Kevin Kell, M.A.

User Experience Architect

- B2B Enterprise Apps
- SaaS Cloud
- B2C Web Applications

Sections

- Introduction
- UX Design Philosophy and Process
- Portfolio Highlights
- Case Studies

About me

- Masters in Social Psychology
  - Emphasis on HCI and Social Computing (Internationally published, 9 citations)
- Over 20 years of experience as a UI Designer
  - Started out as a usability engineer at CompuServe
  - Moved to the Bay Area, started UX at Marimba, a pioneering Java startup
  - Ran a successful consulting practice for 12 years (DreamWorks, Intuit, NetApp, and Yahoo)
- Worked on large projects with Cisco and Apple
  - Cisco Quad, earlier worked on redesign of Cisco.com, Learning area
  - Apple SFA
- Started a UX practice at Badgeville, an enterprise Gamification startup
- 5 ½ Years at Oracle as a User Experience Architect

About me

- UX Architect specializing in B2B/SaaS/Cloud Enterprise domains with substantial experience in Consumer Web Applications
- Recently at Oracle, Inc. as a User Experience architect who brings a consumer aesthetic to enterprise software - SaaS Platforms with AI, and Sales & Service cloud applications
- Finishing up an engagement with Cleo, Inc. a cloud integration platform

Practice Areas at Oracle

- CX/CRM space: SaaS Sales Cloud & Service Cloud
  - *In this age, the only source of competitive advantage is the one that can survive technology-fueled disruption: an obsession with customer experience* - Amanda Ciccatelli (Customers 1st)
- My Oracle Support - $20 billion in revenue/year – redesigned the main tool for Oracle support engineers
- Engagement Cloud (Service)
  - Omnichannel (Messaging, Chat, Phone), Notifications, Data Security, Customer Verification, Knowledge Management, Customer Management Dashboard
- Engagement Cloud (Sales) - Field Sales

What Others Say

Corinne Wayshak
Principal UX Designer, Strategist, and CXO
September 15, 2012,
Corinne managed Kevin directly

Kevin was a key player for my team and our entire UX group. He always offered solutions and perspectives that earned him enormous respect which, in turn, reflected well on our group. Any group that gets a chance to work with him will be happy they did!

Barry Shimelfarb
Design Advisor and UX Leader
January 4, 2011,
Barry managed Kevin directly

Not only is he an exceptional interaction designer, but his collaborative personal style, abundant energy, excellent presentation skills, and grace under pressure make him a truly unique talent.

Satwinder Mangat
President, ALLDATA
October 5, 2009,
Satwinder managed Kevin directly

Kevin's designs are elegant, well thought out, and yield solutions that are easy for users to understand. In addition, he is a pleasure to work with. I highly recommend him!

About Kevin

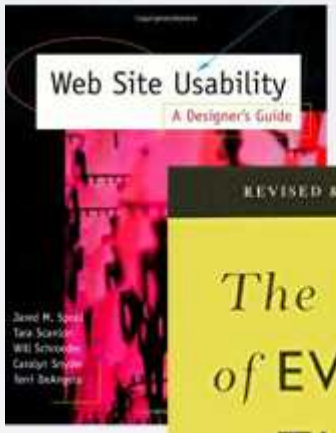
Hiking

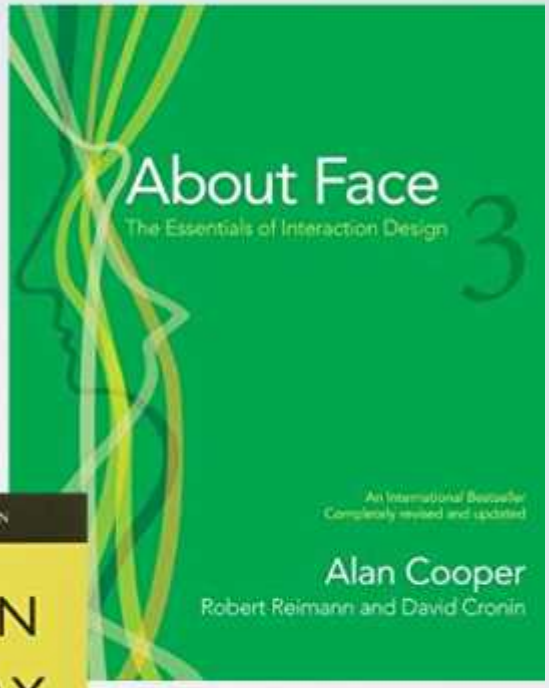
Music

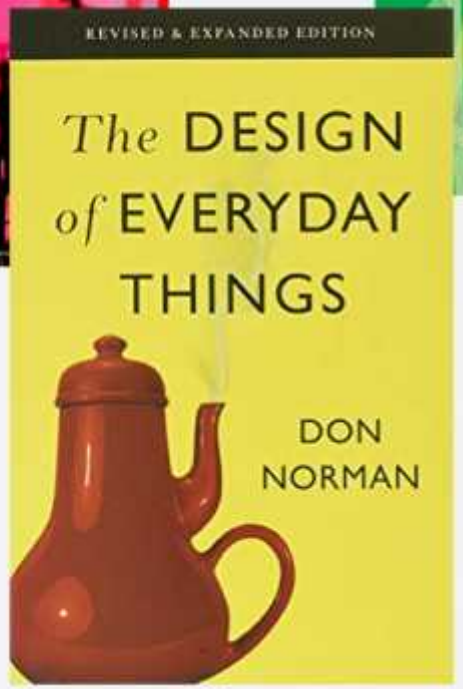
Volunteering

Influences

- Jakob Nielsen
- Alan Cooper
- Jared Spool
- Dana Chisnell
- Don Norman
- Tim Brown







Philosophy

It’s all about the user.

See what I did there?

User-Centric Experiences deepen the Customer Relationship

Effective experiences → Higher satisfaction → More customer spend

Guiding Principles

- Show the data, interaction is secondary; don't make me interact to get it
- Pleasure, Flow, Meaning
  - **Pleasure**: "THANK YOU! PLEASE TELL NONE OF YOUR FRIENDS ABOUT THE GREAT STUFF YOU BOUGHT, WE ARE TRYING TO KEEP MOOSEJAW A SECRET."
  - **Flow**: Remove steps that computers can do just fine. Removing unnecessary steps improves the flow of the design
  - Meaning begets passion or a deep pride in being an active customer of a business - because they make a solid product and deliver great service
- Design thinking converts need into demand
  - Create something that improves people's lives which can realistically be accomplished but makes good business sense
- Plan the experience first, the system comes later
  - What does the user care about?
  - What are the user's problems?
  - Articulate what the user's goals are
- Understand the shape of the data

Guiding Principles

- Minimalism

"*Perfection is achieved, not when there is nothing more to add, but when there is nothing left to take away.*"

The message is clearly spelled out and the screen is void of unnecessary clutter

Tips: Be severe when deciding what stays and what goes.

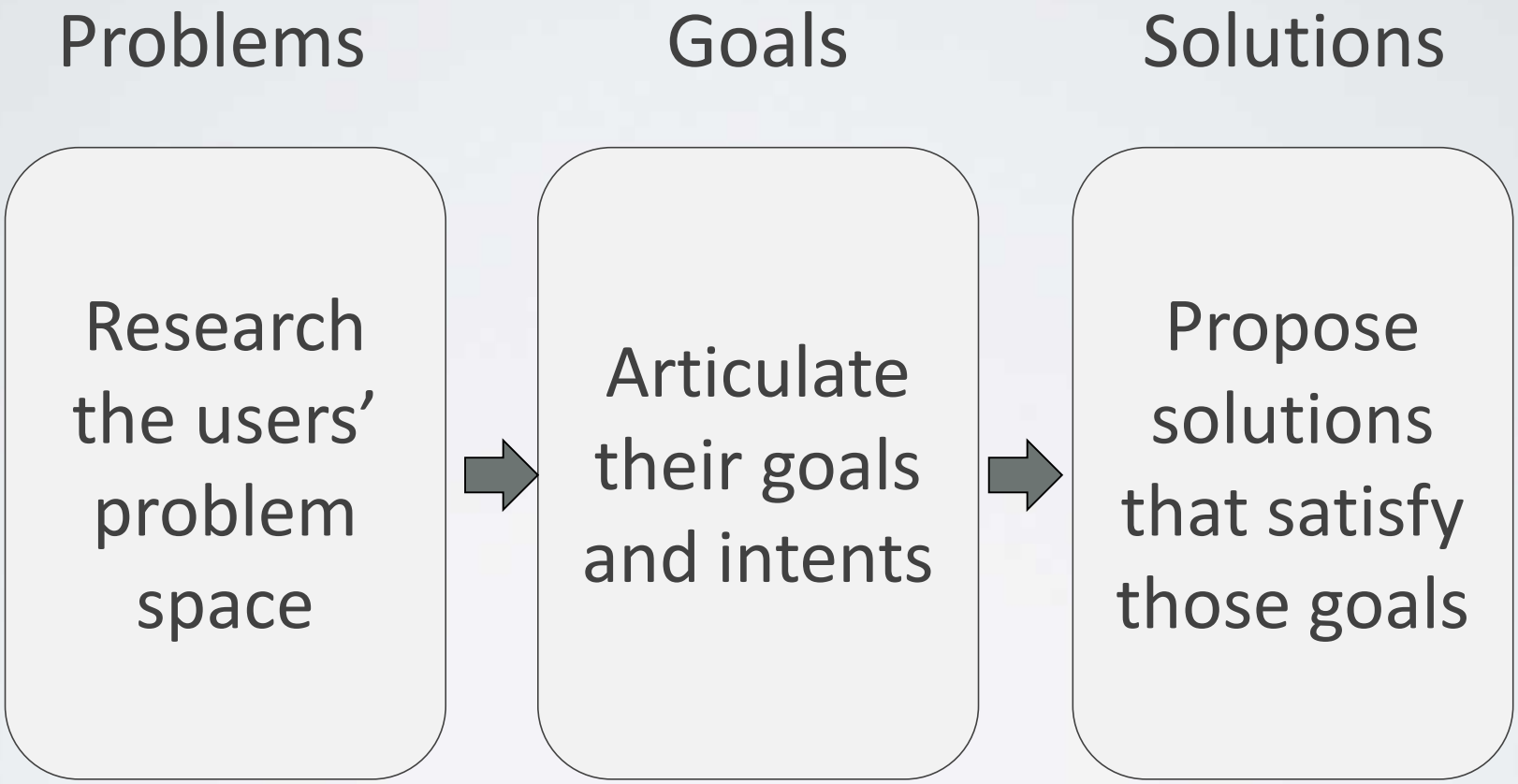
Simplify
Color Scheme

Create a Single Focal Point per Screen

Content is king, and visual layout salutes the king

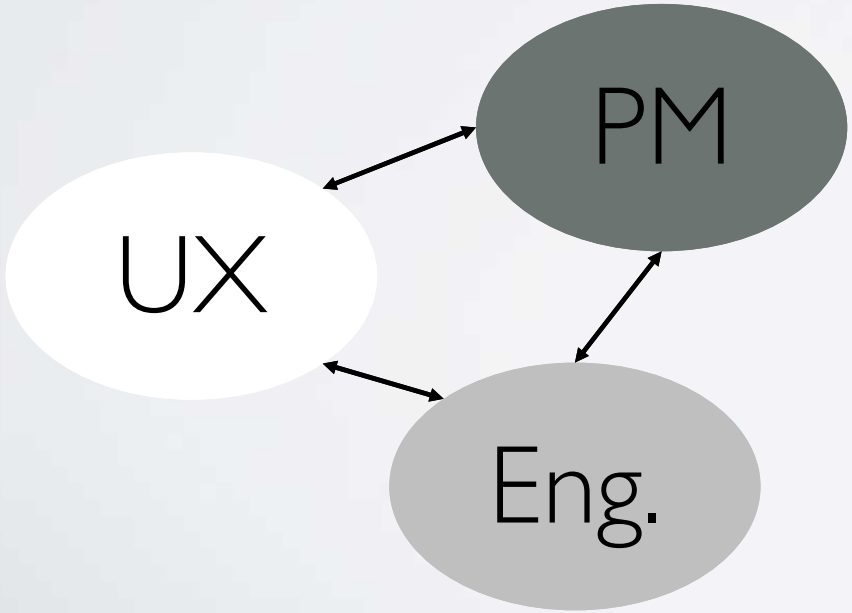
Use Generous Whitespace

Experience Components



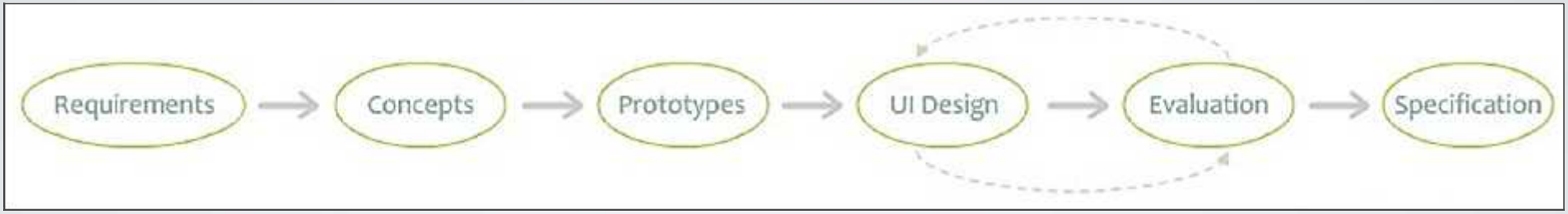
High-Level Process

- Research and understand your users and their needs
- Model users' work, problems, and flow
- Concepts to address the model
- Create solutions that flesh out the concepts
- Test it with users, do a specification after validation
- Create a working version



