visit the experience?
7. What will make them return?

Creative Services Project Kickoff Checklist

Version 1.0



Branding

1. Is there an existing style guide we should follow? (If not, does a logo, color palette, preferred font, etc. exist?)
2. Are there any “must haves” for the design?
3. Are there any experiences we should review for inspiration?



RESEARCH

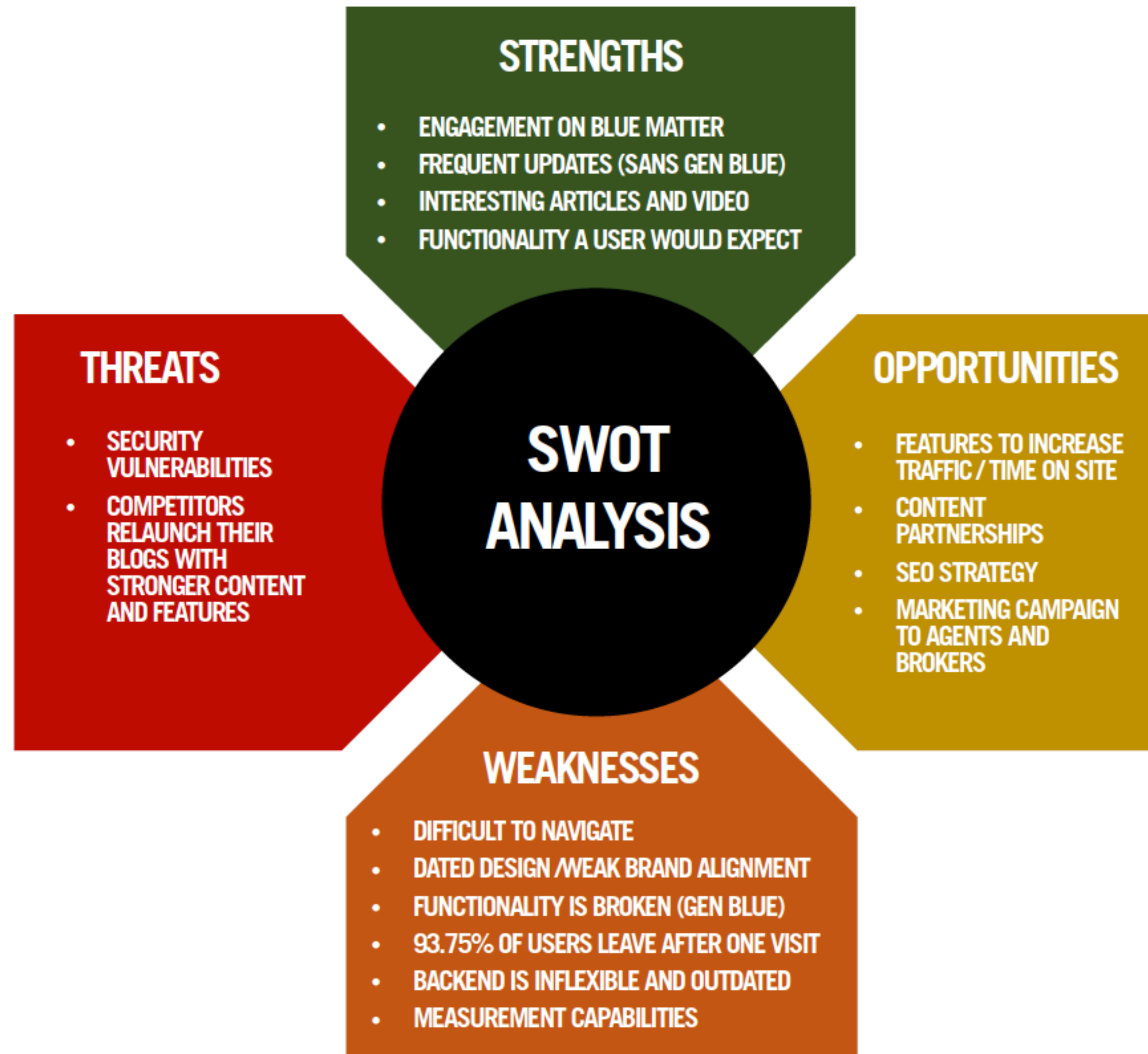
CURRENT STATE AUDIT

A Current State Audit is performed to document the client's existing experience through the lens of a user. The goal of a Current State Audit is usually to determine the experience's strengths/weaknesses and establish a baseline to measure against in the future.

Depending on the experience type, there are different criteria you may choose to evaluate. A good starting point is a heuristics analysis to determine if the experience is "usable". From there, you may want to dive into a more detailed audit of the UX, look and feel, content and features. Lastly, based on what you learned on the project kickoff meeting, consider the following:

- Does the experience meet the needs of users as described by stakeholders?
- Are the primary and secondary tasks described by stakeholders easy to find and accomplish?
- What will make users return to the experience?
- Is the experience just "usable" or is it meaningful?

The final deliverable could take the form of an Expert Analysis, SWOT or detailed audit of content, UX, visual design and functionality.



Usability Heuristics Checklist

Version 1.0



10 Usability Heuristics for Interface Design adapted from Jakob Nielsen.

- ☐ **Visibility of System Status**
Is the user kept informed about what is going on as they navigate through flows with appropriate feedback within a reasonable amount of time (e.g., "Please wait while we gather your information." screen)?
- ☐ **Match Between the Experience and the Real World**
Does the experience speak the user's language with words and concepts that are familiar (e.g. is the site filled with legalese and corporate talk or does it speak in everyday language?)
- ☐ **User Control and Freedom**
Can the user easily navigate and perform actions? Is there an easy way for a user to undo any accidental actions?
- ☐ **Consistency and Standards**
Is the design consistent (e.g. are all submit buttons blue and flush left throughout the experience)? Are the interaction patterns consistent (e.g. does clicking an arrow always expand a panel)? Are industry standards being followed?
- ☐ **Error Prevention**
Are users warned of potential problems in advance (e.g. when creating a password, is the user warned they did not meet the character requirements before they hit submit)?
- ☐ **Recognition Rather Than Recall**
Are there features in place to minimize what the user must remember to use the experience? (e.g. "remember password", type ahead, icons to provide context, display of last products viewed, etc.)
- ☐ **Flexibility and Efficiency of Use**
Are there accelerators (shortcuts) that allow experts to move through the experience faster without affecting novice users?
- ☐ **Aesthetic and Minimalist Design**
Is the experience aesthetically pleasant and efficiently composed? Less is more – calls to action and key information should be easily seen.

Usability Heuristics Checklist

Version 1.0



- ☐ **Help Users Recover from Errors**
Are error messages presented in plain language that clearly indicates the problem? (e.g. Do 404 pages exist that give users the ability to navigate elsewhere or search for what they're looking for?)
- ☐ **Help**
In today's day and age if a user is seeking help, something is truly wrong with the experience. That said, if the experience warrants it, there should be some form of Help and/or a Customer Support number depending on the product.

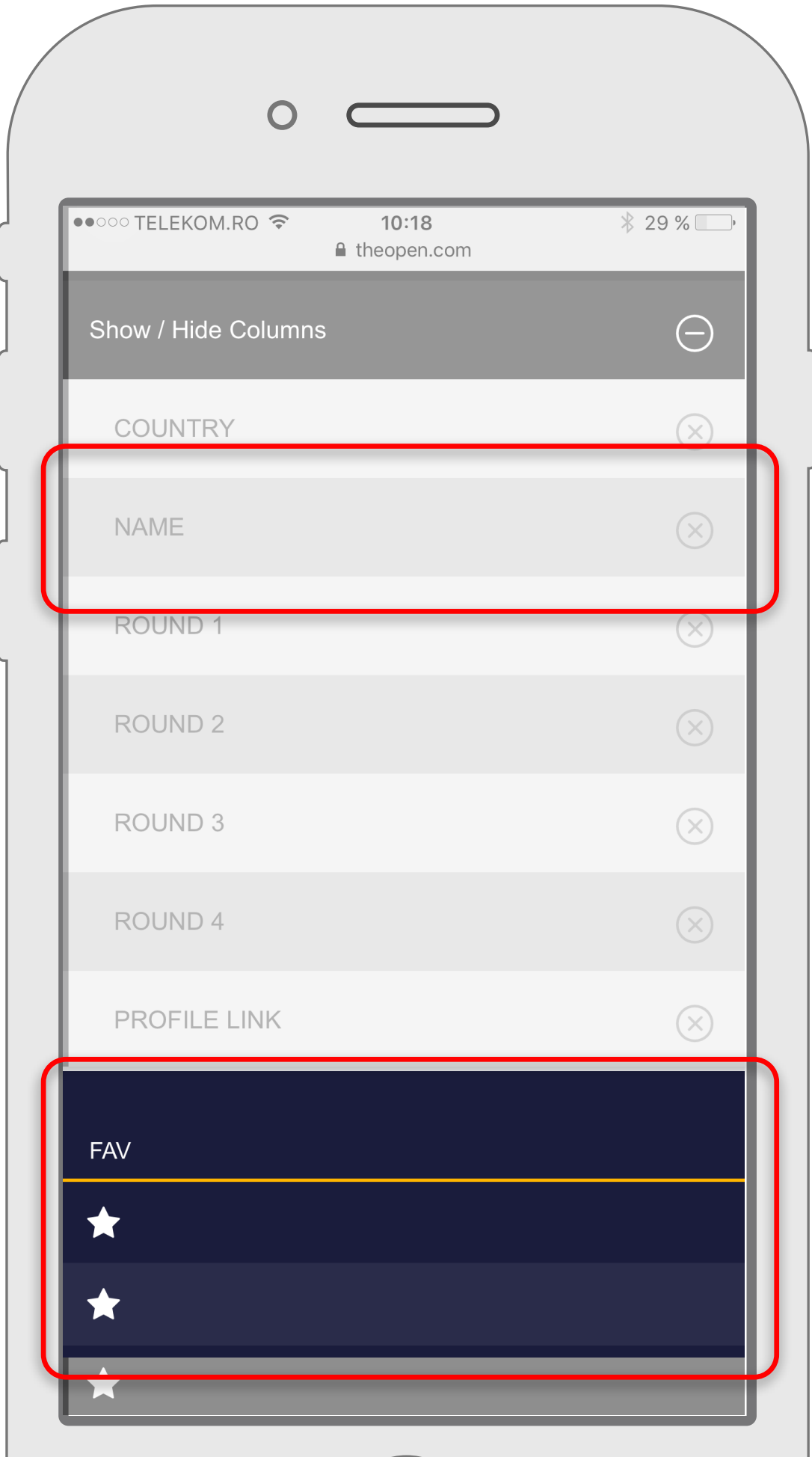


Current State Audit: Usability Testing

PROBLEM 1:

A user can make the My Tee Times section empty, even if they have favorite players.

- ✗ The user is able to deselect all columns in the table.
- ✓ The interface should prevent users from deselecting columns such as *Player Name* or *Tee Time* thus avoiding an empty table data.



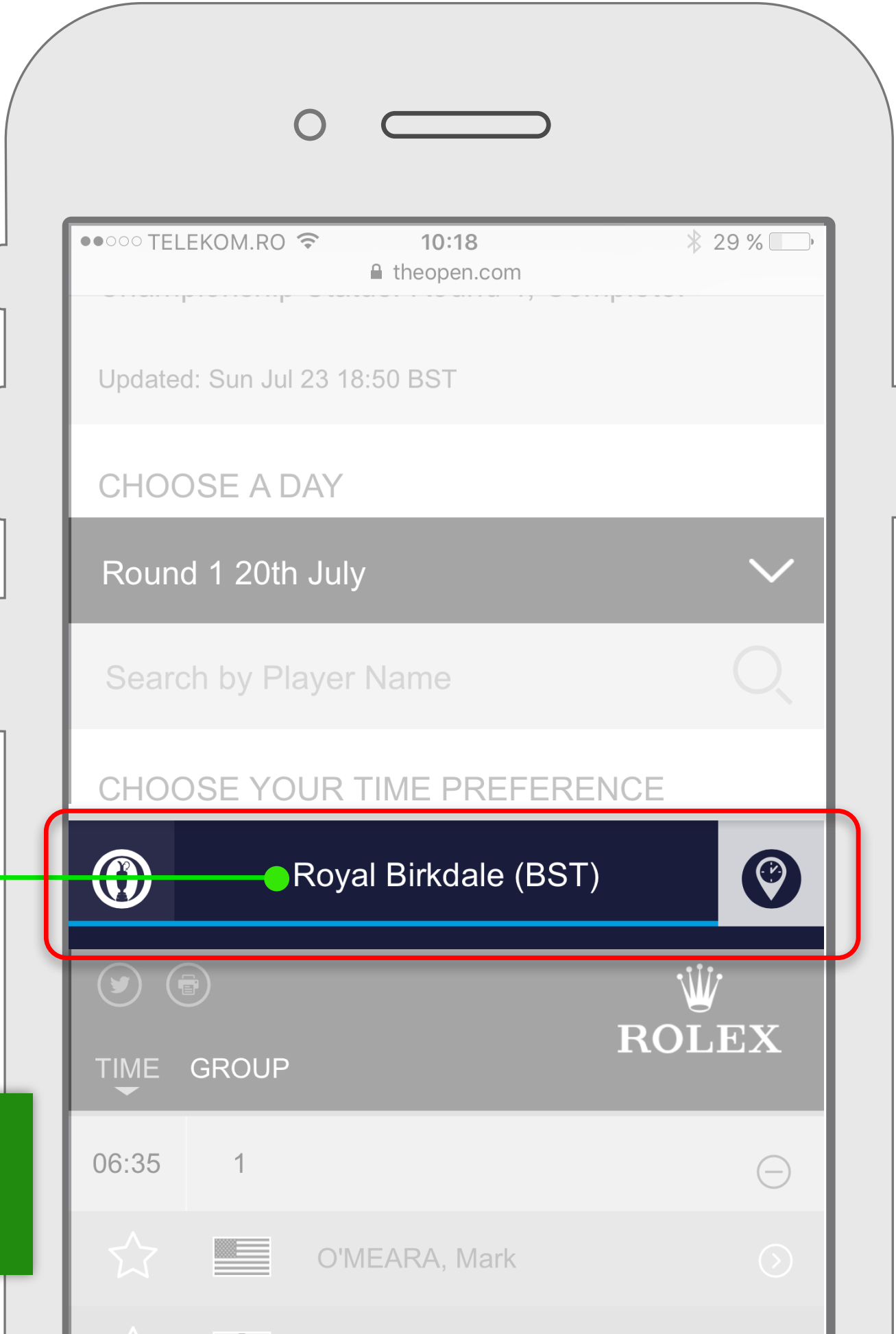
Current State Audit: Usability Testing

PROBLEM 2:

Time zone switch is confusing.

- ✗ The user could not say where on the switch to press in order to change the time zone. He was constantly trying to push on the active tab which is not a clickable area.
- ✓ The interface should clearly distinguish between what part of the time zone switch is active and not clickable vs. what is inactive and clickable.

User clicked on the text, although this is not a clickable area



Current State Audit: Usability Testing

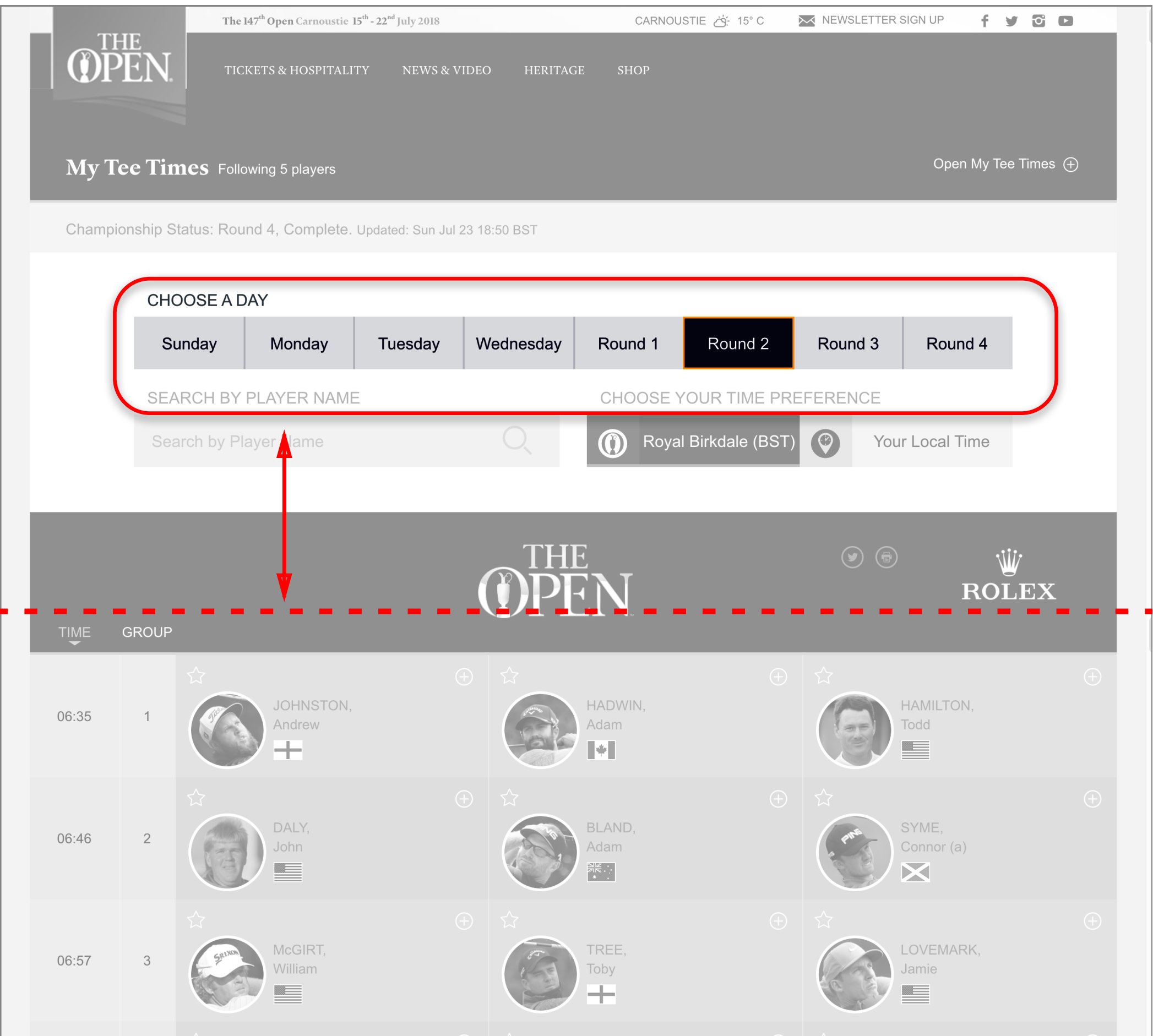
PROBLEM 3:

Day/round navigation is separate from the table which breaks the proximity principle.

- ✗ The navigation is far away from the content, making the user think more than they need to. On mobile, day/round changes has no effect on the page unless the user scrolls down to check the table.
- ✓ Elements that are close together are perceived as more related than elements that are farther apart. Having days and tee times table close together reduces the complexity and reinforces the relatedness of the elements.
- ✓ Relevant information such as the tee times table or Rolex logo should stay or start above the fold.

"I can't tell what pressing these buttons will do.. it seems nothing happens..."

