

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



Music



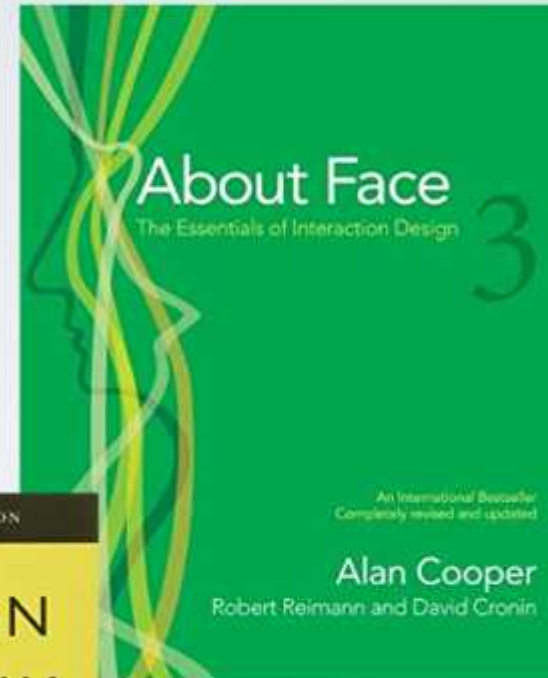
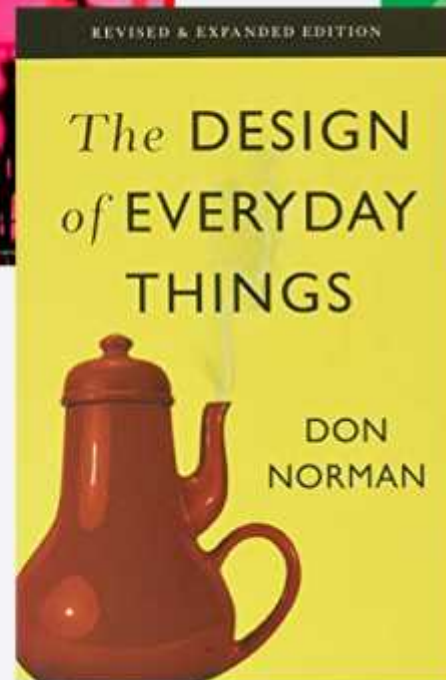
Hiking



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

Problems

Research
the users'
problem
space

Goals

Articulate
their goals
and intents

Solutions

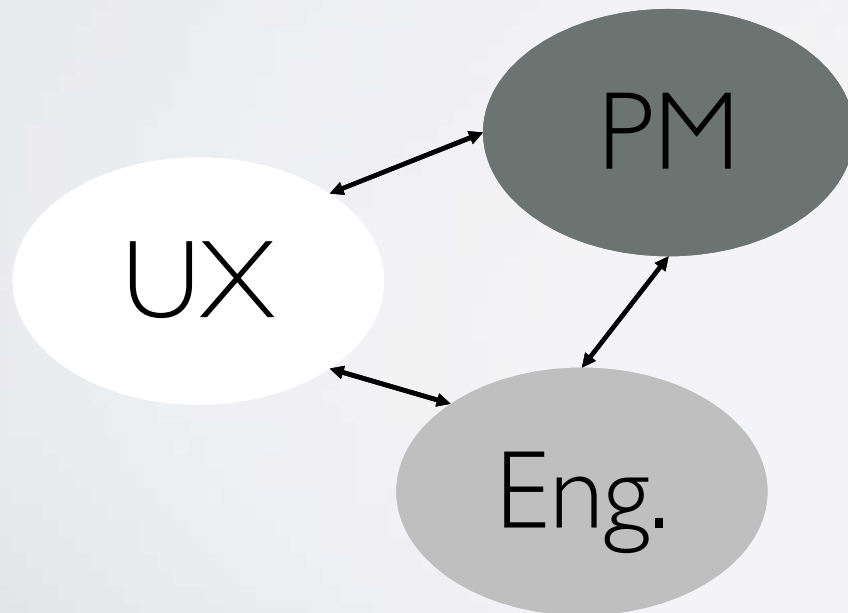
Propose
solutions
that satisfy
those goals



