Kevin Kell, M.A. Peninsula, SF Bay

Product Designer / UX Architect @ ServiceNow

- Traveled around the world (26 countries)
- Coaches soccer for AYSO San Carlos
- Volunteers for school activities (creative director of haunted house)
- Designed own house / constructs projects by hand
- Helps kids learn about investing
- Studies soil science and permaculture

Shanshan County Turpan, Xinjiang,
China 42.834284, 89.864778

TOPICS

Journey

Philosophy

Process

Architecture

So, you want to be a designer?

- Started in a Social Psychology doctorate program at Cincinnati – became interested in a design discipline within Human Factors called Human-Computer Interaction

- Researched and wrote a masters thesis on HCI, and published the thesis in "Computer in Human Behavior" an international journal

- Took a masters degree to pursue a job in technology

- Wanted to become a designer but couldn't without experience

- First job was as a user researcher but worked at night to learn design and was promoted to a designer position by the company

Designer Journey

20 years + experience as a UX Designer

B2B Enterprise Apps - SaaS/Cloud
B2C Web Applications

**CINCINNATI** — Masters in Social Psychology (HCI focus) – Published Thesis in Computers in Human Behavior

Ran a successful boutique design consultancy
(Intuit, Yahoo!, Intel Capital, Dreamworks)

CISCO / **Apple** — Worked on large projects for Cisco and Apple

Badgeville *The Behavior Platform* — Started a UX practice for Badgeville, an enterprise Gamification startup

ORACLE — Redesigned legacy products and designed new SaaS/cloud products at Oracle

servicenow — Currently UX Architect at ServiceNow (Platform / Portal / Landing Pages)
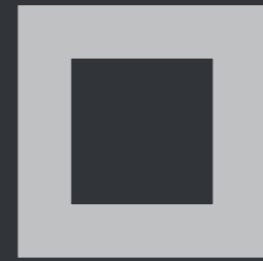
HIGHLIGHTS & ACHIEVEMENTS

Some interesting projects and achievements that showcase my effectiveness and impact.

Conducted over 40 user research studies

Lead designer for iPhone and iPad sales tool for VP of Global Sales

Redesigned Cisco.com's Learning area, resulting in revenue growing from $150m to $400m yearly (according to stakeholder)

Redesigned Intuit.com's homepage and navigation architecture (audience size ~ 10 million

One of the lead designers of the primary support platform responsible for $20 billion in yearly revenue

TOPICS

Journey

Philosophy

Process

Architecture

Intention
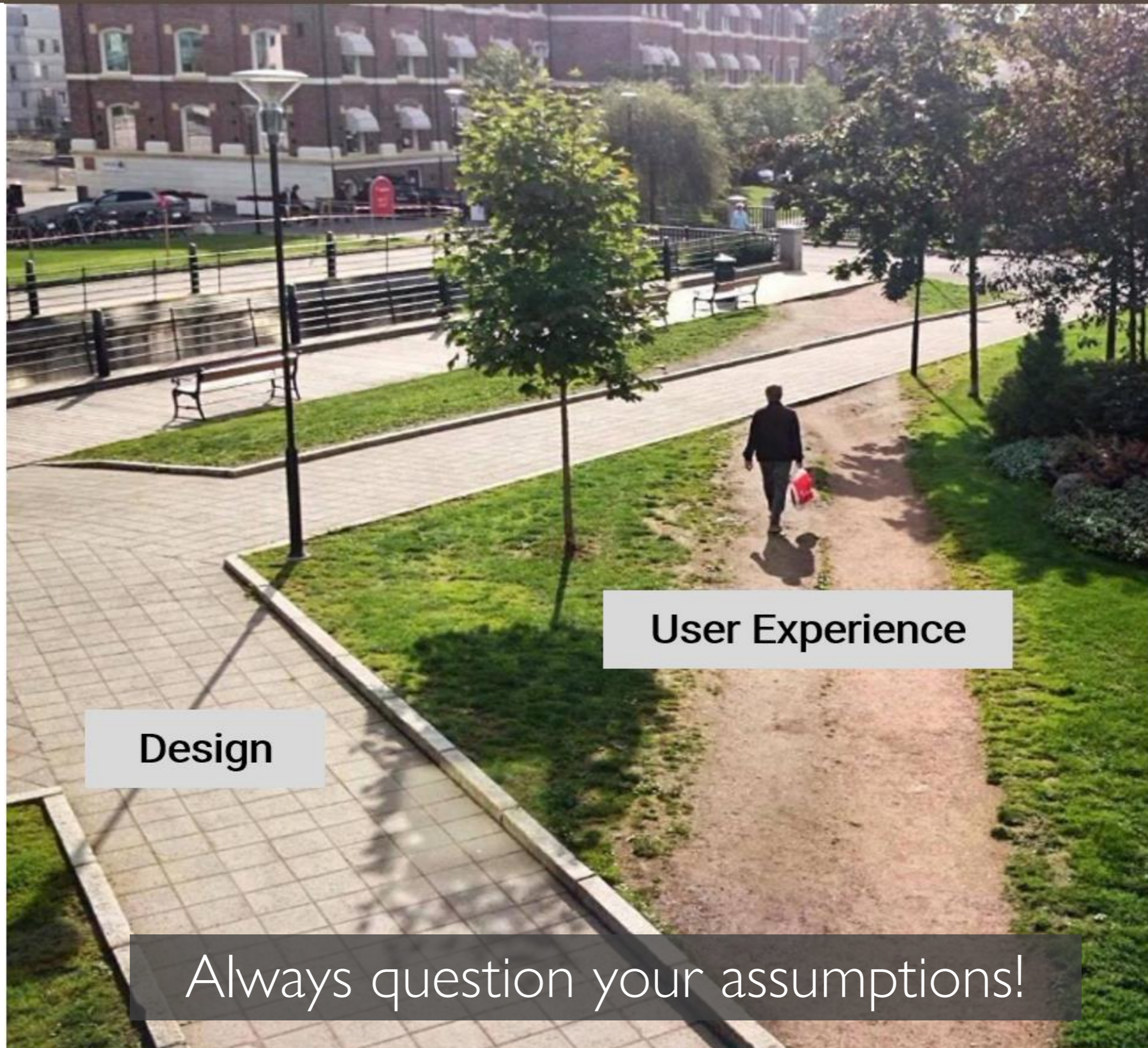
Outcome

Design

User Experience

Always question your assumptions!

What is User Experience Design?

Experience design

is matching creative ideas and innovations to real-world problems and in doing so, making users' lives better.

A UX designer

is someone who thrives on addressing complex challenges and strives to make their solutions simple and elegant.
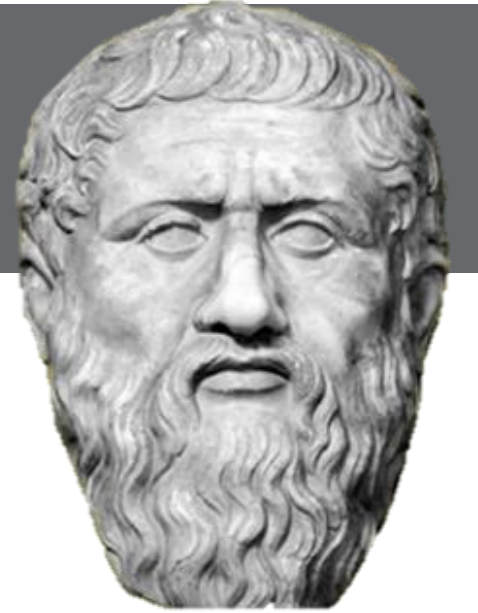
Plato. Not an actual user.

It's all about the user.
(period)

User-Centric Experiences deepen the Customer Relationship

Effective experiences → **Higher satisfaction** → **More engagement**

Product Experience First

Features

Product

Features focus creates design debt!

Product Thinking

- Love the problem, not your solution

- Think about products, not about features

- Use product heuristics (goal-focused, anticipate user needs, minimum viable quality, etc.)
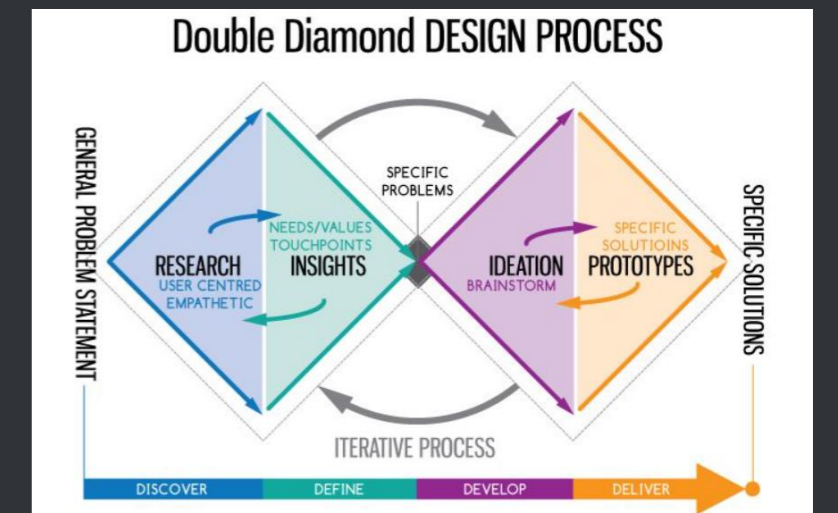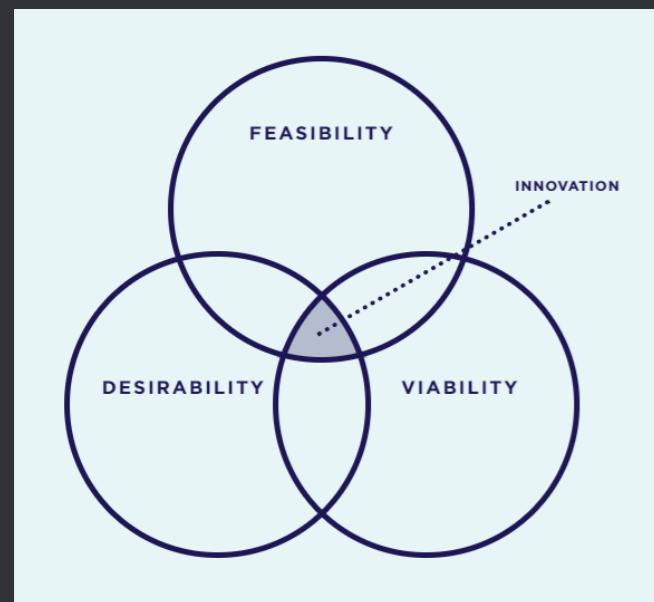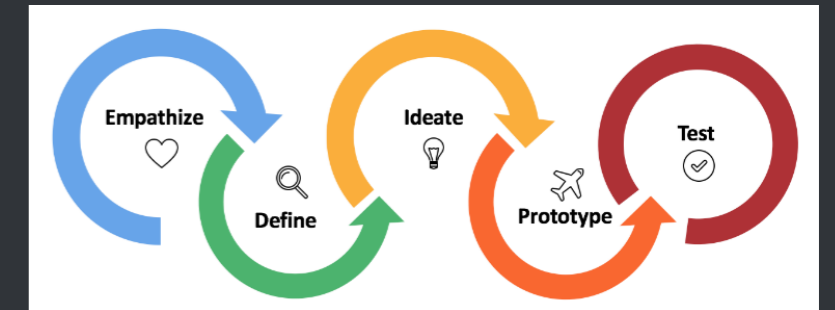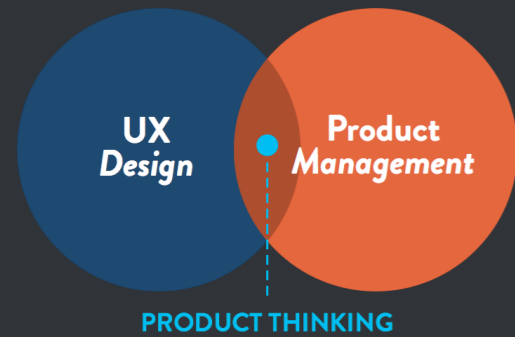
Desired UX Design Outcomes

Useful
- Does it operate in ways users will find value in?

Learnable
- Can it be learned quickly?

Memorable
- Do they have to relearn it each time they use it?

Effective
- Does it get the job done?

Desirable
- Do people want it?

Delightful
- Is using it enjoyable, or even fun?

The 7 Key Elements

Valuable — Useful
Accessible — Usable
Desirable — Findable
Credible

UX

Steve Krug: "Don't make me think"
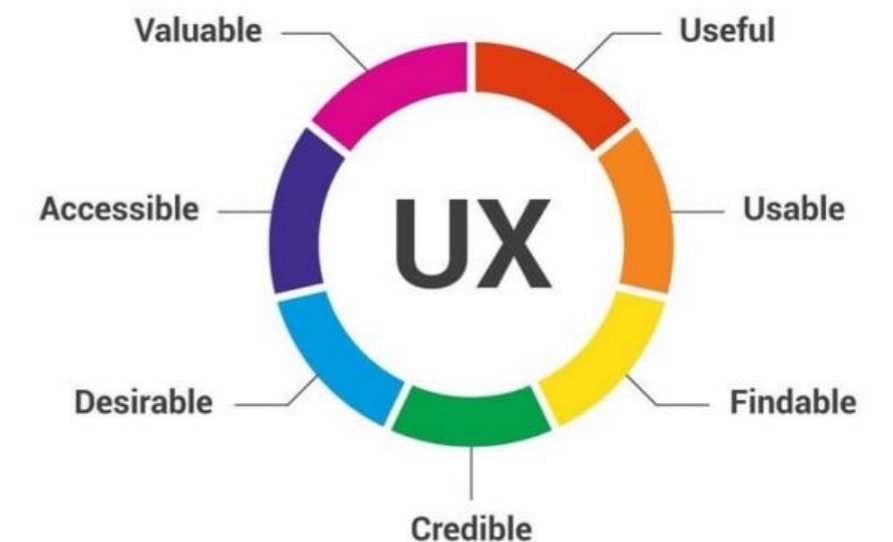
My Goals as a UX practitioner

- Create designs that emphasize relevant data and user-focused features by using solid interaction strategies