- Test User 1



Current State Audit: Usability Testing

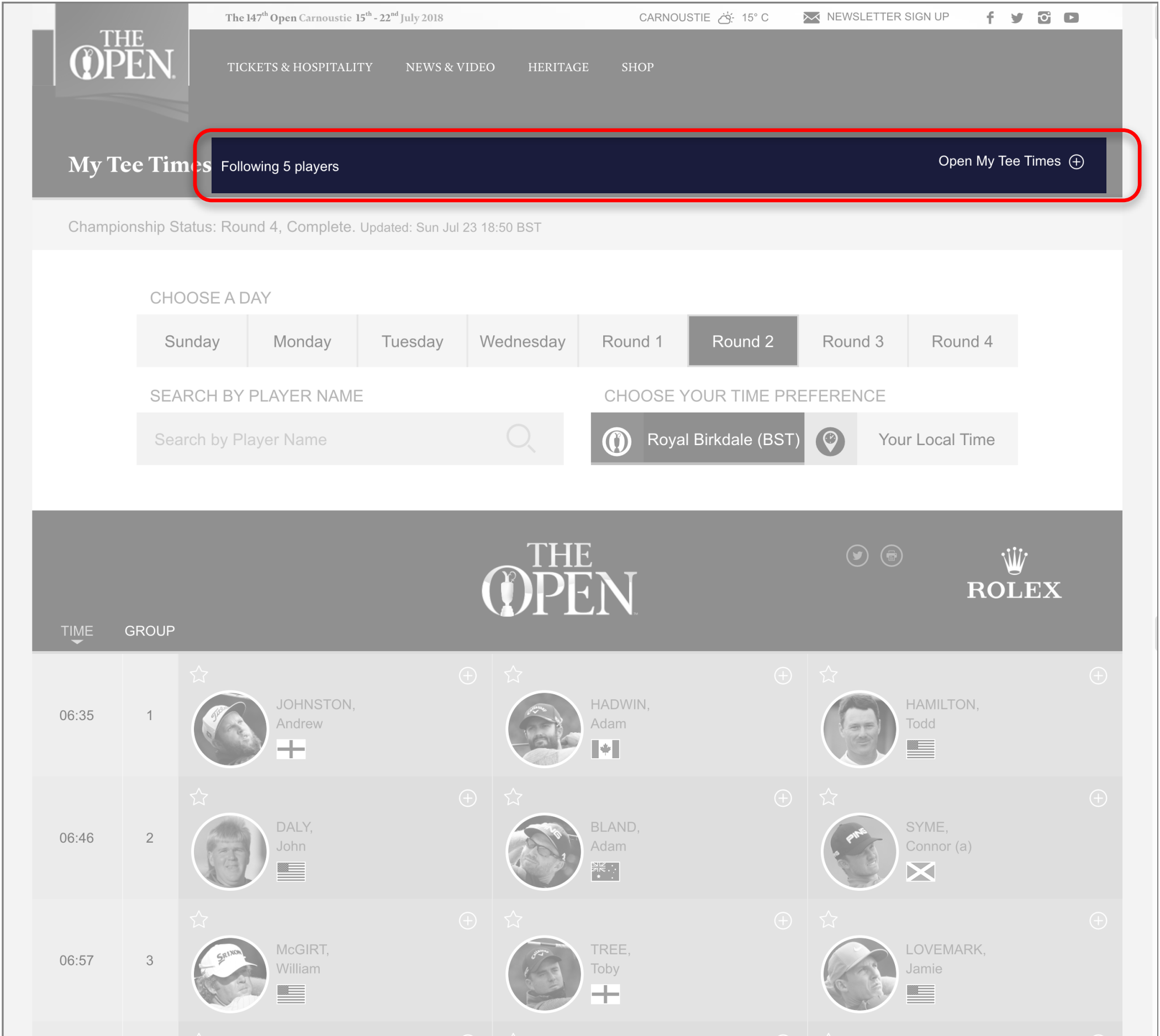
PROBLEM 4:

Having two links that perform the same action with different CTAs and treatments creates confusion.

- ✗ User interface complexity increases when a single feature or hypertext link is presented in multiple ways.
- ✓ Reducing choices achieves *simplicity* and improves scanning and comprehension processes. Favorite players section should be accessed from the same single link and the container should be closed same way assuring the circularity of the interaction.

“I expected that the other link (Open My Tee Times) would do something different but actually it opens the same thing, which is confusing.”

- Test User 2

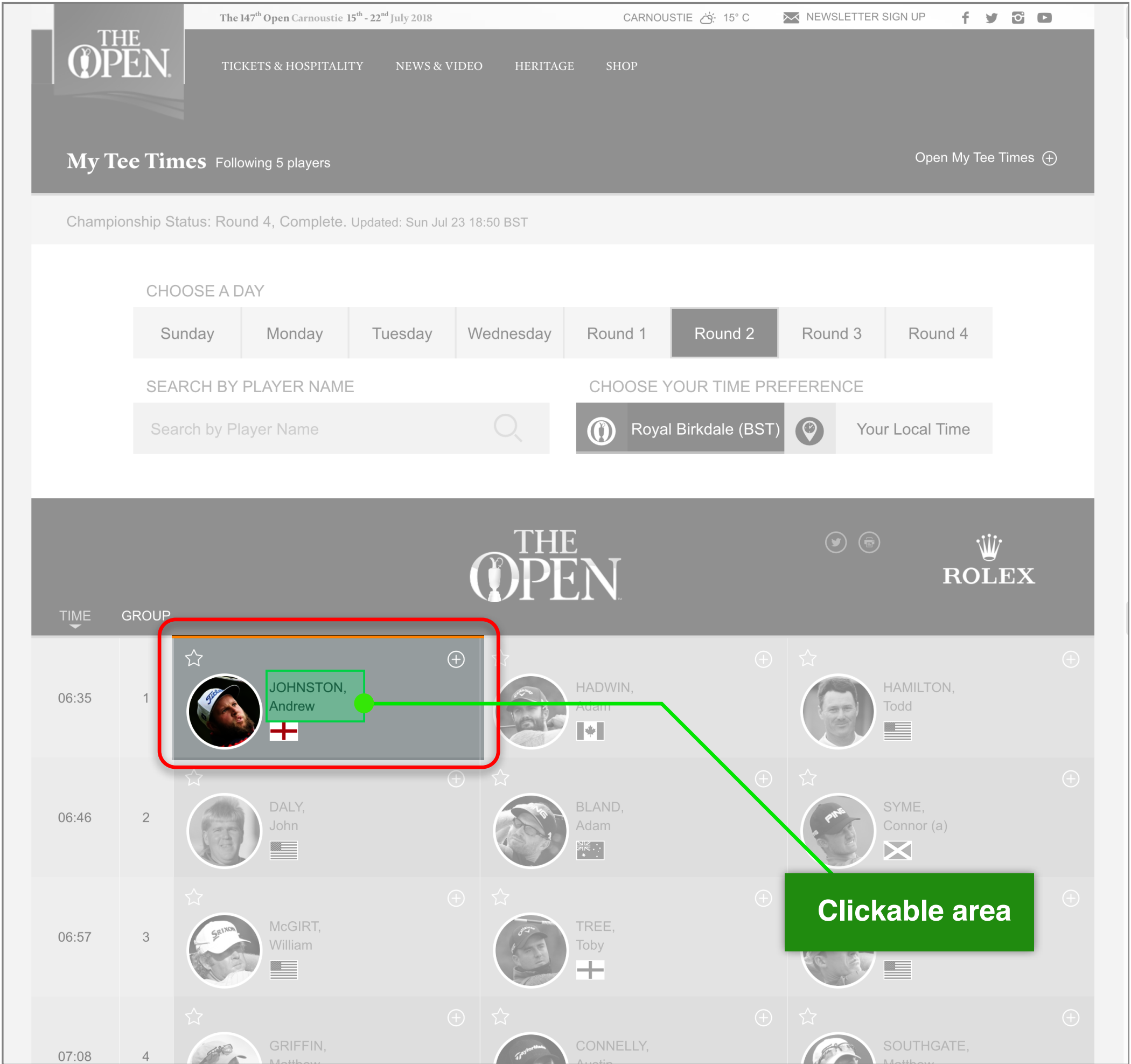


Current State Audit: Usability Testing

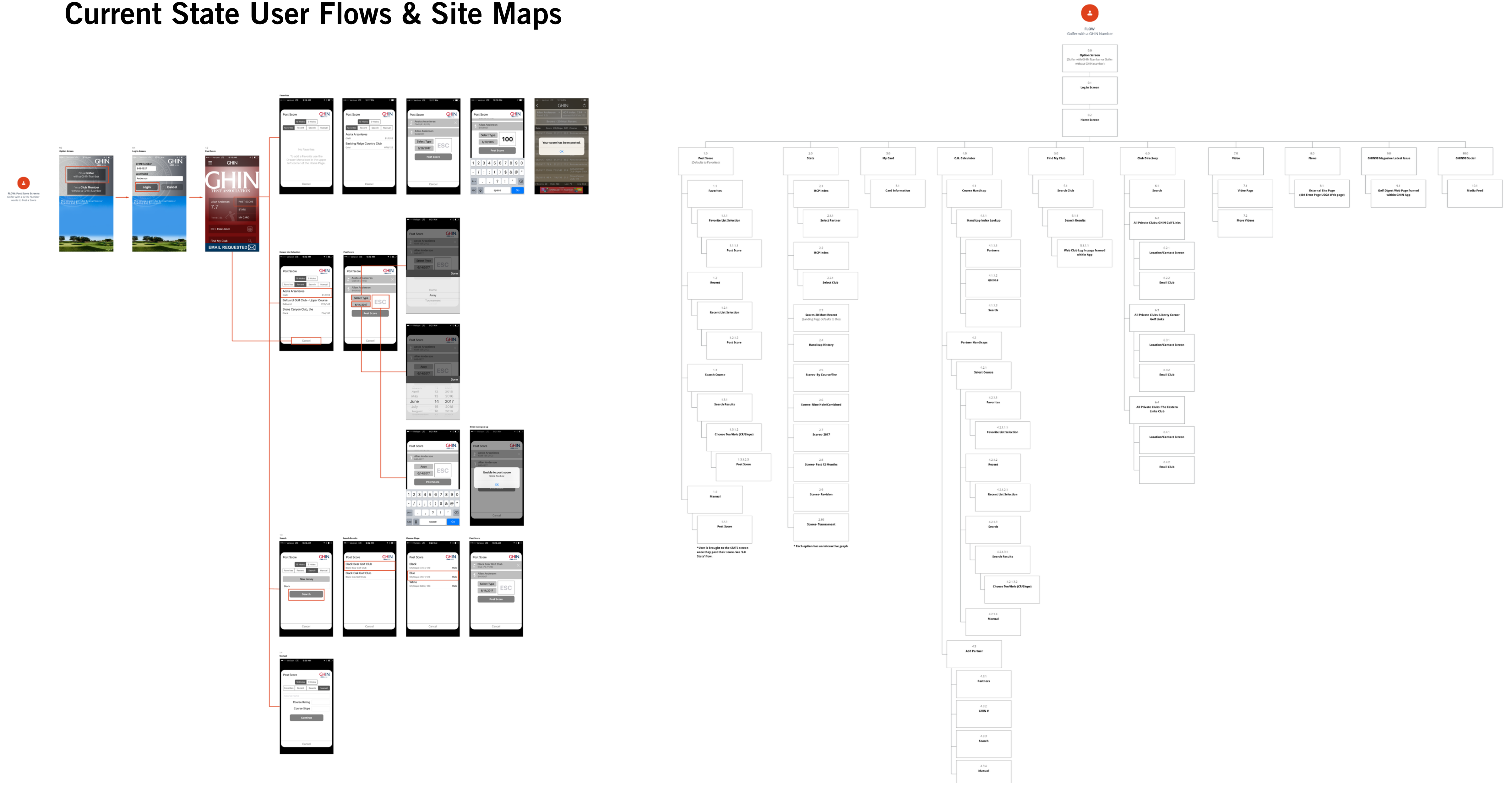
PROBLEM 5:

Clickable area on the player card is not identifiable. Icons are frequently misused.

- ✗ Clickable area is not obvious. During testing, users happened to click either on the picture or outside the name so player stats section is not opened.
- ✗ Add to Favorites (star button) and open player details (plus button) were thought to have the same role, since both imply an 'adding' action.
- ✓ Player box should be entirely clickable. An indicator should suggest that the box is expandable.
- ✓ Expand player details is done via clicking on the entire player cell.



Current State User Flows & Site Maps



Current State Audit Findings

These are our high-level observations and recommendations. As we complete Discovery and create user stories, these ideas will be fleshed-out further, with additional recommendations to improve the experiences.



Search is Cumbersome

Searching for a course, partner or handicap is a multi-step process on the app and site.

We recommend reducing the amount of data required to perform a search.



Inconsistent Features Across Products

Most features are not available across products or differ in varying degrees across products.

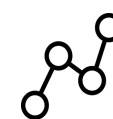
Our recommendation is to strive for consistency and have features available across products where it makes sense.



Inconsistent Flows Across Products

The steps to complete a task and/or the data required and displayed are different across products.

We recommend standardizing the flows across products where it makes sense - keeping in mind what works for touch screens may not on the web.



Too Many Steps to Complete Tasks

Users are asked to input data that could be pre-populated or consolidated onto one screen.

Our recommendation is to use profile or historical data to repopulate screens and allow the user to make edits if needed.



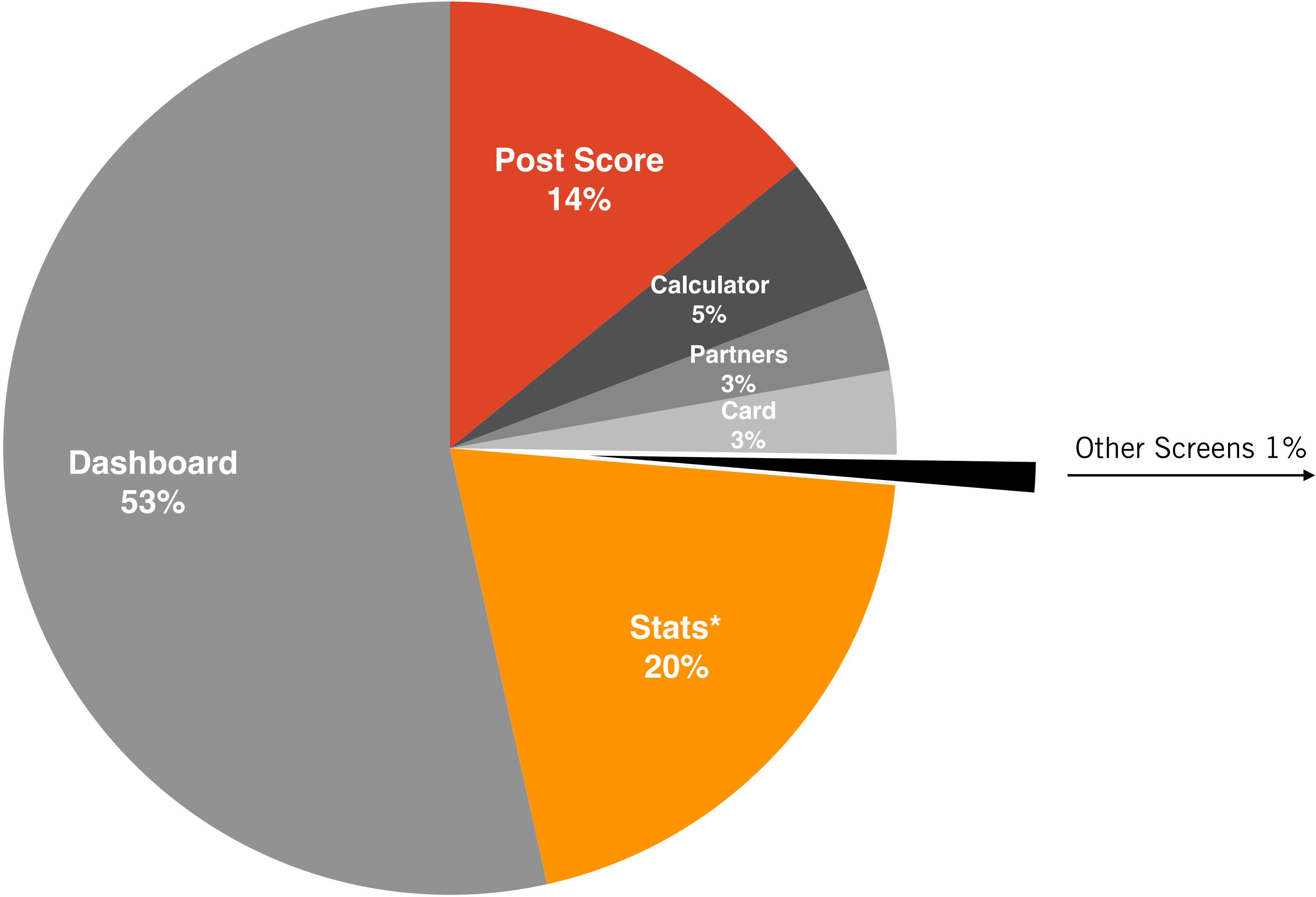
The Website

The site needs some love and defined focus. Clubs & Associations have their own sites.

Additionally, it should be responsive allowing the mobile site to be subsetting.