High-Level Process

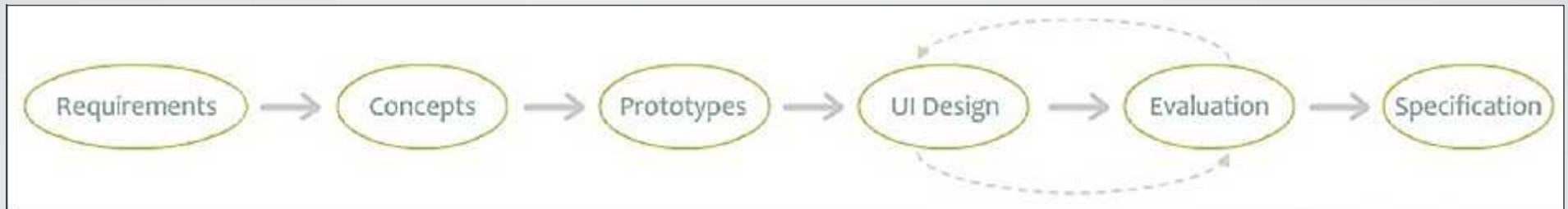


- Research and understand your users and their needs
- Model users' work, problems, and flow
- Concepts to address the model
- Create solutions that flesh out the concepts
- Test it with users, do a specification after validation
- Create a working version



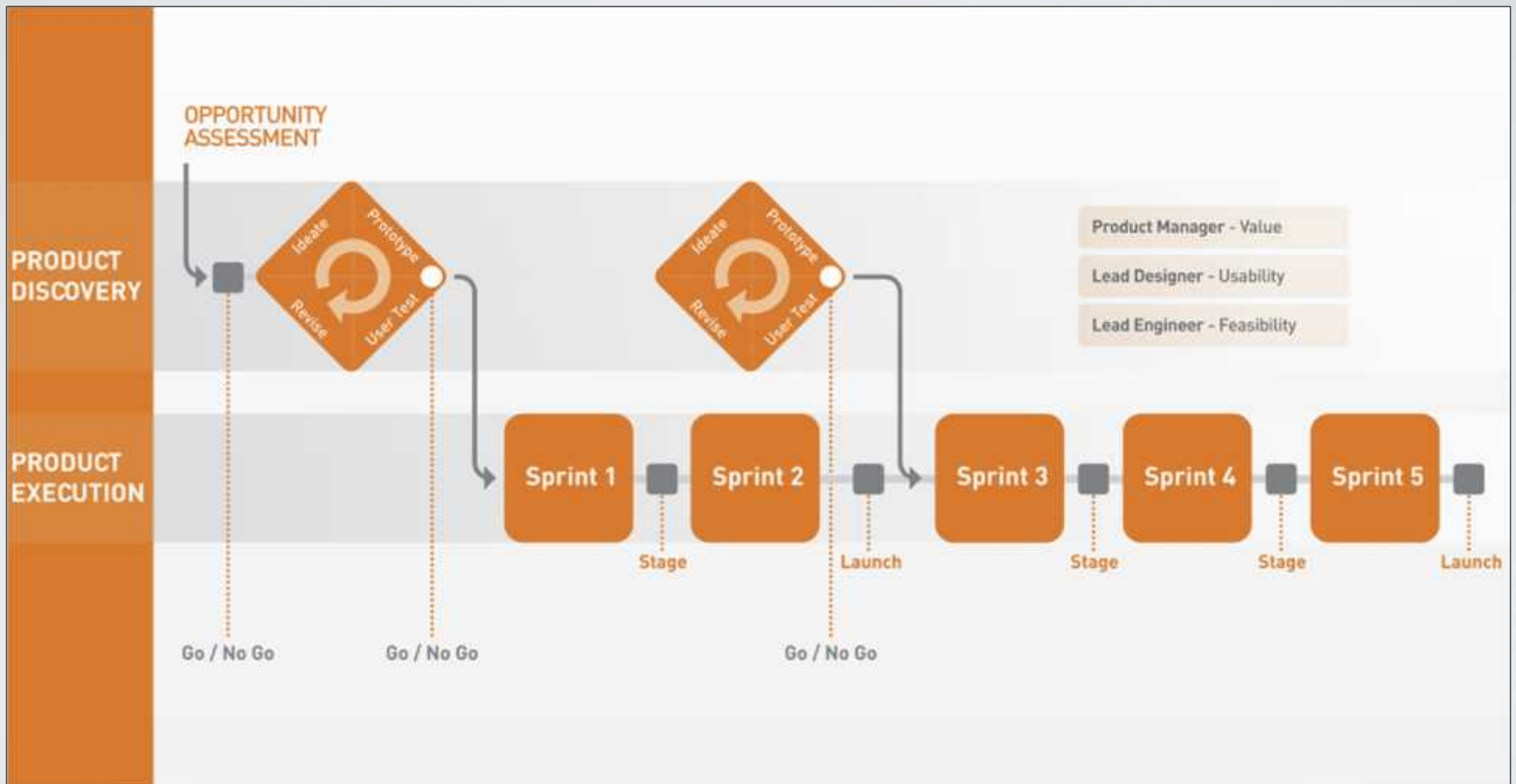
- The product development system is interdependent, and UX must work directly with each practice area
- UX works with PM to define requirements and visualize product concept
- UX works with Eng to get concept and designs implemented according to the original vision