- Design products that are world-class by effectively solving user problems

- Craft modern user experiences

- Create delight and engagement for my users – remember emotions! ☺
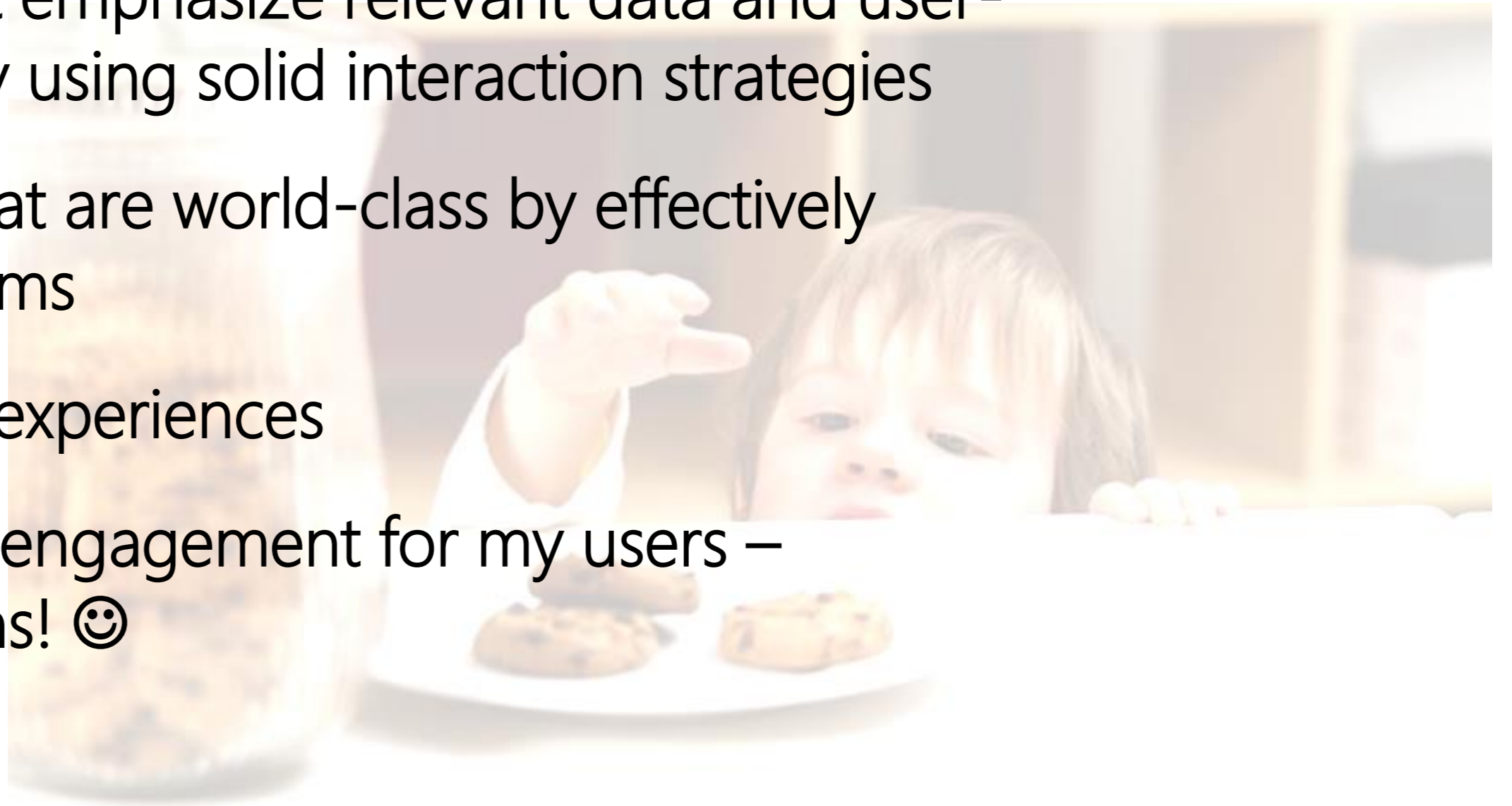
No one buys a Lamborghini for the gas mileage

You might buy a Lamborghini for the art, the style, the speed. None of which has to do with economy.. The car commands a high price because it makes buyers feel something.

Design is the driver of emotional engagement.

The Cause of Modern Design

Modern UX Handbook

Principles of
Modern UX

Kevin Kell, UX Architect

Prescriptive - AI (Wisdom + Insights that are actionable)

- Organize and Prioritize
- Wisdom not data
- Dynamic not Static
- Automation of simple tasks
- Reactive

Info Meaning: Comparison & Baselining

- Comparison
- Gamification
- Understand relative performance

Convenient

- Don't make me interact
- Minimize Navigation
- Visual UI
- Streamlined / Simple First
- Rapid scaling
- Social / Collaborative

Knowledge: Contextual and Relevant Content

- Recency / Frecency
- Curated - Role-specific or

Personalized & Customized Experiences

- Personalized & Customized Experiences

Where I Shine

Research
- Researching and identifying the user's and needs and validating as I proceed

Value
- A design-thinking approach that emphasizes user & customer value over features

Modeling
- Analyze and model task flows/processes that will support the user's goals

Full cycle
- End to End design from conceptualization to finished specs

Product Development Process
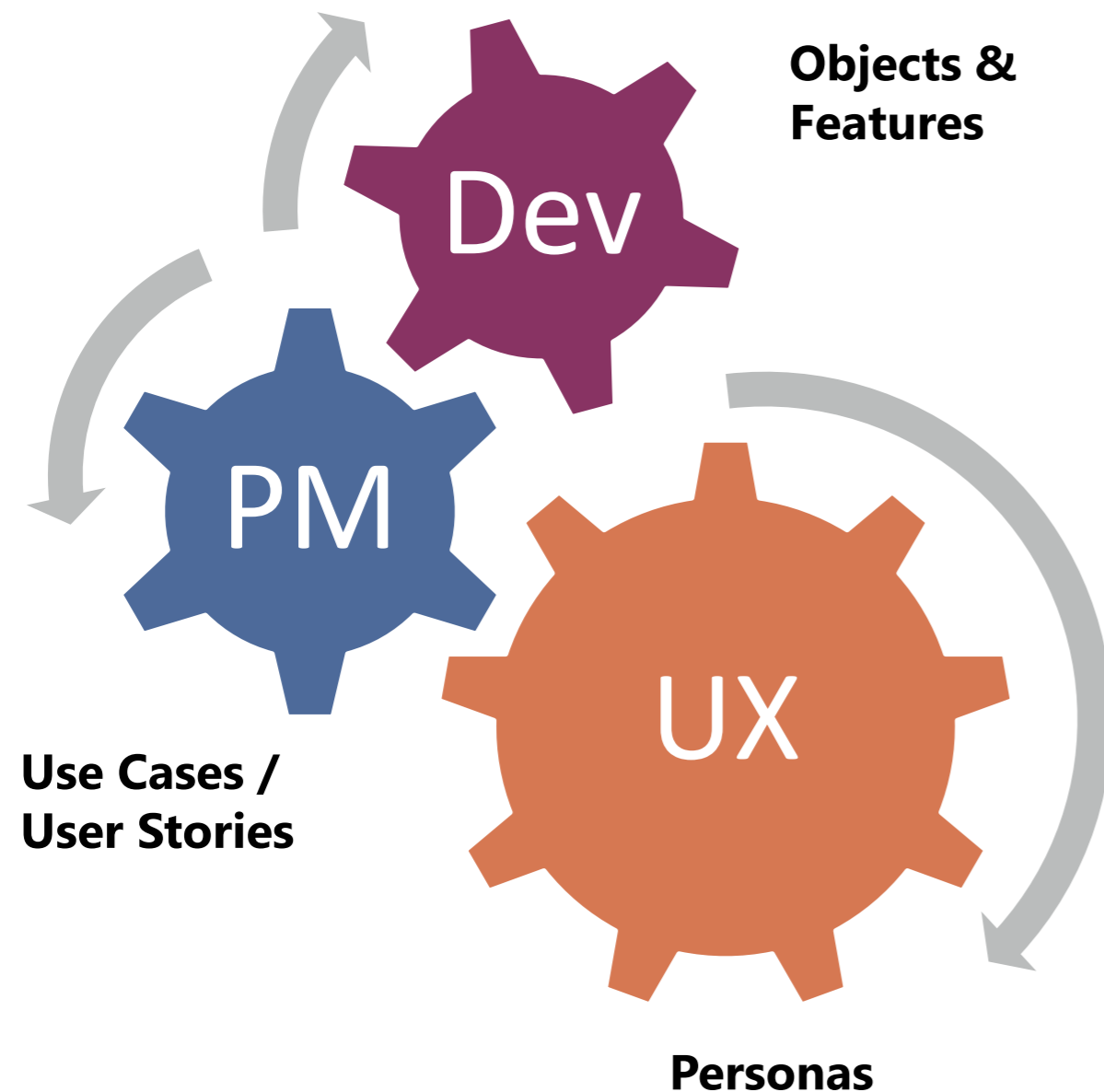
AGILE Cross-functional teams

- The product development system is interdependent

- UX works with PM to define requirements and create product vision + concepts

- UX works with Dev to get designs implemented and to validate the output

A Framework that Works

Problems

Goals

Solutions

Research the users' **problem** space

Articulate **goals** and intents

Propose **solutions** that satisfy those goals
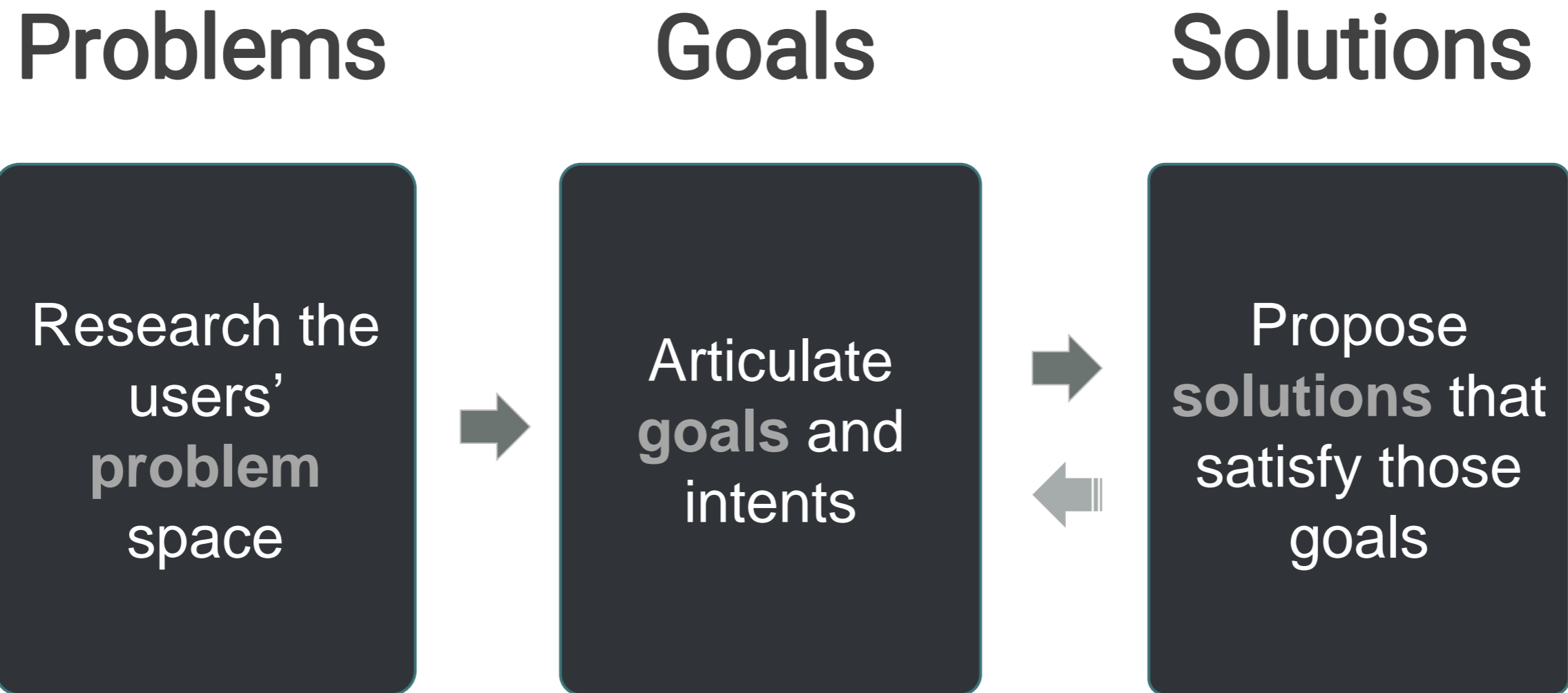
Problems and goals serve as a reality-check for your solutions

Strategic Deliverables

Expert Review

Business Goals

P-G-S

Task Model

Info Architecture

Scenarios

Use Cases

- **Review** what's been implemented to date

- Documentation of the **business' goals**

- Articulation of the user's **problems, goals,** and **solutions**

- **Model** of user tasks (with objects, relationships, contexts, etc.)
  - Tasks can be critical, frequent, or incidental

- Analysis of existing **Information Architecture** and a proposed new one

- **Scenarios** that describe the user's aspirations and what we're providing them to achieve those, reflective of task flows, and use with 'day in the life' analyses and key moment artifacts

- **Use cases** (or user stories) that support each major goal of the user

★ Metrics that Promote Success

Create successful organizations through automated workflows

Scenario

1 After the call Albert affirms Eric's Security Settings skill since he was able to so quickly solve the problem, enhancing his reputation on the system which leads to his getting more such issues routed his way by the system. Eric also gets a boost on the leaderboard.

2 Albert is able to mark that he wants more issues like this so the system issues further training to enable routing more such issue types in the future.

3 In the wrap-up Albert types that it's likely they'll see more of the same issue in the future so the system analyzes new issues for a pattern cropping up like what Carl had. When enough problems are seen and a pattern is identified, the appropriate action can be taken, e.g. fix the product, improve the knowledge base, or train agents.

Signature moments
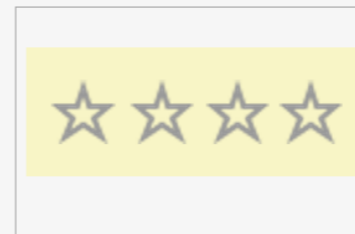
☆☆☆☆ Agent-driven skill scoring. Help analytics to dynamically change routing.
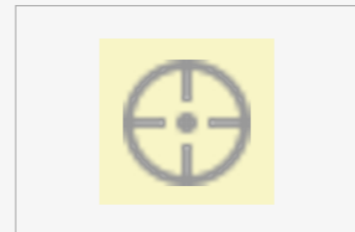
Professional development. Interests and goals drive training and routing.
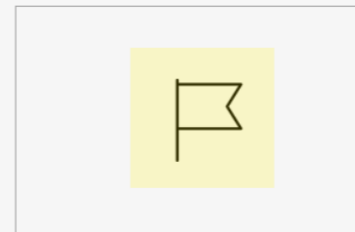
Analytics kick off watches for patterns based on new issues that are identified.

TOPICS

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Architecture

How the UX Architect thinks
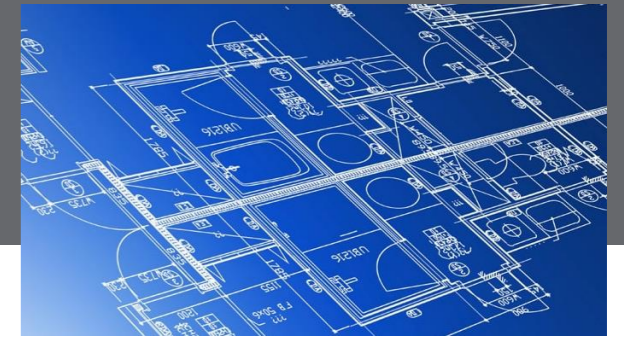
Systems

- Drive systems thinking into the organizational fabric through evangelization and artifacts.

Questions

- What's the appropriate future based on the strategy? How do we add features? How are people using the product now?

Modeling

- Process and modeling: how does all this fit together?