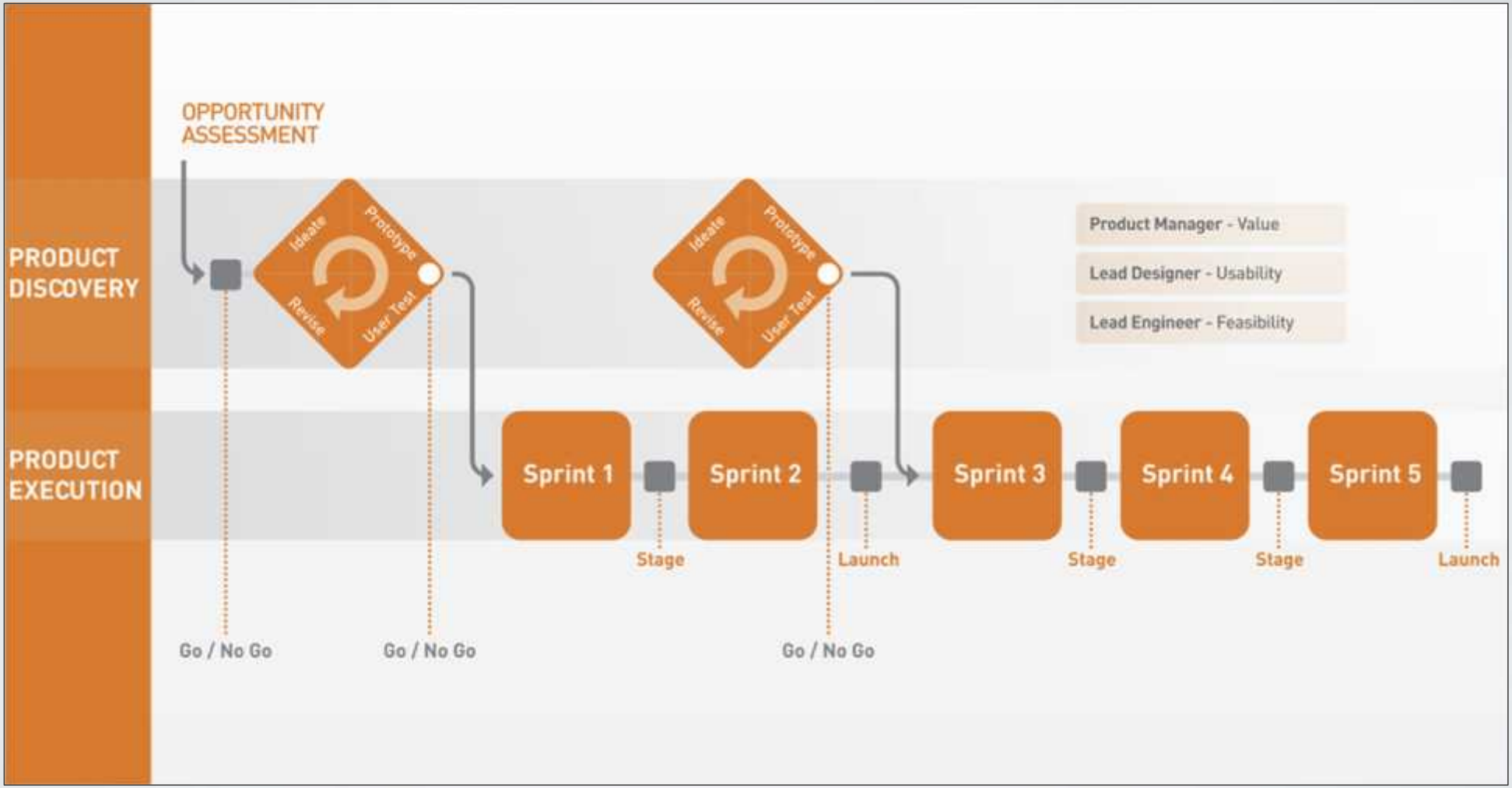
- The product development system is interdependent, and UX must work directly with each practice area
- UX works with PM to define requirements and visualize product concept
- UX works with Eng to get concept and designs implemented according to the original vision

Typical Steps in a UX Process



- Researching **requirements** is your primary information-gathering step
- **Concepts** are visual renderings of ideas and vision for the product that begin to translate the problems and user needs
- **Prototypes** are flow and navigation-driven user interface proposals and are used for general communication
- **UI Design** is the detailed design step that produces detailed wireframes
- **Evaluate** your prototypes, react to the feedback by iterating
- Create a **specification** that you can give to Development

UX in an AGILE World



Tools

- Sketch (patterns, UI toolkit, designs)

- Jira (bugs, user stories, etc.)
  +Kanban

- Confluence (specs)

- Invision (prototypes)

- AGILE / Scrums

User Scenarios and Signature Moments

★ 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.

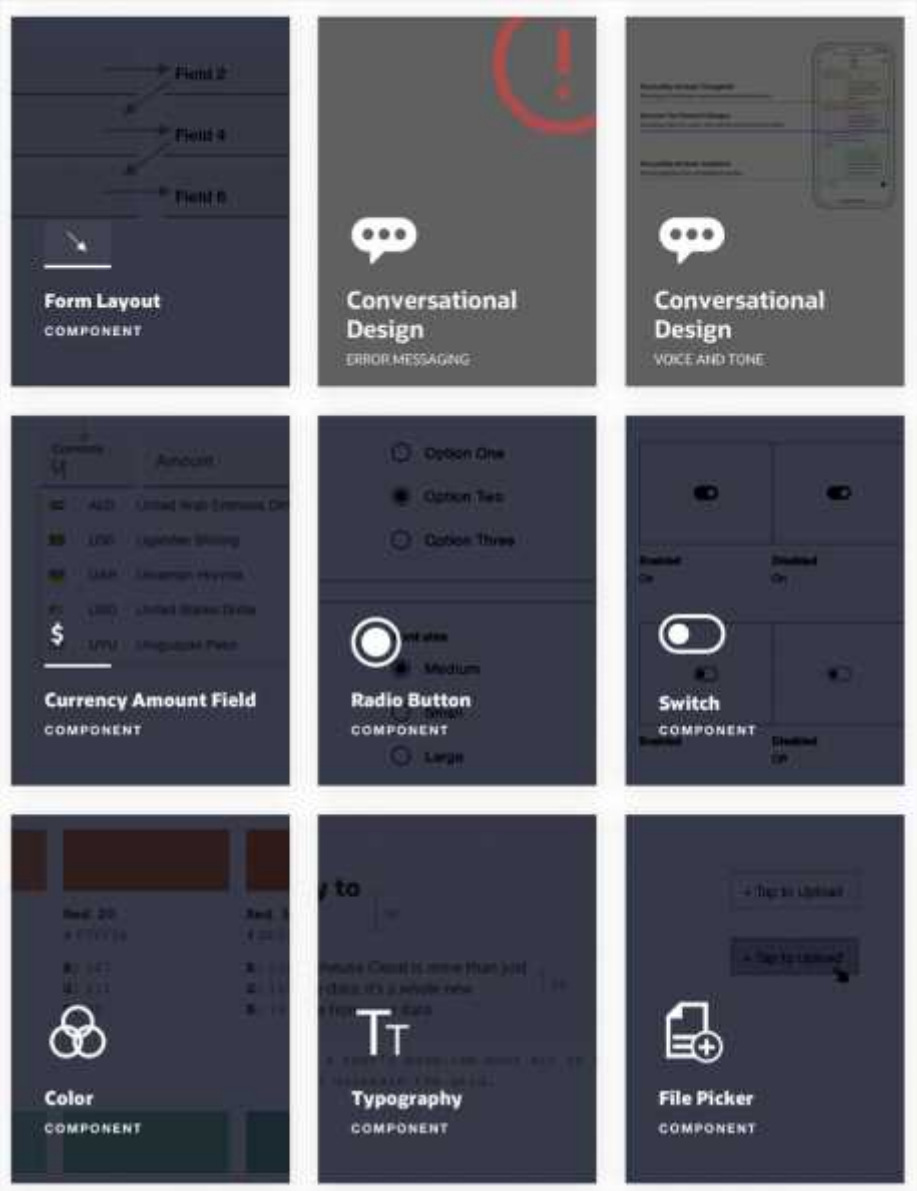
Signature moments

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.

Pattern Libraries - Components



Career

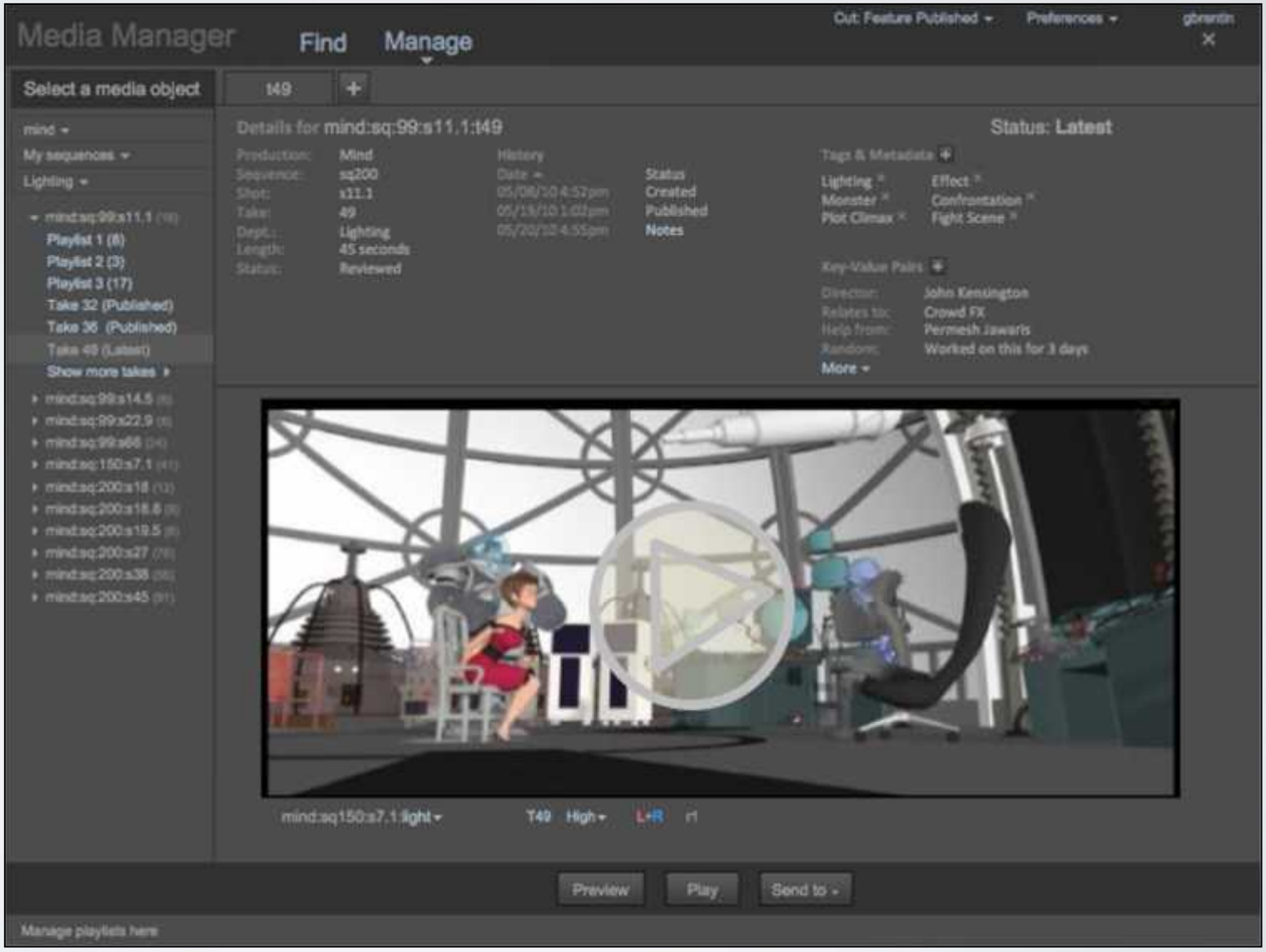
Employers

Consulting

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.



Quad/WebEx Social

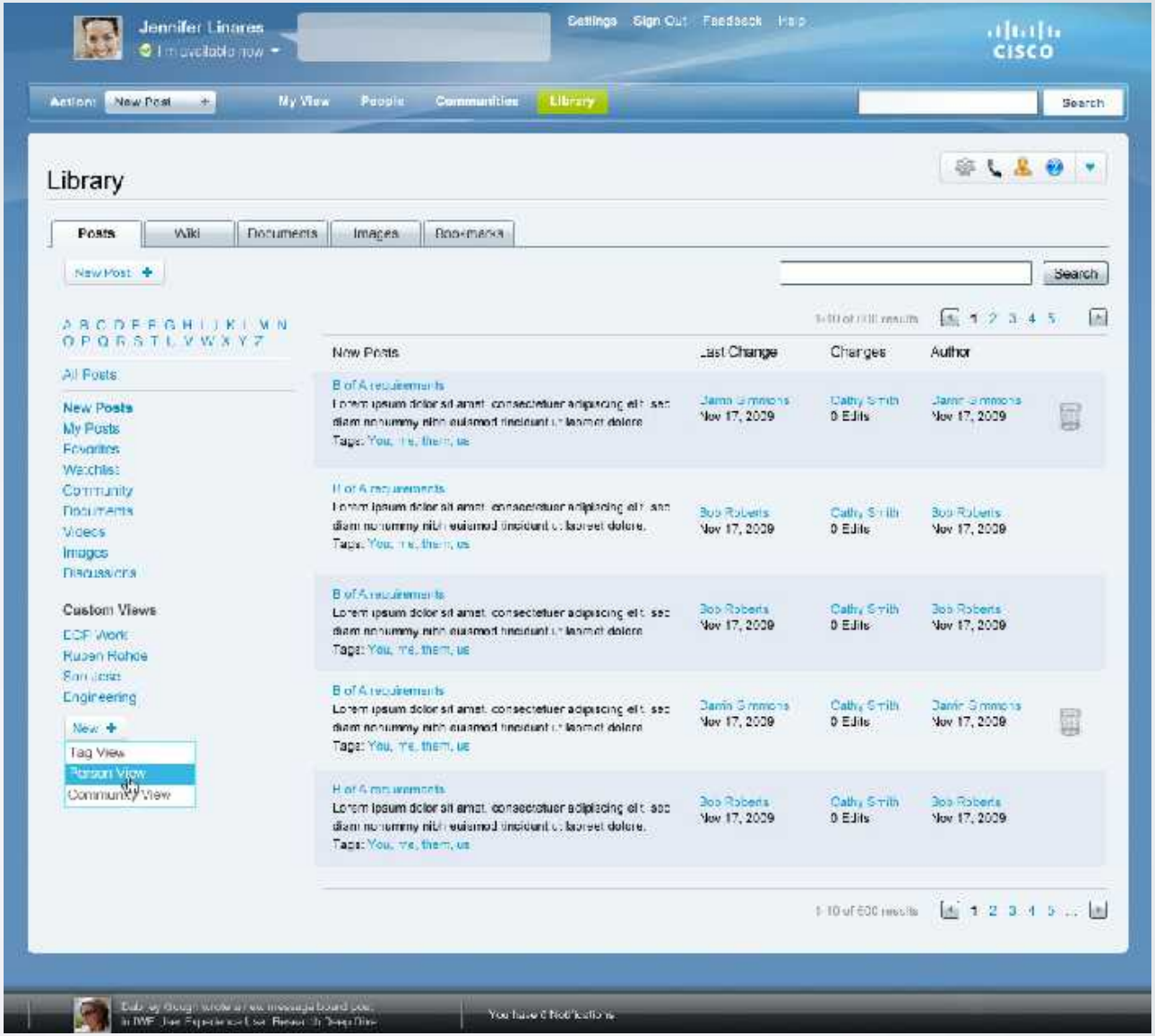
For Cisco, I served as a lead UX designer on their premier collaboration / social networking tool now called WebEx Social. I managed the design for the Content Management area as well as Administration.

Quad/WebEx Social

This is a closeup of one of the content detail pages that shows users posting data and collaborating on the wiki.