Google Analytics Review

Mobile App - Total Screen Views
06/19/2016 - 06/25/2017



Screen	Total Views
Find My Club	0.39%
Enter Tournament	0.29%
Club List	0.16%
Social	0.10%
Magazine	0.07%
News	0.04%
Results	0.02%
Club Detail	0.0024%
Videos	0.0005%

*Includes redirects from Post Score Success Page

Google Analytics

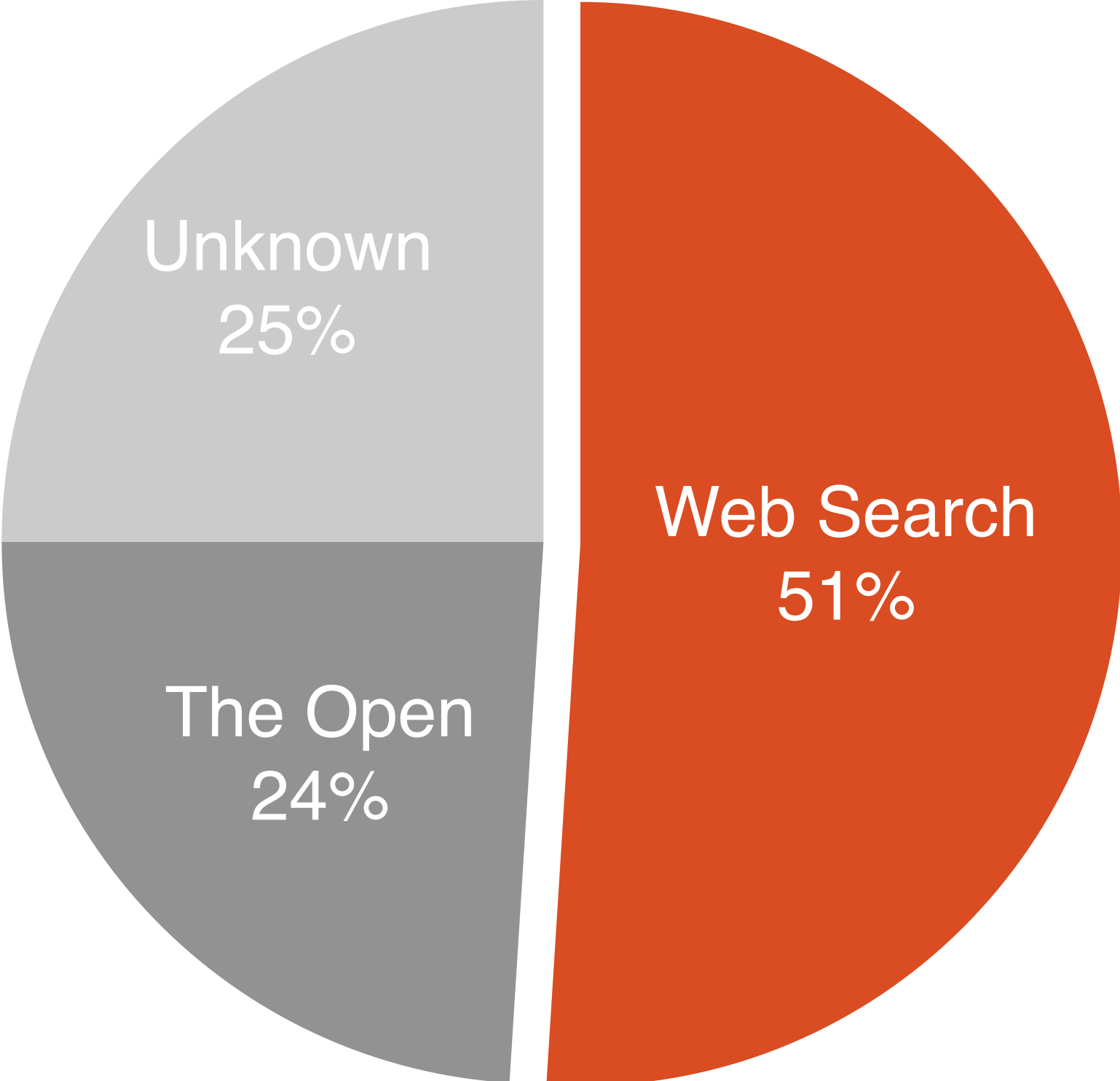
Vanilla Mobile App (No Co-Branding)

06/19/2016 - 06/25/2017



Current State Audit: Analytics The Week of The Open

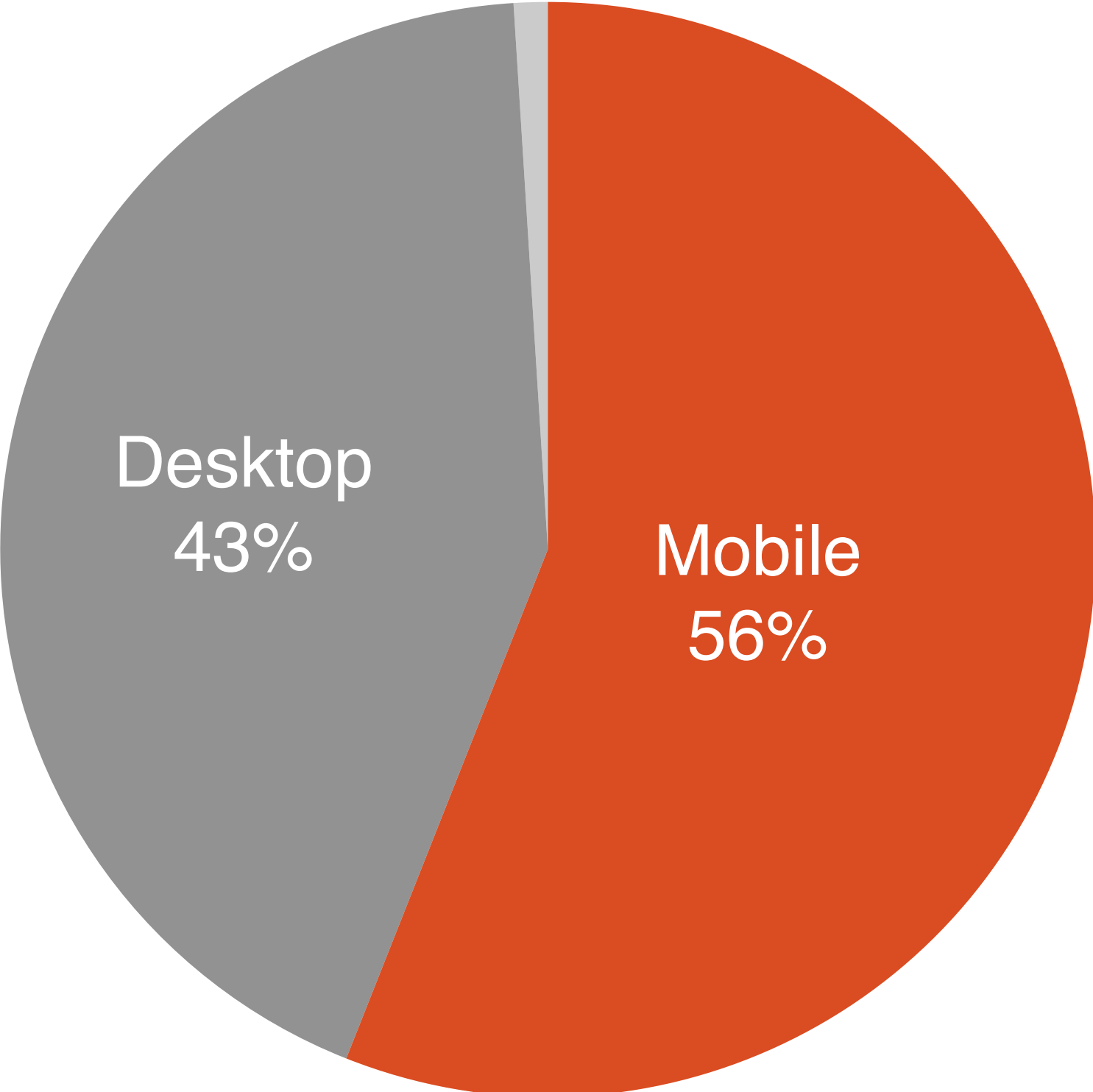
Tee Times Page Referring Sites



Google UK	37%
Google US	21%
Google Australia	7%
Android Native Search	5%
Bing.com	5%
Google Sweden	5%
Bbc.co.uk	5%
Google Ireland	5%
Google Espana	4%
Google Germany	4%
Google South Africa	2%
Yahoo Japan	1%

The home page & leaderboard are the primary referring pages on the site. The Unknown category should be investigated further (social media?).

Tee Times Page Views by Device



Of mobile devices, 72% are phones, 28% are tablets.

COMPETITIVE ANALYSIS

A Competitive Analysis is a tool used to evaluate and document the client's competition through the lens of user experience. The goal of a Competitive Analysis is usually to determine the "baseline" of where the client needs to be to meet the competition and then create recommendations to differentiate the client's experience within the marketplace.

Before starting the analysis, determine the dimensions you will evaluate and how you will measure them. It's helpful to conduct the analysis after you've concluded most of your research to see if and how the competition is solving any unmet user's needs and pain points you've uncovered.

Example assessment criteria:

- How easy is it to use the experience?
- How easy is it to find content?
- Which use cases are prioritized?
- What user types are prioritized?
- What language and voice are used throughout the experience?
- How many clicks does it take to accomplish key tasks?
- What is the experience's design personality?
- Is the experience "just usable" or truly meaningful?
- Is the experience solving for user's needs and pain points?

THE COMPETITION



CISCO IS WIDELY CONSIDERED THE **LEADER** IN THE NETWORKING SPACE. HOWEVER, HIGH CUSTOMER DEPLOYMENT COSTS ARE FREQUENTLY CITED FOR RECENT DROP IN SHARE.



JIRA AGILE IS RAPIDLY GROWING AS THE **DE FACTO STANDARD** FOR
AGILE DEVELOPMENT AND BUG TRACKING SOFTWARE.



AN EVALUATION OF THE COMPETITION ALONG THE FOLLOWING DIMENSIONS:

HOMEPAGE DESIGN	EASY ACCESS TO FAVORITE CONTENT	MOTIVATION FOR SOCIAL SHARING	EASE OF ACCOUNT CREATION	INNOVATION	MOBILE APP ENHANCES EXPERIENCE	THS IS THE NAME OF THE DIMENSION EVALUATED	THS IS THE NAME OF THE DIMENSION EVALUATED
--------------------	---------------------------------------	-------------------------------------	--------------------------------	------------	--------------------------------------	---	---



HOW WELL DESIGNED IS THE HOMEPAGE?
ARE THE PATHS INTO THE CORE USE CASES CLEAR AND
PRIORITIZED CORRECTLY? IS IT PLEASING TO LOOK AT?

HOMEPAGE
DESIGN

EASY ACCESS
TO FAVORITE
CONTENT

MOTIVATION
FOR SOCIAL
SHARING

EASE OF
ACCOUNT
CREATION

INNOVATION

MOBILE APP
ENHANCES
EXPERIENCE

THIS IS THE
NAME OF THE
DIMENSION
EVALUATED

THIS IS THE
NAME OF THE
DIMENSION
EVALUATED



HOW EASY IS IT FOR USERS TO EASILY IDENTIFY A PIECE OF
CONTENT AS A “FAVORITE?” HOW EASY IS IT TO ACCESS
FAVORITED CONTENT?

HOMEPAGE
DESIGN

EASY ACCESS
TO FAVORITE
CONTENT

MOTIVATION
FOR SOCIAL
SHARING

EASE OF
ACCOUNT
CREATION

INNOVATION

MOBILE APP
ENHANCES
EXPERIENCE

THIS IS THE
NAME OF THE
DIMENSION
EVALUATED

THIS IS THE
NAME OF THE
DIMENSION
EVALUATED



ARE USERS MOTIVATED OR INCENTIVIZED TO SHARE
WITH THEIR FRIENDS TO HELP DRIVE TRAFFIC AND
REDUCE USER ACQUISITION COSTS?

HOMEPAGE
DESIGN

EASY ACCESS
TO FAVORITE
CONTENT

MOTIVATION
FOR SOCIAL
SHARING

EASE OF
ACCOUNT
CREATION

INNOVATION

MOBILE APP
ENHANCES
EXPERIENCE

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DIMENSION
EVALUATED



IS NEW ACCOUNT CREATION **SIMPLE**, FAST, AND INTUITIVE?
HOW LIKELY ARE USERS TO COMPLETE THIS FUNNEL?

HOMEPAGE
DESIGN

EASY ACCESS
TO FAVORITE
CONTENT

MOTIVATION
FOR SOCIAL
SHARING

EASE OF
ACCOUNT
CREATION

INNOVATION

MOBILE APP
ENHANCES
EXPERIENCE

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DIMENSION
EVALUATED



DOES THE COMPETING APP USE **CUTTING EDGE** DESIGN TRENDS?
DOES ITS LEVEL OF INNOVATION SUPPORT THE OPTIMAL USER
EXPERIENCE?

HOMEPAGE
DESIGN

EASY ACCESS
TO FAVORITE
CONTENT

MOTIVATION
FOR SOCIAL
SHARING

EASE OF
ACCOUNT
CREATION

INNOVATION

MOBILE APP
ENHANCES
EXPERIENCE

THIS IS THE
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DIMENSION
EVALUATED



DOES THE ASSOCIATED MOBILE APP **ENHANCE** THE EXPERIENCE
OR MERELY DUPLICATE IT? DOES IT ADEQUATELY ADDRESS
CHANGES IN USER BEHAVIOR DUE TO MOBILITY?

HOMEPAGE
DESIGN

EASY ACCESS
TO FAVORITE
CONTENT

MOTIVATION
FOR SOCIAL
SHARING

EASE OF
ACCOUNT
CREATION

INNOVATION

MOBILE APP
ENHANCES
EXPERIENCE

THIS IS THE
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DIMENSION
EVALUATED

THIS IS THE
NAME OF THE
DIMENSION
EVALUATED



ENTER DIMENSION DESCRIPTION HERE. ELABORATE.
HIGHLIGHT KEY WORDS.

HOMEPAGE
DESIGN

EASY ACCESS
TO FAVORITE
CONTENT

MOTIVATION
FOR SOCIAL
SHARING

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HIGHLIGHT KEY WORDS.

HOMEPAGE
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SO LET'S DIG IN

HOMEPAGE
DESIGN

EASY ACCESS
TO FAVORITE
CONTENT

MOTIVATION
FOR SOCIAL
SHARING

EASE OF
ACCOUNT
CREATION

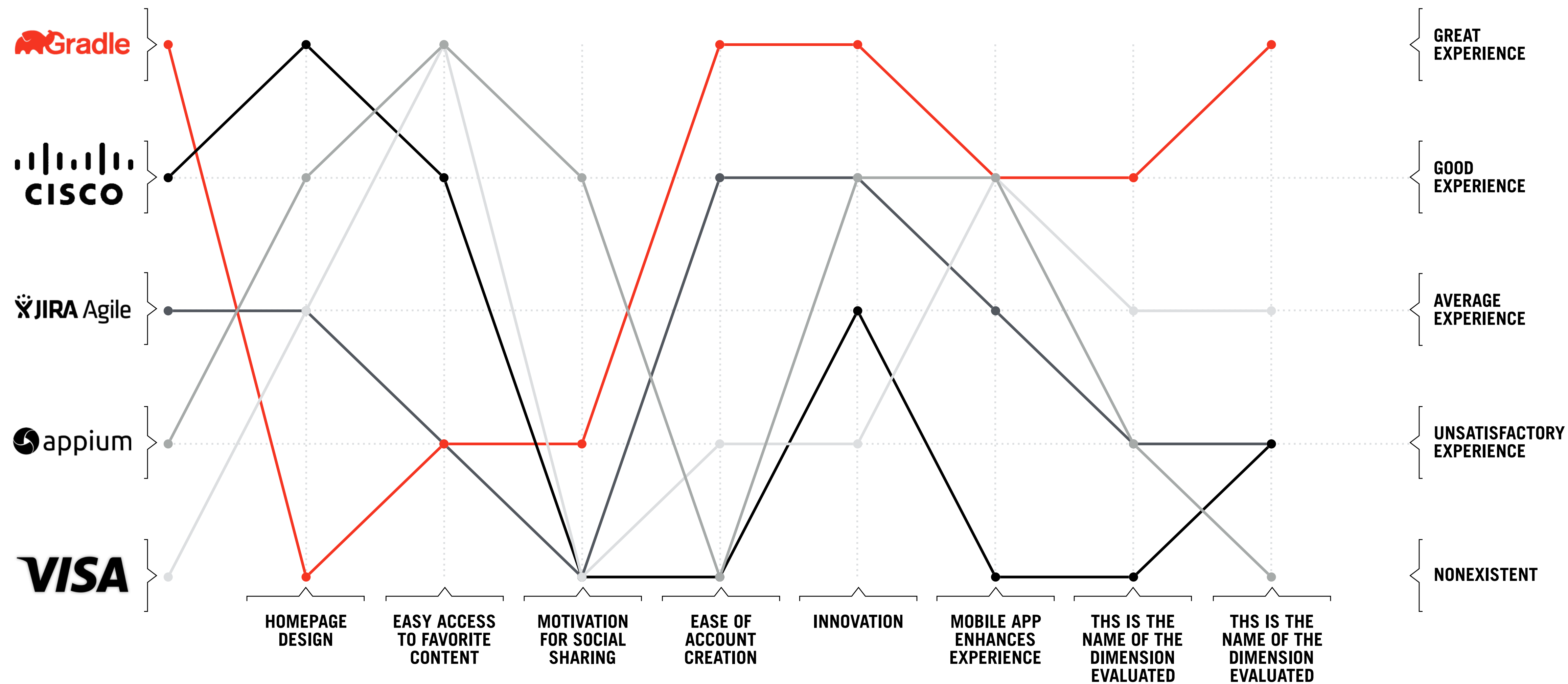
INNOVATION

MOBILE APP
ENHANCES
EXPERIENCE

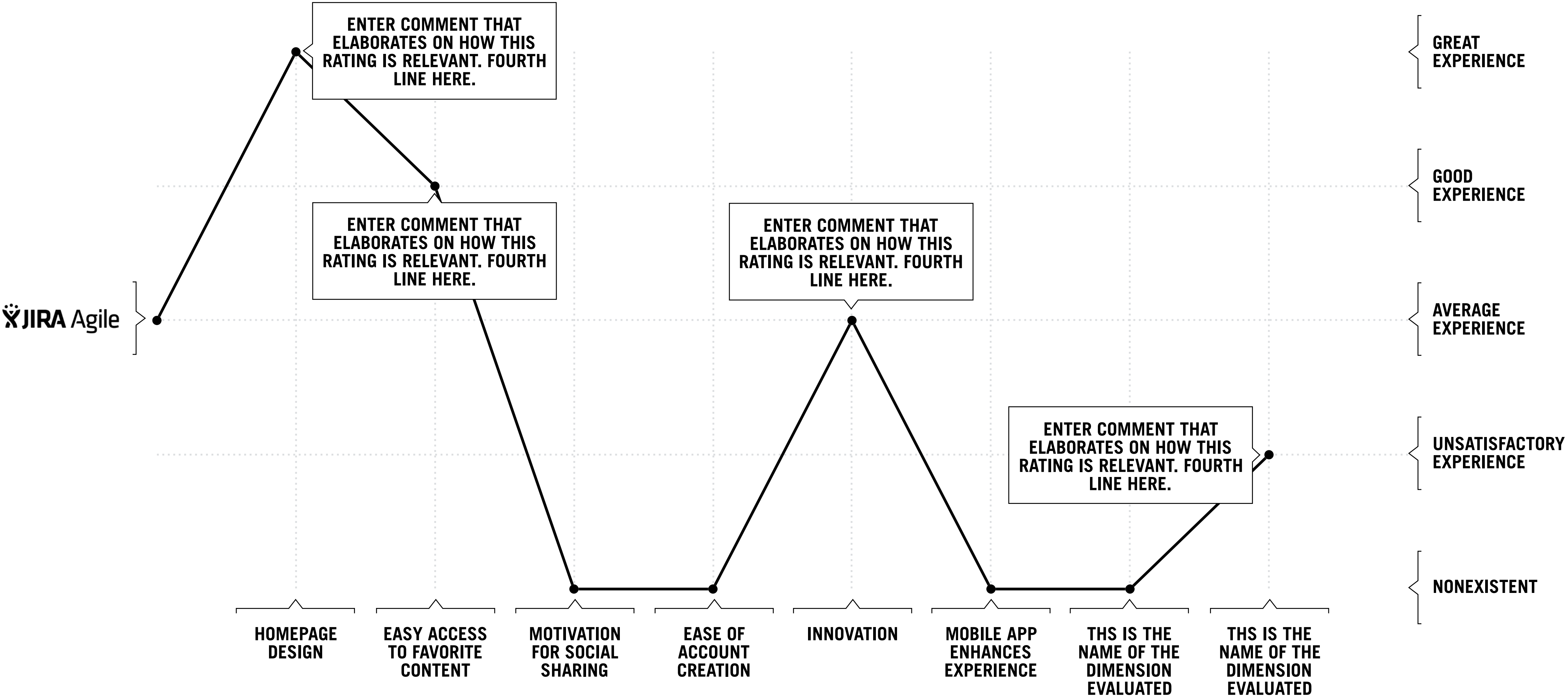
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NAME OF THE
DIMENSION
EVALUATED

LANDSCAPE OVERVIEW



{COMPETITOR NAME} ANALYSIS



FEATURE LIST

FEATURE					
PERSONALIZED CONTENT		✓	✓		✓
NEW CONTENT/PUSH NOTIFICATIONS	✓		✓		
FAVORITING	✓	✓	✓	✓	✓
RECOMMENDATIONS		✓	✓	✓	✓
FRIENDS/GROUPS			✓	✓	✓
MESSAGE BOARDS	✓	✓		✓	✓
INTEGRATED MESSAGE BOARDS		✓		✓	✓
SUGGESTED VIDEOS		✓	✓		✓
USER GENERATED CONTENT	✓		✓	✓	✓
FEATURE X		✓	✓		✓
FEATURE Y	✓	✓	✓	✓	✓
FEATURE Z	✓	✓	✓		✓



STAKEHOLDER INTERVIEWS > DISCUSSION GUIDE

The purpose of interviews is to gain an understand of our stakeholder's business goals and their vision for the project.