E2E

- An end-to-end view that can identify gaps and opportunities in the experience

Concepts

Holistic | Value or benefit | Large & strategic Patterns | Experience risk / opportunity| Optimize vs. Innovate | Patterns in the chaos

Architectural Deliverables

Service Blueprint

Service Blueprint for Seeing Tomorrow's Services Panel
find out more: http://upcoming.yahoo.com/event/1768041

Taxonomy/Mapping

Navigational Models

"Standard" Page Navigation
- Provides just primary nav (L1)
- Browse by primary navigation, in-page links, and browser controls.
- Not yet developed

"Multi-tasking" Navigation
- Provides session tabs for navigating
- Multi-tasking Page Navigation uses parent and child tabs for multi-tasking, gathering related items into a single tab for each case.
- Seen in **ITSM, CSM, HR Agent Workspaces**

End-to-End Flows

ORACLE®

Field Sales Concept
for Sales Cloud

Project and Goal

One of the Sales Cloud projects I was tasked with by the VP of Product Management was to design a point solution for Sales Pipeline Management, but first I needed to understand the user, the Field Sales Representative.

Activities

- Worked with Senior Oracle Field Sales Reps to collect needs, tasks, questions, and scenarios

- User research, concepting, wireframing

- Designed initial concepts

Outcomes

- I expanded the scope to include general field sales use cases

- The project was incorporated into the nex-gen Sales Cloud designs

Goal is to develop concept solutions for Field Sales

ORACLE

Key use cases are centered around field sales and pipeline management

How do we get there?

#4: Beware the 5 Pipeline Killers

Once you start paying attention to the 3 metrics listed above, you'll start to notice that some of the opportunities in your Pipeline are outliers, which can clog your Pipeline. To maintain Pipeline integrity, you should remove these outliers from your Pipeline.

But how do you know which to purge? Watch out for these 5 signs of Pipeline Killers:

1. **Age in Stage** – Stalled deals convert at much lower rates than quickly progressing ones. Look for opportunities in your Pipeline that have **stayed in the same stage** for as long as your average Lost Deal and flag them as at-risk.

2. **Non-Linear Stage Leaps** – The beauty of the Sales Pipeline is that it matches up so well with the buyer's journey. Therefore, if **an opportunity goes through the Pipeline haphazardly** without a linear progression, it usually means that that opportunity is less likely to convert.

Understand the domain

Raphael B
people.oracle.com/@rb
Application Sales Representative
West Conshohocken PA, US · 1:20 AM Thu

"Gap between what they use and what they're supposed to use on Sales Cloud"

- How do I get 10/20 to 30/40's?

Empathize with the user

Problem		Goals
Don't have a feel for what's going on with my pipeline; Need to know what's been done or changed	→	**Understand:** Want to see my pip (whether I'll make quota). Which are late? Surface activity of myse
Don't know what to work on - where should I focus my efforts? What are next steps?	→	**Prioritize:** Decide which Opp work on and also plan out m time/activities
Need to work quickly to get a deal with customers and team members	→	**Communicate:** Send materia assign tasks
Hard to keep things up to date	→	**Document:** Update opportu and easily communicate the upwards
Have to keep my pipeline full	→	**Develop:** Find new opportur prospecting

Articulate Problems, Goals, & Solutions

VISION, INC
Cloud Applications Solution
Type anything to start an activity, we'll figure out what kind it is ...
All   Activities   Tasks   Notes   Emails   Calls   Stages
August 3 **Follow-up Meeting** with Frank T. Meeting concluded with
August 2 **Customer Response** Hi John, I did get your materials tha on July 29th. They look good, I just have a question. 3:44 P
From: Frank Tesler
To: John James, Jason Hemstrong
Reply   Repl
August 1 **Scheduled Meeting** with Frank T. Was able to call Frank, availability for the next steps coming up. 4:55 PM

Author a proof-of-concept

Understand the Domain

Get to know the typical concepts and problems in this space.

#4: Beware the 5 Pipeline Killers

Once you start paying attention to the 3 metrics listed above, you'll start to notice that some of the opportunities in your Pipeline are outliers, which can clog your Pipeline. To maintain Pipeline integrity, you should remove these outliers from your Pipeline.

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2. **Non-Linear Stage Leaps** – The beauty of the Sales Pipeline is that it matches up so well with the buyer's journey. Therefore, if **an opportunity goes through the Pipeline haphazardly** without a linear progression, it usually means that that opportunity is less likely to convert.

3. **Opportunity Size** – An opportunity's size dictates a lot about how it will act and how

Field Sales Rep Interviews

Research Setup:

- 5 Oracle field sales reps on multiple occasions + feedback + iteration

- CX, CRM space, Health, Upmarket

- Tend to be less than 10 opportunities at a time

Exploring the context of use goes a long way toward understanding your users.

Users, In Their Own Words....

Bill V
people.oracle.com/@bvi
CRM Application Sales Manager
🇺🇸 Beachwood OH, US · 12:58 AM Thu

Annie K
people.oracle.com/@
Application Sales Manager
🇺🇸 Atlanta GA, US · 1:00 AM Thu

Cris P
people.oracle.com/@c
Application Sales Manager
🇺🇸 Chicago IL, US · 12:07 AM Thu

"Need a perspective on what's going on with an account"

"My contacts can't be visible to my sales team (*Inside Sales reps*) will pick up contact and activity and start calling into that account - throws a wrench into that relationship!"

What would make you 10x more effective?
"Text or instant thing on phone that says 'Do you want document that?'"

I asked sales reps unique questions like: "What would make you 10x more effective?" Users would articulate their needs and problems, like '*keep them from stealing my deals*'

Sales Rep's Own Questions

- (When your boss asks) "How are you getting to your number this quarter?"

- "What are other deals, assets, purchases, or trouble tickets for this customer?"

- "What do I do now that I found out a competitor is on this deal too?"

  - "How do I put together a Kill Sheet for a particular competitor?"

- "The customer's CIO is outraged on a P1 issue open for an entire month"

- "Sales Manager needs you to bring in one or two deals in the next few days to make the team's numbers this quarter"

Questions reveal needs as well and create a realistic context for how Field Sales operates.

Field Sales Rep Persona

DANIEL RICHARDSON

Field Sales Rep

AGE: 41

LOCATION: San Francisco, CA

EXPERIENCE: 11 years

WORK PATTERN: Road Warrior
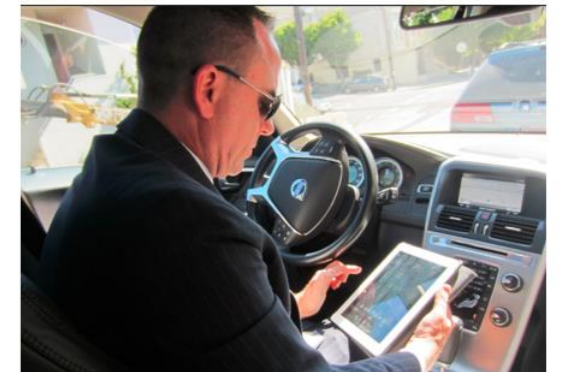
Job Roles by Area	Persona	Typical Tasks	Critical Tasks	Focal Task(s)
Sales Representative	Daniel Richardson	• Prep for Client Meetings • Conduct Post-Meeting Activities • Communicate w/Sales Team and Management • Networking • Create proposals • Schedule meetings and follow-ups	• Meet with stakeholders • Close Deals • Sign Contracts	• Maintain Customer Relationships • Create trust • Help customer define the problem

A great way to understand the world of the user is to break things down into TYPICAL, CRITICAL, and FOCAL tasks

Eye-opening Findings

⚠ Our biggest competitor is Outlook

⚠ Oracle isn't even using its own software

- Outlook integration isn't set up

⚠ Several custom solutions have been made because the software doesn't provide the necessary solutions

There were some surprising lessons-learned.

Field Sales Journey

1: Problem & Process

2: User Interviews

3: Lessons Learned

4: Problems and Goals

5: Architecture

6: Concepts

7: Outcomes

Marketing Forwards	Prospect Lead	Convert to Oppty	Oppty Assessed & Researched	Quote is Generated	Finish Deal (Decision)	Close
Sales Development Rep (SDR)	Inside Sales Rep (ISR)	Inside Sales Rep (ISR)	Field (FSR) / Inside Sales Rep (ISR)	Field (FSR) / Inside Sales Rep (ISR)	Field (FSR) / Inside Sales Rep (ISR)	Field (FSR) / Inside Sales Rep (ISR)

Marketing Forwards — Sales Development Rep (SDR)

Conditions
- Receive leads from marketing platform, events, etc.

Task
- Basic data integrity checks

Data
- Unqualified Leads from marketing platform

Prospect Lead — Inside Sales Rep (ISR)

Conditions
- Leads are assigned

Tasks
- Initiate contact
- Sales Development Rep qualifies the lead

Data
- Leads list

Actions
- Communicate

Convert to Oppty — Inside Sales Rep (ISR)

Tasks
- Vet client using BANT or other method
- Qualified Leads are converted to Opportunities
- Ensure consistency: Contact info, communications trail, 360 Events, all continue in Oppty
- If pipeline not sufficient, work on prospecting

Data: Qualified leads

Actions: Convert

**Oppty Assessed & Researched — Field (FSR) / Inside Sales Rep (ISR)**

Tasks
- Field Sales presents
- Customer assessed for interest

Data
- Opportunity
- Communications (documenting)
- Sales materials
- Scorecard
- Pipeline state

Actions
- Communicate
- Present
- Forward
- Progress sales stages

Quote is Generated — Field (FSR) / Inside Sales Rep (ISR)

Tasks
- Use CPQ system
- Present quote to customer

Data
- Opportunity
- Products/Quote

Actions
- Add products
- Generate quote
- Update quote
- Communicate quote

Finish Deal (Decision) — Field (FSR) / Inside Sales Rep (ISR)

Tasks
- Work Deal
- Visit customer
- Get decision-maker signoff

Data
- Opportunity
- Communications

Actions
- Communicate
- Meet w/Customer
- Progress sales stages

Close — Field (FSR) / Inside Sales Rep (ISR)

Task
- Close deal

Data
- Opportunity

Actions
- Close deal

- Which lead is hotter?
- Which one is more complete?
- Which one represents more interest?

Now that I've converted:
- Which one had more engagement?
- Which one is more important?
- Why would you work one over the other?

- What should I do right now?
- Which one has the best ROI?
- How much effort should I put into this?
- What are the last, next things going on with this?
- How much is my compensation?

To visualize all the steps to the Field Sales process, I constructed a journey map of the personas involved.

Problems and Goals for an FSR

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Main Problems

Goals
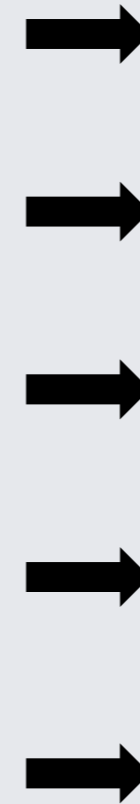
Main Problems		Goals	
Don't have a feel for what's going on with my pipeline; Need to know what's been done or changed	→	**Understand**: Want to see my pipeline health stats (whether I'll make quota). Which opportunities are late? Surface activity of myself and team...	Understand ①
Don't know what to work on - where should I focus my efforts? What are next steps?	→	**Prioritize**: Decide which Opportunities to work on and also plan out my time/activities	Prioritize ②
Need to work quickly to get a deal with customers and team members	→	**Communicate**: Send materials, follow-up, assign tasks	Communicate ③
Hard to keep things up to date	→	**Document**: Update opportunities quickly and easily communicate their status upwards	Document ④
Have to keep my pipeline full	→	**Develop**: Find new opportunities by prospecting	Develop ⑤

Key insight: There's a Progression to This

Analyze

Understand (1)

- What is the state of things?
- What does the data say?
- Where has activity happened?
- What has customer done?
- What has the team done?

Decide

Prioritize (2)

- What's scheduled next?
- Where should I spend my effort?
- What's my expected compensation?
- Who should I follow-up with?
- What Opportunities need attention?

Act

Communicate (3)

- What does the customer need?
- What do team members need to know?
- What materials should be sent?

Record

Document (4)

- What were the decisions and outcomes of customer contacts?
- How has the opportunity changed based on events
- What does management want to know about the business case or the status of this opportunity?

Refill

Develop (5)

- What leads are there in a current contact or account?
- What areas is a non-customer interested in? What initiatives do they have planned?

Daily

COOL STUFF: The goals fit together sequentially in a process flow. We've uncovered the Rosetta Stone of field sales.

Solutions articulate tasks and data

Goal	Solutions	
	Tasks	**Data**
Understand	Browse the data; Monitor the state of contacts, accounts, team activities	KPI's, Stats, Visualizations, and Timeline. Compare Oppty vs. Avg. Won Deal or Avg. Win sales cycle; Timeline (Macro), my/team activities to date, updates to contacts and accounts (Micro)
Prioritize	Look at compensation, and the most promising Opportunities; Figure out my next steps, and what needs to be done	W2 compensation per deal, (win % x deal size); Recommendations, Day/Quarter desired activities, follow-ups, tasks
Communicate	Send materials, follow-up, assign tasks	Task content, sales materials, meeting agendas
Document	Post-meeting data entry, build biz case for mgmt.	Call Logs, Meeting summaries, Scorecards, Actions to Close
Develop	Get leads from contacts, keep up-to-date with potential customers, look at leads per account	

By detailing out the solutions, we identify tasks to support and data objects that users will need