Quad/WebEx Social

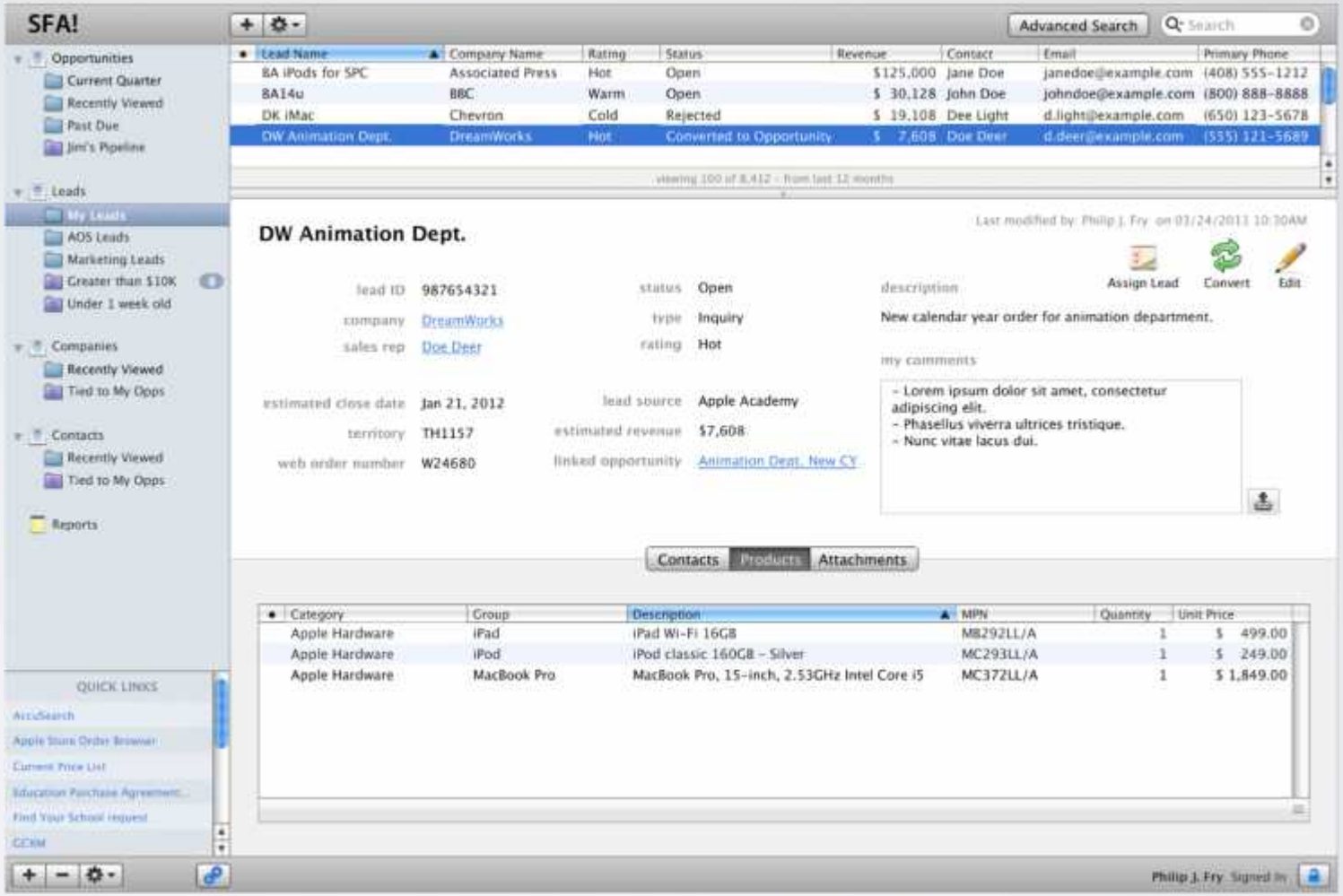
The Library was the centralized content management area. Users could find content from across the system here.



Sales Force Automation

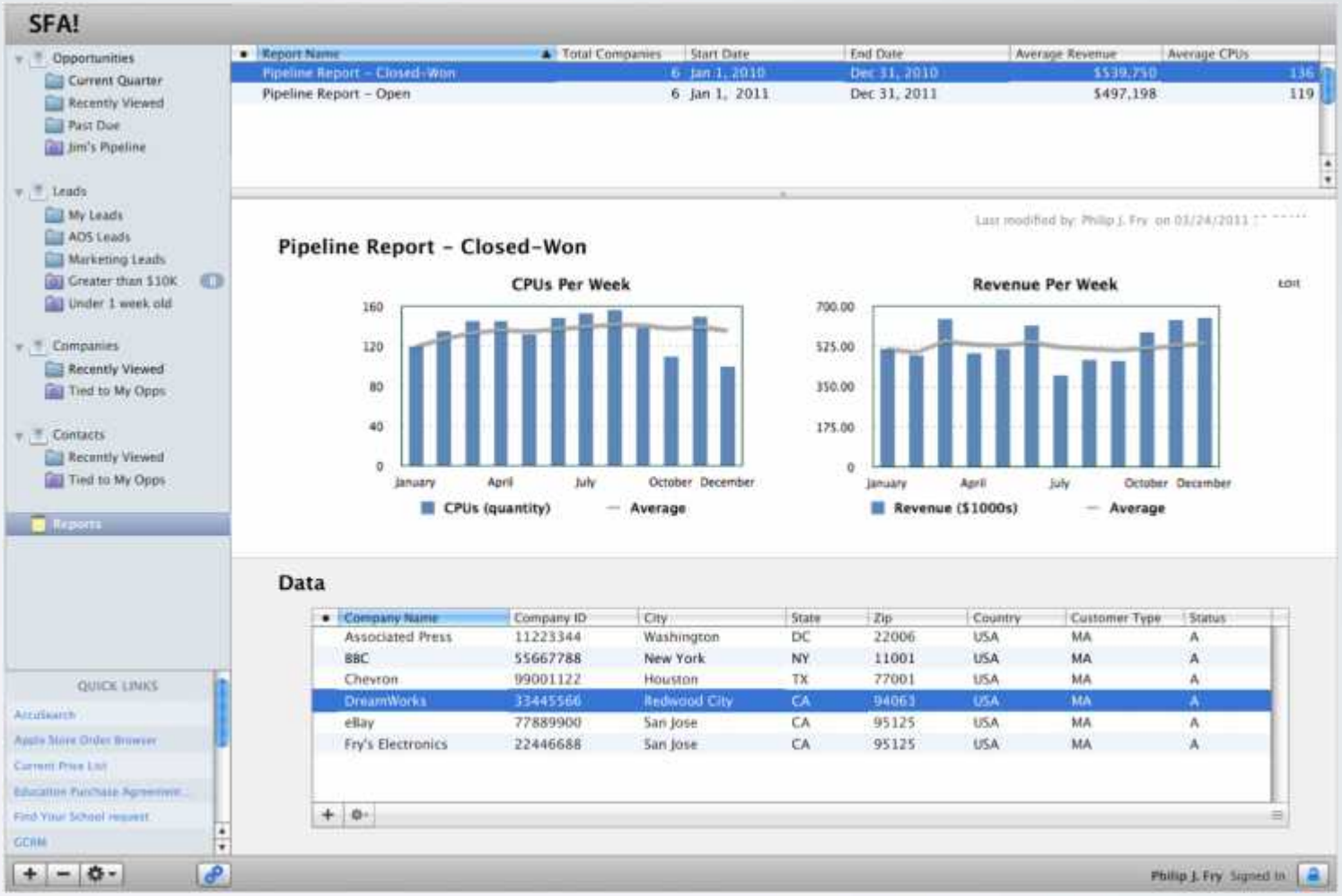
At Apple I helped design a tool for the VP of iPhone/iPad sales and his sales force to manage large account sales and the overall sales lifecycle and process.

As part of researching this project, we went onsite to Apple stores to talk with the Business Sales teams and conduct contextual inquiries.



Sales Force Automation

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



Kazeon Information Controller

Project

Kazeon is a network appliance that helps manage unstructured data for applications such as legal discovery and de-duping. This project redesigned the web UI.

Persona

Storage administrator

Problem

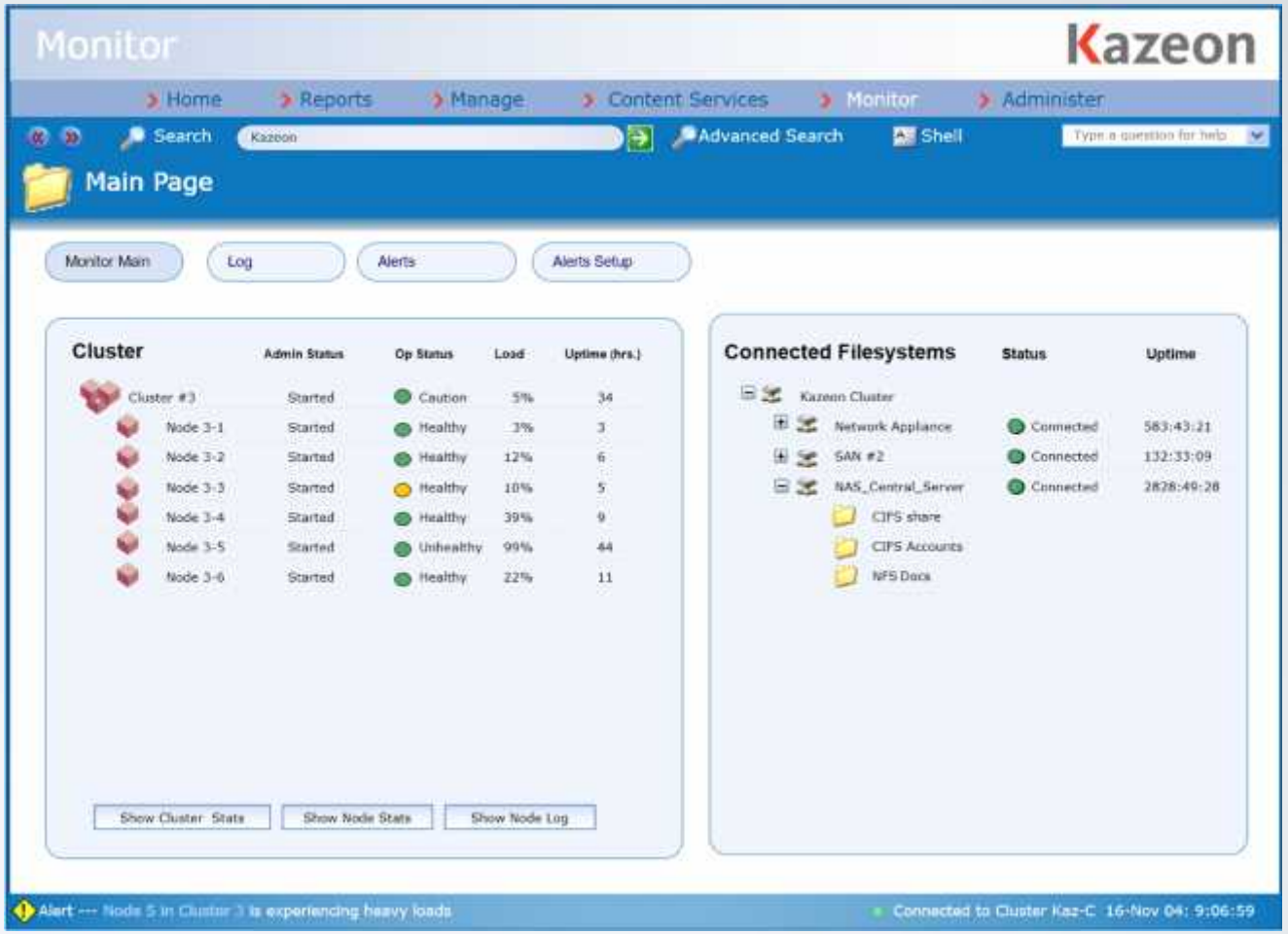
Administrators need to get a lot of functionality, monitor networks and hardware, and perform tasks on the storage systems in addition to catching exceptions and monitoring the health of the systems

Goal

To quickly move from one task to another, and understand when intervention is necessary

Solution

A full-fledged web management UI that's very easy to get around and configure.



Kazeon Information Controller

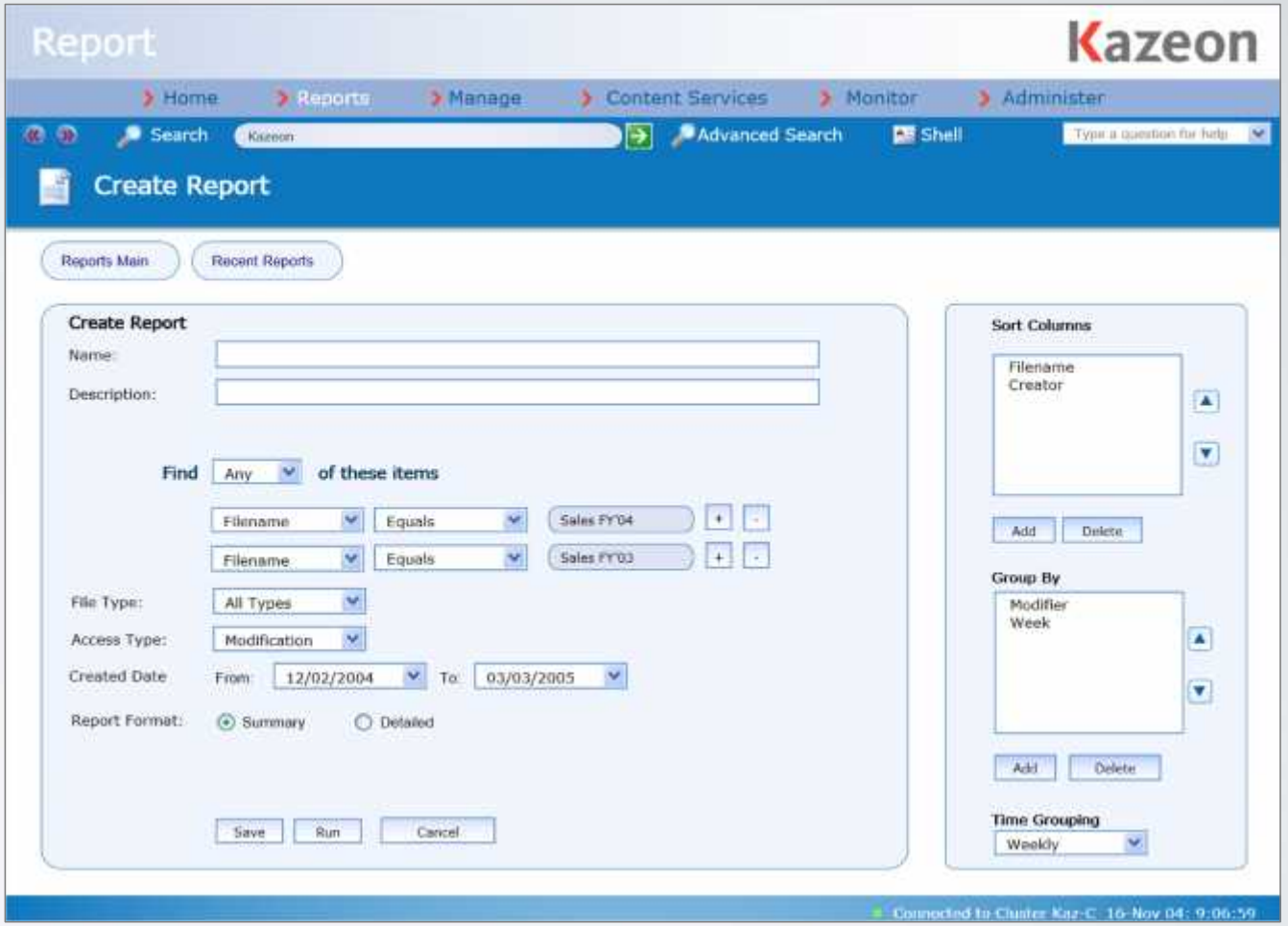
Solution

Mount and manage connected filesystems.