Interviewing stakeholders early in the process can generate good will and excitement. It also helps us understand the organizational structure, internal politics, technical constraints and operational readiness. It's also worthwhile to interview Customer Support representatives, when appropriate, since they have the most direct contact with end users and can provide valuable insights.

It is important to have a discussion guide when conducting interviews to keep the meeting on point and glean as many insights as possible. Since every project is unique, these questions should be modified based on the project scope and objectives. A unique set of questions may also be created for specific stakeholder roles (e.g. Technology, Marketing, etc.).

The Discussion Guides should be reviewed and updated throughout the interview process. Typically new questions are added after the first few interviews.

Stakeholder Interview Questions

Version 1.0



Interview Process

- Work with the client and project team to create the interview questions and schedule.
- Introduce yourself and Endava at the start of the interview. Explain the project scope and objectives. Ask permission to record the interview.

Interview Questions

General

1. Describe your role within the organization.
2. How do you see the company's landscape changing in the next five years?
3. What emerging threats are you taking seriously?
4. How do you think your organization is perceived (in the US/Worldwide)?

Competition

1. Who are your competitors?
2. What advantages does your organization have over these competitors?
3. How does your product/experience compare to your competitors?

Stakeholder Interview Questions

Version 1.0



Current State

1. What is the primary purpose of the product/experience?
2. What is the main source of traffic to the product/experience?
3. Who is your current audience? Are they different from your target audience?
4. What information do you believe your users are seeking?
5. What are the top two or three tasks you hope users will complete within the product/experience?
6. What do you consider to be the best three features of the product/experience?
7. What makes users stay on within the product/experience and come back regularly?
8. Have you received any feedback from your users? If so, what have they said?
9. What three features do you feel need the most improvement?
10. Are there any features you feel are missing?
11. How does the product/experience fit into your organization's overall goals and objectives?

Future State

1. Is there a product/experience you believe portrays what your organization would like to portray?
2. What would you say the tone/personality of the product/experience should be?
3. What are the short term goals for this project?
4. What would make this project a success?
5. How is success currently measured?
6. Is there anything else we need to know?



RESEARCH

USER INTERVIEWS > DISCUSSION GUIDE

The purpose of user interviews is to help us understand their needs, behaviors, goals and pain points so we can solve for them through design.

It is important to have a discussion guide when conducting interviews to keep the meeting on point and glean as many insights as possible. Since every project is unique, these questions should be modified based on the project scope and objectives. A unique set of questions may also be created for specific end user roles (e.g. Admin, Requestor, etc.)

The Discussion Guides should be reviewed and updated throughout the interview process. Typically new questions are added after the first few interviews.

User Interview Questions

Version 1.0



Interview Process

- Work with the client and project team to create the interview questions and schedule.
- Ensure the interviewee will be able to share their screen with you during the interview.
- Introduce yourself and Endava at the start of the interview. Explain the project scope and objectives. Ask permission to record the interview and screen (in sharing/remote situations).

Interview Questions

1. How did you find the product/experience?
2. During an average week, how much time do you spend on the product/experience?
3. What pages/features do you spend the most time on?
4. Are there any pages/features you do not use for any reason?
5. Are there features that do not exist that you would like to see?
6. What aspects of the product/experience do you find the most valuable?
7. What aspects of the product/experience do you find to be the most challenging?
8. Have you ever been unable to find information or complete a task you thought would be on the site? If so, what? What did you do after your first try was unsuccessful?
9. How easy is it to find the information you need on a scale of 1-5 (5 being extremely easy)?
10. How easy is it for you to complete tasks on a scale of 1-5 (5 being extremely easy)?
11. Are there any existing pages or features you feel could be combined?
12. Which pages or features do you feel are working well?
13. Do you have any other comments or suggestions?



PERSONAS

Personas are fictitious summaries that describe the key behaviors, attributes, motivations, and goals of the users we're designing for. A persona is created from primary research with real users and takes the form of a vivid narrative describing a single person who represents a behavioral segment.

As a set, personas become a summary of what the team understands about the users and how their needs and goals can be met. Personas then become the key tool in driving forward the experience design. Ideas are vetted against each persona's needs, and solutions to pain points can be considered based on current behavior patterns. Instead of team discussions leaning on opinions and personal perspectives, decisions can be made based on research, an understanding of how users really behave, and what they are trying to accomplish.

AGE 72

RETIREMENT 54

STATUS Widow

DEPENDENTS None



Penny worked at British Telecom for 20 years in several offices across London. When BT asked her to move to Wood Green in North London, she decided to take voluntary redundancy.

“I love it – I’m never in. I don’t know how I found time to go to work!”

UNIQUE CHARACTERISTICS



ATTITUDE TOWARDS LIFE INSURANCE

“When I was working, I didn’t have life insurance – with BT, you get a lump sum if you die in service. But I’ve been considering life insurance recently – I trust my bank and they asked me if I’d thought about it.”

FINANCIAL CONCERNS

“I get by fairly easily on my pension. But it’s always been important to me to pay my way. I don’t want my children to have to pay for my funeral.”

LIFE INSURANCE/ALTERNATIVE STRATEGIES

- Penny has recently taken out life insurance
- She has savings in case the life insurance does not cover her funeral
- She has also made a will

TYPICAL PURCHASE JOURNEY

1. Insurer emails Penny’s son about renewal
2. Son checks premium and calls Penny
3. If both are satisfied, son renews online
4. If not satisfied, son looks for a better quote

TRUSTED BRANDS

- ↑

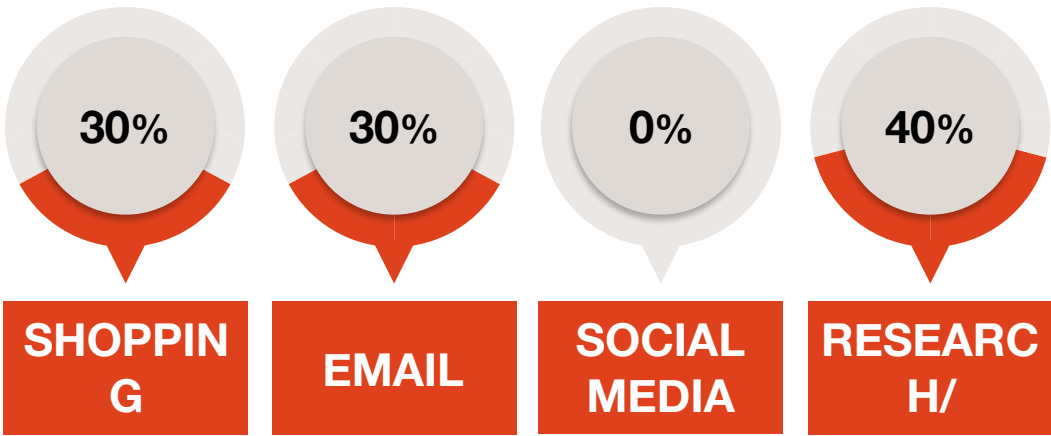
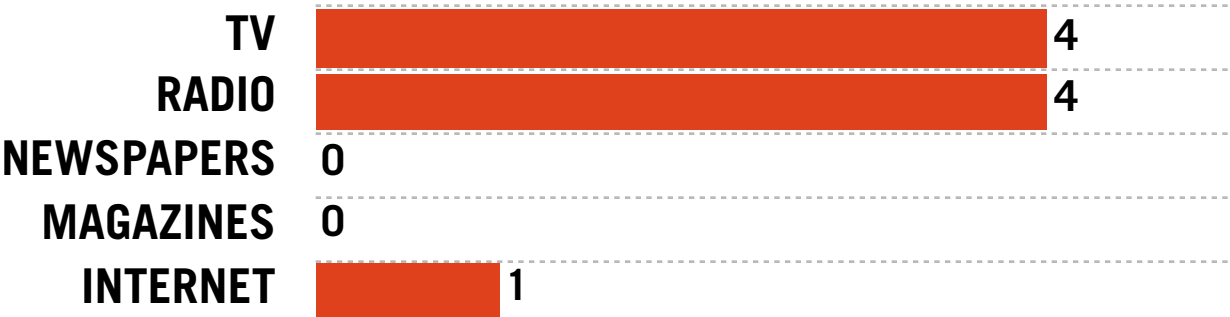
SAGA | M&S

“Saga were the only company that was prepared to insure the whole house, not just my garden flat”
- ↓

DIRECT LINE

“I had dealings with them in the past and was disappointed”

MEDIA CONSUMPTION (HOURS/DAY)



AGE 69

RETIREMENT 58

STATUS Married

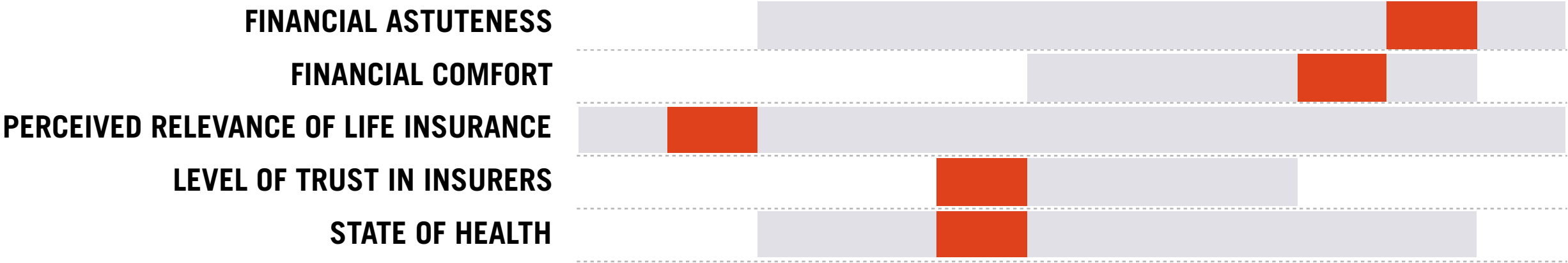
DEPENDENTS 1 semi-dependent

“I’m enjoying my retirement, but with reservations – I miss work. I keep busy researching my family history.”



Leo is financially astute and did a great deal of financial planning before he retired. Now 11 years into his retirement, he and his wife can relax and enjoy their life together.

UNIQUE CHARACTERISTICS



ATTITUDE TOWARDS LIFE INSURANCE

“I had life insurance years ago. But my financial planning changed when I paid my mortgage off.”

FINANCIAL CONCERNS

“Because of my planning and saving, I have no financial concerns. Everything is in order.”

LIFE INSURANCE/ALTERNATIVE STRATEGIES

- Leo has made a will and set up power of attorney
- He makes a regular contribution to his son’s pension
- He has also pre-paid for his funeral

TYPICAL PURCHASE JOURNEY

1. Leo’s car insurance renewal date was approaching
2. He did some research and discovered it was cheaper to renew online
3. He called up the insurer and demanded that they renew him at the online rate

TRUSTED BRANDS

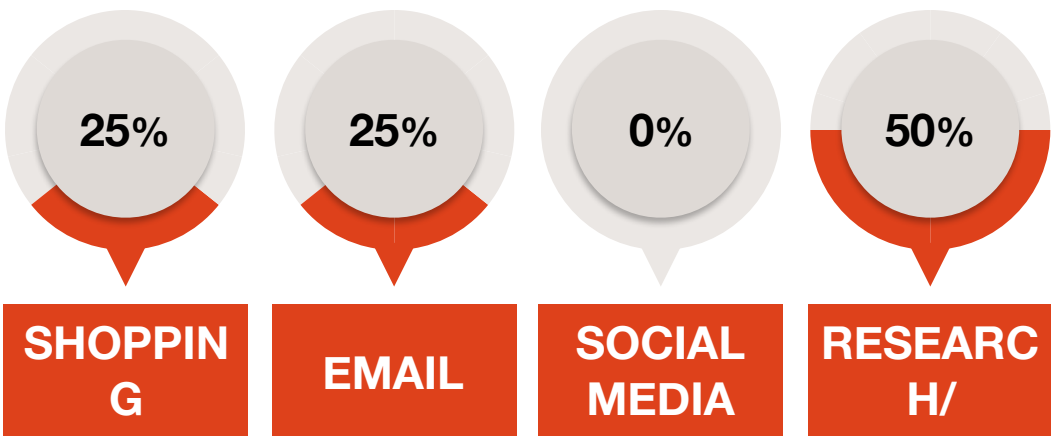
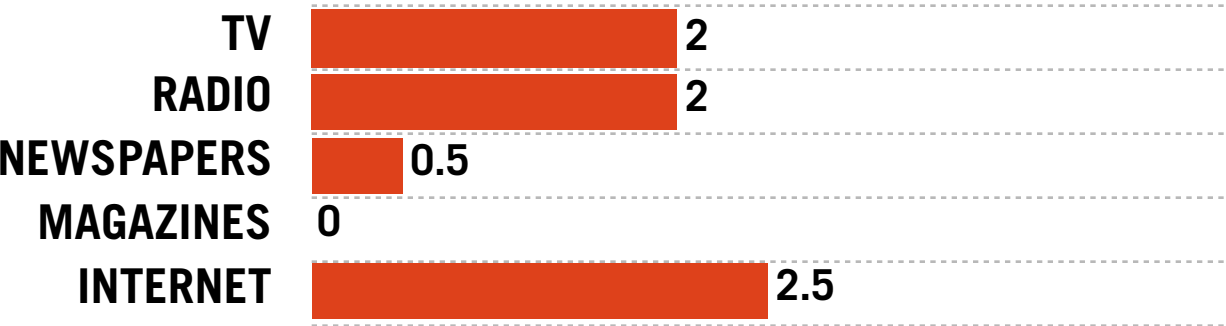
↑ PRUDENTIAL - STANDARD LIFE - FRIENDS LIFE - AVIVA

“I’ve had dealings with all of them and they were OK”.

↓ ADMIRAL - DIRECT LINE

“Admiral screwed us. I won’t use them again!”

MEDIA CONSUMPTION (HOURS/DAY)



AGE 67

RETIREMENT 60

STATUS Divorced

DEPENDENTS None

"I'm enjoying my retirement – every single day."



Bea is a retired special needs teacher. She is extremely active and has made lots of friends since retiring. Thinking about the future is something she prefers not to do.

UNIQUE CHARACTERISTICS



ATTITUDE TOWARDS LIFE INSURANCE

"When I was working, I didn't know there was such a thing as life insurance. My parents didn't have it. In any case, I probably couldn't have afforded it on my wages."

FINANCIAL CONCERNS

"My one concern is the worst case scenario – residential care. I'm very active now, but I don't want to become a burden to my family."

LIFE INSURANCE/ALTERNATIVE STRATEGIES

- Bea has never really planned for her retirement, but received a windfall when her mother died
- She has made a will and thinks that is sufficient

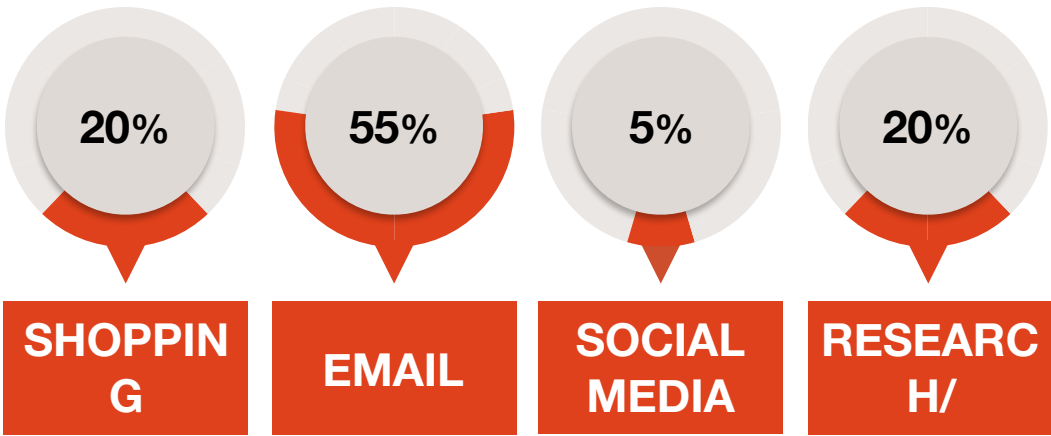
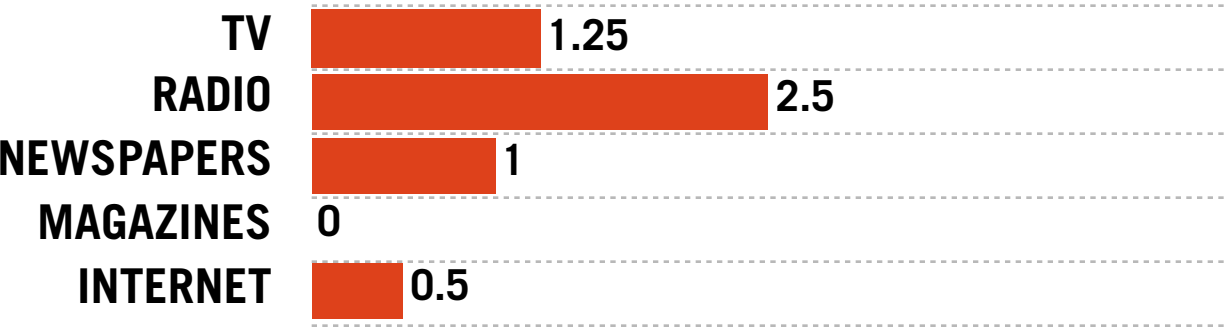
TYPICAL PURCHASE JOURNEY

1. Bea writes down the renewal date of her home insurance
2. She doesn't get a letter from the insurer, but calls them anyway
3. The premium has gone up a but, but the insurer offers her a small discount and Bea renews on the phone

TRUSTED BRANDS

- ↑ **INSURE FOR RETIREMENT**
"I use them for household insurance. They're reputable (I think)".
- ↓ **OLD MUTUAL - SWISS RE LIFE CAPITAL - AIG - AEGON - FRIENDS LIFE - LEGAL & GENERAL**
has not heard of

MEDIA CONSUMPTION (HOURS/DAY)





RULES CONSUMERS

Persona 1

Name

MATT

User type

PLAYER / NEWBIE GOLFER**WHY I NEED TO CONSULT THE RULES**

To learn the basics and to improve my game.

WHEN I NEED TO CONSULT THE RULES

Before I go out to play.

JOBS TO BE DONE

Learn the basics, such as:

- I'm in a bunker. What do I do?
- Where do I tee off?
- How do I deal with hazards and what do I do when I'm out of bounds?
- What happens if I lose a ball?

TOUCHPOINTS

Video

Mobile

Social Media

Face-to-Face

AIMS

- To understand the basics quickly so that I can enjoy the game.

PAINS

- No peer to ask about the Rules.
- Golf feels intimidating due to etiquette and snobbishness.
- Rules are boring.
- I know nothing about the game.
- I don't understand the terminology.

GAINS

- Understanding the dos and don'ts and golfing etiquette.
- Increased confidence.
- The opportunity to show off my knowledge.
- I can get recognition by passing a test.
- I can be more like my golfing hero.

JOURNEY MAPS

A journey map charts the process a user goes through to complete a task. Journey maps are primarily used to understand user needs and pain points in an effort to identify areas for improvement and optimize the overall user experience.

To create a journey map, we first develop a list of steps users will complete, as well as the device(s) used. We then place those tasks into a rough timeline and add the emotions and/or thoughts a user has at each step to create the overall story based on what we heard during user interviews.