Prospective Architecture

ORACLE

Goals

Use cases

Pages

Understand

1. Things in Condition RED (top priority)
   What just happened or came in?

Home

Prioritize

2. Prioritize: What should I work on?
   Need: Best bang for the buck

Pipeline

3. Plan my Day / Tomorrow
   What are my tasks and appointments today?

Communicate

4. Prep for specific customers (research account?)

Document

5. Update an opportunity

Details

6. Close that deal

Develop

7. Develop leads – Get work

Pipeline
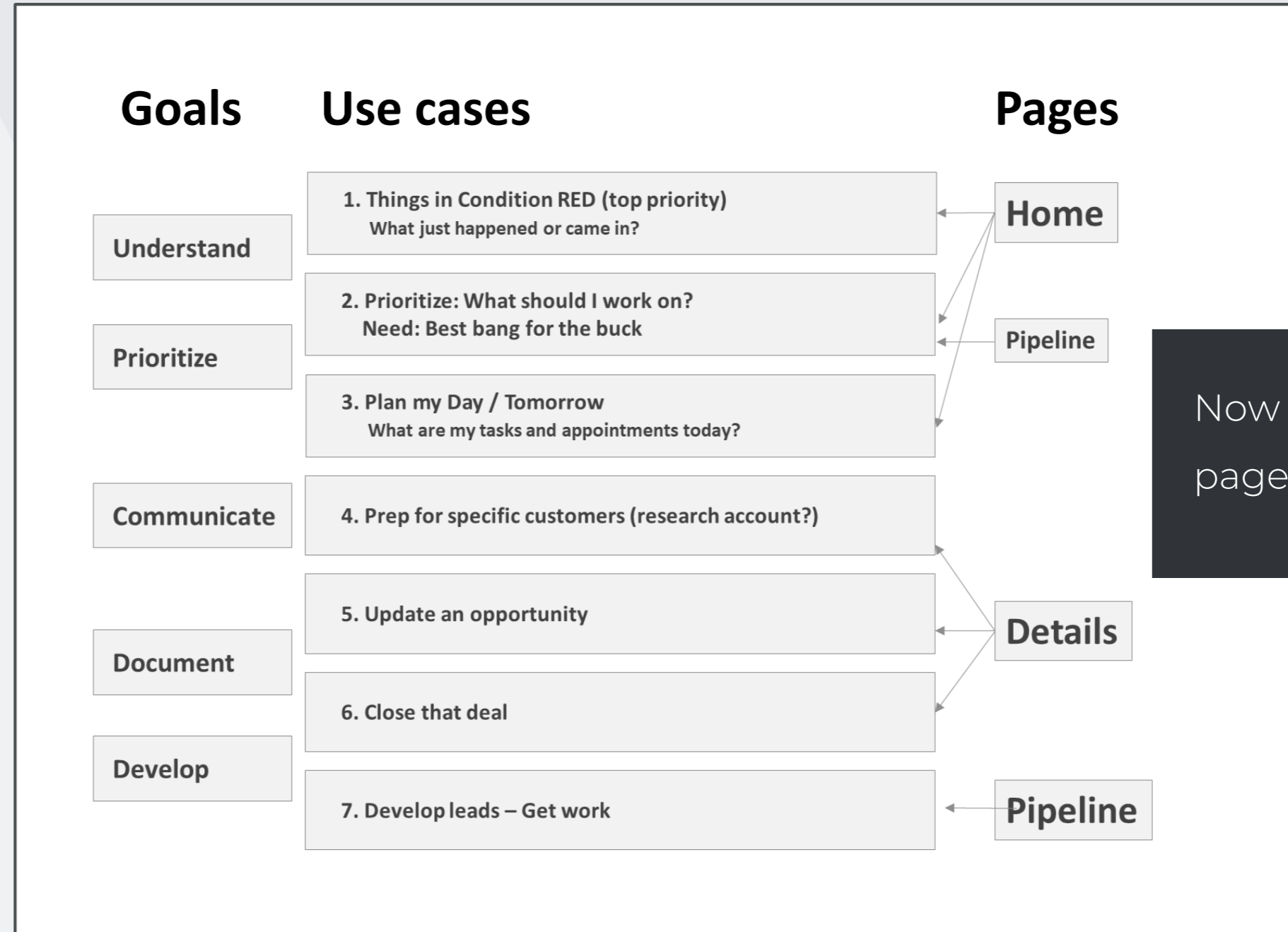
Now we start seeing page entities emerge

Wireframes

Home Page

Pipeline (Kanban)

Detailed Opportunity
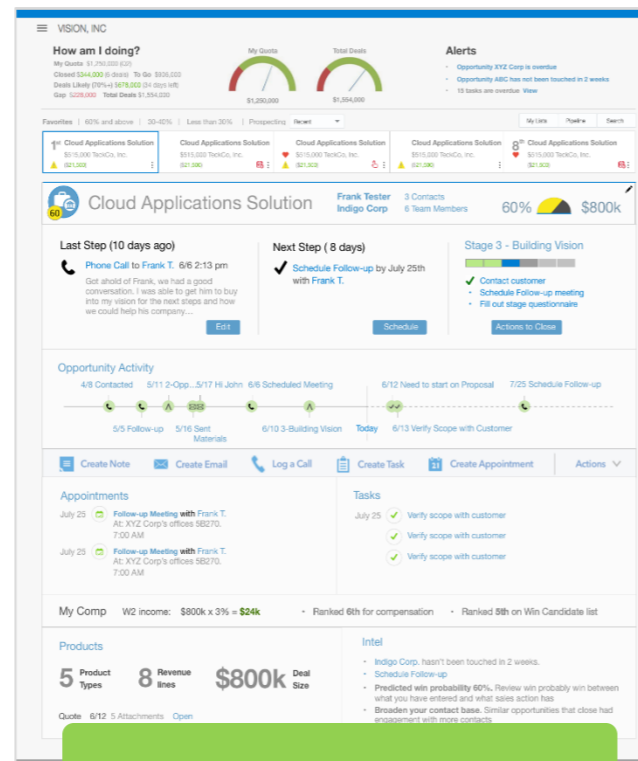
Surfaces critical opportunities in a fast-switch interaction mechanism
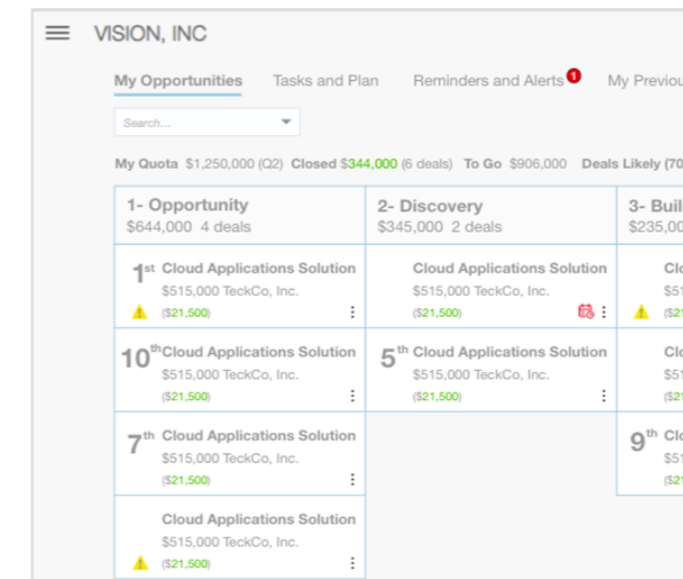
All Opportunities but highlights changed, recommended, critical, and stalled
(Filter for favorites or other dimensions)
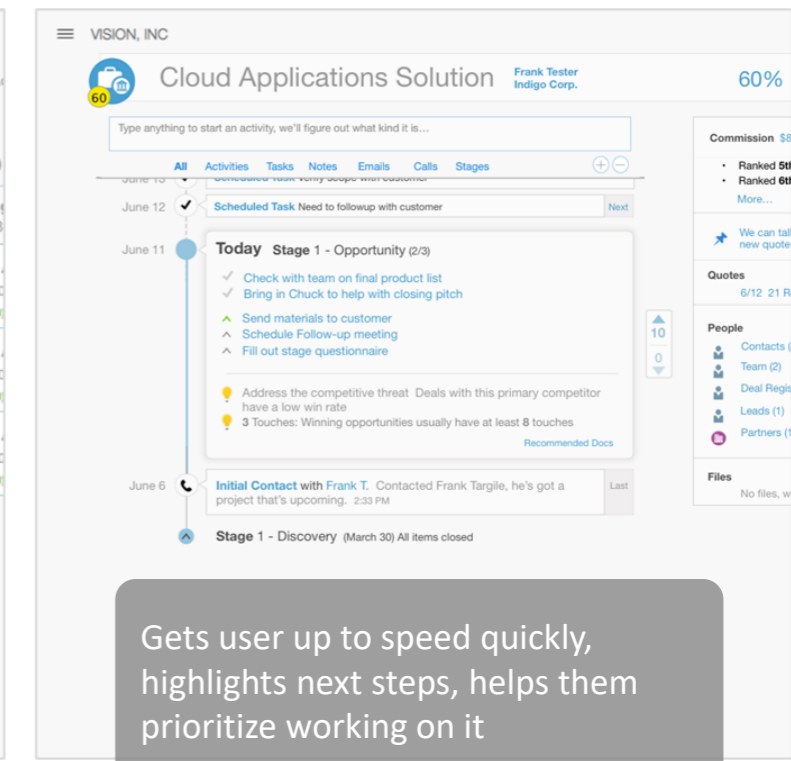
Gets user up to speed quickly, highlights next steps, helps them prioritize working on it

General > Specific
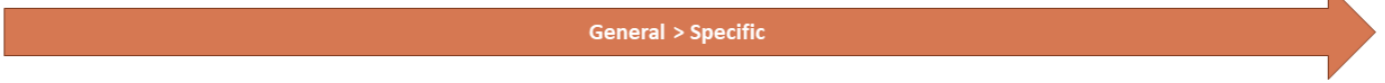
New Home Page Concept

1: Problem & Process

2: User Interviews

3: Lessons Learned

4: Problems and Goals

5: Architecture

6: Concepts

7: Outcomes

Everything to get up to speed on this opportunity can be seen in seconds

Pipeline Dashboard Wireframe

Pipeline (Kanban) Dashboard
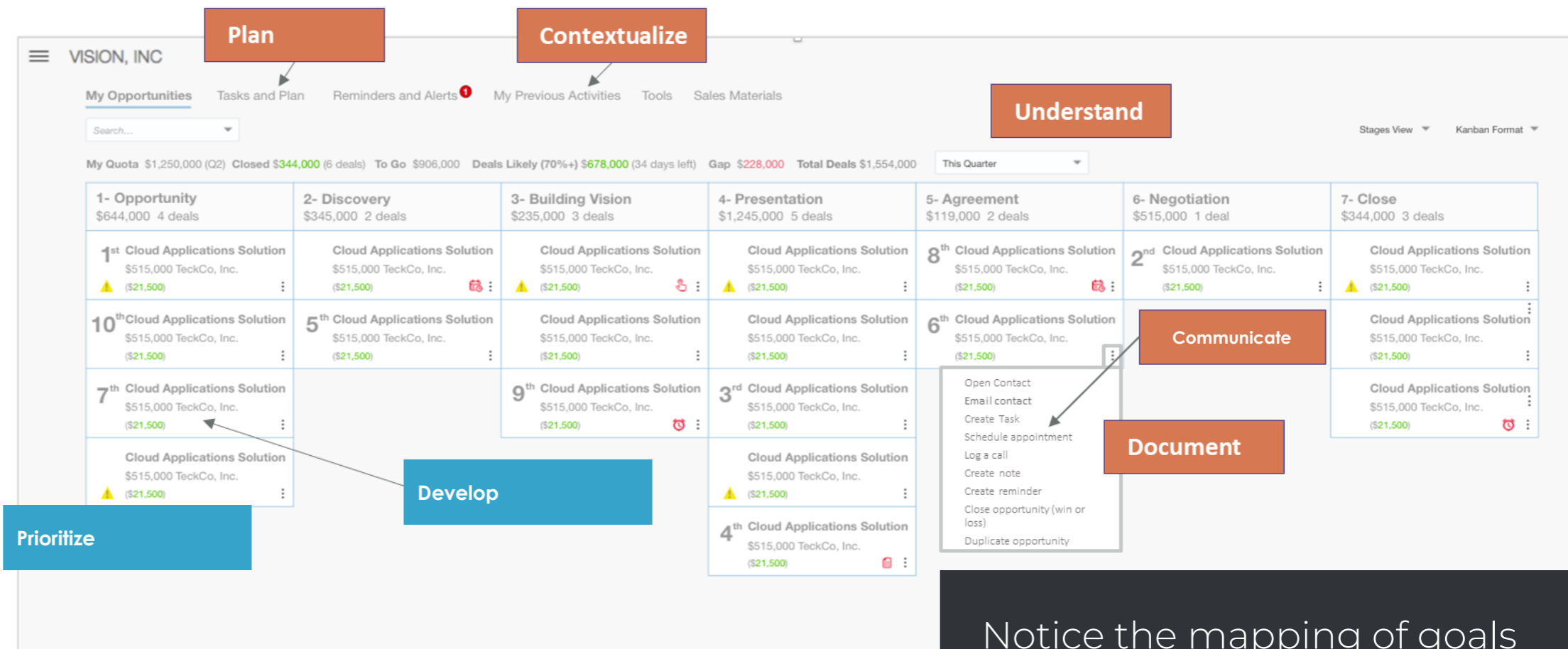
Notice the mapping of goals to the page design. You can see exactly how those goals are being supported.

Oppty Details Concept 1: Timeline

A timeline effectively handles a large set of data in an ordered structure.

Oppty Details Concept 2: Grid Version

1: Problem & Process

2: User Interviews

3: Lessons Learned

4: Problems and Goals

5: Architecture

6: Concepts

7: Outcomes

Notice the goal mapping here as well.

Oppty Details Concept 3: Guided

The Guided concept effectively breaks apart the data model into an easily-scanned set of ordered sections.

Outcomes

Home Page
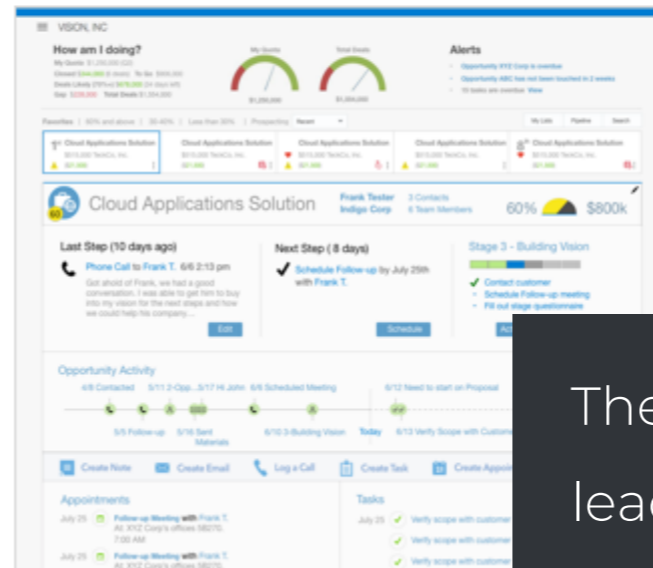
Pipeline (Kanban)
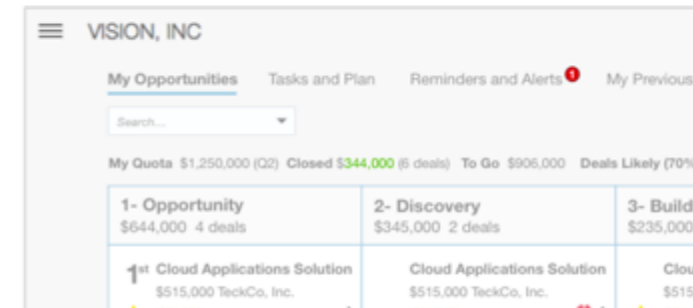
Detailed Opportunity
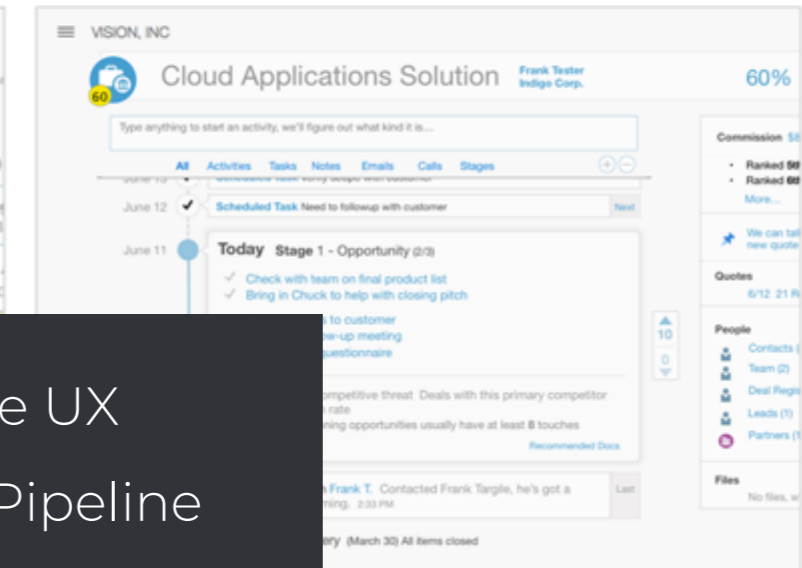
The project demonstrated to the UX leadership that Field Sales and Pipeline management use cases could and should be incorporated into the larger Sales Cloud product framework.