Kazeon Information Controller

Solution

Keep track of the resources on the system by creating reports.



eSilicon SCM Web Before

Project

eSilicon had a dated and clunky data and visualization UI for managing semiconductor fabrication processes

Persona

SC Manager

Problem

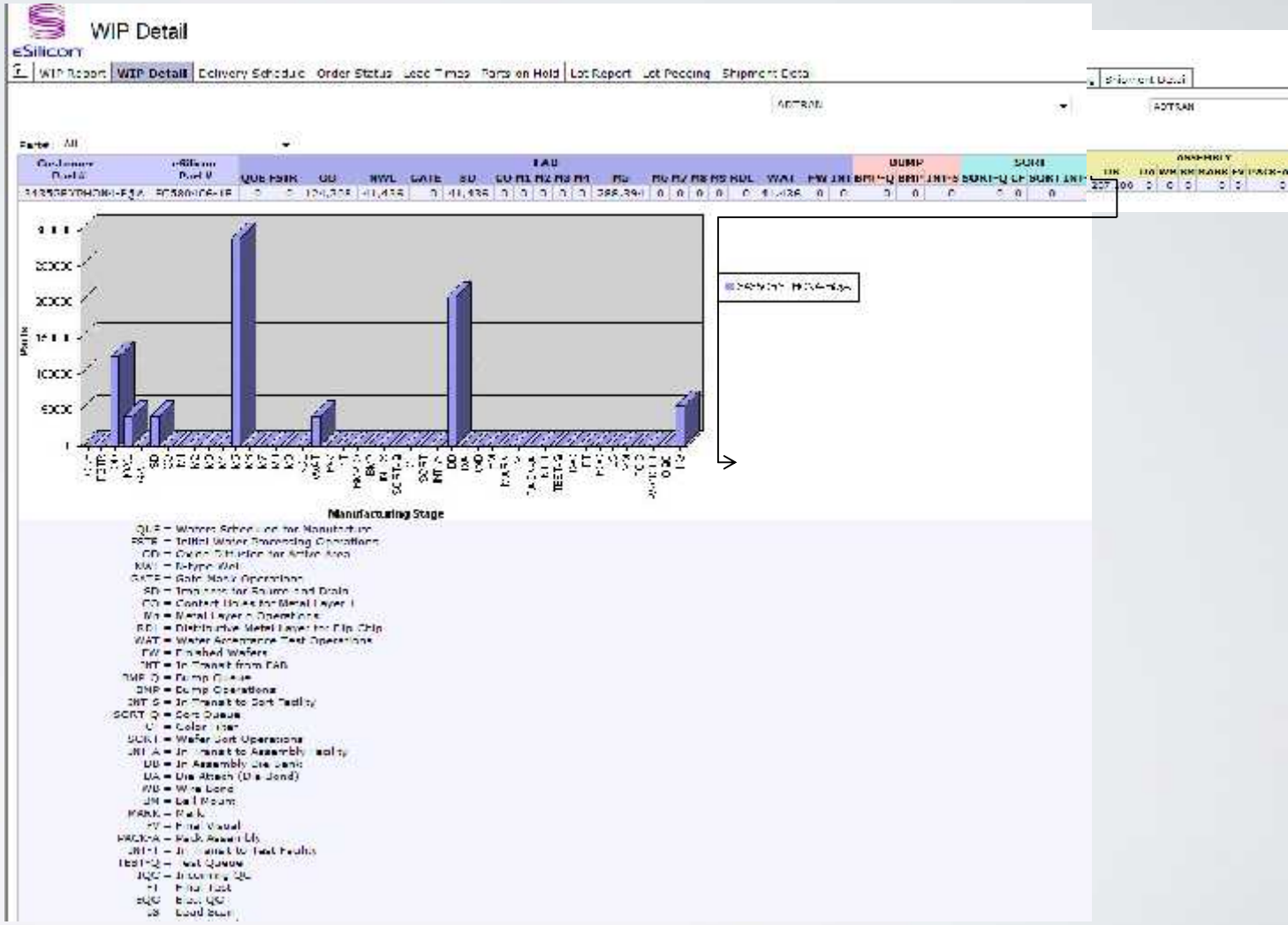
There are many stages in the fabrication process and lots of data points. Display becomes a tricky issue.

Goal

For the SC manager, they want to see where parts are throughout the manufacturing process, and if any exceptions occur.

Solution

Instead of having long horizontal tables, summarize the data so it's easily scannable.



eSilicon SCM Web After

Goal

For the SC manager, they want to see where parts are throughout the manufacturing process, and if any exceptions occur.

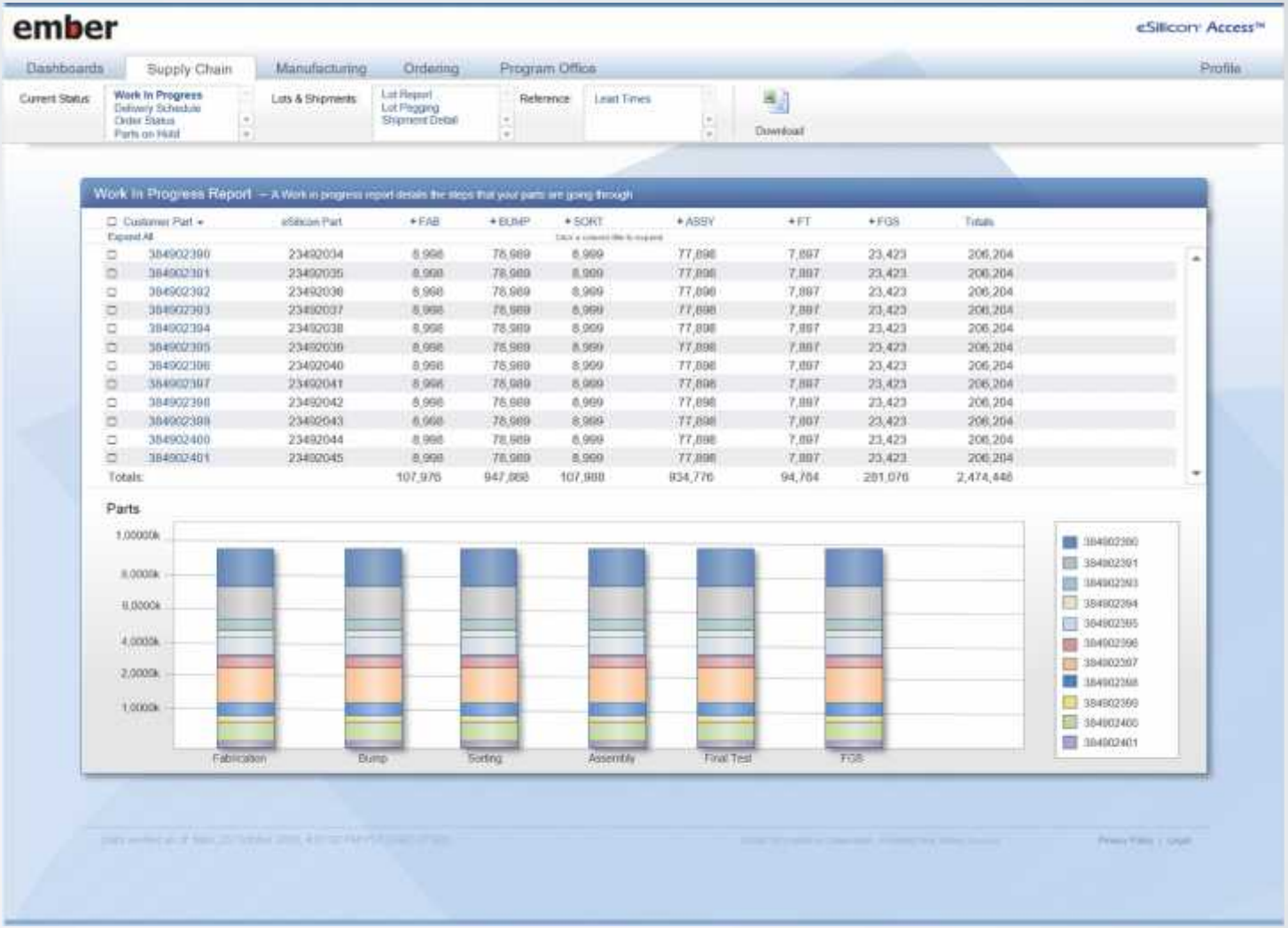
Solution

Instead of having long horizontal tables, summarize the data so it's easily scannable. Show reports in scalable lists at the top so navigation is substantially reduced.

WIP Report Closeup

Solution Continued

Notice the use of progressive disclosure to allow a useful overview that allows for quick acquisition of the overall process health and avoids horizontal scrolling until absolutely necessary.



Badgeville Gamification Platform

Project

I started the UX practice at Badgeville, reporting to the VP of Product Management. My main task was to rev the current 1.0 UI to a much more professional and easy to use 2.0 version

Persona

Gamification platform administrator

Problem

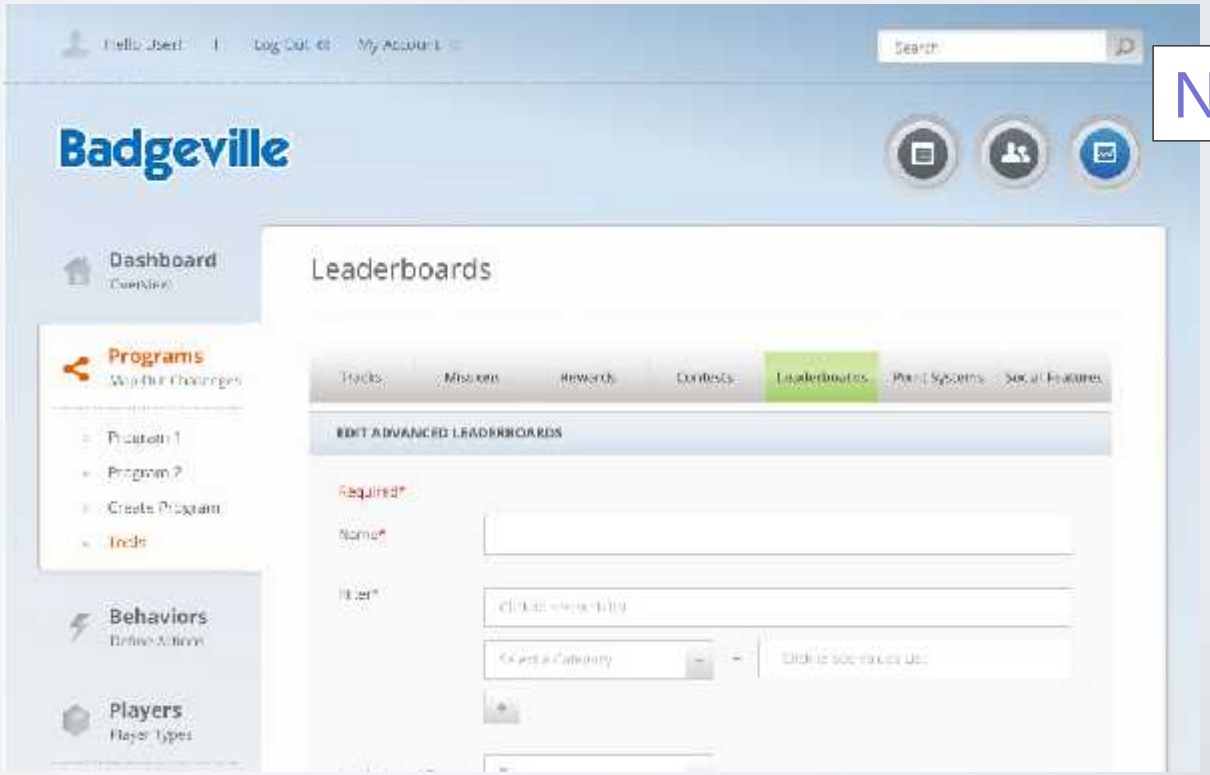
Setting up a system to track and incentivize behavior can be difficult

Goal

Add game mechanics (leaderboards, goals, badges, points, etc.) to my SaaS product or site.

Solution

An implementation and management-centric platform that clearly reflects the conceptual categories that users will work with on the system.