Sometimes we need to consider and include the entire ecosystem in our journey maps to understand the promises that are being made outside of the experience and determine whether or not we have to deliver on them. For example, are emails or text messages sent to the user that drive them to our experience? Is it a TV spot? What is the content of these messages and what do we have to deliver within our experience to support them?

Potential Scenarios During The Open: Practice Tees

	Saturday	Sunday	Monday	Tuesday	Wednesday
Practice Tees	Tee Times announced.	Schedules are very fluid and change often.			
Planning At Work, Home, or with Friends 	• Users would want to sign up to be alerted of their favorite players' tee times • Users would want a notification if the tee time of a favorite player was changed and the ability to update their calendar • Users would want to receive a notification when all tee times are announced • Users may want to explore ticket options • Users may want to view highlights and stats from last year • Users may want to view information about the course • Users may want to research players • Users would want to create a watch list (calendar) and plan their viewing • Users may want to share that list with friends • Users may want to see who is teeing off next • Users may want to view results				
Watching At the Event (Not Televised) 		• Users may want to create/edit/view their day on the course so they know what time to be at what hole to see their favorite players • Users would want a notification if the tee time of a favorite player was changed and the ability to update their calendar • Users may want to view highlights and stats from last year • Users may want to view information about the course • Users may want to research players • Users may want to see who is teeing off next • Users may want to view results			

Potential Scenarios During The Open: Championship Tees

					Users mostly viewing Tee Times on Leaderboard			
	Sunday	Monday	Tuesday	Wednesday	Thursday R1	Friday R2	Saturday R3	Sunday R4
Championship Tees		Tee times announced for first two rounds (notification, social, TV, site)	Only changes if a player is replaced.			Tee Times announced for Saturday	Tee Times announced for Sunday	
Planning At Work, Home, or with Friends	• Users would want to sign up for an alert to receive tee times for fav players • Users may want to explore ticket options • Users may want to view highlights and stats from last year • Users may want to view information about the course • Users may want to research players	• Users would want to create a watch list (calendar) and plan their viewing on TV or at the course • Users may want to share that list with friends • Users would want a notifications of their favorite players' Tee Times • Users would want a notification if the tee time of a favorite player was changed and the ability to update their calendar • Users may want to research players • Users may want to explore ticket options • Users may want to view highlights and stats from last year • Users may want to view information about the course						
Watching At the Event or on TV					• Users may want to create/edit/view their day on the course so they know what time to be at what hole to see their favorite players • Users would want a notifications of their favorite players' Tee Times • Users may want to view highlights and stats from last year • Users may want to view information about the course • Users may want to research players • Users may want to see who is teeing off next • Users may want to view results			



CASSANDRA HOWARD

“As a busy working mother, I need technology to make my life easier and help me to tasks quickly. I do not have time to figure out how something works.”

Age:

41

Marital Status:

Married 3 children (6, 9, 11)

Location:

Charlotte, NC

Occupation:

HR Generalist



DEVICE PROFILE

I own both an iPhone 6C and an iPad mini. It seems like my kids use my iPad more than I do sometimes. We also have two laptops that we all share.



SCENARIO

Customer wants to pay a bill quickly/easily. Doesn't want to think to hard about making a payment.

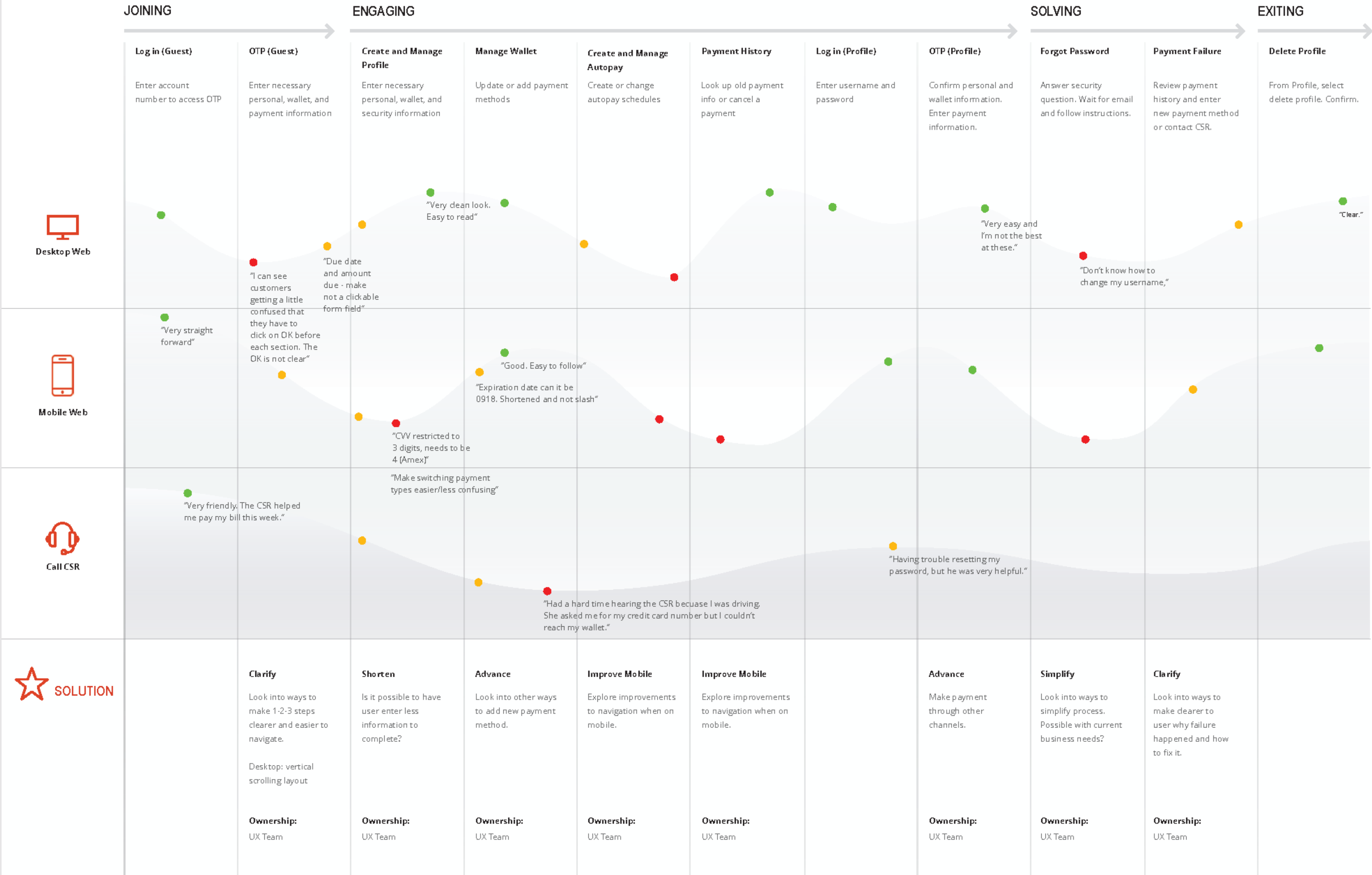


THE GOAL

- 1 Pay bill quickly/easily
- 2 Pay easily while on the go
- 3 Payment automation



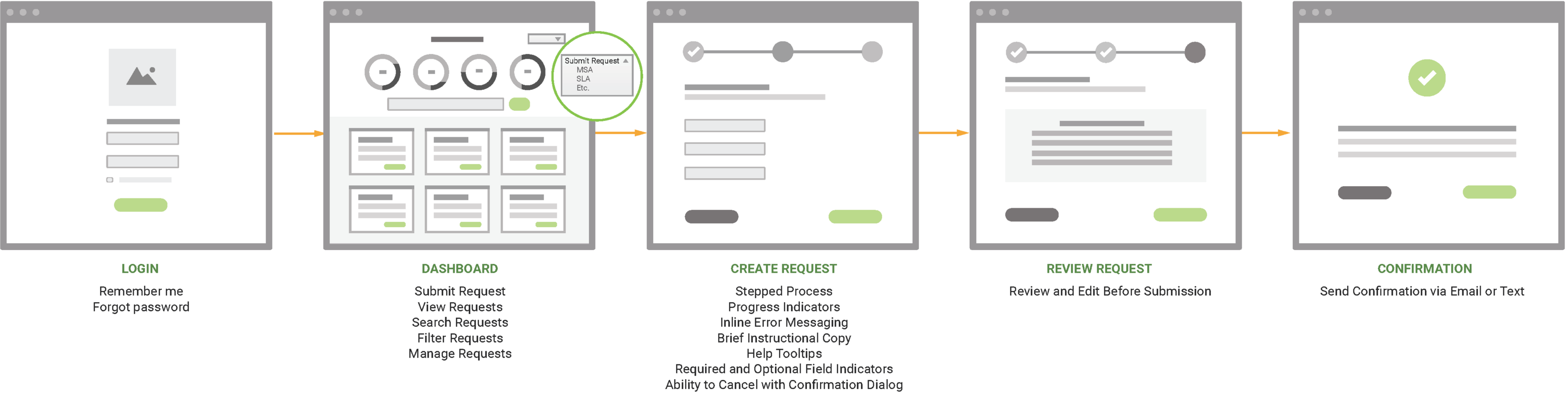
THE EXPERIENCE



INSIGHTS

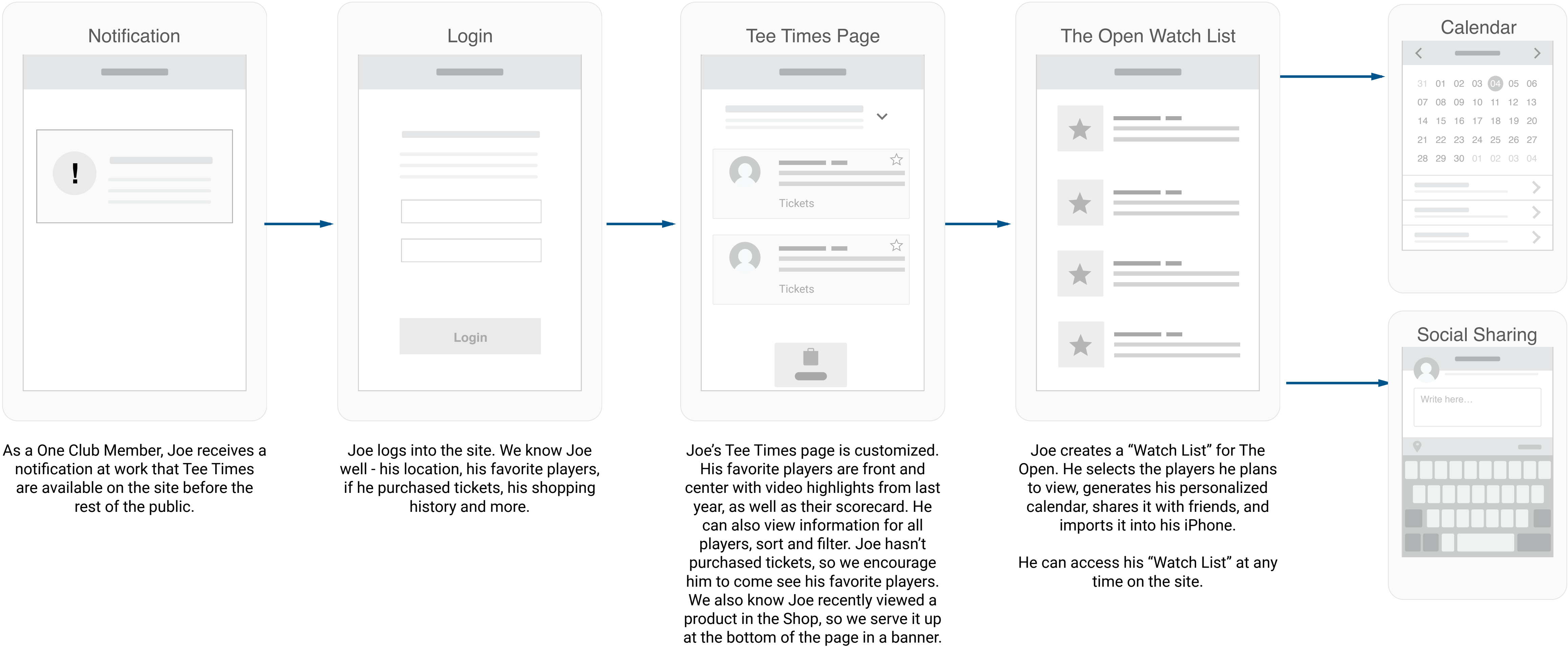
USER FLOWS

The purpose of a user flow is to illustrate the steps a user may go through to complete a specific task. This allows us to map back to the business goals and technical constraints, identify pain points and ensure the pathway to achieve a goal is clear – with the perceived effort meeting user expectations.



User Flow #1: Planning

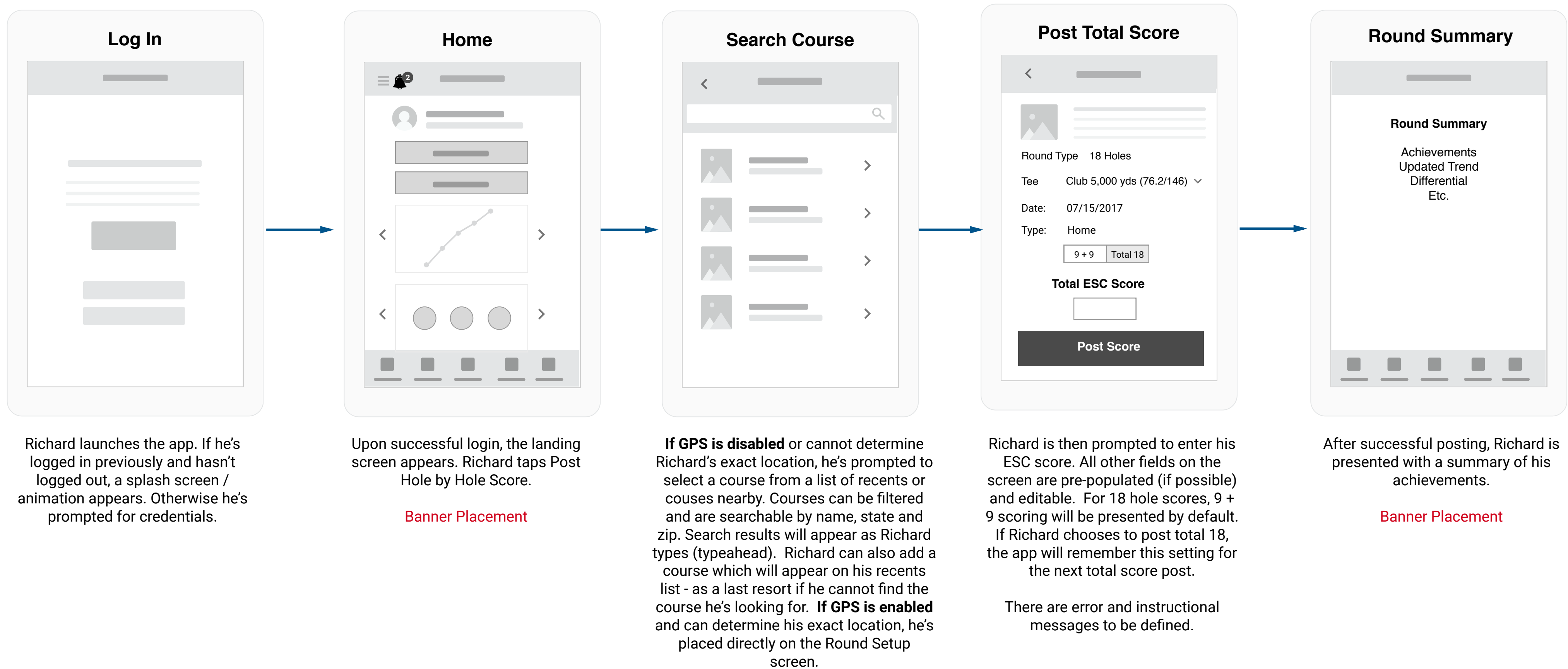
Joe, a One Club Member, receives a notification he has exclusive access to the Tee Times.



Mobile App User Flow 2

Richard finished playing a round and wants to post his total score for 18 holes.

- ★ This is an existing feature on the app and the most used
- ★ Reduce the number of steps & make it easier
- ★ Encourage posting of Front and Back 9 scores



CREATIVE BRIEF

The Creative Brief should be completed before any work experience design work is started. Completion of the brief is a joint effort between UX, Visual Design and Project Management.

The purpose of the Creative Brief is to provide the Creative Services team with the information needed to produce their designs such as the project vision, goals, target audience, etc. This document should be used to brief the team during the internal project kickoff meeting and can be referred to later in the project lifecycle to ensure the creative deliverables meet the project vision and goals.

Creative Brief



Client:
Version: 1.0
Date:
Author:

1. Background/Overview

Introduce the project and any relevant background information.

Example: Kim Technologies is a leader in the artificial intelligence marketplace, currently focused on the legal sector. In 2017, Kim will focus its efforts on obtaining business outside of legal. Our goal is to redesign Kim's current interface to appeal to this wider audience.

2. Project Objective and Goals

Write a concise, one or two sentence description outlining the overall objective of the project.

Example: The primary objective of this project is to significantly improve Kim's user experience and visual design based on industry standards and best practices. Our goal is to enable users to quickly find the information they need and easily complete key tasks.

3. Target Audience

Who is the target audience? Be sure to include as much detail as possible – age, demographics, profession, online behavior, preferences, goals, pain points, etc.

4. What Do We Want Users to Do?

What are we trying to get our target audience to do exactly? What are the primary tasks and information the audience is seeking? What does the client want these users to do?

5. Key Insights

Briefly list any insights that can be gleaned from existing analytics and customer feedback.

6. The Competition

Identify who the client's competitors are. Provide links to relevant online experiences.

7. Branding

Are there existing brand guidelines we need to follow (e.g. logo, color palette, etc.)? What about tone and messaging?

Creative Brief



8. Project Mandatories

What are the mandatory elements for this project (e.g. legal, accessibility, launch date, etc.)?

9. Success Metrics

What defines success for this project? What metrics, if any, will be measured?

10. Past Projects

Indicate below any key projects we've produced in the past for this client. List the project name, a brief description and provide a link to the shared project folder. If no prior work exists, provide a link to the winning proposal.

11. Deliverables

What tasks are we responsible for (e.g. Stakeholder Interviews, Competitive Analysis, etc.) and what are the deliverables/dates? Be sure to note if Endava is responsible for the build and who the Technical Lead is.



RESEARCH

WIREFRAMES

After sketching ideas, we take the best ones and refine them into wireframes. Wireframes can be in a low, medium or high fidelity format depending on where we are in the process, the methodology we're using, and the overall project scope.