Badgeville Platform Redesign
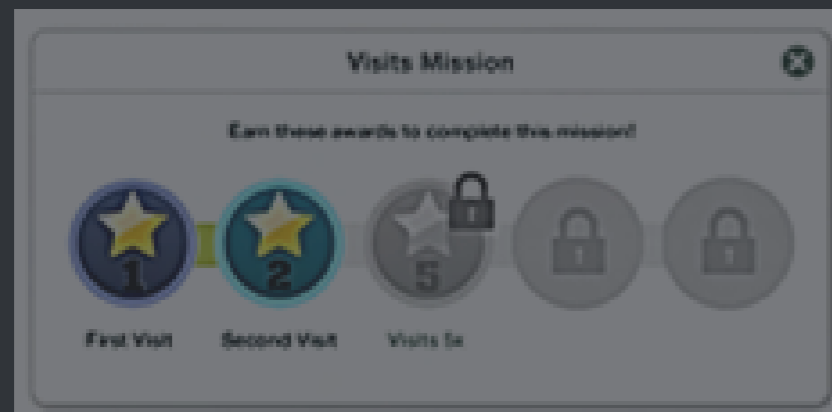
About the Company

Badgeville was an enterprise gamification startup dedicated to helping other companies leverage game mechanics to incentivize user behaviors.

Project and Goal

I left Apple to start a UX practice at Badgeville, reporting to the VP of Product Management. The founder and CEO tasked me with leading a 'radical revision' to the level of usability of the product which had not had formal UX design practices applied.

Activities

- UX design practices: user research, task flows, wireframes
- Worked extensively with customers to collect needs, tasks, and other inputs
- Redesigned the platform
- Created a new VX design language
- Worked with PMs and Engineers to get the new designs implemented

How do we get there?
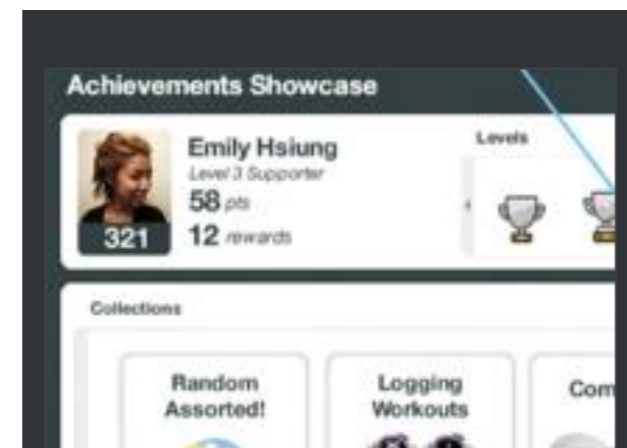
Understand the domain
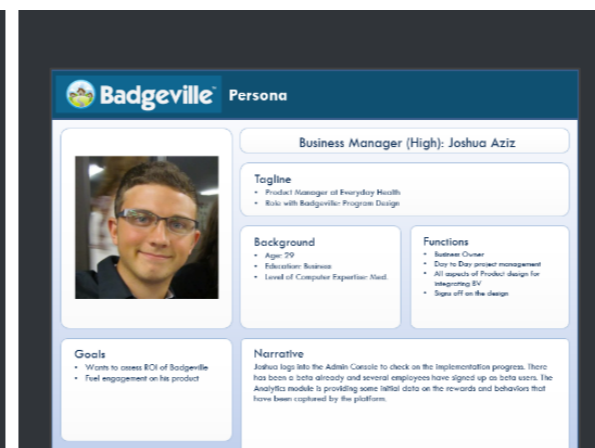
Empathize with the user
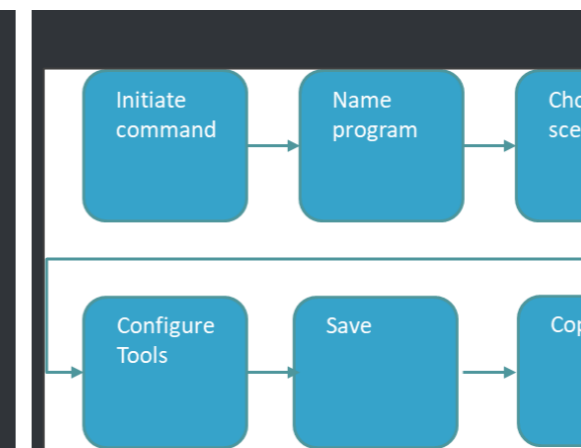
Map key user flows
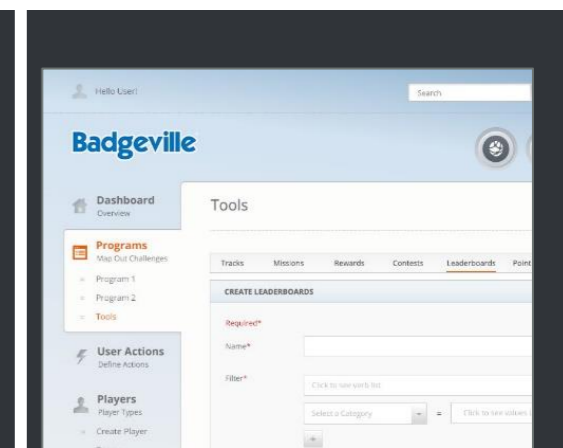
Propose new UX system

Primary goals for the redesign project

Badgeville
The Behavior Platform™

- Increase self-service in the product

- Lower campaign producer and support costs

- Re-orient the product from a primarily developer platform to a campaign design & management one.

- Reduce the implementation time by lowering the learning curve

- Create more customer success stories

Platform Game Mechanics
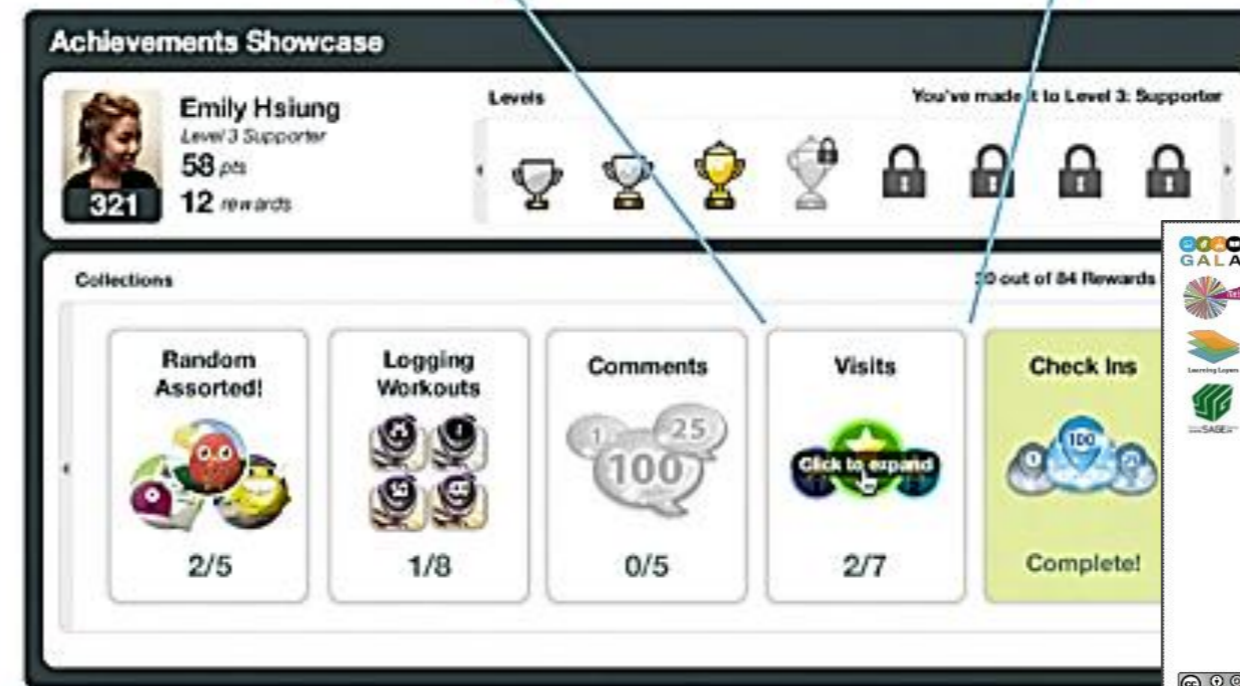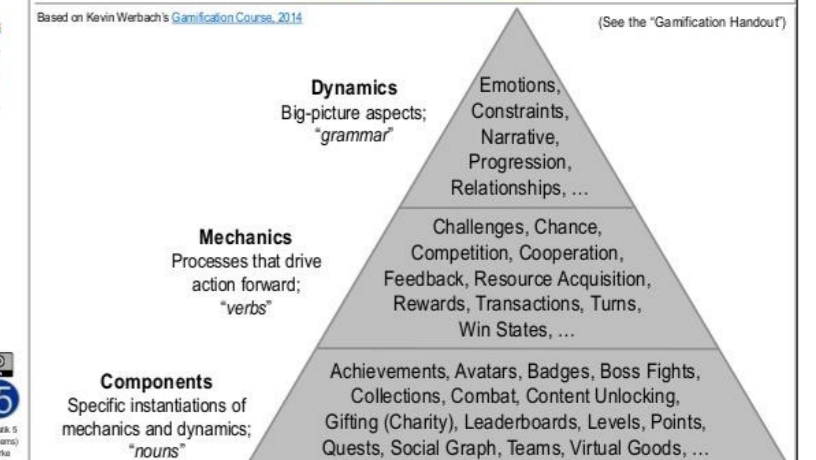
Competitive Analysis

Bunchball Nitro
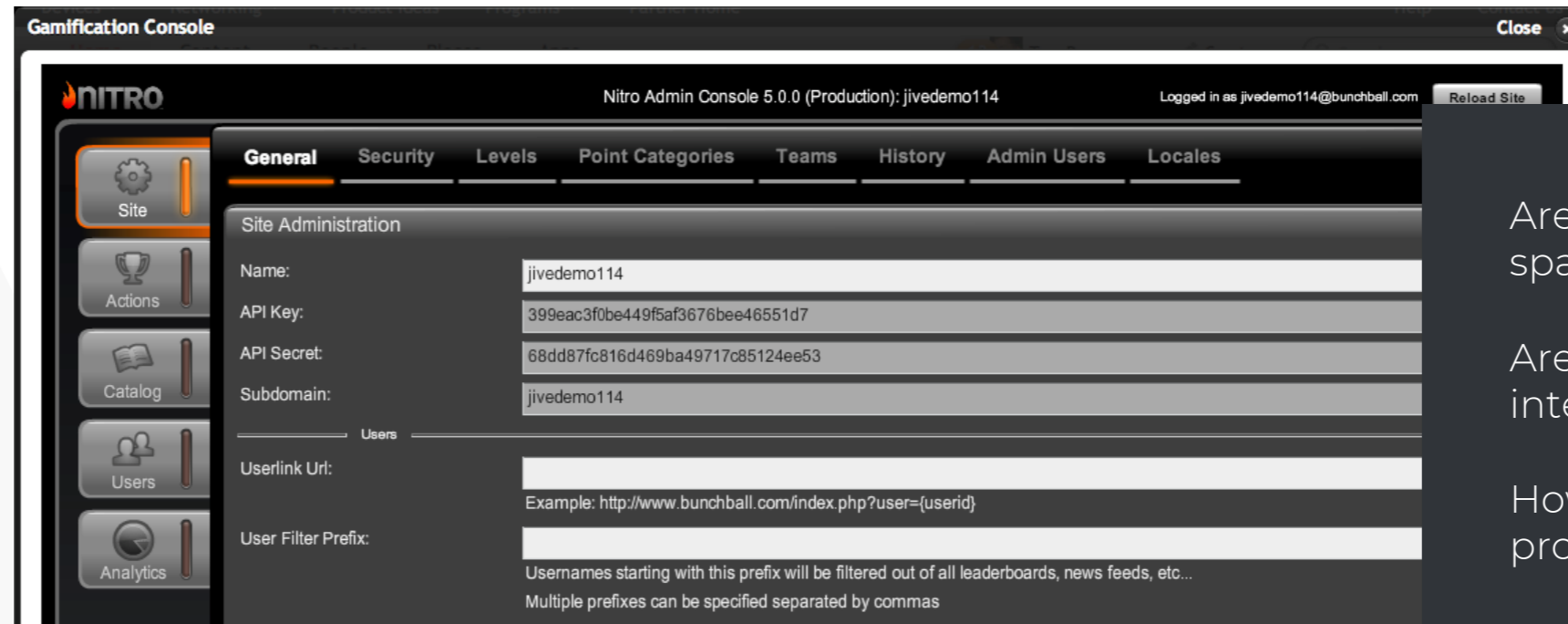
Are there competitors in this space?

Are they doing something interesting?

How are they solving the same problems?