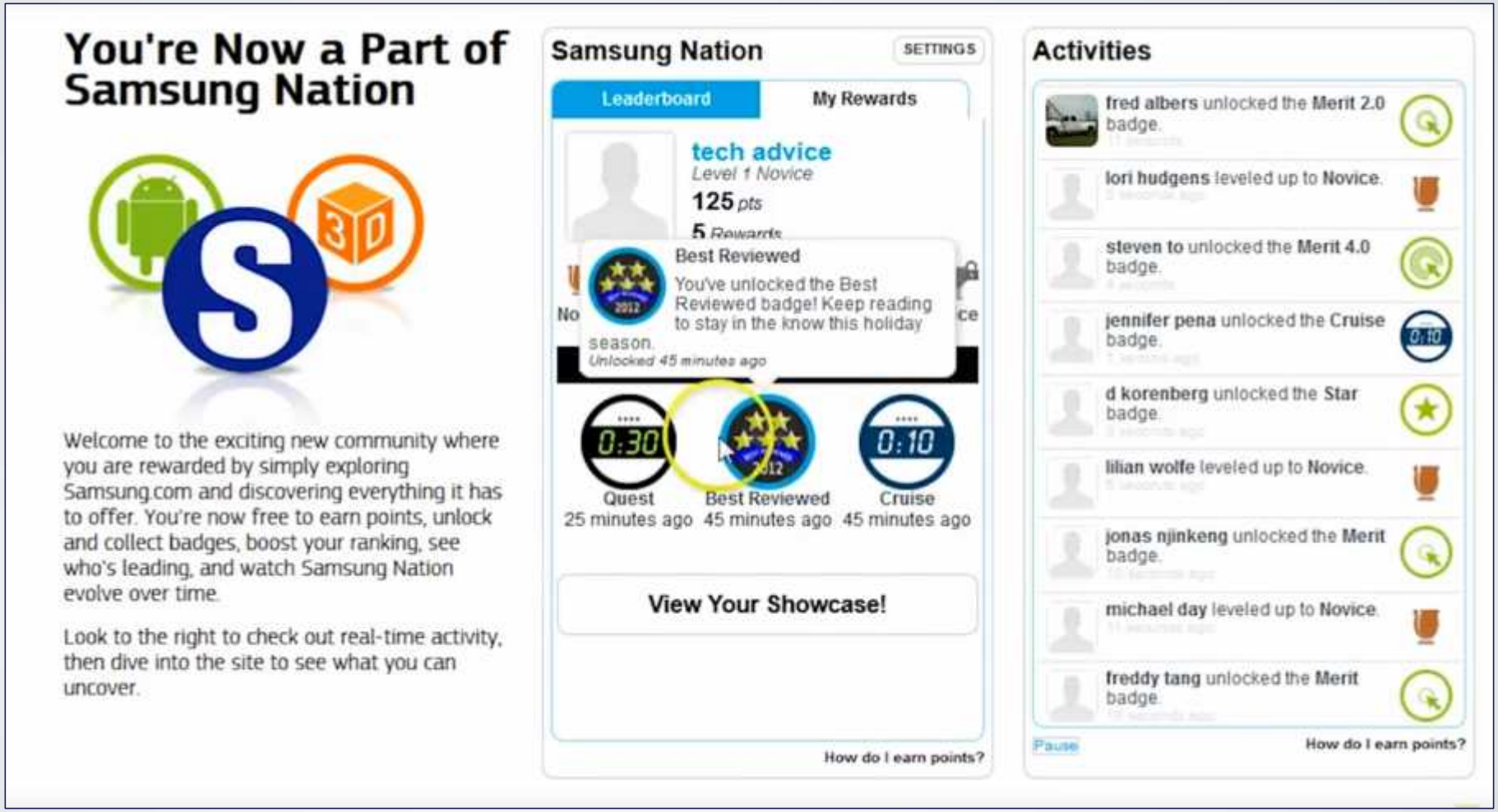
Badgeville Game Mechanics

Core

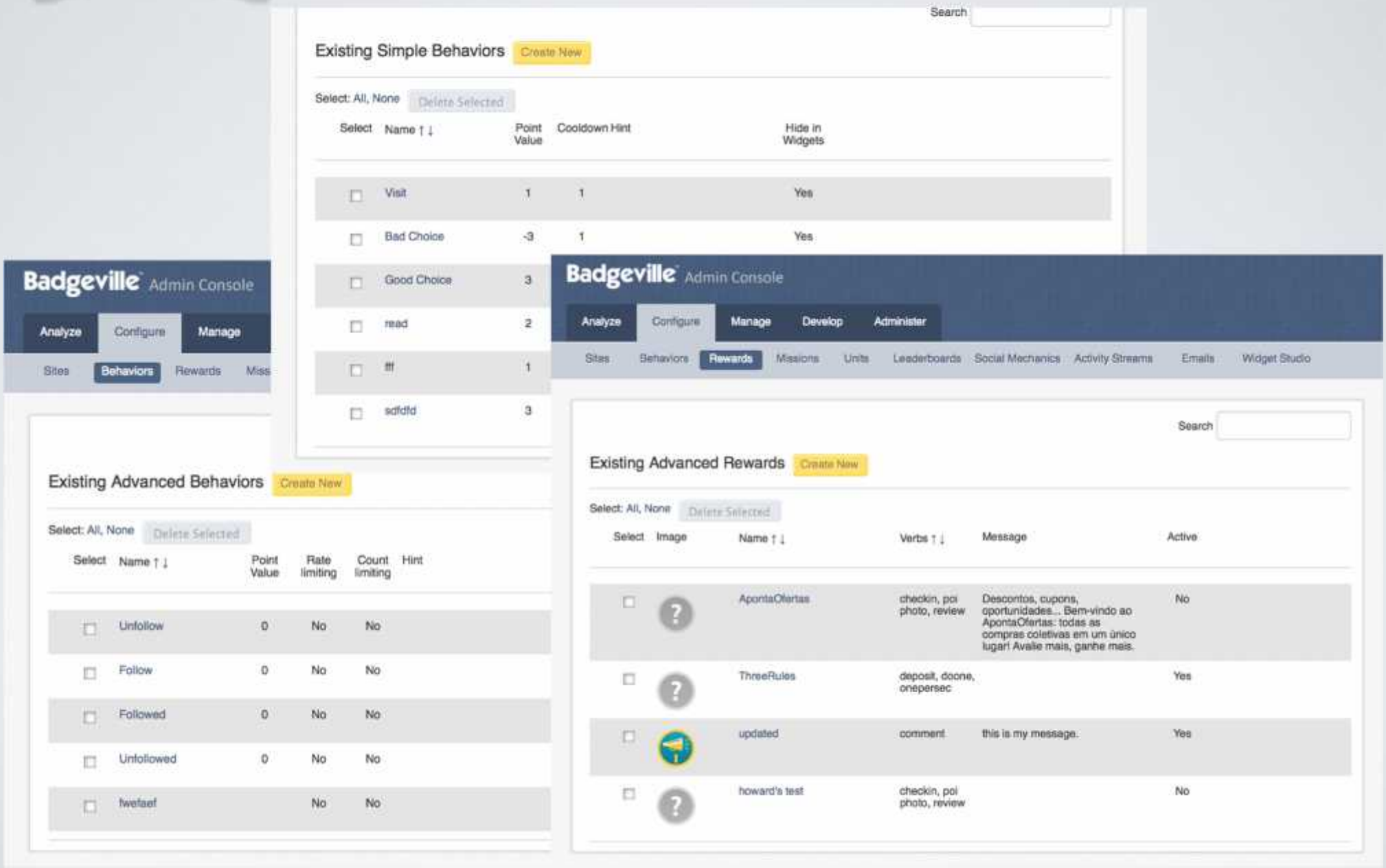
Behaviors score points
Non-repeatable Missions set goals
Collect Badges

Badgeville

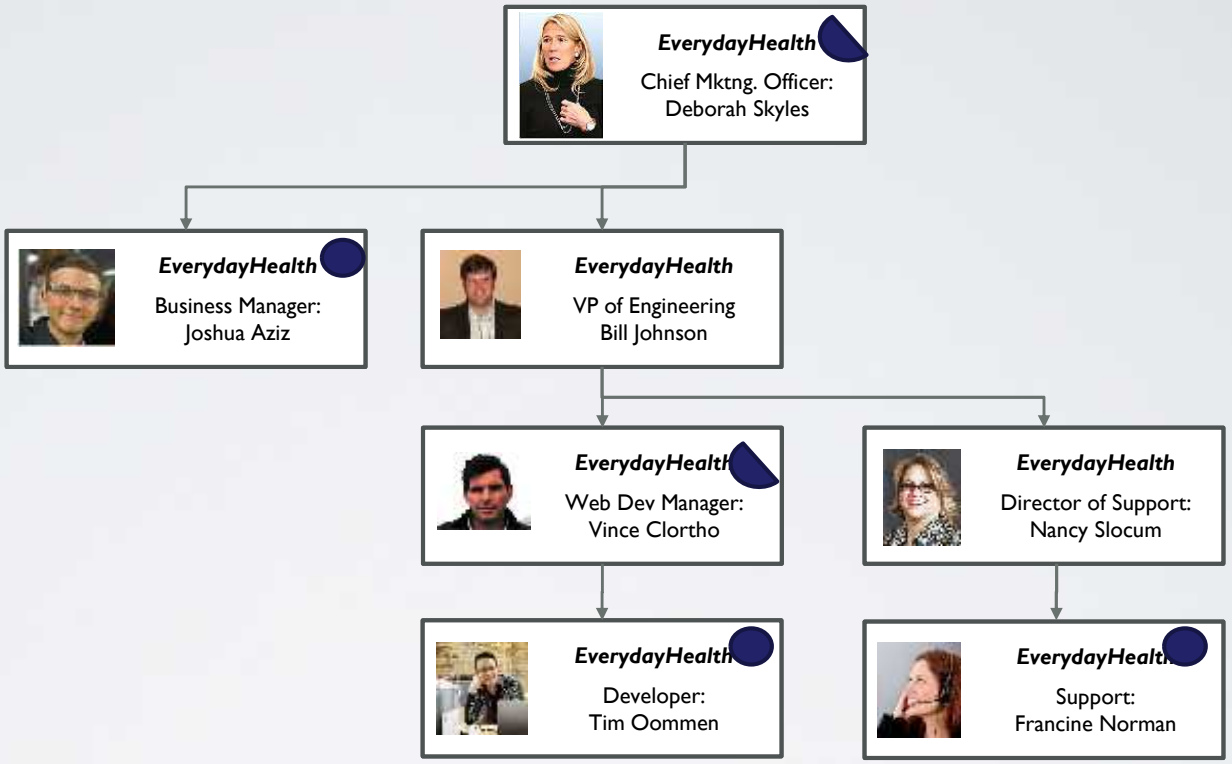
Badgeville Implementation



Badgeville Pre-Redesign



Persona Organization Chart



Main Users

Tangential Users

User Scenarios

Chief Mktng. Officer: Deborah Skyles

User Scenario

- 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 (High): Joshua Aziz

User Scenario

- Joshua needs a new campaign for Jillian Michaels' site. They want to increase retention and have to create a new site in the console.

Developer: Tim Oommen

User Scenario

- Tim gets tasked with making sure that new levels and missions are configured in the BV console. He needs to have them show up correctly on the targeted Web pages.

Support: Francine Norman

User Scenarios

- 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.

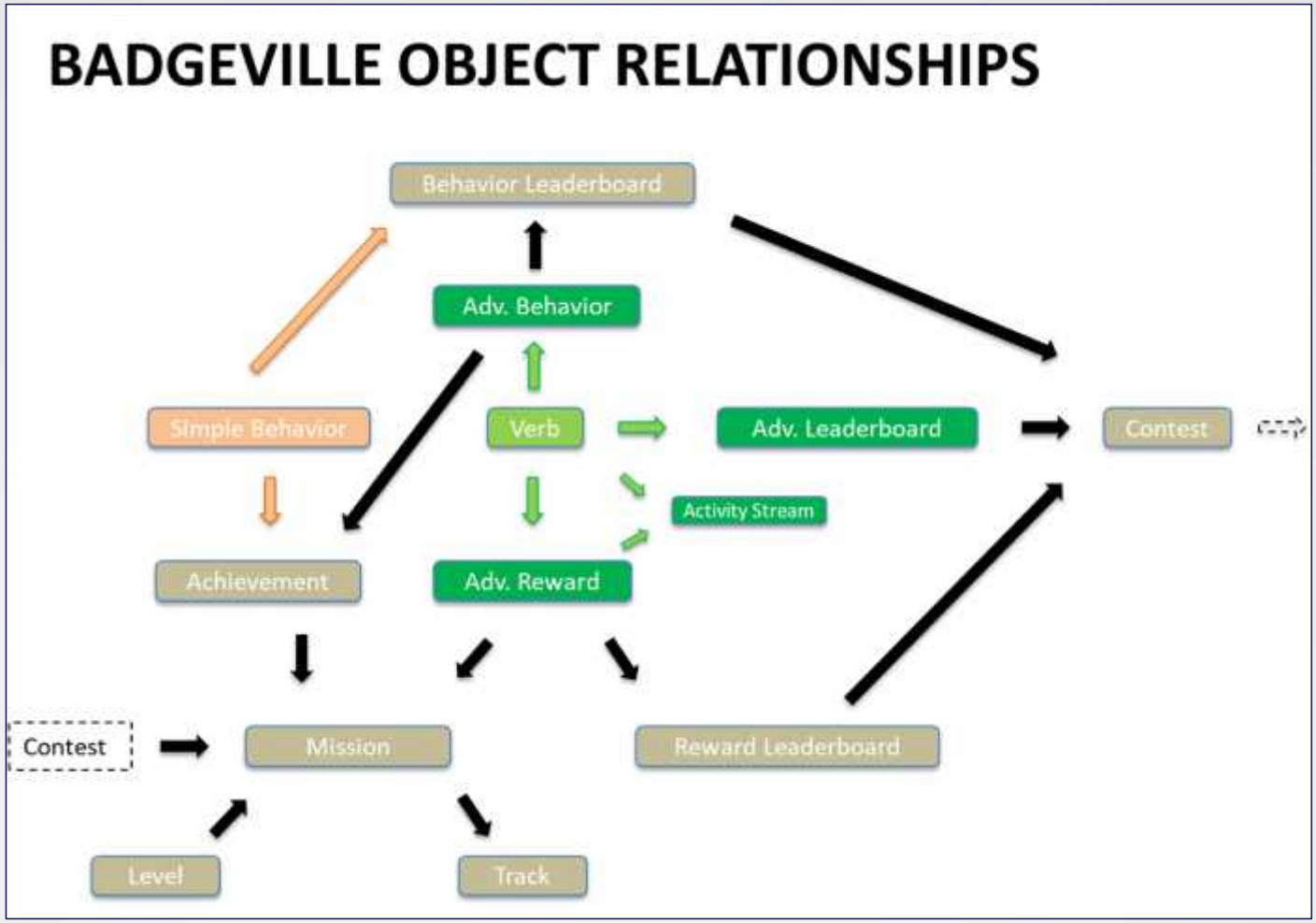
End User: Billie Jo Wilson

User Scenarios

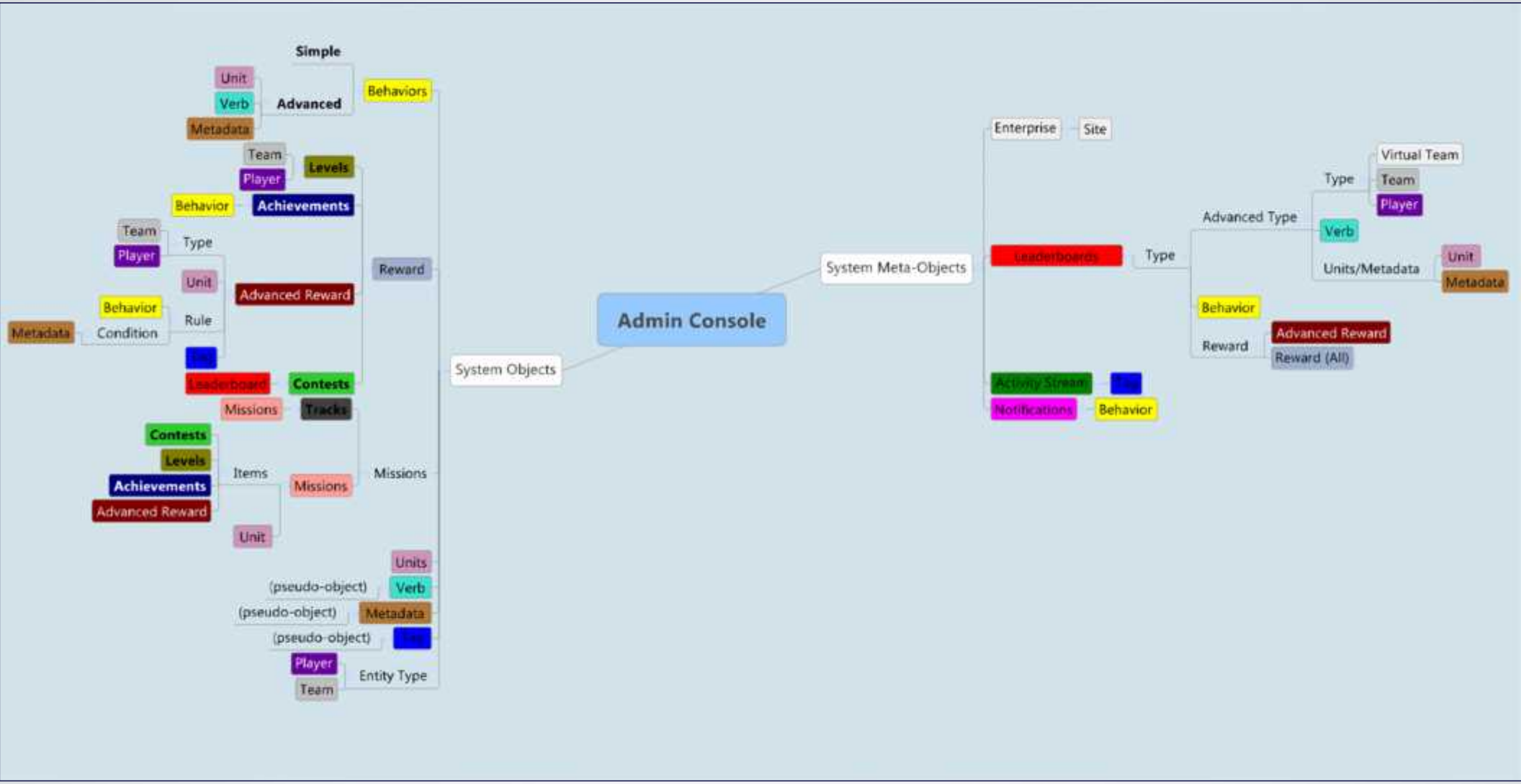
- Billie Jo knows is proud of her Super Shopper badge but it disappeared one day. Feeling annoyed, she called up customer support to ask for it back.