Generally speaking, wireframes depict:

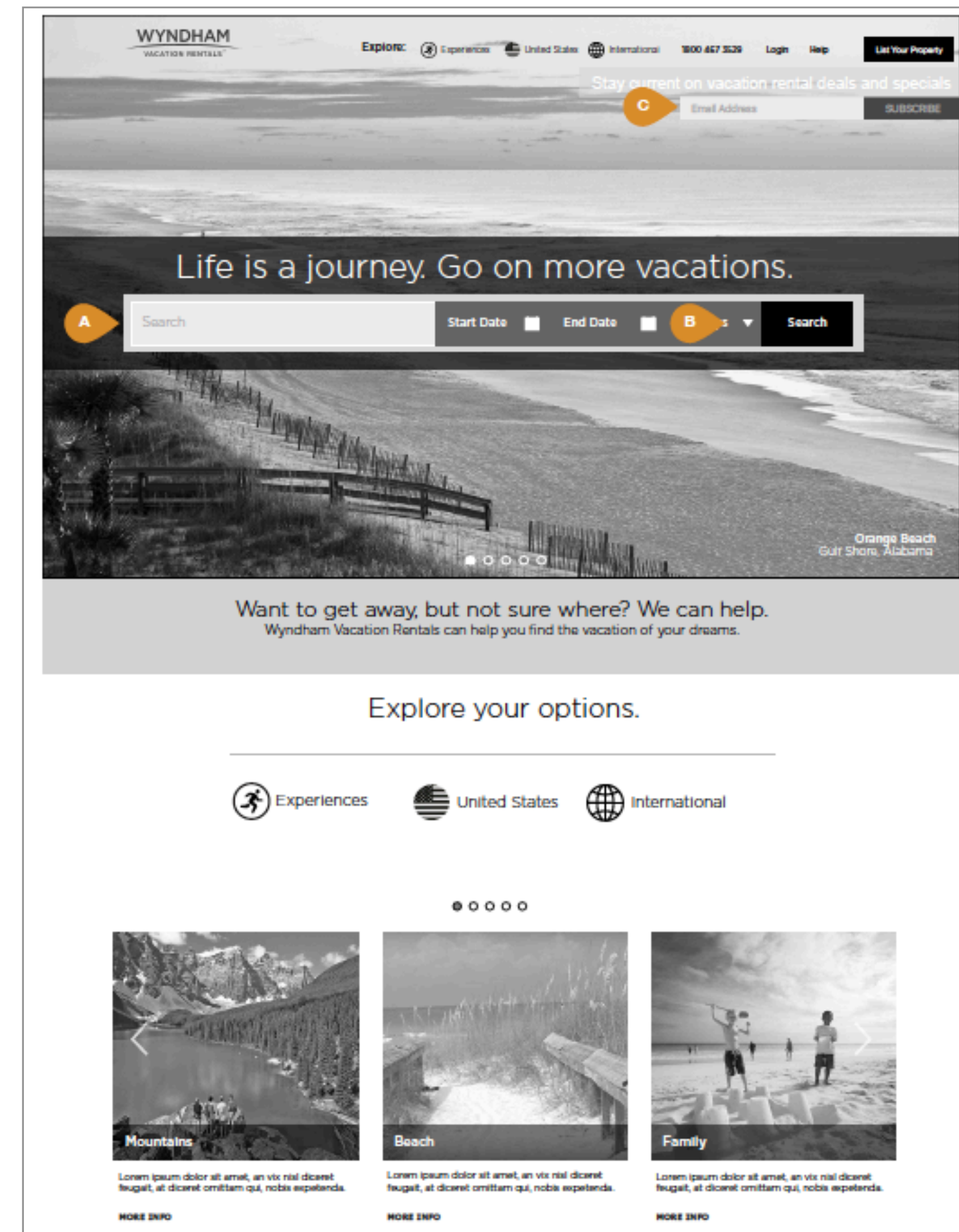
- Screen content and general layout: This will include mostly placeholder content
- Screen flow: How key screens flow into the next and interaction patterns contained within
- UI controls: Which types of interface elements are used (for example, a button, a slider, a checkbox, etc.)
- Approximate placement/sizing of pictures, icons, and text
- Screen/module states: Different states of screen elements based on user interactions, e.g. error handling

As wireframes are being designed, it's important to vet them with the Development Team for a feasibility check. Any concerns must be addressed before the designs are finalized.

LOW-FIDELITY WIREFRAME



HIGH-FIDELITY WIREFRAME



WIREFRAME COVER PAGE

CONTENTS

- Homepage Desktop
- Homepage (Language Dropdown) Desktop
- Homepage Mobile
- Homepage Mobile Menu/Alert/Language

ADDITIONAL REQUIREMENTS

Technical constraints that were provided from workshops with the client.

1024 x 768 should be regarded as the most common screen resolution.

The "fold" is 600px below the top of the canvas.

No videos should be displayed.

Internet Explorer 8 is the browser standard.

Images should be optimized to 20-50kb each.

Tracking and Schedules should be prioritized as they are analytically the most frequently used features.

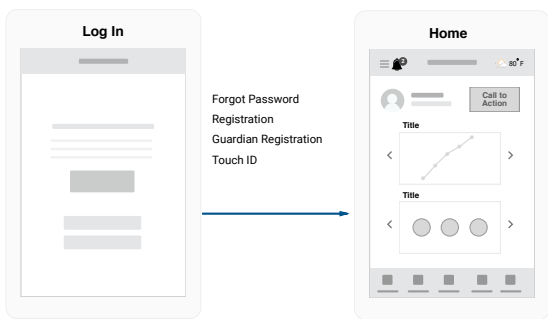
FUNCTIONAL REQUIREMENTS

These will be referenced and associated with annotations for clarity.

- 1 I will want to **track my shipments** so that I have a timeline of consistent updates on the status and conditions of my shipments.
- 2 I will want **point-to-point schedules** so that I can properly plan and initiate a shipment through My Maersk Line.
- 3 I will want to **register an account** with My Maersk Line so that I can utilize the service.
- 4 I will want to **log in to My Maersk Line** so that I can manage my account.
- 5 I will want My Maersk Line to be **designed responsively** with legacy browser compliance (IE 8) and canvas size efficiency so that it is accessible on more devices for any circumstance.
- 6 I will want My Maersk Line to be designed with **optimized** and minimal visual components so that global accessibility across a spectrum of network transfer rates are not negatively impacted.
- 7 I will want the My Maersk Line site to be **built to accommodate a roadmap** of new features so that I have greater satisfaction and My Maersk Line has ongoing vitality as a brand.
- 8 I will want to be **notified about any and all functional site changes** prior to the change being made — potentially with an opportunity to opt in to a preview — so that I can manage my expectations of Maersk's tools prior to an update.
- 9 I will want **notifications** on the site whenever particular functionality such as tracking shipments or dashboard use aren't available so that I will know why query submissions aren't processed and when they might be.
- 10 I will want the site to allow me to **manually select my language** preference so that I may define my default language.
- 11 I will want a **continuity of experience** across all Maersk site pages so that I develop a comfort, familiarity, and ease of use with Maersk's entire web experience.



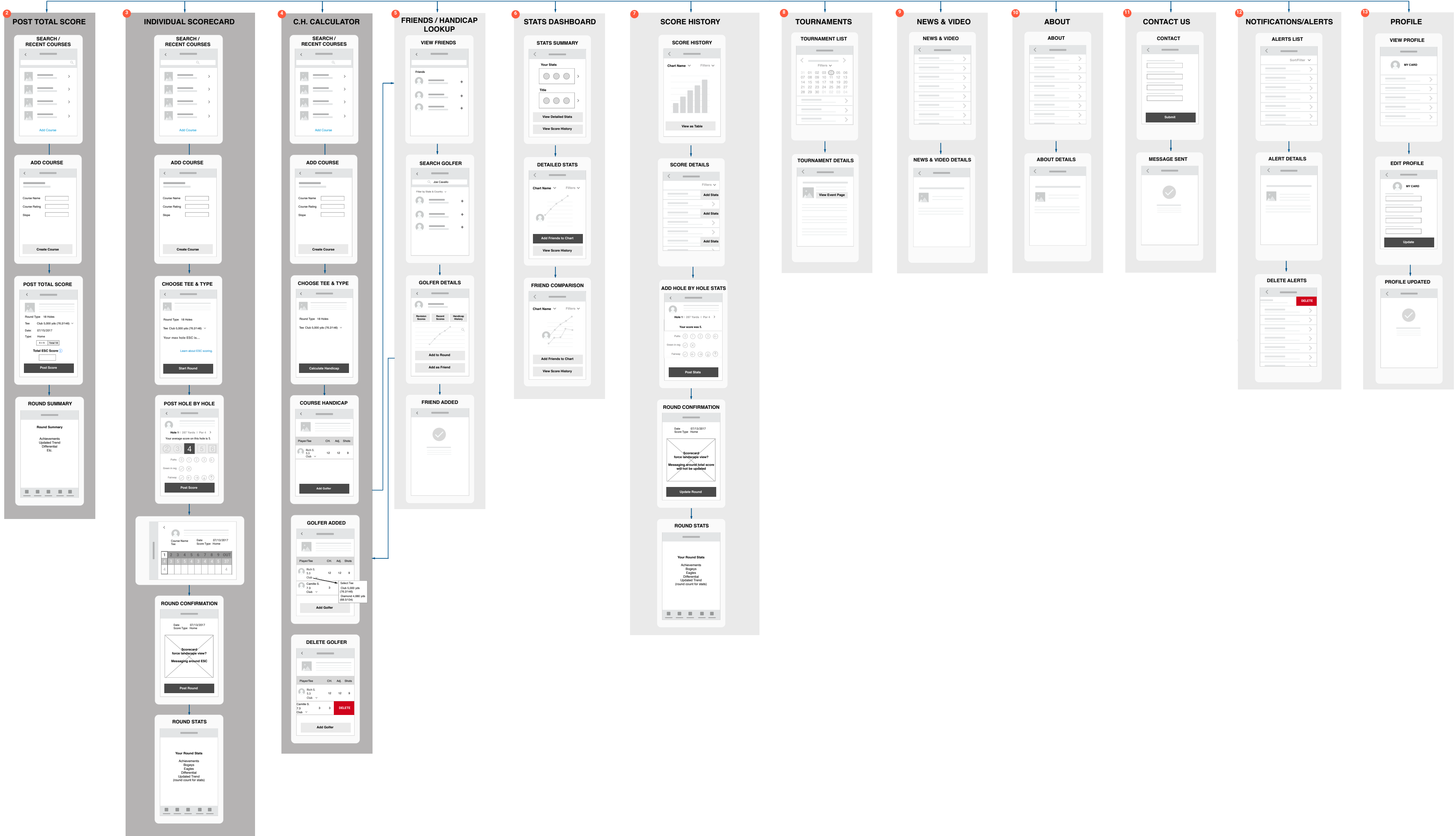
Draft Sitemap: Mobile App



KEY

Some detailed requirements have been discussed

Detailed requirements have **not** been discussed



USABILITY TEST PLAN

Usability testing is a critical part of the design process and should be conducted several times as ideas are refined and finalized. Testing can be done with sketches on paper, printed wireframes or clickable prototypes.

When conducting a test, it is imperative you have a well formulated test plan that outlines how the testing will be conducted and the tasks participants will be asked to complete. If you're conducting a second round of testing on a revised prototype, be sure to ask users to complete the same tasks as the last round so you can measure if the experience has improved.

Ideally test participants will be users of the existing experience or a similar one. They should also represent the client's target audience. If you are unable to find users for testing, there are several firms that can recruit participants for a fee (make sure your project has the budget for this). Worst case, you can test with friends and family, co-workers who are far removed from the project, or even recruit and test with strangers at the local coffee shop.



FRONT OFFICE

FIRST CLICK USABILITY TEST PLAN



OBJECTIVE AND GOALS

THE PURPOSE OF THIS STUDY IS TO VALIDATE THE OVERALL USER EXPERIENCE AND CALLS TO ACTION ON SELECT FRONT OFFICE SCREENS.

OUR GOAL IS TO DETERMINE IF USERS CAN EASILY FIND INFORMATION AND CALLS TO ACTION THAT WOULD ALLOW THEM TO COMPLETE KEY TASKS.

WE WILL ALSO ASK AN OPEN-ENDED QUESTION UPON COMPLETION OF THE STUDY SOLICITING OVERALL FEEDBACK FROM OUR PARTICIPANTS.



STUDY SETUP

PARTICIPANTS WILL RECEIVE AN EMAIL DESCRIBING THE PURPOSE OF THIS TESTING WITH INSTRUCTIONS FOR COMPLETION AND A LINK TO THE STUDY.

ONCE ON THE SITE, PARTICIPANTS WILL BE PRESENTED WITH A TASK AND CORRESPONDING WIREFRAME. WE WILL ASK THEM TO CLICK ON THE WIREFRAME EXACTLY WHERE THEY WOULD EXPECT TO BE ABLE TO COMPLETE THE TASK.

ALL PARTICIPANTS WILL BE ASKED TO COMPLETE THE SAME TASKS, IN THE EXACT SAME ORDER.

WE ESTIMATE THE STUDY WILL TAKE NO LONGER THAN 10 MINUTES TO COMPLETE - AND THAT IS GENEROUS.



HOW WE'LL MEASURE PERFORMANCE

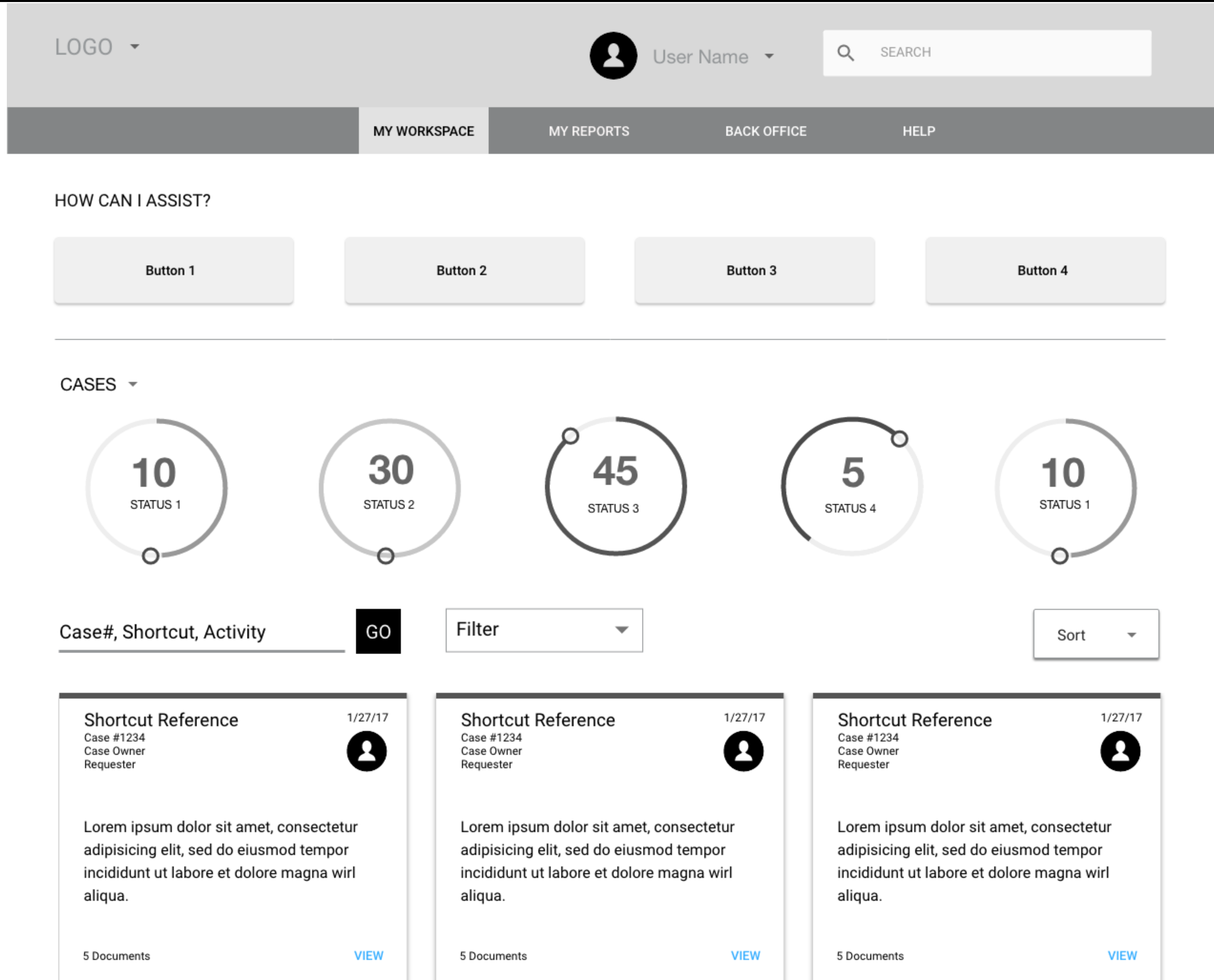
FOR EACH TASK, A SUCCESS AREA (OR AREAS) WILL BE DEFINED ON THE RELATED WIREFRAME.

WHEN A PARTICIPANT CLICKS ON THE WIREFRAME TO COMPLETE A TASK, THE LOCATION OF THAT CLICK WILL BE STORED - ALLOWING US TO ESTABLISH IF THE PARTICIPANT WOULD HAVE REACHED THEIR DESIRED LOCATION.

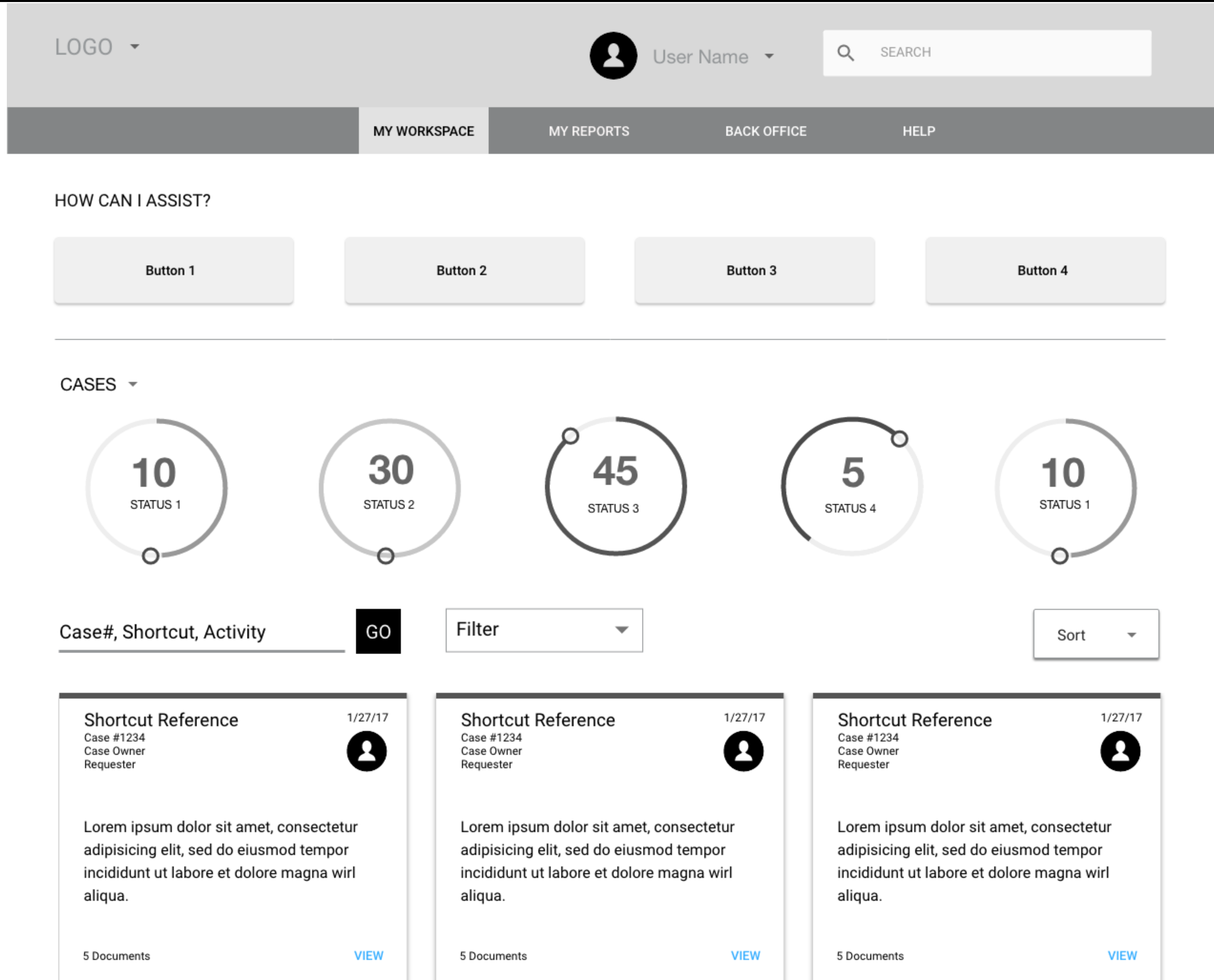
WE WILL PROVIDE A DETAILED ANALYSIS OF TASK SUCCESS RATES AND CORRESPONDING HEAT MAPS AT THE END OF THE STUDY.