Gigya
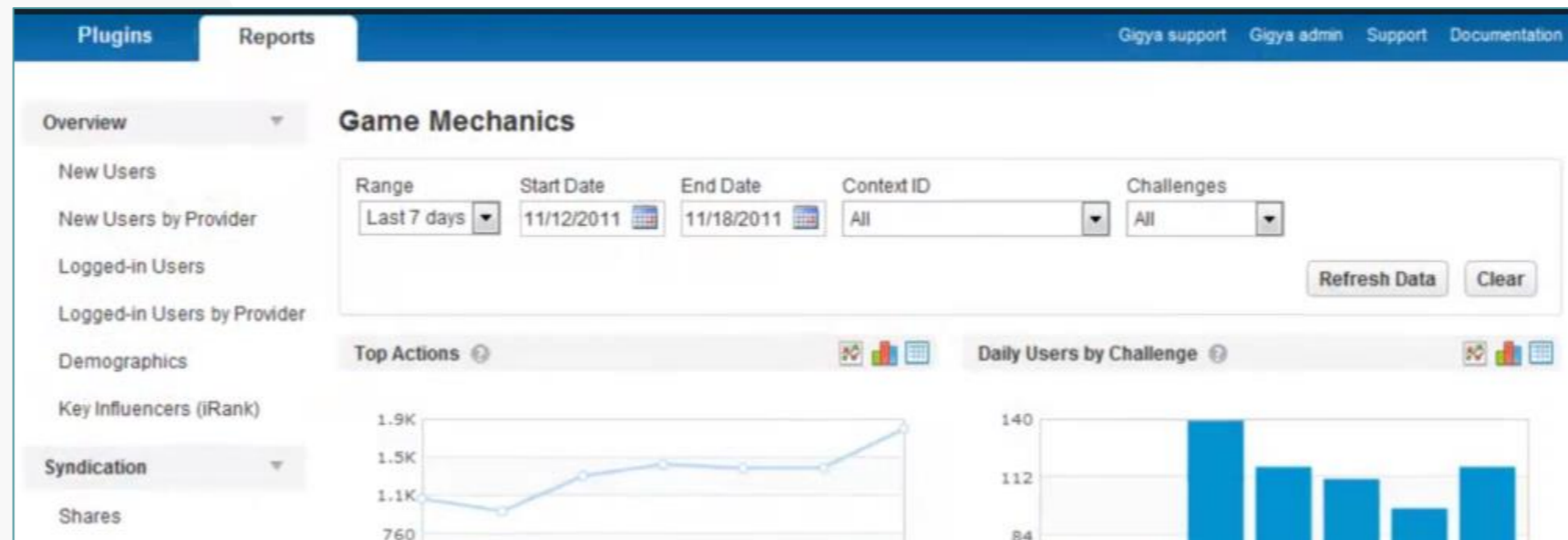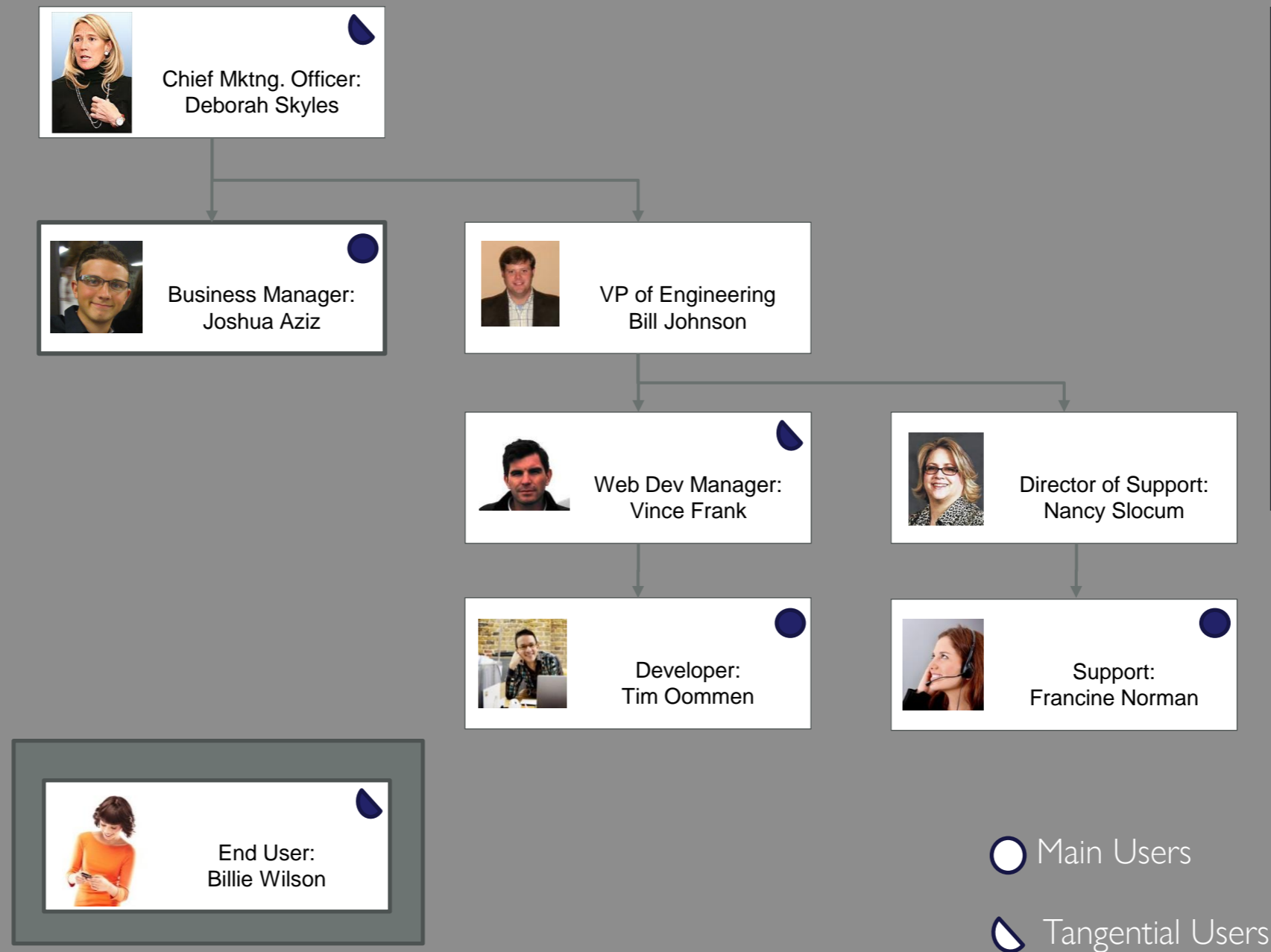
Persona-driven Scenarios

Chief Marketing Officer: Deborah Skyles

- Deborah wants her product or social platform manager to develop a gamification strategy and to get up and running quickly. She needs her product manager to report to her often about effectiveness and ROI.
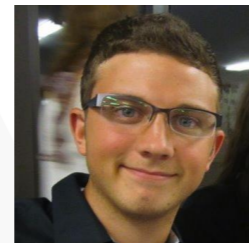
Business Manager: Joshua Aziz

- Joshua needs a new campaign for Jillian Michaels' site. T[...] retention and need to create a new site in the console.
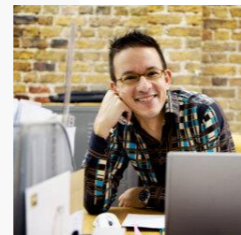
Developer: Tim Oommen

- Tim gets tasked with making sure that new levels and mis[...] the BV console. He needs to have them show up correctly [...] pages.

Support: Francine Norman

- A customer calls with questions about where their badge went. It turns out that the badge was taken away when a mission was repeated. Francine files a support ticket with Badgeville about the issue.

End User: Billie Jo Wilson

- Billie Jo knows is proud of her Super Shopper badge but it disappeared one day. Feeling annoyed, she called up customer support to ask for it back.

Developing scenarios alongside the identified personas helps contextualize the usage of your product.

Developing Persona Templates

It helped to have real users to build Personas around

Badgeville Persona

Business Manager (High): Joshua Aziz

Tagline
- Product Manager at Everyday Health
- Role with Badgeville: Program Design

Background
- Age: 29
- Education: Business
- Level of Computer Expertise: Med.

Functions
- Business Owner
- Day to Day project management
- All aspects of Product design for integrating BV
- Signs off on the design

Goals
- Wants to assess ROI of Badgeville
- Fuel engagement on his product

Narrative
Joshua logs into the Admin Console to check on the implementation progress. There has been a beta already and several employees have signed up as beta users. The Analytics module is providing some initial data on the rewards and behaviors that have been captured by the platform.

Frustrations and Pain Points
- BV Admin Console is hard to learn
- Lots of training is involved in learning the system
- Cannot find information when he needs it

Role Description
- Manages the business, product side and some marketing tasks
- Designs the integration strategy
- Have to have data
- Signs off on the design

Product Areas
- Analyze
- Configure
- Manage

Skills
- Technical Skill 1 ——— 3 ——————— 10
- Gamification   1 ——————— 6 ——— 10

Badgeville Usage Stats

Site	Simple Be	Advanced	Levels	Rewards	Advanced	Missions	T
Baseline Configuration (baseline.hsn.net)	0	1	1	1	1	1	
Basic (basic.api.com)	0	1	1	0	1	1	
Beat The GMAT (www.beatthegmat.com)	0	1	0	0	1	0	
Bedsider Production (bedsider.org)	0	1	1	0	1	1	
Best Life (www.thebestlife.com)	0	1	1	1	1	1	
Beyond the Guide (beyondtheguide.com)	1	0	1	1	0	1	
Bill Hennessy Test (hennessygrp.com)	0						
Binekarac SilentMode (binekarac.vw.com.tr)	1						
BlackBook Production Site (blackbookmag.com)	1						
BradsDeals (bradsdeals.com)	1						
Buddy Press KidzVuz (kidzvuz.com)	1						
Buzznet (buzznet.com)	1						
C3 (c3.com)	0						

Pulling data from the system tells us what's being used (or not)

I also worked with internal teams to get insight into customer support issues

Badgeville Pre-Redesign

Analyzing tab order reveals that the UI isn't following a realistic usage pattern. Here, there are three tabs that can be grouped together and target a technical persona compared to the Analyze and Manage tabs.

Core User Task Flows

1. Design Game

A. Create Program

1. Initiate command
2. Name program
3. Choose scenario
4. Choose goal(s)
5. Review template and add/subtract from list of Tools
6. Add existing component instances
7. Configure Tools
8. Save
9. Copy code
10. Copy widgets

```
[Initiate command] → [Name program] → [Choose scenario] → [Choose goal(s)] → [Review template +/- from list of Tools] → [Add existing component instances]

[Configure Tools] → [Save] → [Copy code] → [Copy widgets]
```
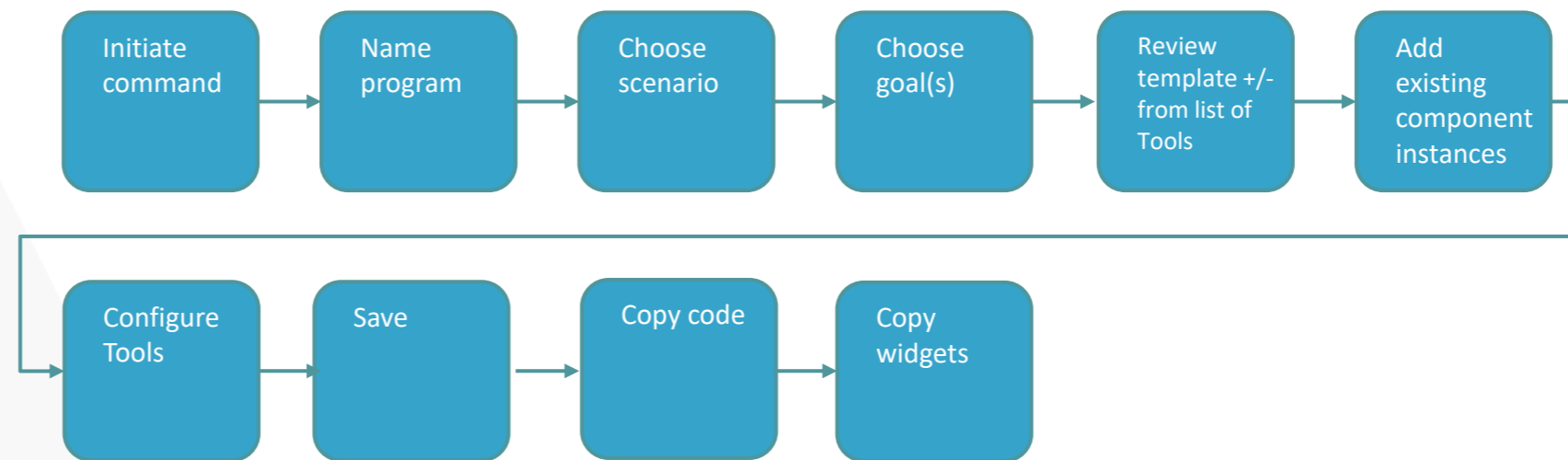
2. Monitor

1. Go to program or to dashboard
2. View the desired set of reports
3. Click on a report to go to full page

```
[Go to Program/Dashboard] → [View Report Set] → [Full Page Individual Report]
```