Developing Badgeville Personas

Analysis of System Objects



Mind-mapping Relationships



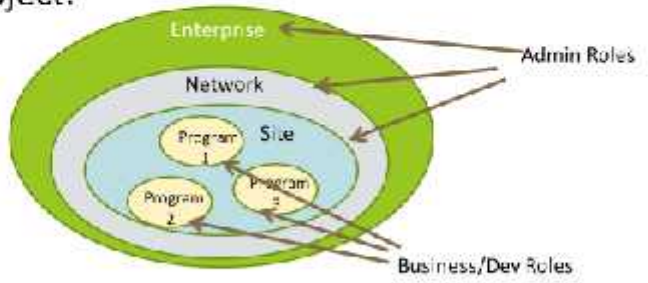
Redesign Proposal

Goals

- Increase self-service in the UI and lower Producer and Support costs
- Re-orient the product from a primarily developer platform to a design & management one.
- Radically improve the level of usability of the product
- Reduce the implementation time by lowering the learning curve and enhancing customers' quality of technical choices
- Create more customer success stories by building a UI that can capture customer goals and promote effective game design

Overall Plan

- Revise and simplify the list of objects according to company and customer feedback
- Re-architect the product for visibility and simplicity (new: Program object)
- Enterprise, Network, and Site are management objects whereas everything below is a design (game) object.



- The UI Rearchitecture is a long-term project and will need several releases to achieve its goals.

Redesign Proposal

Changes In-depth

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

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

3. Users can create Behaviors externally (Web page) along with Metadata and the system does not require pre-configuration via the UI.

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

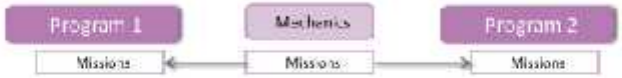
5. Deprecate Tags in favor of a single Metadata library (use Keys only in place of Tags)

6. Fix **Contest** object so that contest awards are not reset per individual.

Changes In-depth- 2

8. Create new object: **Programs**

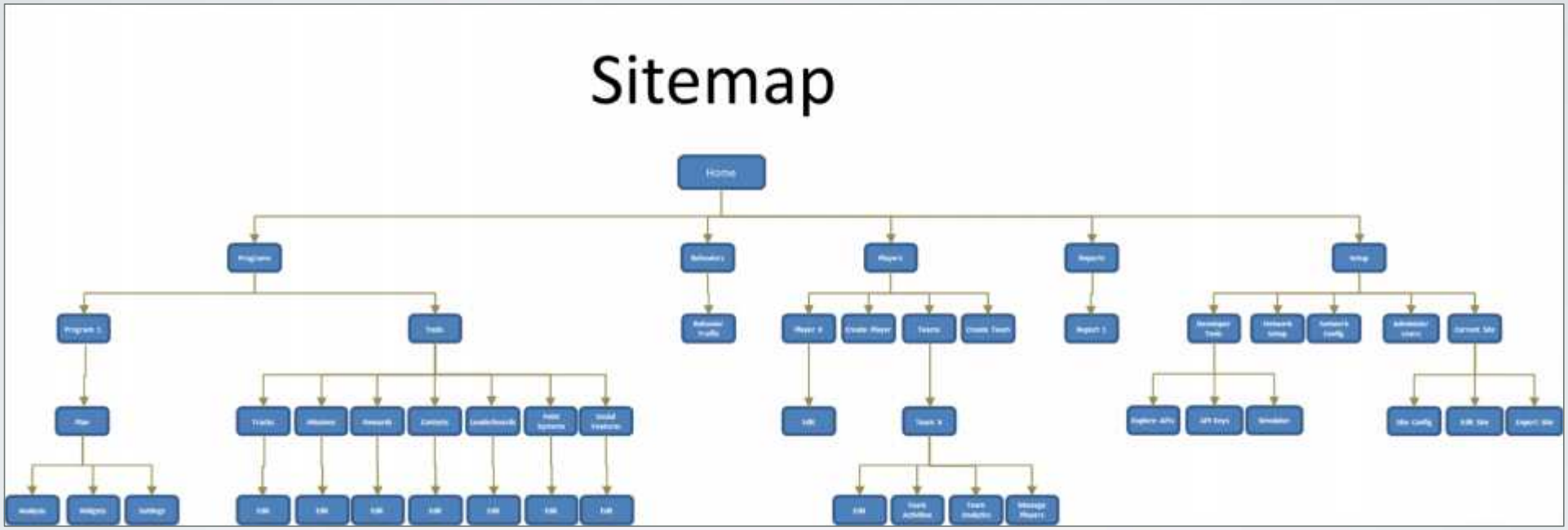
9. Architect the product so that programs can share and reuse common system objects



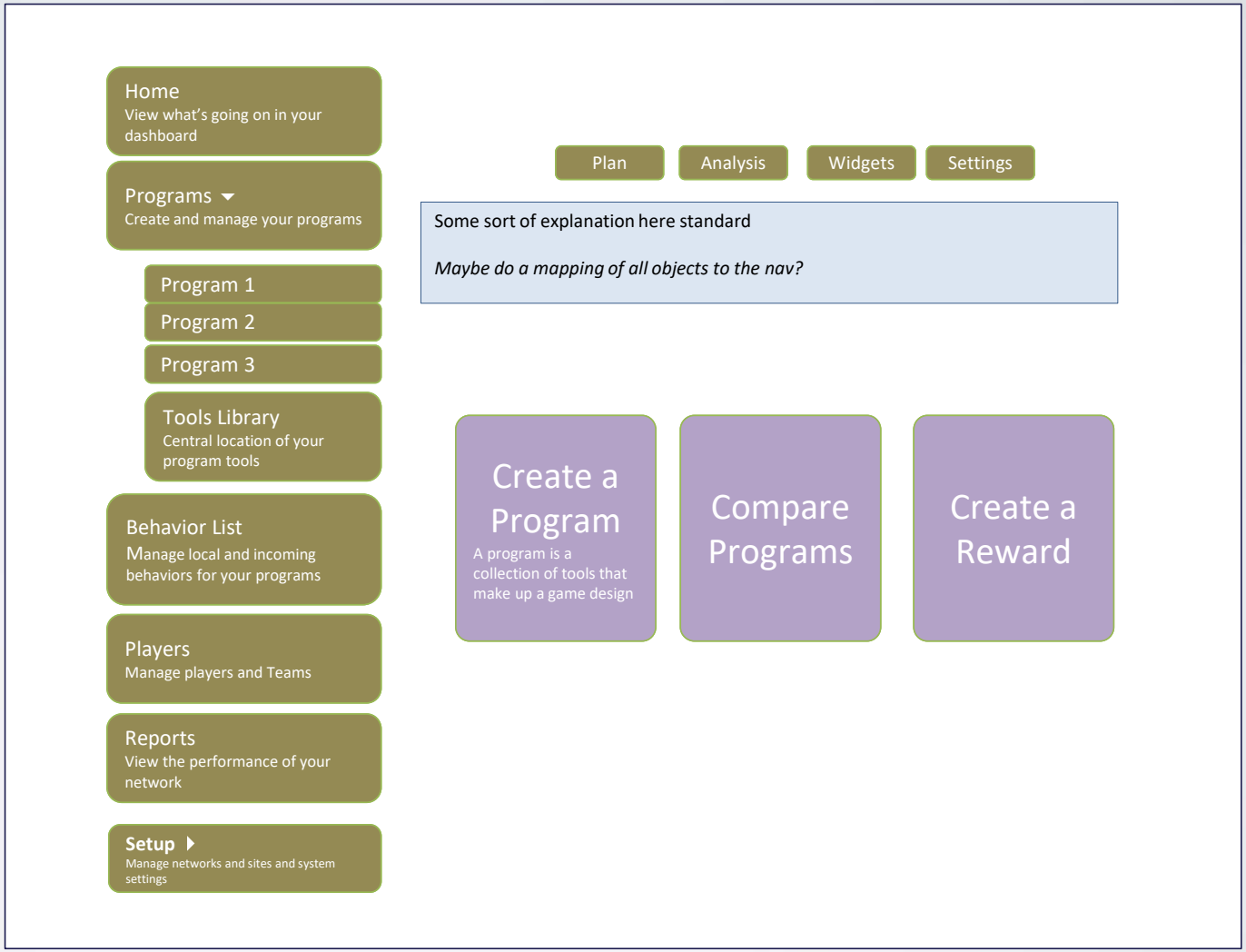
Core User Tasks

1. Design a game
    - Create/manage programs
        - Reuse a component
    - Set up the design
        - Build rewards (rewards or levels)
    - Monitor Program
2. See what behaviors have been performed
3. Understand how things are performing
    - Reports
4. Manage/Investigate players and teams
5. Setup networks and sites
    - Set up other things