TASK 1: WHERE WOULD YOU CLICK TO SUBMIT A NEW REQUEST?



TASK 2: WHERE WOULD YOU CLICK TO VIEW DETAILS OF ONE OF THE DISPLAYED CASES?



TASK 3: WHERE WOULD YOU CLICK TO ONLY DISPLAY ASSIGNED CASES?

LOGO ▾

 User Name ▾

MY WORKSPACEMY REPORTSBACK OFFICEHELP

HOW CAN I ASSIST?

Button 1Button 2Button 3Button 4

CASES ▾

10
STATUS 1

30
STATUS 2

45
STATUS 3

5
STATUS 4

10
STATUS 1

Case#, Shortcut, Activity

GO

Filter ▾

Sort ▾

Shortcut Reference1/27/17

Case #1234
Case Owner
Requester



5 Documents

VIEW

Shortcut Reference1/27/17

Case #1234
Case Owner
Requester



5 Documents

VIEW

Shortcut Reference1/27/17

Case #1234
Case Owner
Requester



5 Documents

VIEW



TASK 4: WHERE WOULD YOU CLICK TO UPLOAD DOCUMENTS FOR THIS CASE?

LOGO

User Name

SEARCH

MY WORKSPACEMY REPORTSBACK OFFICEHELP

CASES

10
STATUS 1

30
STATUS 2

45
STATUS 3

5
STATUS 4

10
STATUS 1

Case#, Shortcut, ActivityGOFilterSort

Shortcut Reference
Case #1234
Case Owner
Requester

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Shortcut Reference
Case #1234
Case Owner
Requester

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Shortcut Reference
Case #1234
Case Owner
Requester

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5 DocumentsVIEW

5 DocumentsVIEW

5 DocumentsVIEW

Case ManagerDocumentsAttachmentsCase AuditCase Work Items

Case 01231
User Accessed Activity 'Content-Control--20161127-00000002'
for Activity 'Accept'
michelle santoriello12/15/2016 11:27:13 AM

Case 12331
User Accessed Activity 'Content-Control--20161127-00000002'
for Activity 'Accept'
michelle santoriello12/15/2016 11:27:13 AM

Case 45631
User Accessed Activity 'Content-Control--20161127-00000002'
for Activity 'Accept'
michelle santoriello12/15/2016 11:27:13 AM

Case 67831
User Accessed Activity 'Content-Control--20161127-00000002'
for Activity 'Accept'
michelle santoriello12/15/2016 11:27:13 AM

Previous 1 2 3 Next



TASK 5: WHERE WOULD YOU CLICK TO COMPLETE THIS NEW REQUEST?

LOGO ▾

 User Name ▾

 SEARCH

MY WORKSPACE

MY REPORTS

BACK OFFICE

HELP

[Breadcrumb 1](#) > [Breadcrumb 2](#) > [Breadcrumb 3](#)



Case Detail Information

All fields required unless noted.

My Shortcut Reference

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Information goes here

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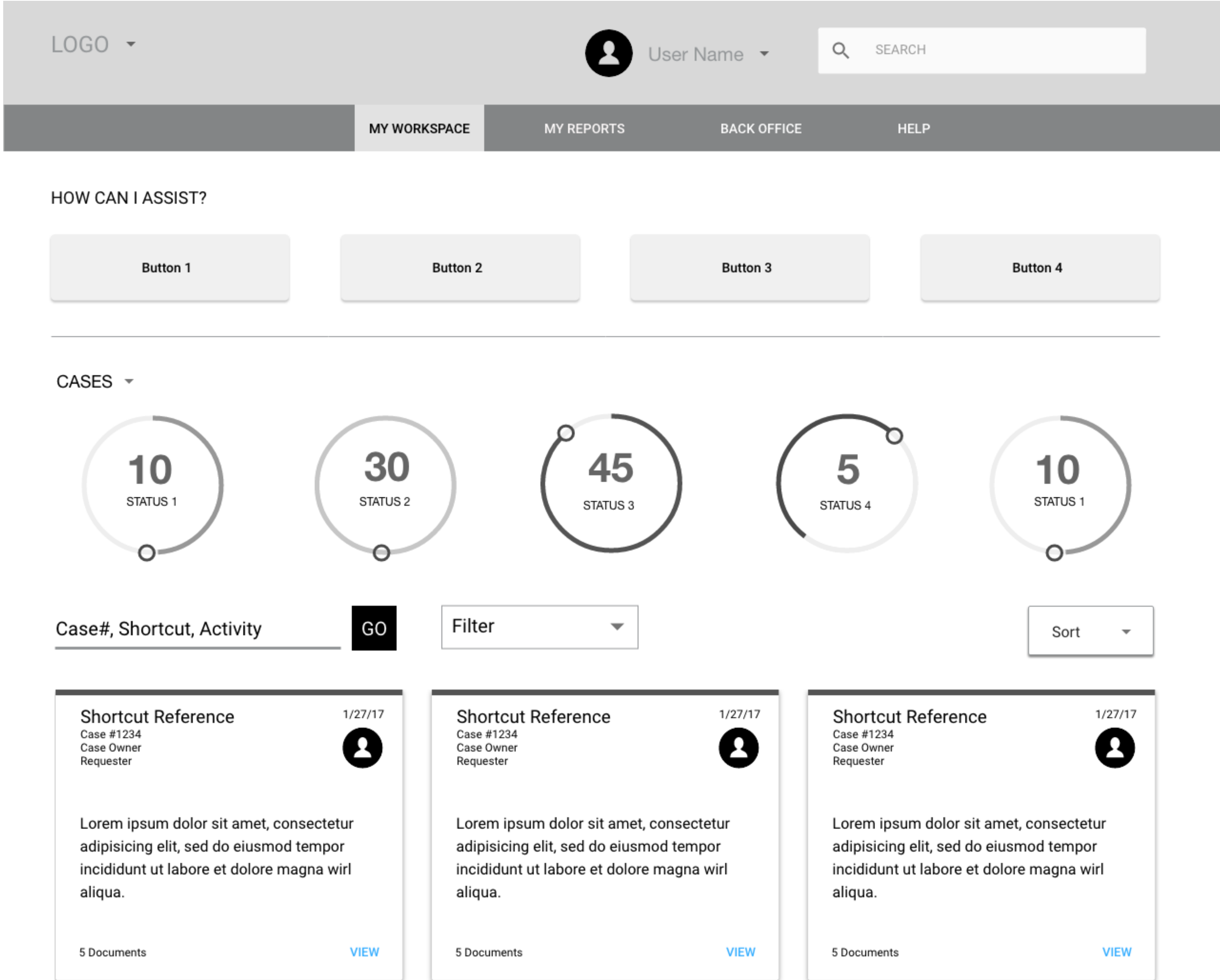
[Cancel](#)

Back

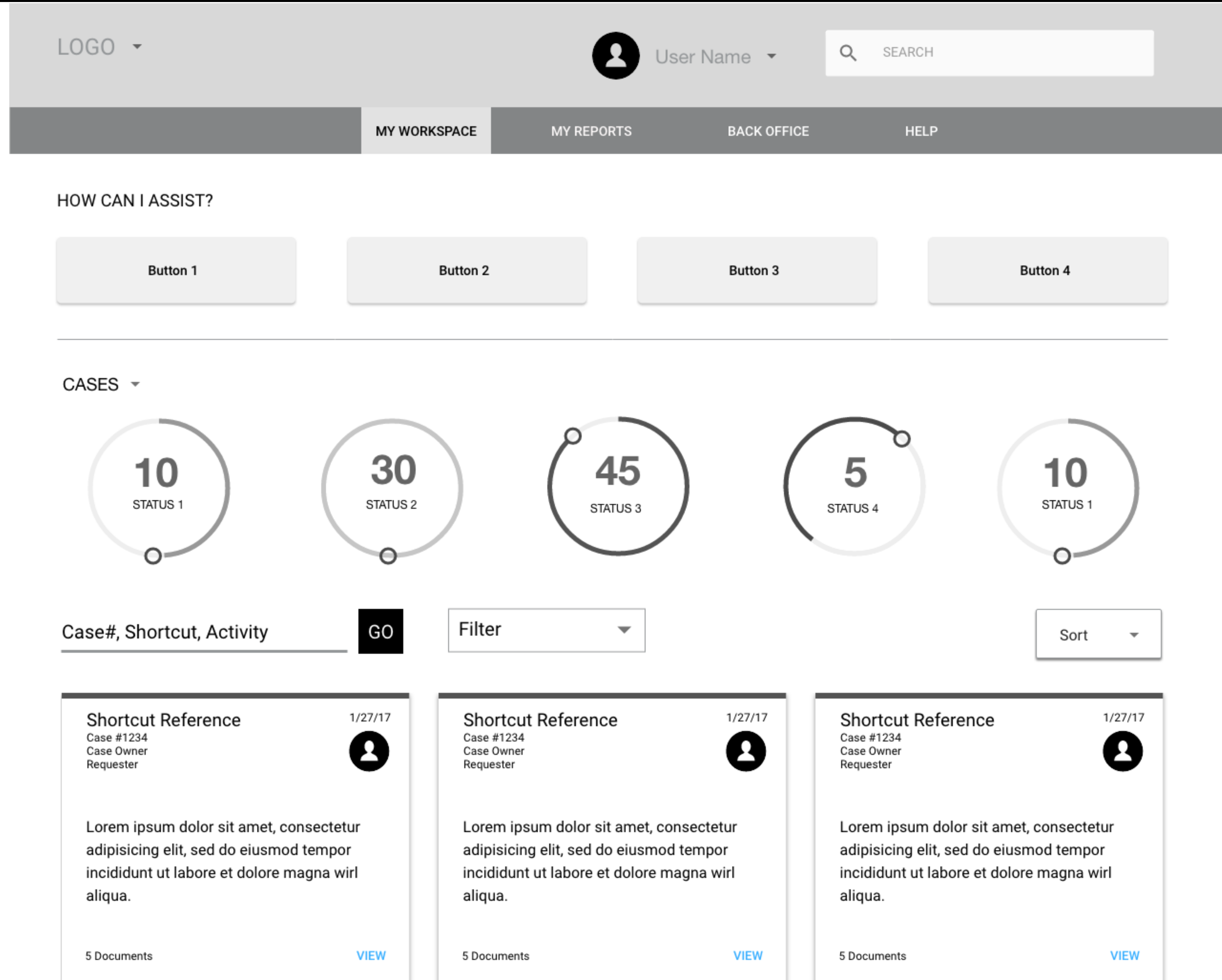
Next



TASK 6: WHERE WOULD YOU CLICK TO CHANGE YOUR PASSWORD?



TASK 7: WHERE WOULD YOU GO TO FIND A SPECIFIC CASE NOT VISIBLE BELOW?



USABILITY TEST RESULTS

Upon completion of usability testing, the results are compiled and analyzed. The moderator and note taker work together to formulate recommendations to improve the experience, if any, and report out to the design team and potentially the client. The goal of the results report is to determine if another iteration of the design and testing is required to address issues or if the experience meets the UX vision and user needs as is.

The Usability Test Results document should include an overview of the study and what you were trying to achieve, a summary of key findings, and then a screen by screen breakdown of tasks users were asked to complete, where the pain points were and what part of the experience worked well. Include verbatims, if possible, as well as task completion rates. If the testing was conducted through an online tool, you may be able to include heat maps that show exactly where participants clicked and the time they took to complete a specific task.



FRONT OFFICE

FIRST CLICK USABILITY STUDY RESULTS



STUDY OBJECTIVES AND GOALS

THE PURPOSE OF THIS STUDY WAS TO VALIDATE THE OVERALL USER EXPERIENCE AND CALLS TO ACTION ON SELECT FRONT OFFICE SCREENS.

OUR GOAL WAS TO DETERMINE IF USERS COULD EASILY FIND INFORMATION AND CALLS TO ACTION THAT WOULD ALLOW THEM TO COMPLETE KEY TASKS.



STUDY SETUP

12 RIVERVIEW EMPLOYEES WERE SENT AN EMAIL INTRODUCING THE STUDY WITH INSTRUCTIONS FOR COMPLETION, AN END DATE AND A LINK TO THE ONLINE SURVEY.

ONCE ON THE SITE, PARTICIPANTS WERE SHOWN VARIOUS WIREFRAMES AND ASKED TO CLICK WHERE THEY WOULD GO TO COMPLETE TASKS.

ALL 12 EMPLOYEES COMPLETED THE SURVEY.



SUMMARY OF FINDINGS

OVERALL, THE TASK COMPLETION RATES WERE VERY HIGH.

PARTICIPANTS DID EXPERIENCE ISSUES COMPLETING ONE TASK. THE WIREFRAME USED FOR THAT TASK WAS MODIFIED (AND IS INCLUDED IN THIS REPORT) TO ADDRESS USABILITY CONCERNS.

WE'VE ADDED NOTES, WHERE APPLICABLE, REGARDING WHICH ELEMENTS OF PAGES SHOULD BE CLICKABLE.



CLICK WHERE YOU WOULD GO
TO CHANGE YOUR PASSWORD.

100% SUCCESS RATE

LOGO

User Name

91%

MY WORKSPACE

MY REPORTS

BACK OFFICE

HELP

SEARCH

HOW CAN I ASSIST?

Master Services Agreement

Non-Disclosures Agreement

Statement of Work

File Non-Payment Complaint

MORE

CASES

10
SCHEDULE

30
REVIEW

45
EVALUATE

5
DISPOSE

Case #, Shortcut, Activity

GO

Filter

Sort

Shortcut Reference

Case #12111

Case Owner
Requester

05/01/2017

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5 Documents

VIEW

Shortcut Reference

Case #14291

Case Owner
Requester

15/12/2017

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3 Documents

VIEW

Shortcut Reference

Case #31212

Case Owner
Requester

12/12/2017

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aliqua.

1 Document

VIEW

Shortcut Reference

Case #31113

Case Owner
Requester

01/12/2017

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Shortcut Reference

Case #00121

Case Owner
Requester

30/11/2017

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aliqua.

7 Documents

VIEW

Shortcut Reference

Case #37312

Case Owner
Requester

05/11/2017

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aliqua.