Conceptual-mapping of Object Relationships

Badgeville
The Behavior Platform™
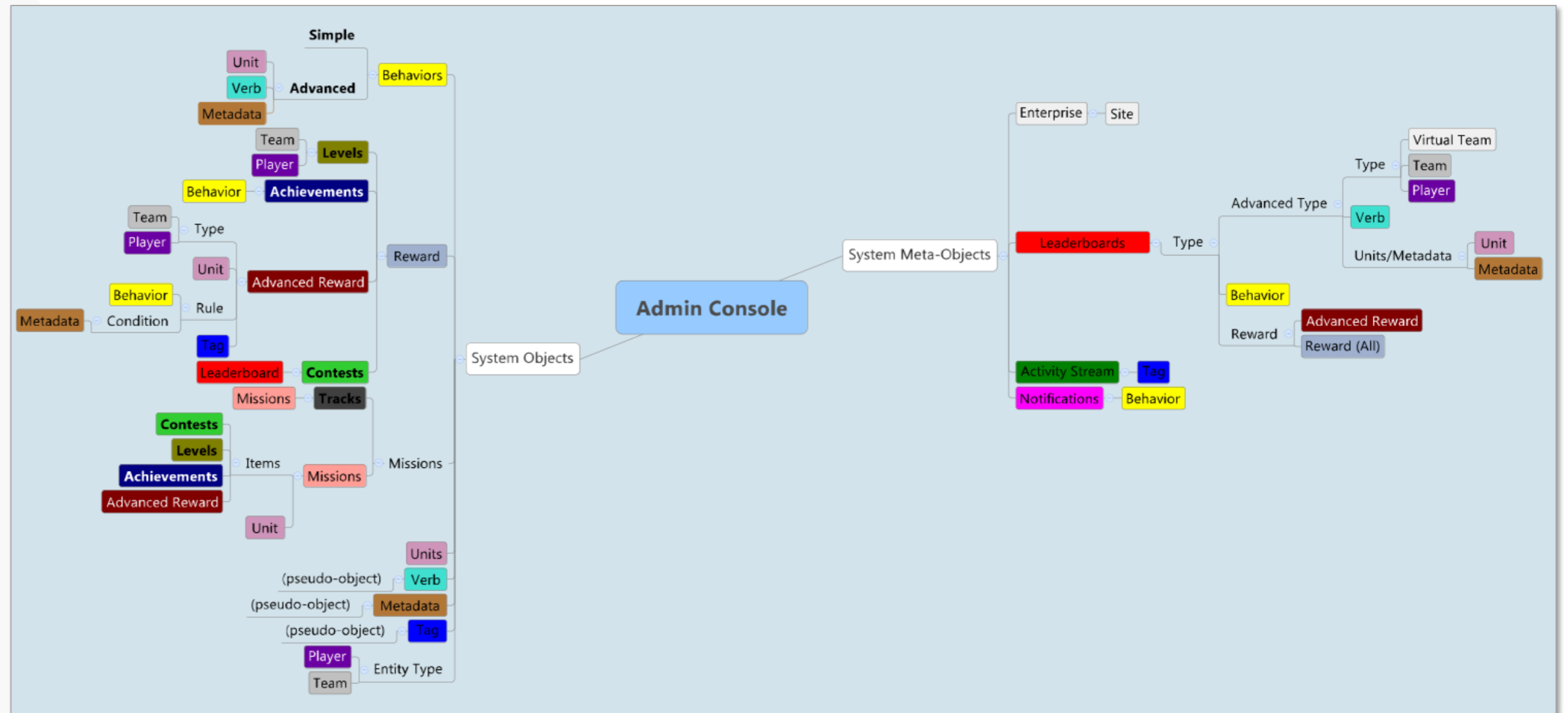
TRACKING THE FLOW OF VERBS AND POINTS THROUGH THE BADGEVILLE SYSTEM
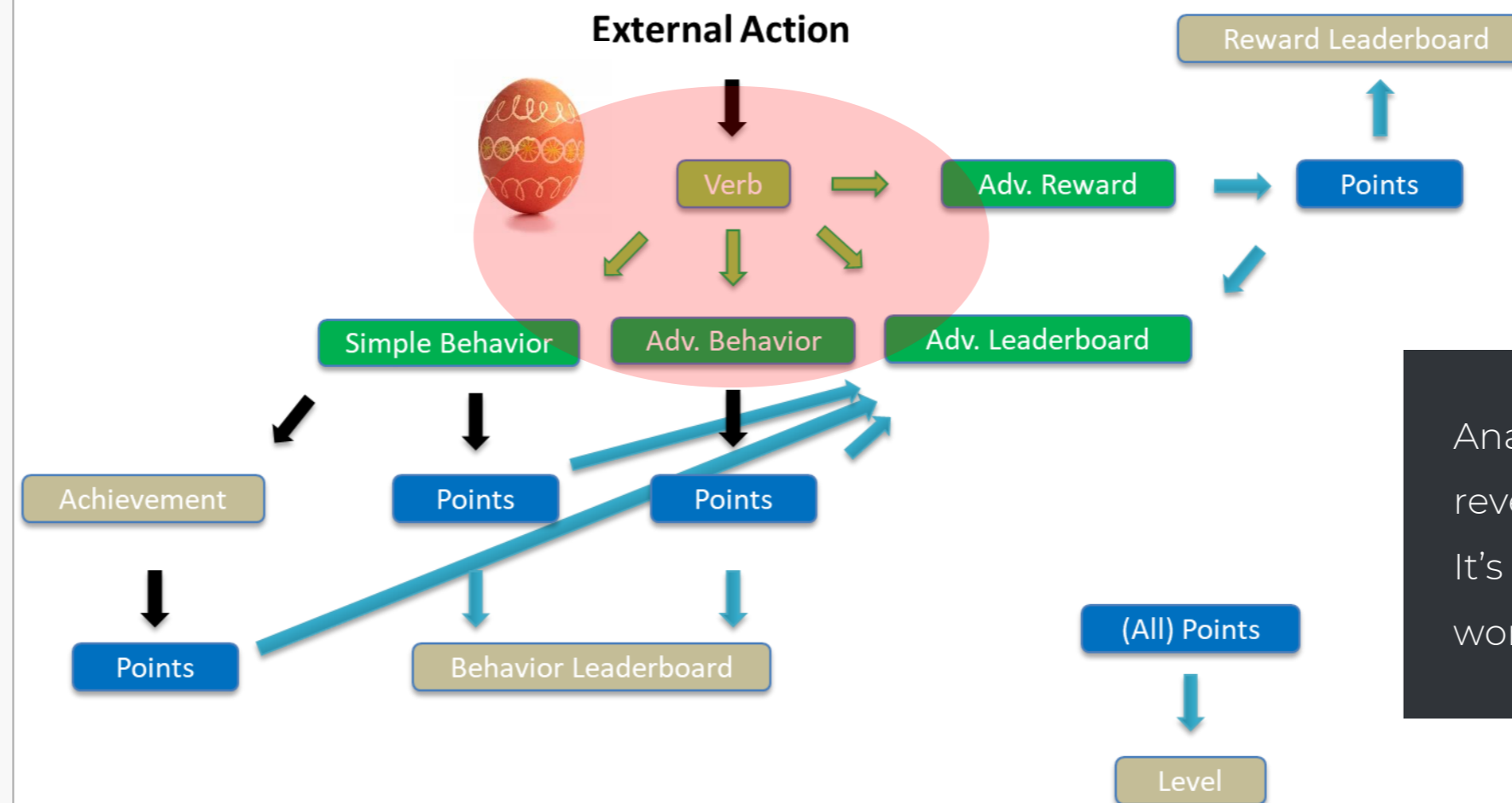
Analyzing how the system works reveals a key truth:
It's the verbs that underlie the working of major system objects

Simplify and Consolidate

Treat all 3 types of behaviors consistently as a singular object (just **Behaviors**)

Verb | Simple Behavior | Advanced Behavior → Behaviors

Treat **Achievements** and **Advanced Rewards** consistently (just Rewards)

Achievement | Advanced Reward → Rewards

Deprecate **Levels** in lieu of a Mission type that accomplishes the same goal.

Level → ⊘ Type of progressive mission (Level-type)

Deprecate Tags in favor of a single Metadata library (use Keys only in place of Tags)

Tags → ⊘ Replaced by Metadata key

Create new object: **Programs**

Program* (new)

Architect the product so that programs can share and reuse common system objects

Program 1 — Mechanics — Program 2
Missions — Missions — Missions
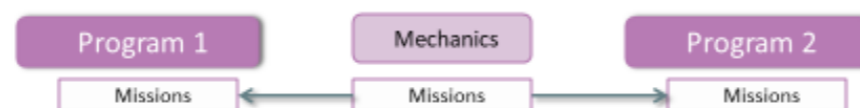
There were a lot of opportunities to simplify the representation of the system for users. Further, I proposed new UI concepts such as 'Programs' that would make it easier to structure campaigns as well as share and reuse game objects.
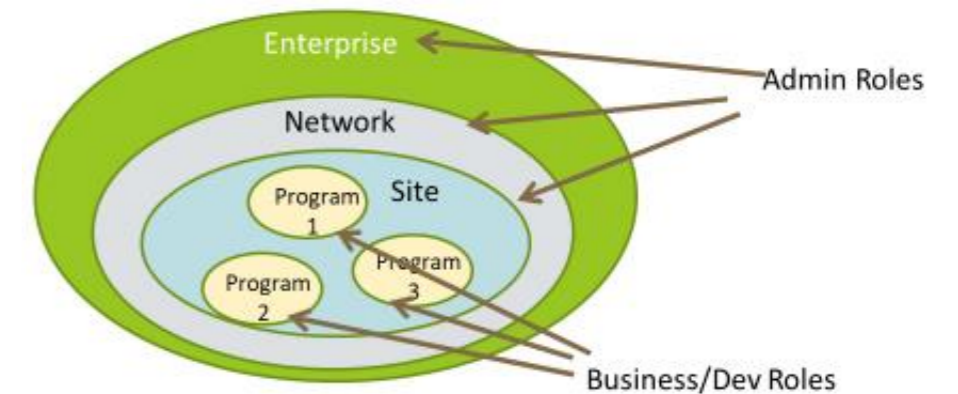
Enterprise
Network
Site
Program 1
Program 2
Program 3
Admin Roles
Business/Dev Roles

New Information Architecture

The sitemap allowed us to track and understand how pages in the UX were to be navigated.
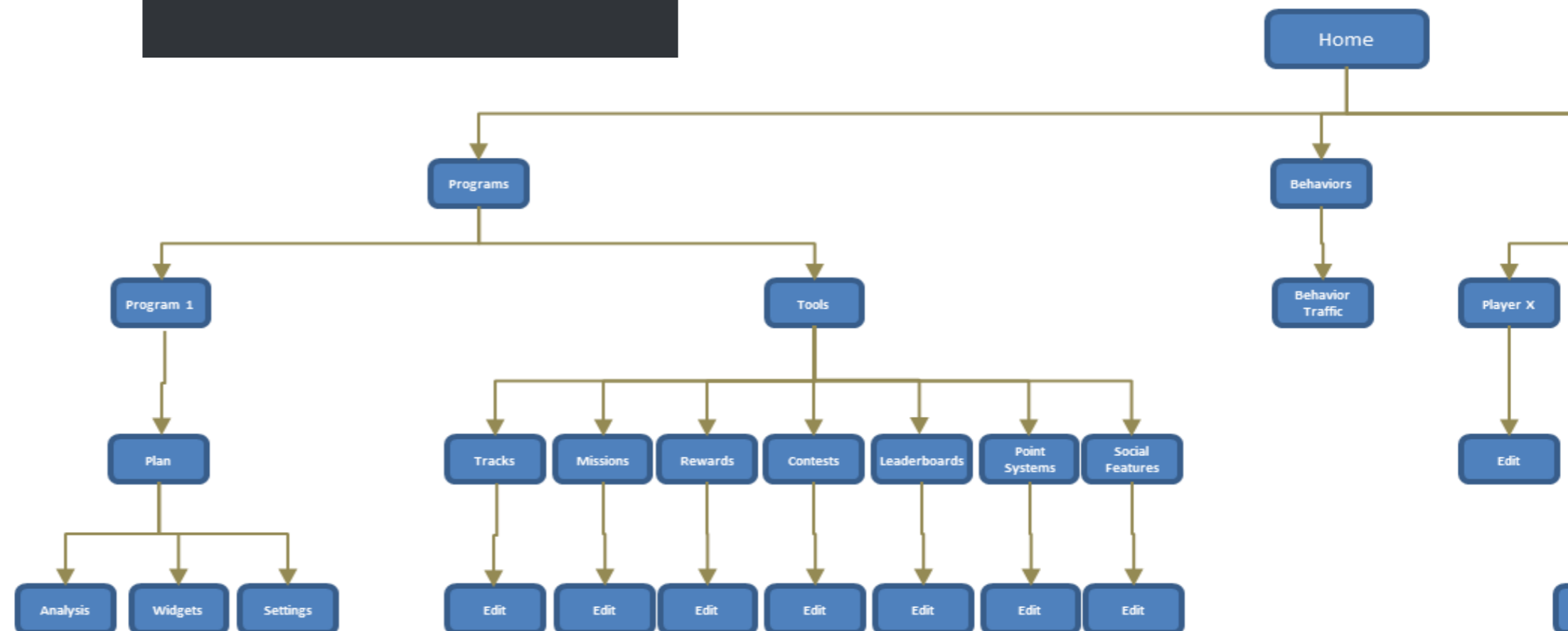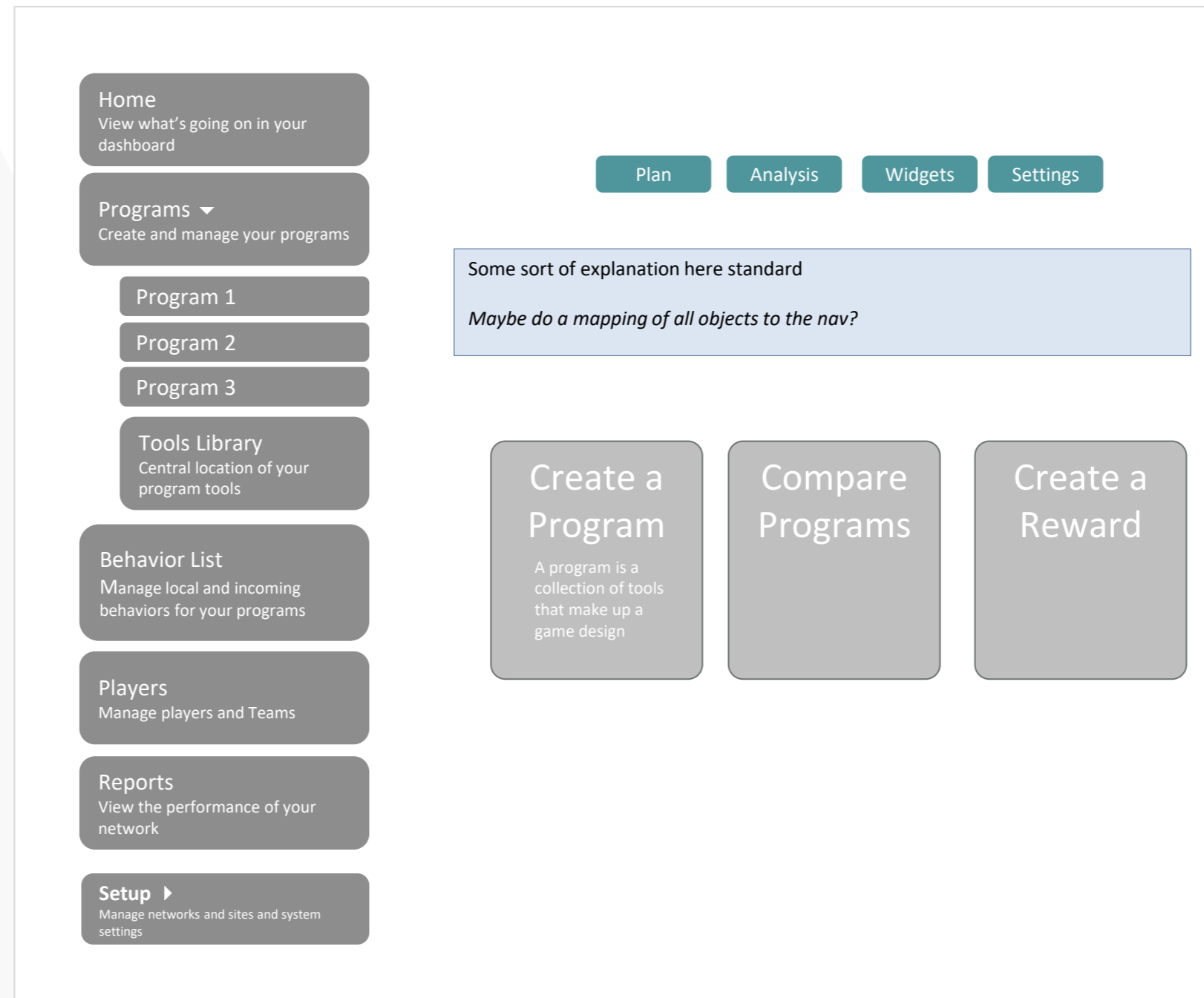
Create a Simple Object

Create a Program

Dashboard

Programs

New Program

Tools

Behaviors

Players

Reports

Setup

Community Sharing Project   Community ▾   Goals: Increase Conversion, Increase social sharing...more

Tracks   Missions   Rewards   ▶

▼ ▲ Track 2

    ▼ ▲ Mission 1

    ▼ ▲ Mission 6

      ▲ Mission 5 - 1

      ▲ Mission 5 - 2

      ▲ Mission 5 - 3

      ▲ Mission 5 - 4

      ▲ Mission 5 - 5

Create a new Reward

Create a new Reward   Detailed →

Reward 3|

Behavior   **Count**

Read ▾   5   +   V Add Context V

Points

12   Credit: Player ▾

Reward Hint   Enter

Reward Message   Enter

Reward Image   ?   Browse

Save   Cancel

I proposed using interaction techniques like direct manipulation to make campaigns easier to configure.

Simplifying Complex Objects

Create Advanced Reward

Definition — Define your Reward by naming it and select its type

Name

☐ Active | January 21, 2013 | 3:00 PM ▾ | to | January 23, 2013 | 12:00 PM ▾

Tag | Tag | Tag | + Add

Triggers — First select an Action to count, set the count threshold, and then set the criteria by entering categories and va

User Action	Count	Chosen Criteria (each action must meet ALL criteria)
Read ▾	5	Category 1 = One Value ✕
+		+

+ Add Rule   Any Rule will trigger

Points — Select the number of points to Reward

Points | 12 | Credit: Player ▾ | ☐ First | 1 | player(s) only | Other Points ⌄

Reward — Give the user a hint and a success message

Reward Hint | Enter | Reward Image

Reward Message | Enter | ? Edit

Additional Settings | >> | Add more detailed settings like time windows and earnings limits

Save | Cancel

Easily scanned structure

More complex objects with a deeper data model were improved to be easier to understand by enhancing scannability.