New Information Architecture

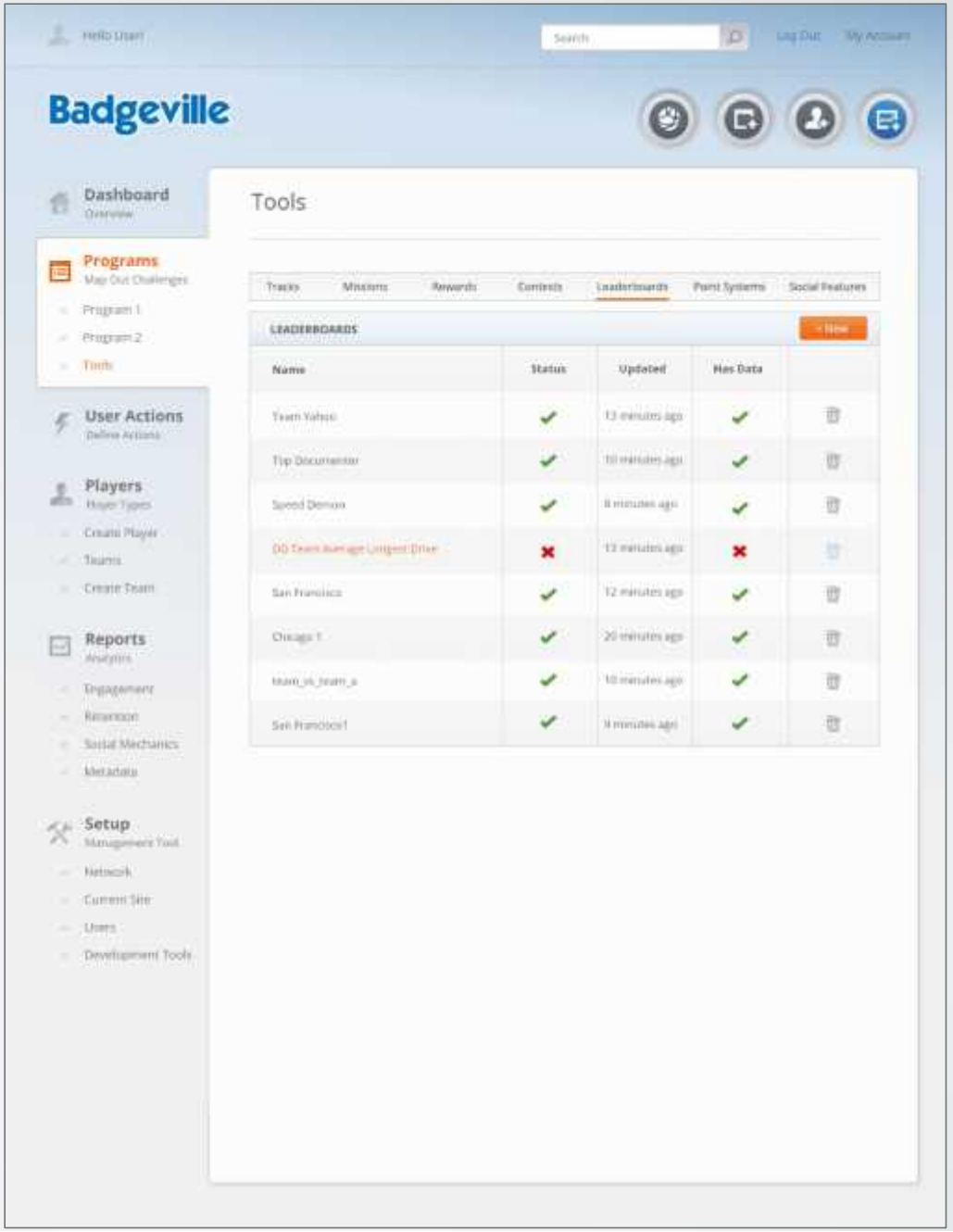


High-Level Navigation Model



Badgeville
The Behavior Platform

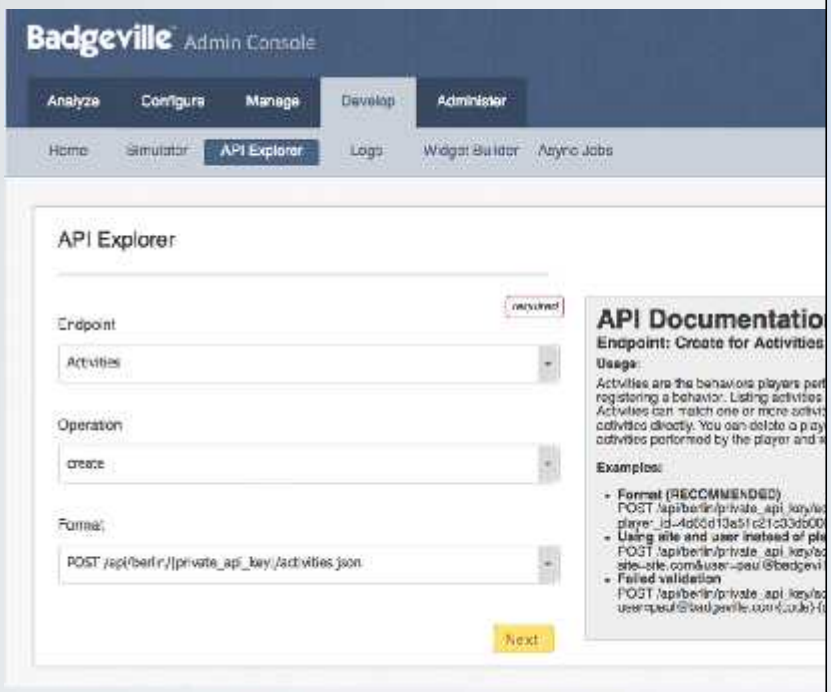
High Fidelity Mockup

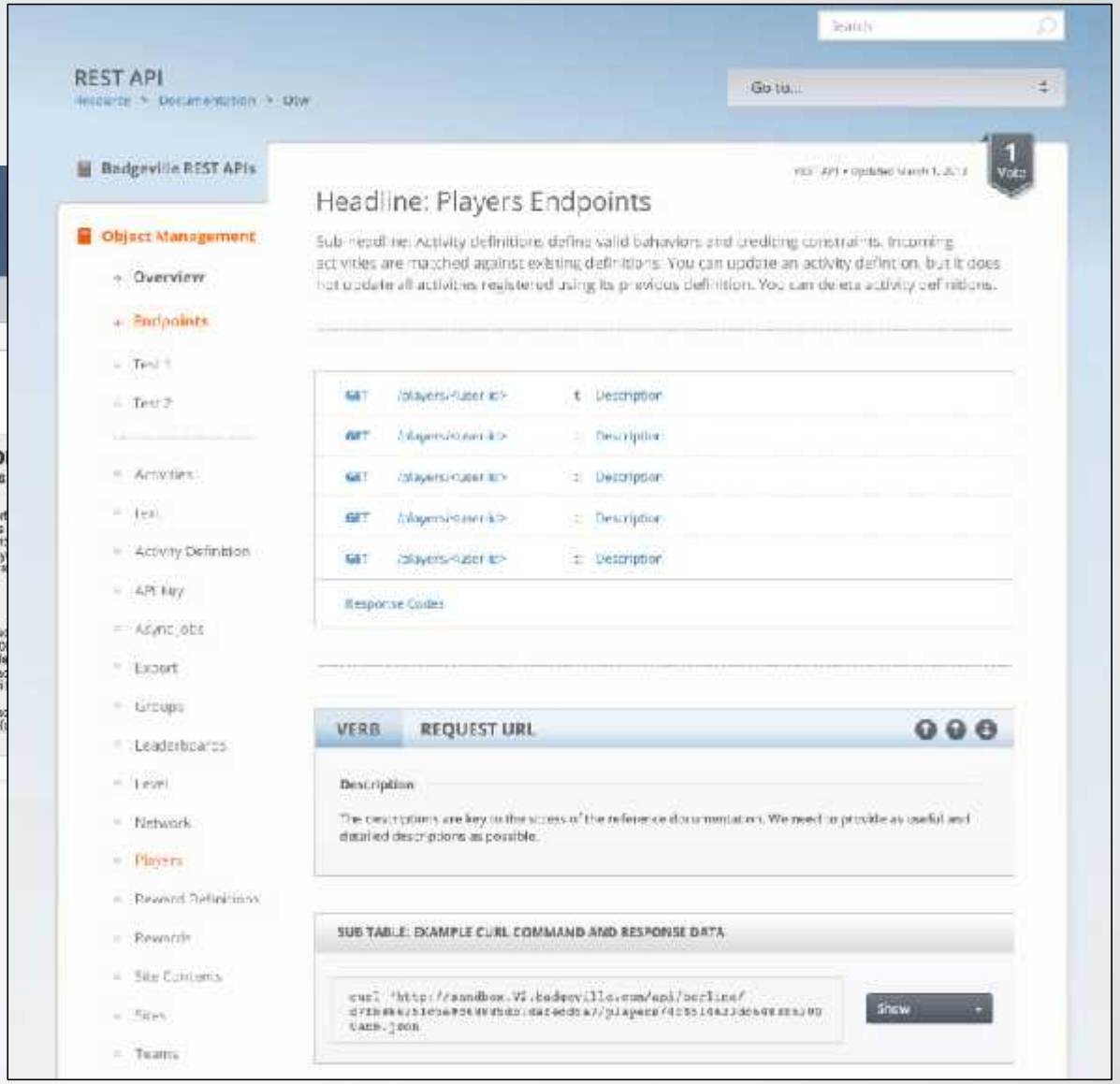


New Reporting & Analytics

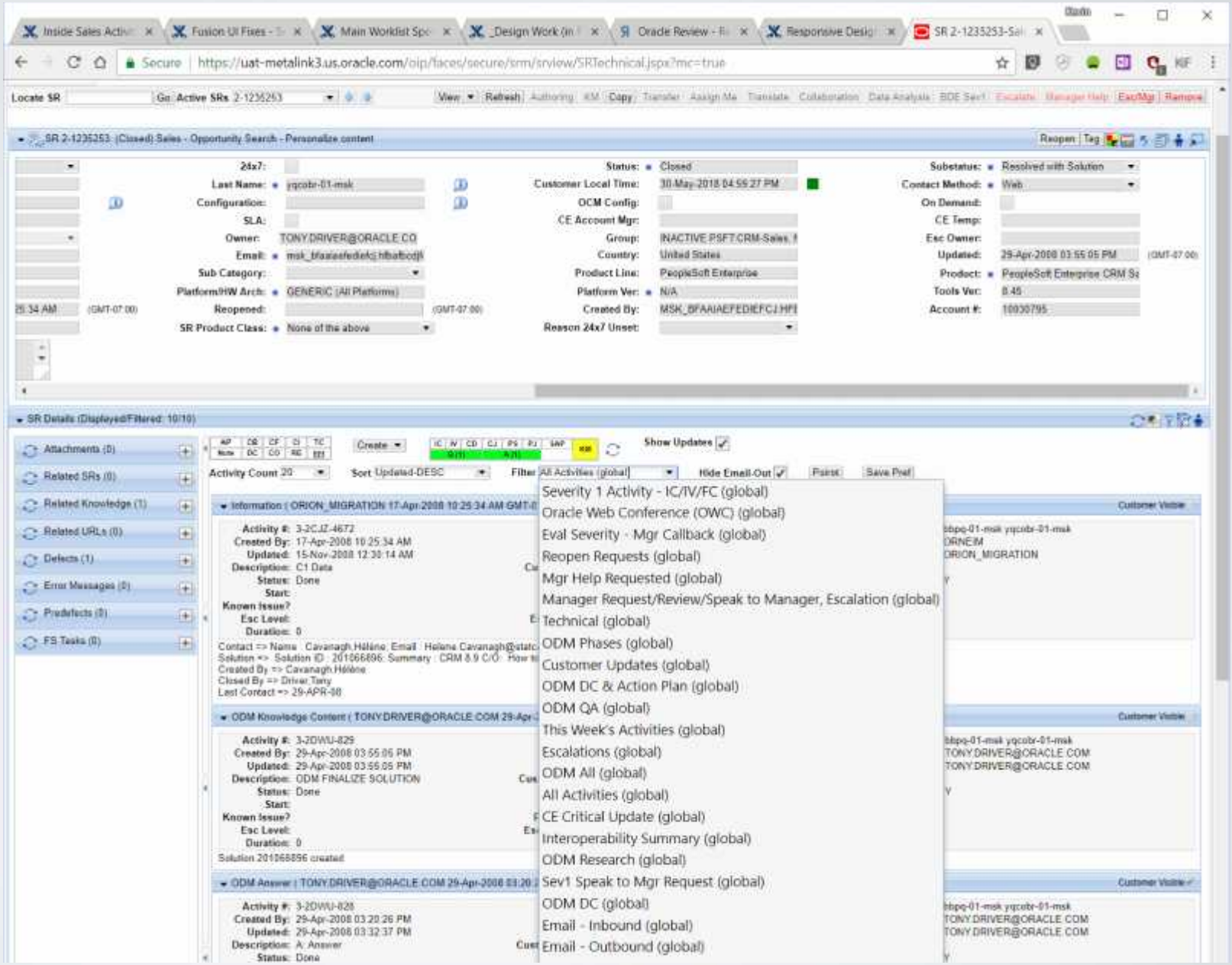
Reporting and Analytics allows administrators to view usage and behavior reports. They can also create custom analyses.

API Explorer Redesign

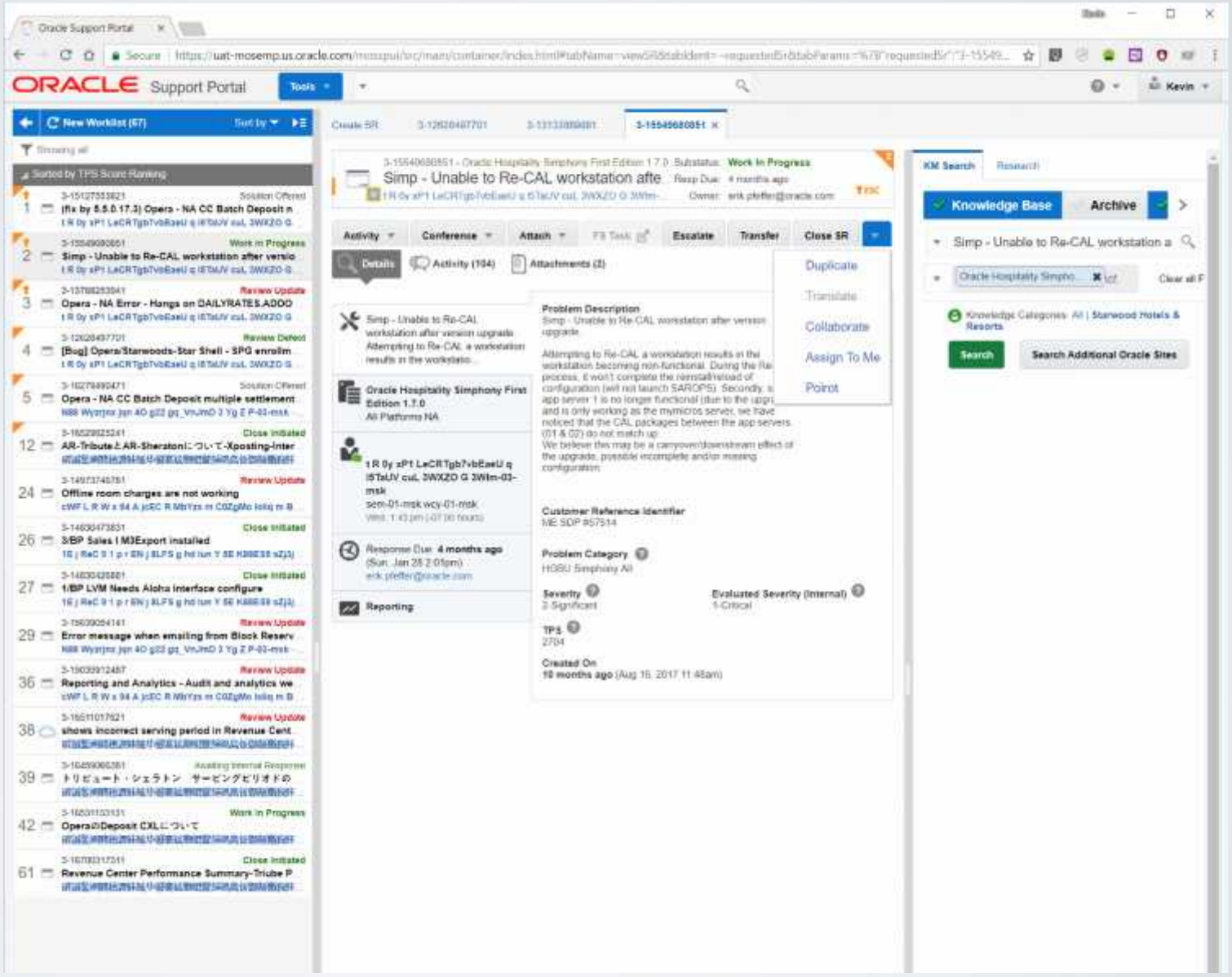




My Oracle Support Portal - Before



My Oracle Support Portal - After

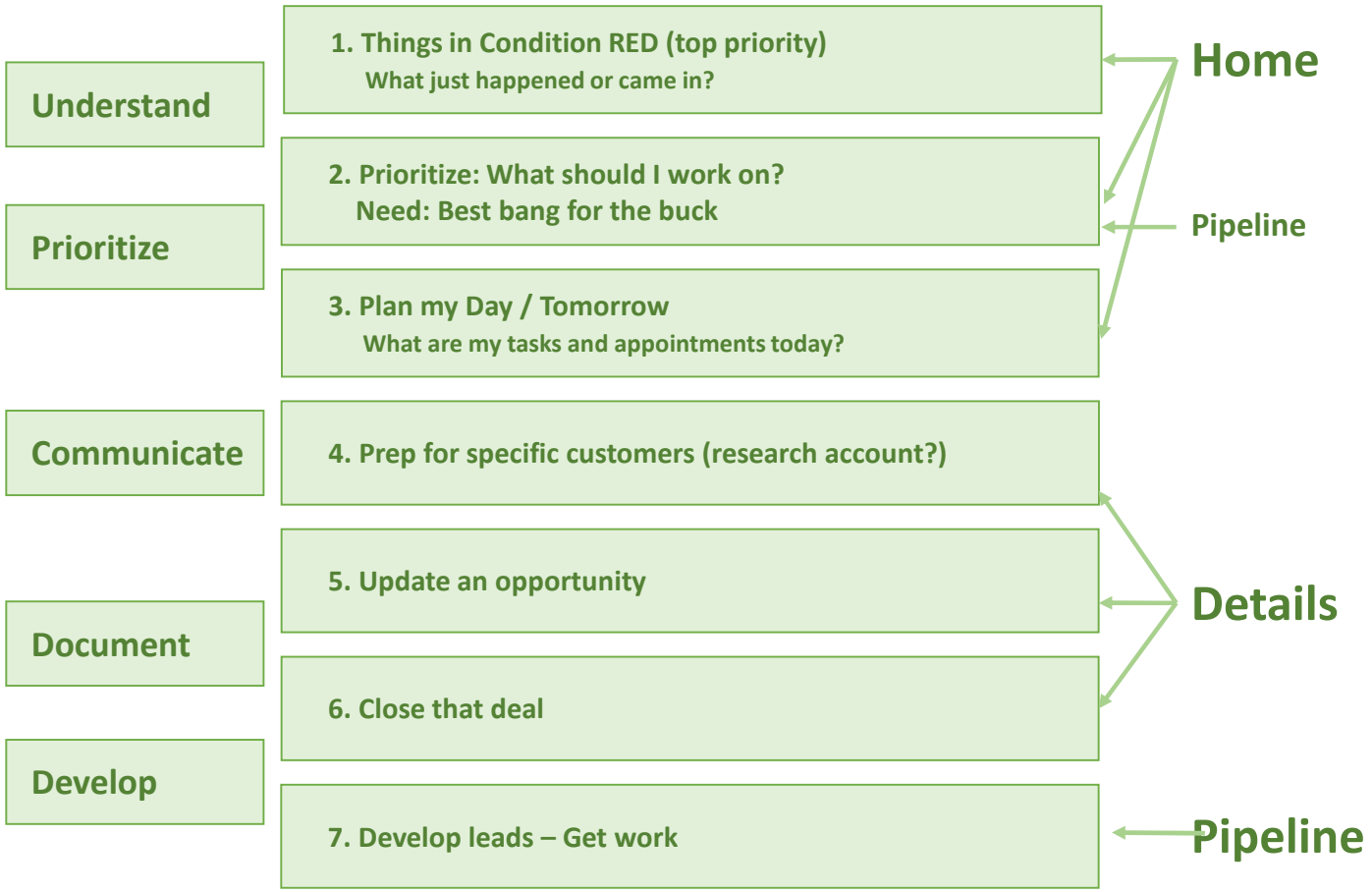


Goals to Solutions (Tasks & Data)

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	New Lead objects, Account leads

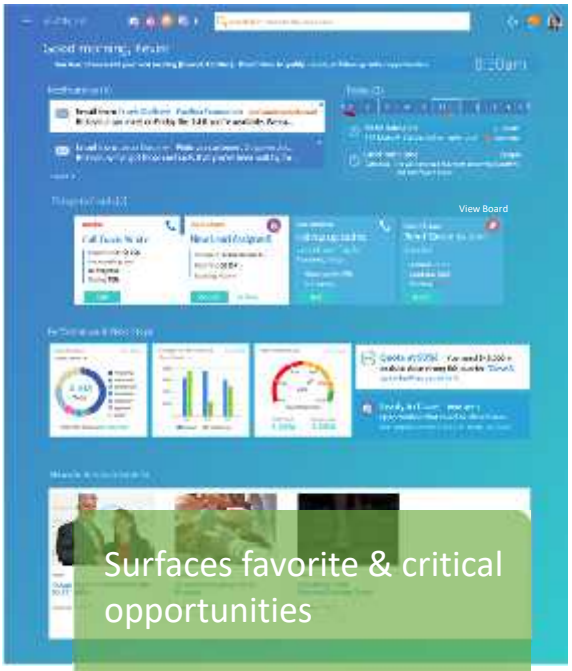
Prospective Architecture

What Architecture satisfies those flows?