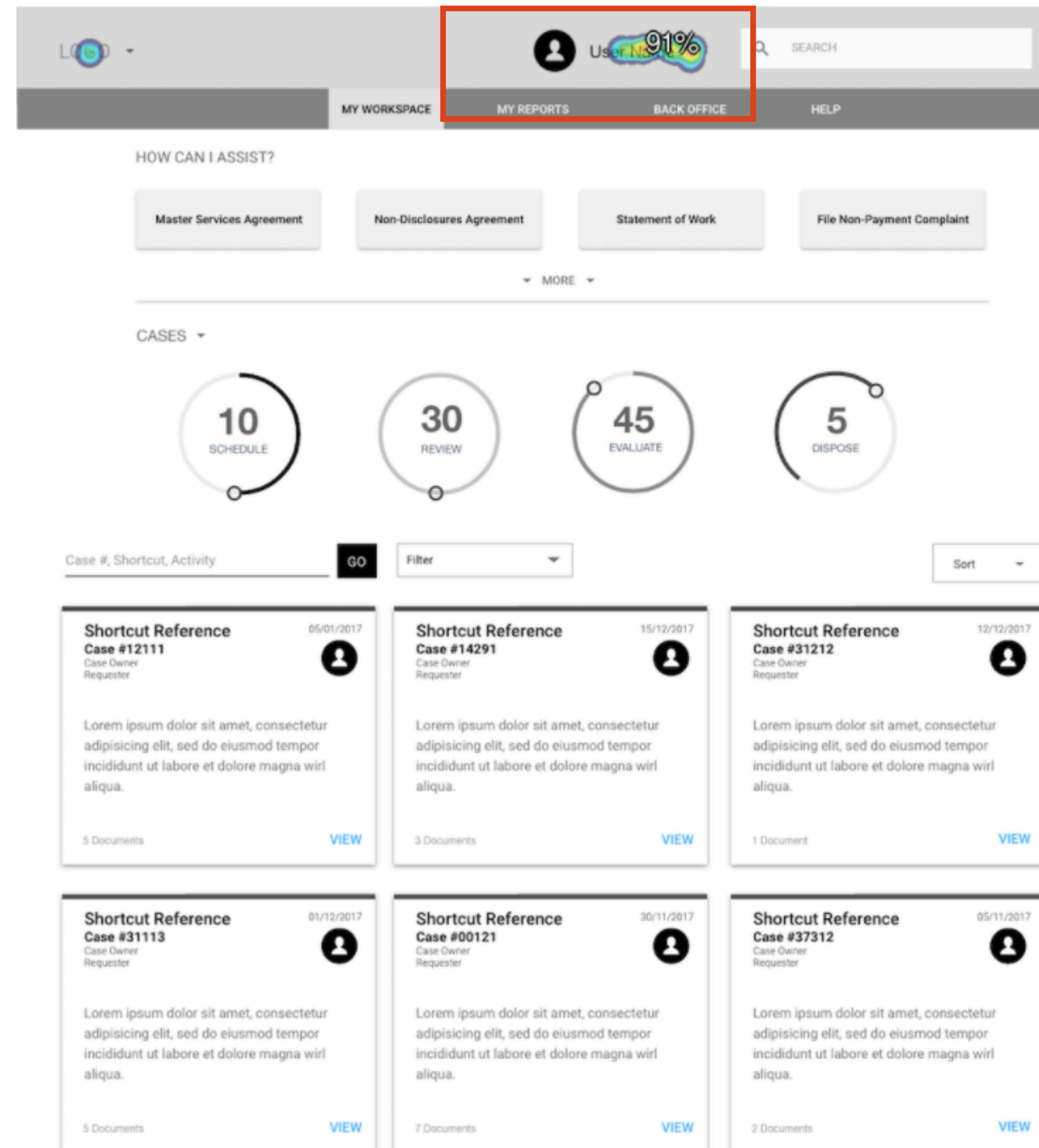
2 Documents

VIEW



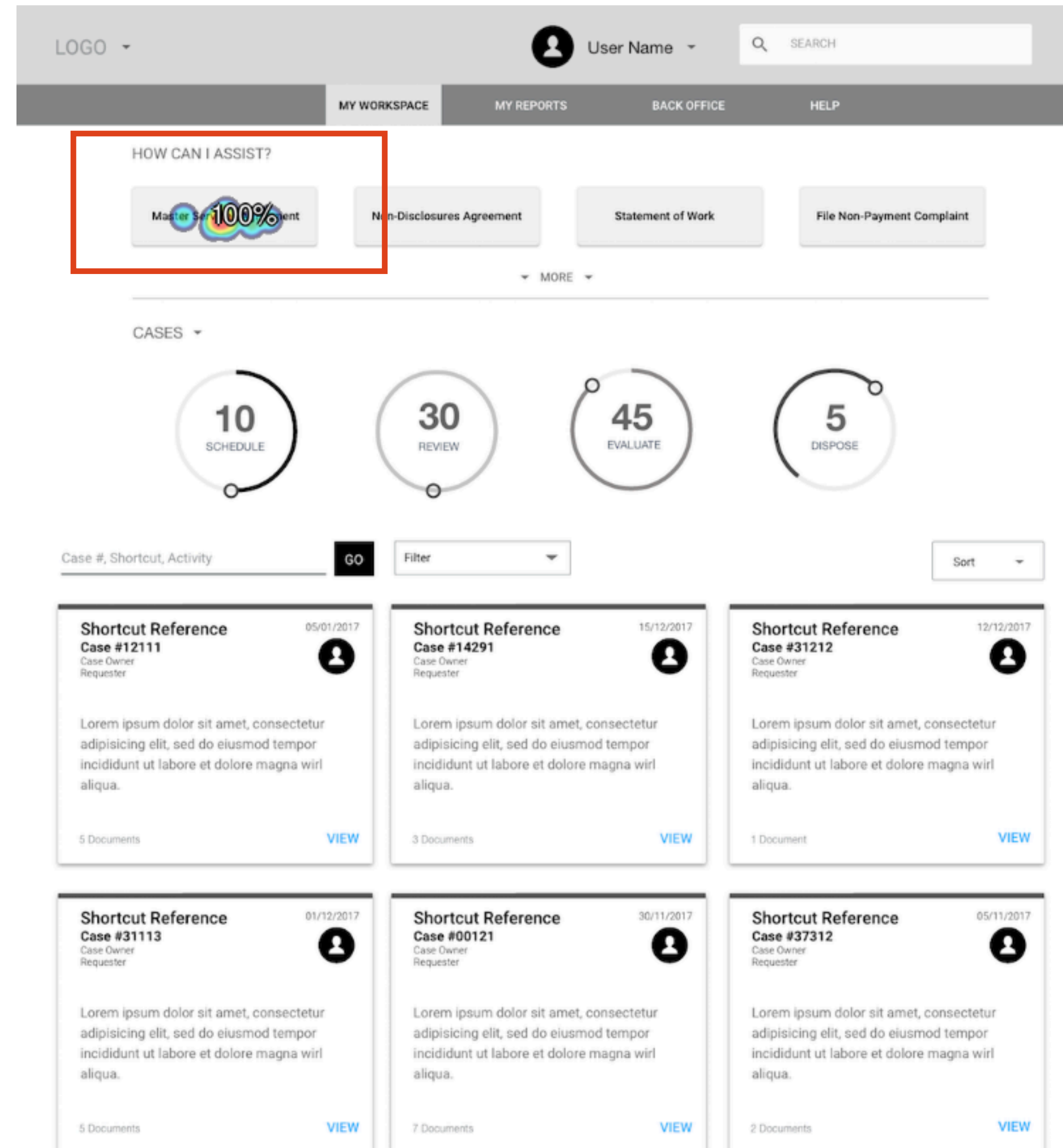
**CLICK WHERE YOU WOULD GO
TO LOG OUT OF THE SITE.**

91% SUCCESS RATE



**CLICK WHERE YOU WOULD GO
TO CREATE A NEW MASTER
SERVICE AGREEMENT.**

100% SUCCESS RATE



CLICK WHERE YOU WOULD GO TO COMPLETE STEP 2 OF THIS FORM.

100% SUCCESS RATE

 **ENSURE STEPS ARE CLICKABLE**

LOGO

User Name

SEARCH

MY WORKSPACE

MY REPORTS

BACK OFFICE

HELP

6 Documents

Breadcrumb 1 > Breadcrumb 2 > Breadcrumb 3

VIEW

7 Documents

VIEW

8 Documents

VIEW

1

Details

36%

Attachments

3

Preview & Submit

Case Detail Information

All fields required unless noted.

My Shortcut Reference

Information goes here

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Cancel

Back

64%

CLICK WHERE YOU WOULD GO
TO ONLY DISPLAY CASES IN
REVIEW.

91% SUCCESS RATE

LOGO

User Name

SEARCH

MY WORKSPACEMY REPORTSBACK OFFICEHELP

HOW CAN I ASSIST?

Master Services Agreement

Non-Disclosures Agreement

Statement of Work

File Non-Payment Complaint

MORE

CASES

10
SCHEDULE

64%
Review

45
EVALUATE

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DISPOSE

Case #, Shortcut, Activity

GO

Filter27%

Sort

Shortcut Reference
Case #12111
Case Owner
Requester

05/01/2017

5 Documents

VIEW

Shortcut Reference
Case #14291
Case Owner
Requester

15/12/2017

3 Documents

VIEW

Shortcut Reference
Case #31212
Case Owner
Requester

12/12/2017

1 Document

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Shortcut Reference
Case #31113
Case Owner
Requester

01/12/2017

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Case #37312
Case Owner
Requester

05/11/2017

2 Documents

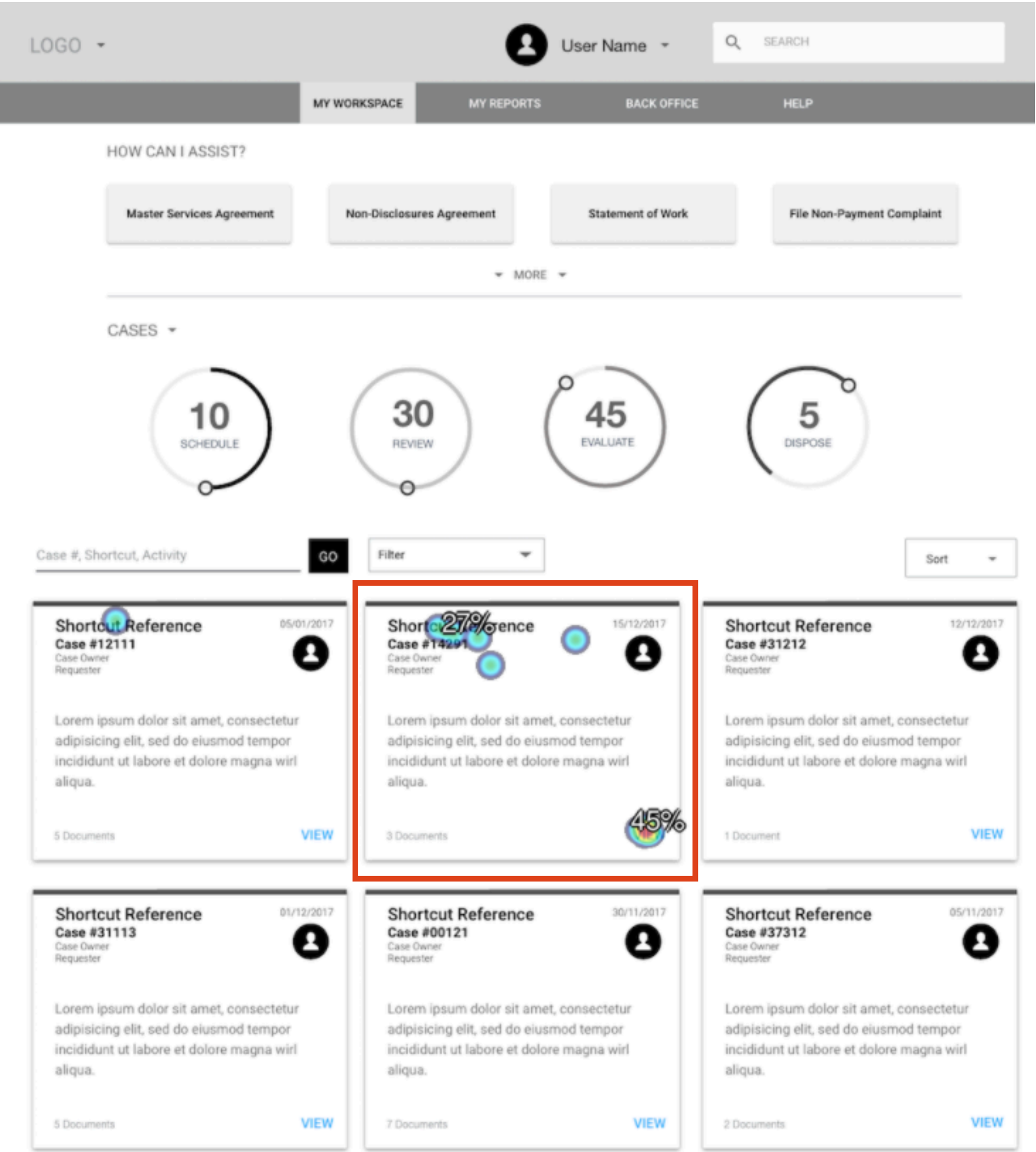
VIEW



CLICK WHERE YOU WOULD GO TO VIEW THE DETAILS OF CASE #14219.

91% SUCCESS RATE

 ENSURE ENTIRE CARD IS CLICKABLE



CLICK WHERE YOU WOULD GO
TO VIEW OLDER VERSIONS OF
THE FIRST DOCUMENT LISTED
FOR CASE #12111.

18% SUCCESS RATE

LOGO

User Name

SEARCH

MY WORKSPACEMY REPORTSBACK OFFICEHELP

HOW CAN I ASSIST?

Master Services AgreementNon-Disclosures AgreementStatement of WorkFile Non-Payment Complaint

CASES

10 SCHEDULE30 REVIEW45 EVALUATE5 DISPOSE

Case #, Shortcut, ActivityGOFilterSort

Shortcut Reference
Case #12111
Case Owner
Requester
05/01/2017
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5 DocumentsCLOSE

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Shortcut Reference
Case #31212
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12/12/2017
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1 DocumentVIEW

Case ManagerDocumentsAttachmentsCase AuditCase Work Items

Case 123Complaint NonPayment of Rent.docxSubmitted byDateVersion 3Supervised%
Compare

Case 123Document NameSubmitted byDateVersion 3Supervised%
CompareSelect

Case 123Document NameSubmitted byDateVersion 1Supervised%
Compare



UPDATED WIREFRAME TO
RESOLVE USABILITY CONCERN.
TEXT CHANGED TO BUTTON
FOR CLARITY.

LOGO

SEARCH

User Name

MY WORKSPACEMY REPORTSBACK OFFICEHELP

HOW CAN I ASSIST?

Button 1Button 2Button 3Button 4

MORE

CASES

10STATUS 130STATUS 245STATUS 35STATUS 4

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Shortcut Reference

Case #1234Case OwnerRequester

1/27/17

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5 DocumentsView

Case ManagerDocumentsAttachmentsCase AuditCase Work Items

Case 123Document NameSubmitted byDateOlder VersionSupervised%

CompareSelect

ONLY PDF, DOC, ZIP

Case 123Document NameSubmitted byDateOlder VersionSupervised%

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ONLY PDF, DOC, ZIP

Case 123Document NameSubmitted byDateOlder VersionSupervised%

CompareSelect

ONLY PDF, DOC, ZIP



CLICK WHERE YOU WOULD GO
TO ADD A NEW ATTACHMENT
TO CASE #12111.

100% SUCCESS RATE

LOGO

User Name

SEARCH

MY WORKSPACEMY REPORTSBACK OFFICEHELP

HOW CAN I ASSIST?

Master Services AgreementNon-Disclosures AgreementStatement of WorkFile Non-Payment Complaint

CASES

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EVALUATE

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DISPOSE

Case #, Shortcut, ActivityGOFilterSort

Shortcut Reference
Case #12111
Case Owner
Requester

05/01/2017

5 Documents

CLOSE

Shortcut Reference
Case #14291
Case Owner
Requester

15/12/2017

3 Documents

VIEW

Shortcut Reference
Case #31212
Case Owner
Requester

13/12/2017

1 Document

VIEW

Case ManagerDocumentsAttachmentsCase AuditCase Work Items

Drag & Drop or Upload a File
ONLY PDF, DOC, ZIP

27%

Drag and drop your file here

55%

Case 456	Document Name		Submitted by	Date	Delete
	Document Name		Submitted by	Date	Delete
	Document Name		Submitted by	Date	Delete
	Document Name		Submitted by	Date	Delete
	Document Name		Submitted by	Date	Delete



CLICK WHERE YOU WOULD GO
TO EXIT THIS CASE.

100% SUCCESS RATE

LOGO

User Name

SEARCH

MY WORKSPACEMY REPORTSBACK OFFICEHELP

HOW CAN I ASSIST?

Master Services AgreementNon-Disclosures AgreementStatement of WorkFile Non-Payment Complaint

CASES

10 SCHEDULE30 REVIEW45 EVALUATE5 DISPOSE

Case #, Shortcut, ActivityGOFilterSort

Shortcut Reference
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Case Owner
Requester

05/01/2017

100%

5 Documents

Shortcut Reference
Case #14291
Case Owner
Requester

15/12/2017

DocumentsVIEW

Shortcut Reference
Case #31212
Case Owner
Requester

12/12/2017

1 DocumentVIEW

Case ManagerDocumentsAttachmentsCase AuditCase Work Items

Drag & Drop or Upload a File
ONLY PDF, DOC, ZIP

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UPLOAD

Case 456	Document Name		Submitted by	Date	Delete
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	Document Name		Submitted by	Date	Delete
	Document Name		Submitted by	Date	Delete
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CLICK WHERE YOU WOULD GO
TO FIND A CASE NOT VISIBLE
ON THIS PAGE.

91% SUCCESS RATE

LOGO

User Name

18%

MY WORKSPACEMY REPORTSBACK OFFICEHELP

HOW CAN I ASSIST?

Master Services AgreementNon-Disclosures AgreementStatement of WorkFile Non-Payment Complaint

CASES

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Sort

Shortcut Reference
Case #12111
Case Owner
Requester
05/01/2017

5 Documents

VIEW

Shortcut Reference
Case #14291
Case Owner
Requester
15/12/2017

3 Documents

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Shortcut Reference
Case #31212
Case Owner
Requester
12/12/2017

1 Document

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Shortcut Reference
Case #31113
Case Owner
Requester
01/12/2017

5 Documents

VIEW

Shortcut Reference
Case #00121
Case Owner
Requester
30/11/2017

7 Documents

VIEW

Shortcut Reference
Case #37312
Case Owner
Requester
05/11/2017

2 Documents

VIEW



CLICK WHERE YOU WOULD GO
TO SEARCH THIS SITE.

100% SUCCESS RATE

LOGO

User Name

100%

MY WORKSPACE

MY REPORTS

BACK OFFICE

HELP

HOW CAN I ASSIST?

Master Services Agreement

Non-Disclosures Agreement

Statement of Work

File Non-Payment Complaint

MORE

CASES

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SCHEDULE

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REVIEW

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EVALUATE

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DISPOSE

Case #, Shortcut, Activity

GO

Filter

Sort

Shortcut Reference
Case #12111

05/01/2017

Case Owner
Requester

5 Documents

VIEW

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SCHEDULE

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REVIEW

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EVALUATE

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Shortcut Reference
Case #14291

15/12/2017

Case Owner
Requester

3 Documents

VIEW

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EVALUATE

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Shortcut Reference
Case #31212

12/12/2017

Case Owner
Requester

1 Document

VIEW

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EVALUATE

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DISPOSE

Shortcut Reference
Case #31113

01/12/2017

Case Owner
Requester

5 Documents

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SCHEDULE

30
REVIEW

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EVALUATE

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DISPOSE

Shortcut Reference
Case #00121

30/11/2017

Case Owner
Requester

7 Documents

VIEW

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SCHEDULE

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REVIEW

45
EVALUATE

5
DISPOSE

Shortcut Reference
Case #37312

05/11/2017

Case Owner
Requester

2 Documents

VIEW

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SCHEDULE

30
REVIEW

45
EVALUATE

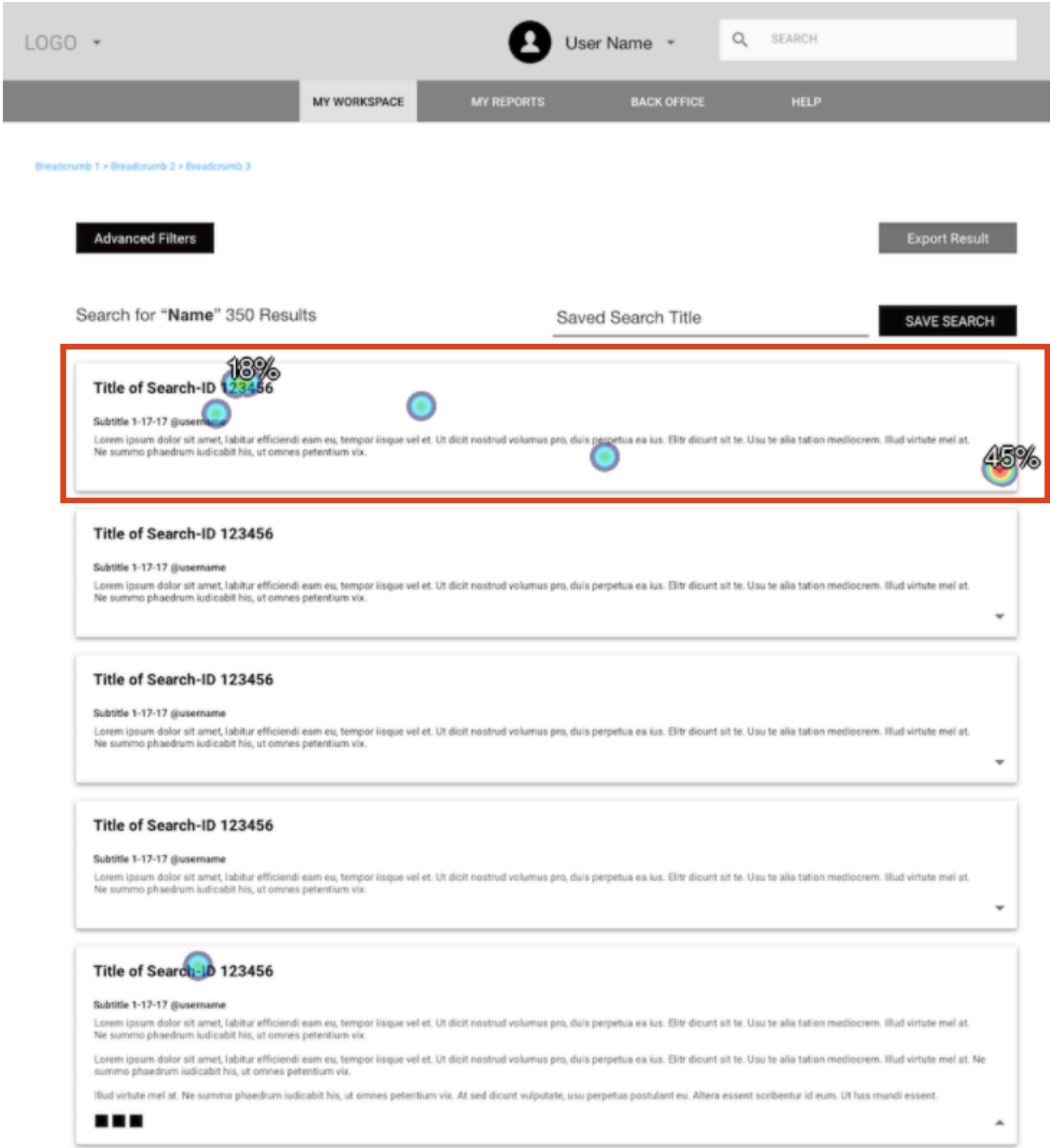
5
DISPOSE



CLICK WHERE YOU WOULD GO TO VIEW THE DETAILS OF THE FIRST SEARCH RESULT.

91% SUCCESS RATE

 **ENSURE ENTIRE CARD IS CLICKABLE**



THANKS.