New Visual System
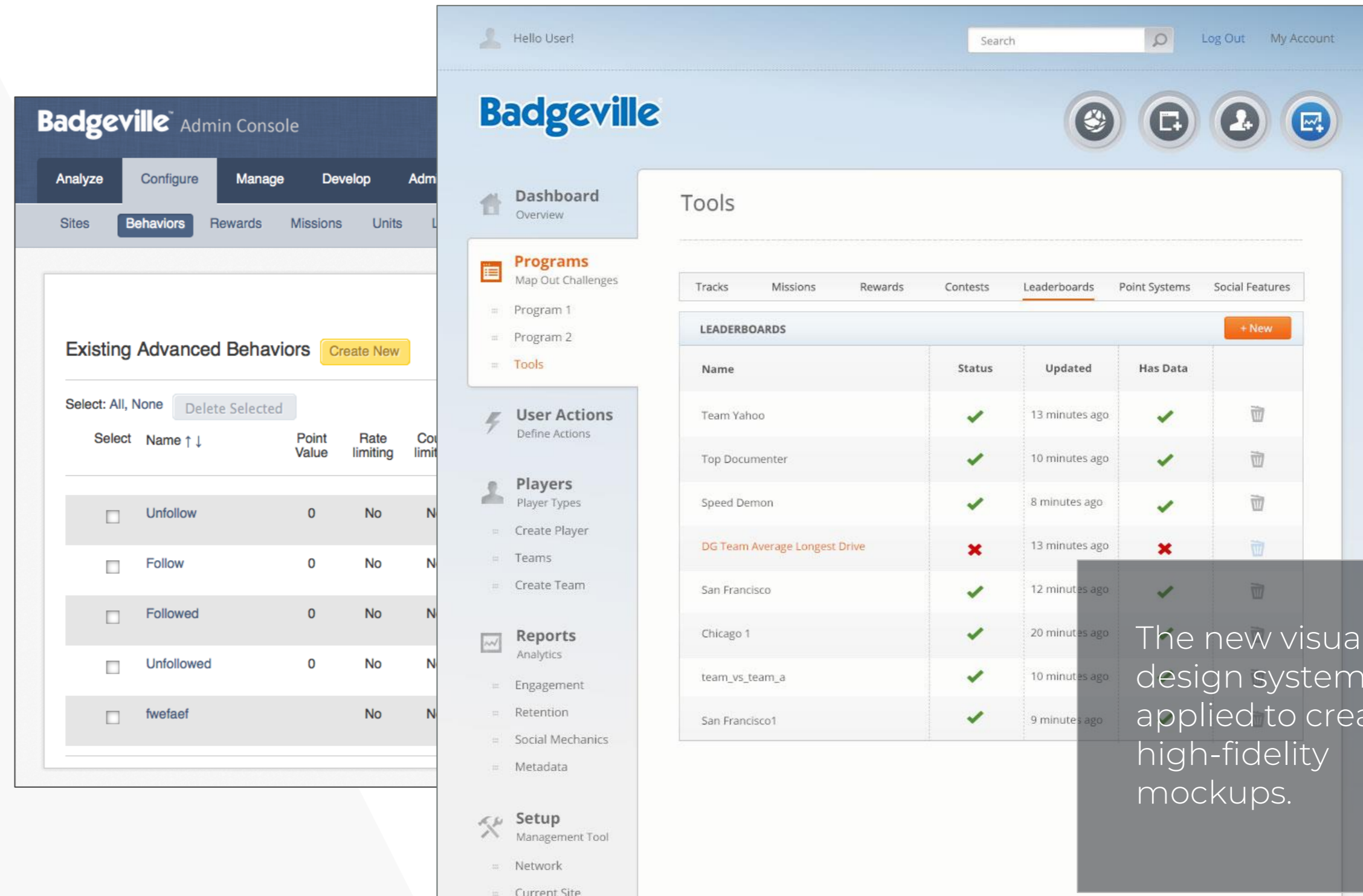
The new visual design system was applied to create high-fidelity mockups.

Benefits of High-Fidelity Mockups
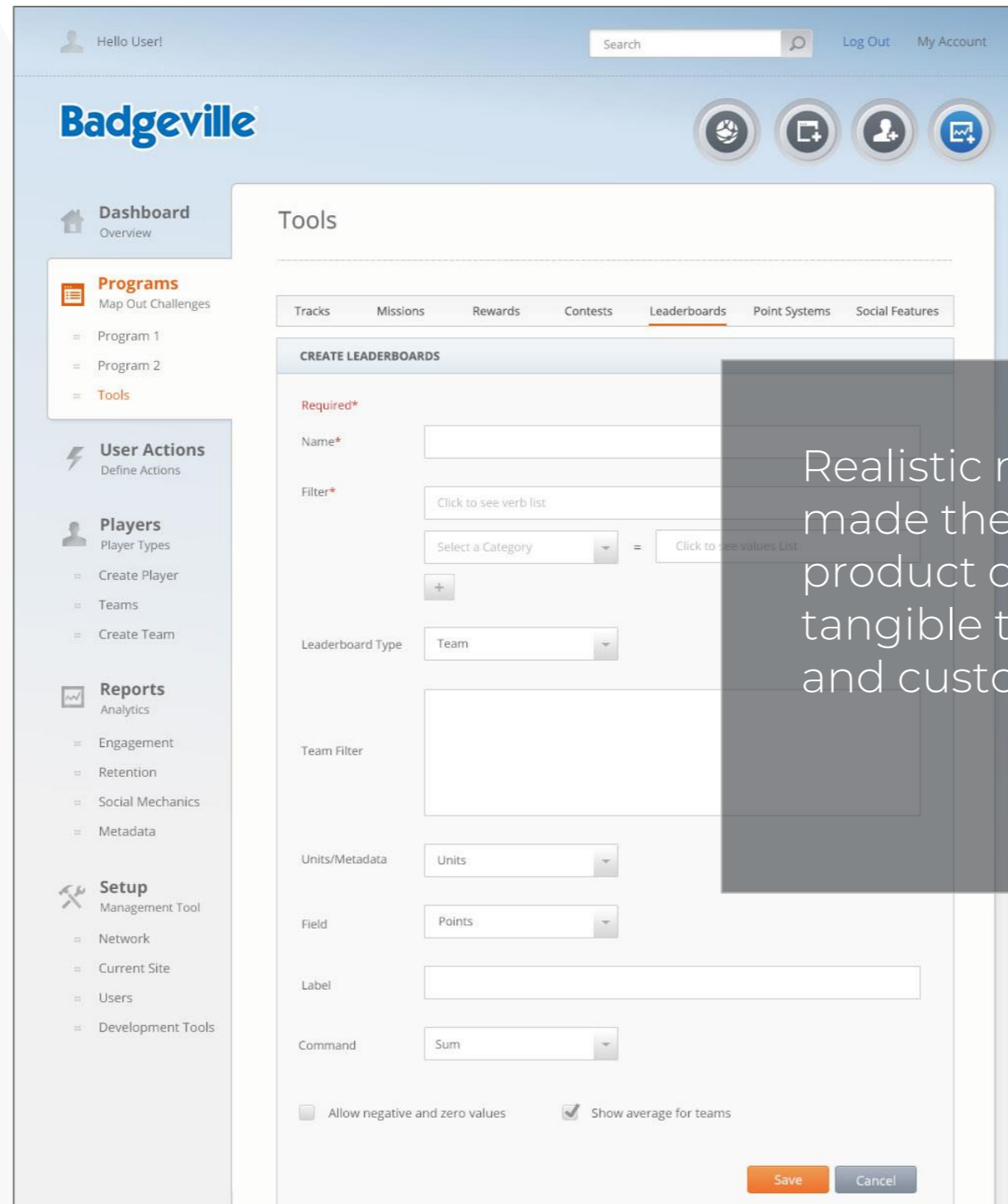
Realistic mockups made the vision and product direction tangible to the team and customers

Outcomes and Impact

Customers were excited to see the prototypes which allowed me to collect detailed feedback. The designs were implemented in staggered releases.

Outcomes and Impact

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Designs

Intuit + Yahoo!

Apple

Dreamworks

Oracle

Consumer Design (10 million+ users)
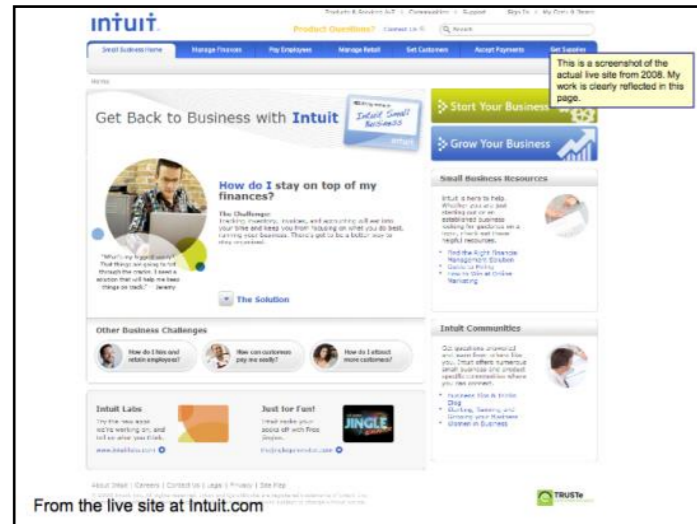
- Intuit.com redesign
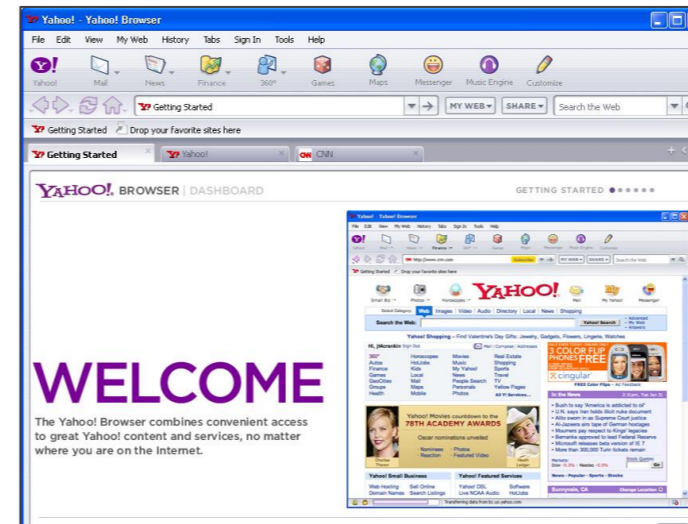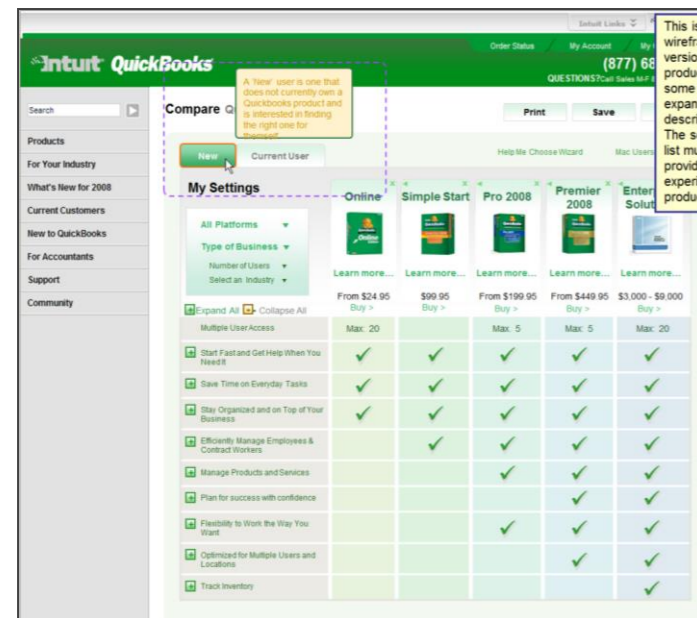
- Quickbooks Product Chooser
- Quickbooks Online
- Intuit Mortgages

- Yahoo! Social Browser
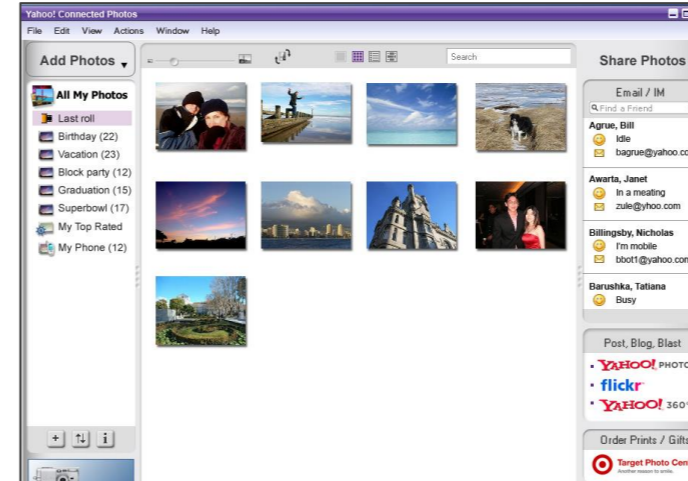
- Yahoo! Photos
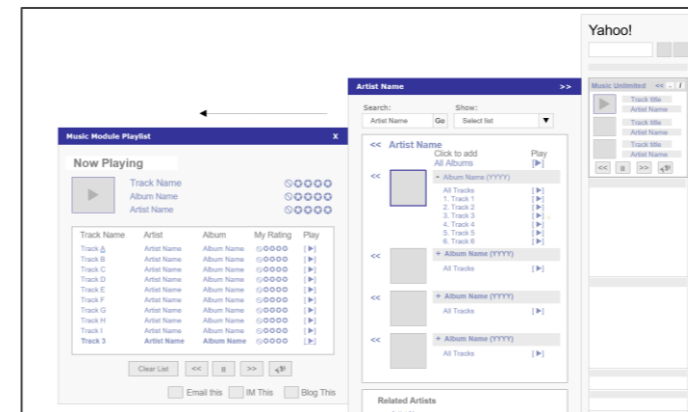
- Yahoo! Sidebar

Apple Sales Force Automation

At Apple I helped design a tool for the VP of iPhone/iPad sales and his sales force to manage large account sales and the overall sales lifecycle and process.

In researching this project, I went onsite to Apple stores and conducted contextual inquiries with the Business Sales team.

Apple Sales Force Automation

The team could make custom reports that spoke to trends and analysis of the sales cycle.

Media Manager

I designed an internal tool for DreamWorks called Media Manager to allow animators and directors to manage the flow of daily animation sequences as movies are being crafted.
Media Manager is an interactive platform with large clip object sets.

Sales Cloud Opportunity Modernization

I redesigned the Overview page for Sales Opportunities to be richer, more actionable (you can now create notes, send emails etc.) and more structured visually with more curb appeal.

END OF PRESENTATION