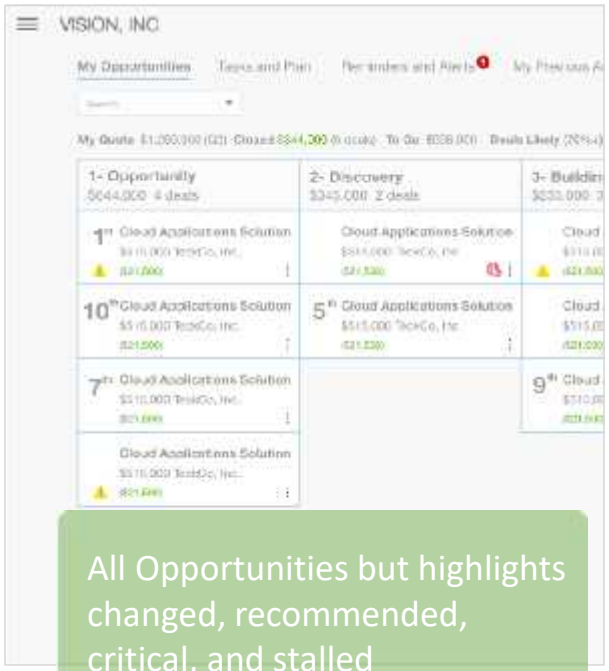
Wireframes

Home Page



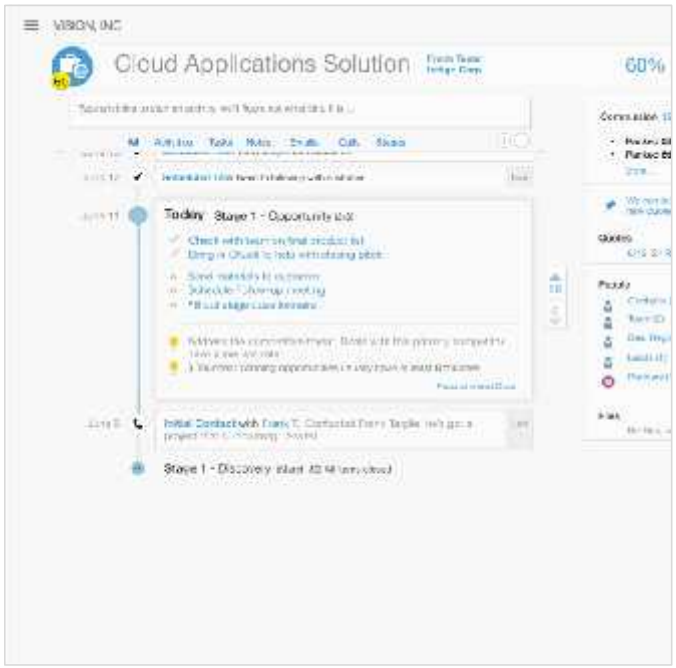
Surfaces favorite & critical opportunities

Pipeline (Kanban)



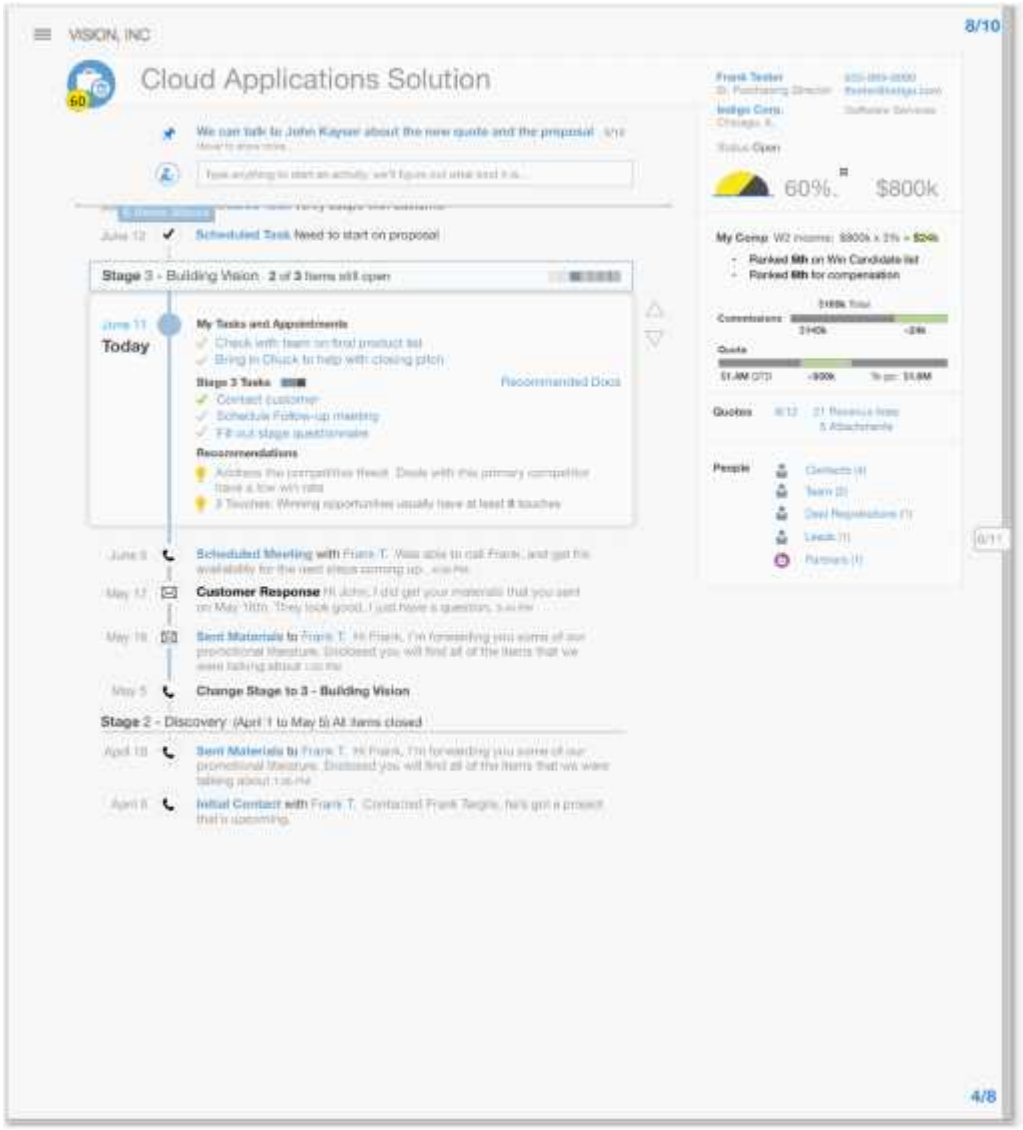
All Opportunities but highlights changed, recommended, critical, and stalled
(Filter for favorites or other dimensions)

Detailed Opportunity



General > Specific

Opportunity Details Concept 1

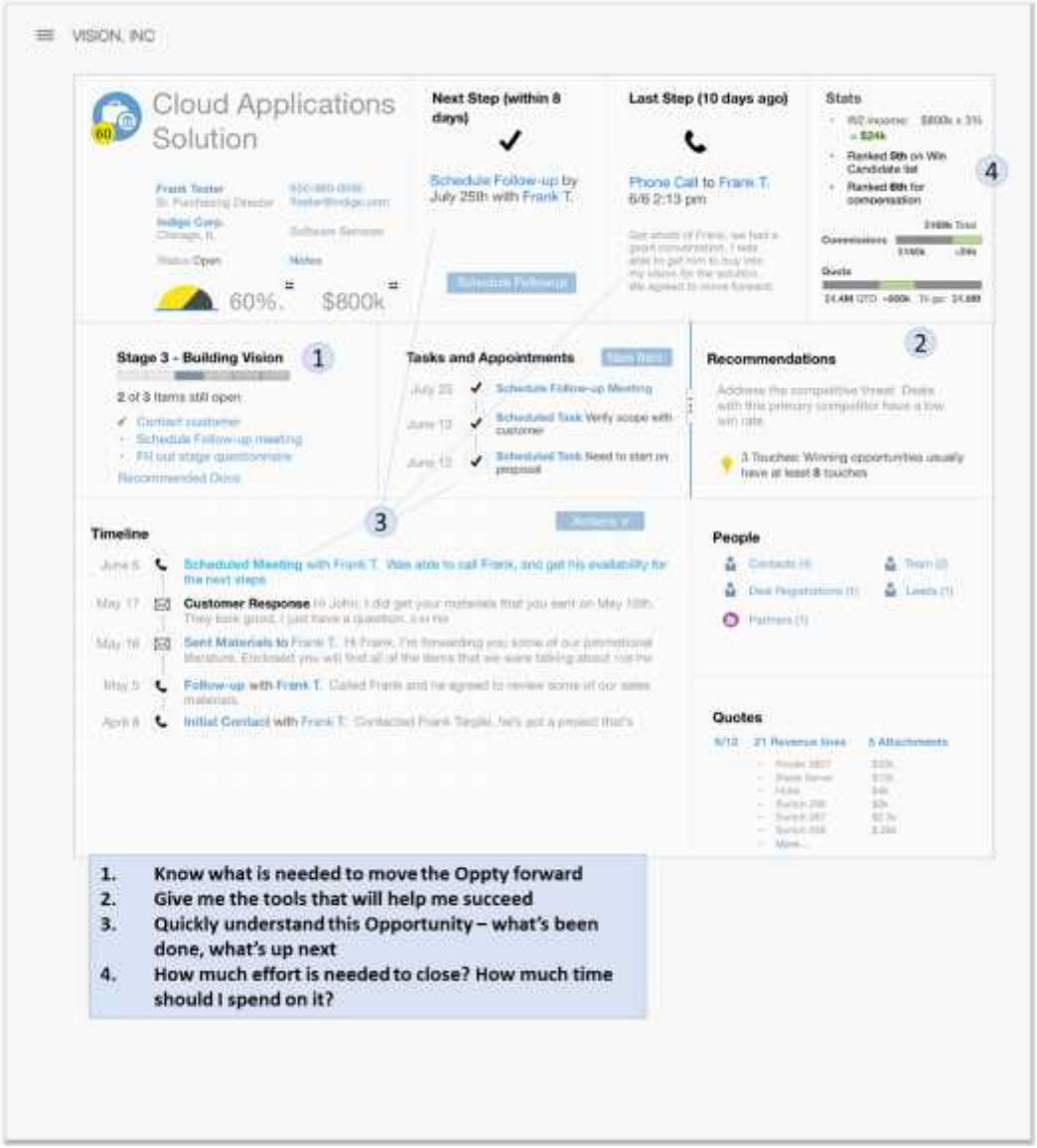


Timeline first

A large data set will have items above and below the page boundaries.

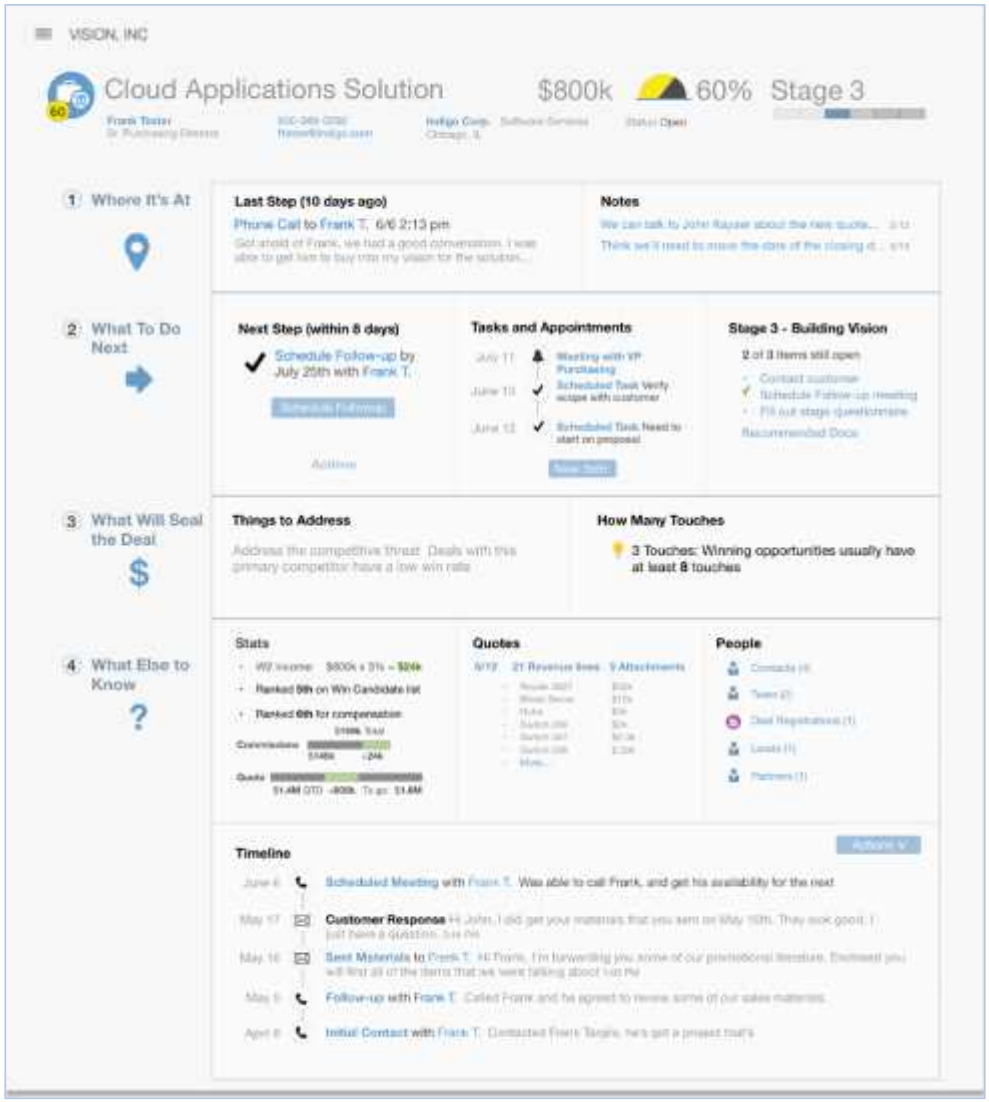
It's quickly scannable and historical events and actions are easy to find

Opportunity Details Concept 2



Grid Version

Opportunity Details Concept 3



Guided Opportunities

1. **Know what is needed to move the Oppty forward**
2. **Give me the tools that will help me succeed**
3. **Quickly understand this Opportunity – what's been done, what's up next**
4. **How much effort is needed to close? How much time should I spend on it?**