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.

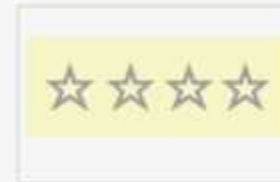
2

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.

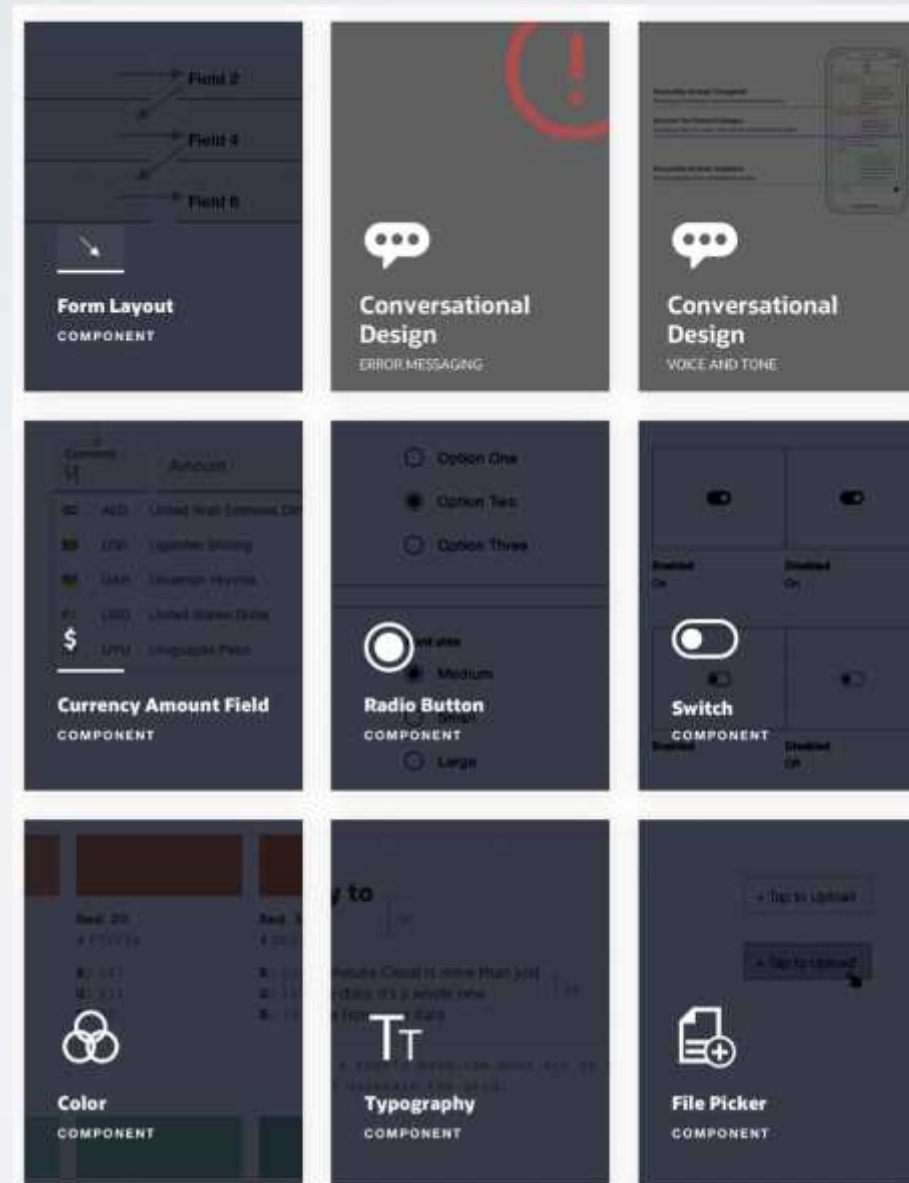


Professional development. Interests and goals drive training and routing.



Analytics kick off watches for patterns based on new issues that are identified.

Pattern Libraries - Components



Career

Employers

The Oracle logo, featuring the word "ORACLE" in white capital letters on a red rectangular background.The Badgeville logo, featuring a blue house icon, the word "Badgeville" in blue, and the text "The #1 Gamification Platform" in smaller blue font to the right.The Cisco logo, featuring a blue square with white vertical bars of varying heights above the word "CISCO" in white capital letters.

Consulting

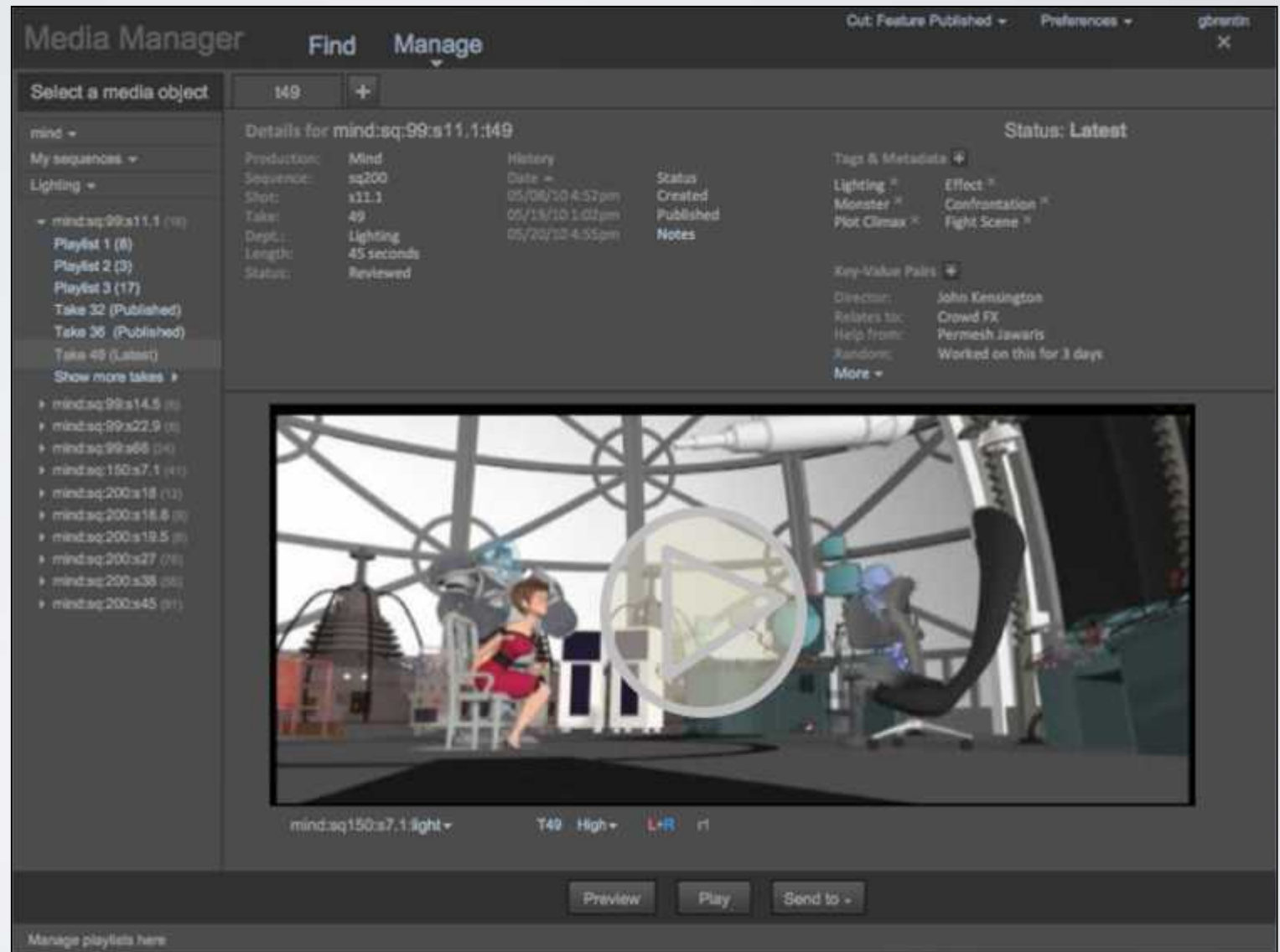
The DreamWorks Animation SKG logo, featuring the words "DREAMWORKS" in a large, stylized font above "ANIMATION SKG" in a smaller font, all on a black background with a white border.The Intuit logo, featuring the word "intuit." in blue lowercase letters, with the tagline "Small business, rejoice.™" in smaller blue text below it.The Oracle logo, featuring the word "ORACLE" in white capital letters on a red rectangular background.



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

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

The screenshot shows the 'Library' page in the Quad/WebEx Social system. At the top, there is a user profile for Jennifer Linares with a 'Settings' link and a 'Sign Out' button. The navigation bar includes 'Action: New Post', 'My View', 'People', 'Communities', and 'Library'. Below the navigation bar, there are tabs for 'Posts', 'Wiki', 'Documents', 'Images', and 'Bookmarks'. A search bar is located on the right side of the library section. The main content area displays a list of posts with columns for 'New Posts', 'Last Change', 'Changes', and 'Author'. The posts are filtered by 'All Posts' and show a list of entries with placeholder text and tags. The footer of the page contains a small profile picture and a message: 'You have 0 notifications'.



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.

The screenshot displays a Sales Force Automation (SFA) interface. The top navigation bar includes a search function and a list of menu items: Opportunities, Leads, Companies, Contacts, and Reports. The main content area shows a table of leads with columns for Lead Name, Company Name, Rating, Status, Revenue, Contact, Email, and Primary Phone. The selected lead is 'DW Animation Dept.' from 'DreamWorks', with a rating of 'Hot' and a status of 'Converted to Opportunity'. Below the table, a detailed view of the lead is shown, including fields for lead ID, company, sales rep, estimated close date, territory, web order number, status, type, rating, description, and my comments. The description reads: 'New calendar year order for animation department.' The my comments section contains three lines of placeholder text. At the bottom, there is a table of products with columns for Category, Group, Description, MPN, Quantity, and Unit Price. The products listed are Apple Hardware, including an iPad, an iPod classic, and a MacBook Pro.

Lead Name	Company Name	Rating	Status	Revenue	Contact	Email	Primary Phone
BA iPods for SPC	Associated Press	Hot	Open	\$ 125,000	Jane Doe	janedoe@example.com	(408) 555-1212
BA14u	BBC	Warm	Open	\$ 30,128	John Doe	johndoe@example.com	(800) 888-8888
DK iMac	Chevron	Cold	Rejected	\$ 19,108	Dee Light	d.light@example.com	(650) 123-5678
DW Animation Dept.	DreamWorks	Hot	Converted to Opportunity	\$ 7,608	Doe Deer	d.deer@example.com	(555) 121-5689

DW Animation Dept.

lead ID: 987654321 | status: Open | description: New calendar year order for animation department.
company: DreamWorks | type: Inquiry
sales rep: Doe Deer | rating: Hot

estimated close date: Jan 21, 2012 | lead source: Apple Academy
territory: TH1157 | estimated revenue: \$7,608
web order number: W24680 | linked opportunity: Animation Dept. New CY

Category	Group	Description	MPN	Quantity	Unit Price
Apple Hardware	iPad	iPad Wi-Fi 16GB	MB292LL/A	1	\$ 499.00
Apple Hardware	iPod	iPod classic 160GB - Silver	MC293LL/A	1	\$ 249.00
Apple Hardware	MacBook Pro	MacBook Pro, 15-inch, 2.53GHz Intel Core i5	MC372LL/A	1	\$ 1,849.00



Sales Force Automation

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

SFA!

Opportunities
Current Quarter
Recently Viewed
Past Due
Jim's Pipeline

Leads
My Leads
AOS Leads
Marketing Leads
Greater than \$10K
Under 1 week old

Companies
Recently Viewed
Tied to My Opps

Contacts
Recently Viewed
Tied to My Opps

Reports

QUICK LINKS
AccuSearch
Apple Store Order Browser
Current Price List
Education Purchase Agreement
Find Your School request
GCRM

Report Name	Total Companies	Start Date	End Date	Average Revenue	Average CPUs
Pipeline Report - Closed-Won	6	Jan 1, 2010	Dec 31, 2010	\$539,750	136
Pipeline Report - Open	6	Jan 1, 2011	Dec 31, 2011	\$497,198	119

Report Name: Pipeline Report - Closed-Won

CPUs Per Week

Revenue Per Week

Data

Company Name	Company ID	City	State	Zip	Country	Customer Type	Status
Associated Press	11223344	Washington	DC	22006	USA	MA	A
BBC	55667788	New York	NY	11001	USA	MA	A
Chevron	99001122	Houston	TX	77001	USA	MA	A
DreamWorks	33445566	Bedwood City	CA	94063	USA	MA	A
eBay	77889900	San Jose	CA	95125	USA	MA	A
Fry's Electronics	22446688	San Jose	CA	95125	USA	MA	A

Philip J. Fry Signed In



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.

Monitor Kazeon

Home Reports Manage Content Services Monitor Administer

Search Kazeon Advanced Search Shell Type a question for help

Main Page

Monitor Main Log Alerts Alerts Setup

Cluster	Admin Status	Op Status	Load	Uptime (hrs.)
Cluster #3	Started	Caution	5%	34
Node 3-1	Started	Healthy	3%	3
Node 3-2	Started	Healthy	12%	6
Node 3-3	Started	Healthy	10%	5
Node 3-4	Started	Healthy	39%	9
Node 3-5	Started	Unhealthy	99%	44
Node 3-6	Started	Healthy	22%	11

Show Cluster Stats Show Node Stats Show Node Log

Connected Filesystems	Status	Uptime
Kazeon Cluster		
Network Appliance	Connected	583:43:21
SAN #2	Connected	132:33:09
NAS_Central_Server	Connected	2878:49:28
CIFS share		
CIFS Accounts		
NFS Data		

Alert --- Node 5 in Cluster 3 is experiencing heavy loads Connected to Cluster Kaz-C 16-Nov 04: 9:06:59



Kazeon Information Controller

Solution

Mount and manage connected filesystems.

The screenshot displays the 'Administer' interface for Kazeon Information Controller, specifically the 'Sideline Filesystems' section. The interface includes a navigation bar with links for Home, Reports, Manage, Content Services, Monitor, and Administer. A search bar is present with the text 'Kazeon' and an 'Advanced Search' button. The main content area features a 'Sideline Filesystems' header and a list of filesystems. A dropdown menu is open, showing options like 'KAZ Metadata Repository', 'CIFS Sideline Data Filesystem', 'NFS Sideline Data Filesystem', 'Centara Data Filesystem', 'DAS/SAN', 'Exchange Email Data Repository', and 'Discover Filesystems'. A table below the dropdown lists filesystems with columns for Filesystem Name, Filesystem Type, Tier, Device Type, and Status. One entry shows an error: 'Error, can't mount on Node 3'. A status bar at the bottom indicates 'You successfully added: "htap5abc"' and 'Connected to Cluster Kaz-C. 16-Nov 04: 9:06:59'.

Filesystem Name	Filesystem Type	Tier	Device Type	Status
htap5abc		2	Sideline	Online
		2	Sideline	Error, can't mount on Node 3



Kazeon Information Controller

Solution

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

The screenshot shows the 'Create Report' page in the Kazeon Information Controller. The page has a blue header with the Kazeon logo and navigation links: Home, Reports, Manage, Content Services, Monitor, and Administer. Below the header is a search bar with 'Kazeon' entered and an 'Advanced Search' button. The main content area is titled 'Create Report' and contains several sections:

- Navigation:** 'Reports Main' and 'Recent Reports' buttons.
- Create Report Form:**
 - Name:
 - Description:
 - Find: **Any** of these items
 - Filename Equals Sales FY'04
 - Filename Equals Sales FY'03
 - File Type:
 - Access Type:
 - Created Date: From To
 - Report Format: Summary Detailed
 - Buttons: Save, Run, Cancel
- Sort Columns:**
 - Filename Creator
 - Buttons: Add, Delete
- Group By:**
 - Modifier Week
 - Buttons: Add, Delete
- Time Grouping:**

At the bottom right, a status bar indicates: Connected to Cluster: Kaz-C, 16-Nov-04: 9:06:59



eSilicon SCM Web Before

Project

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

Persona

SC Manager

Problem

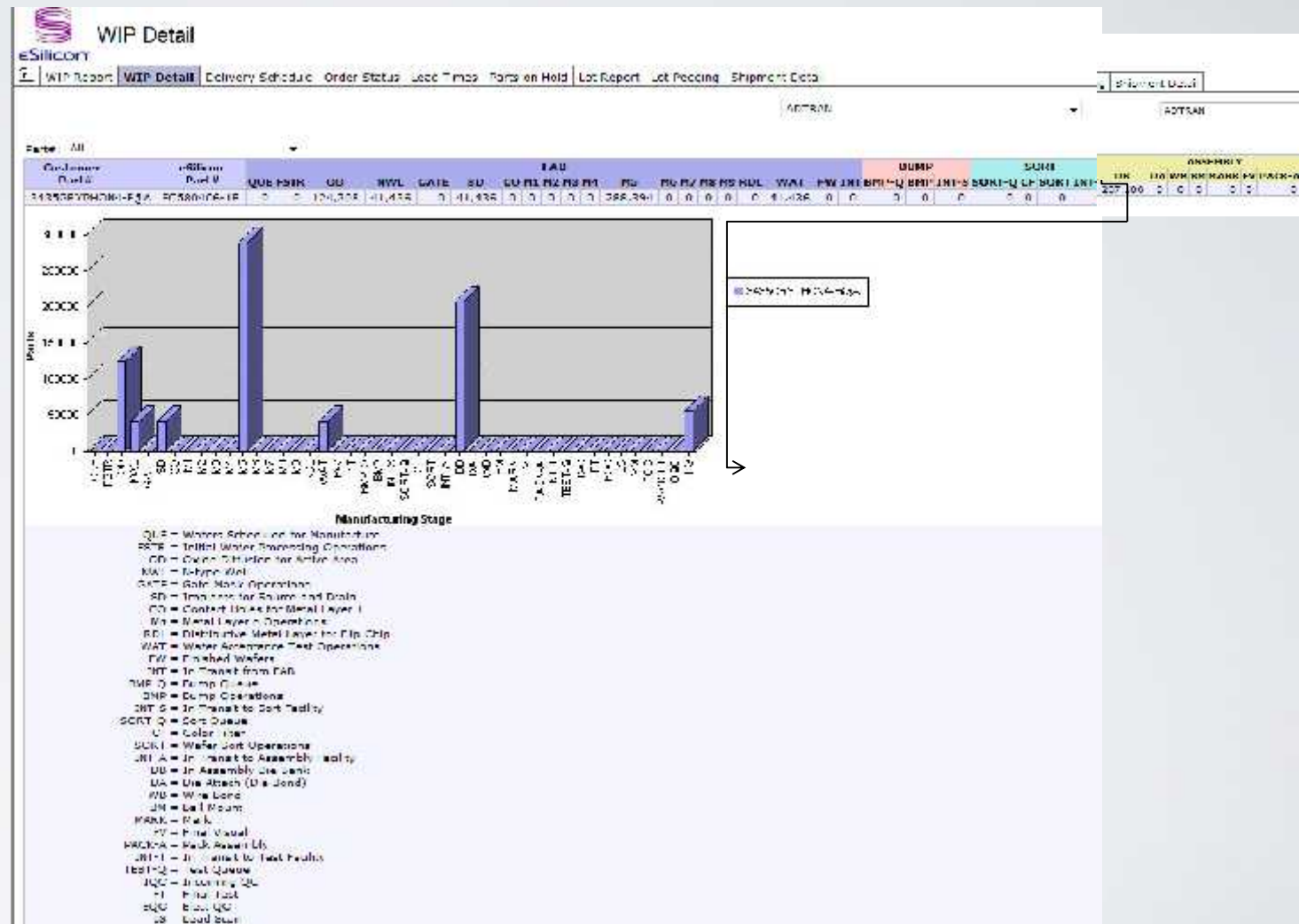
There are many stages in the fabrication process and lots of data points. Display becomes a tricky issue.

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.





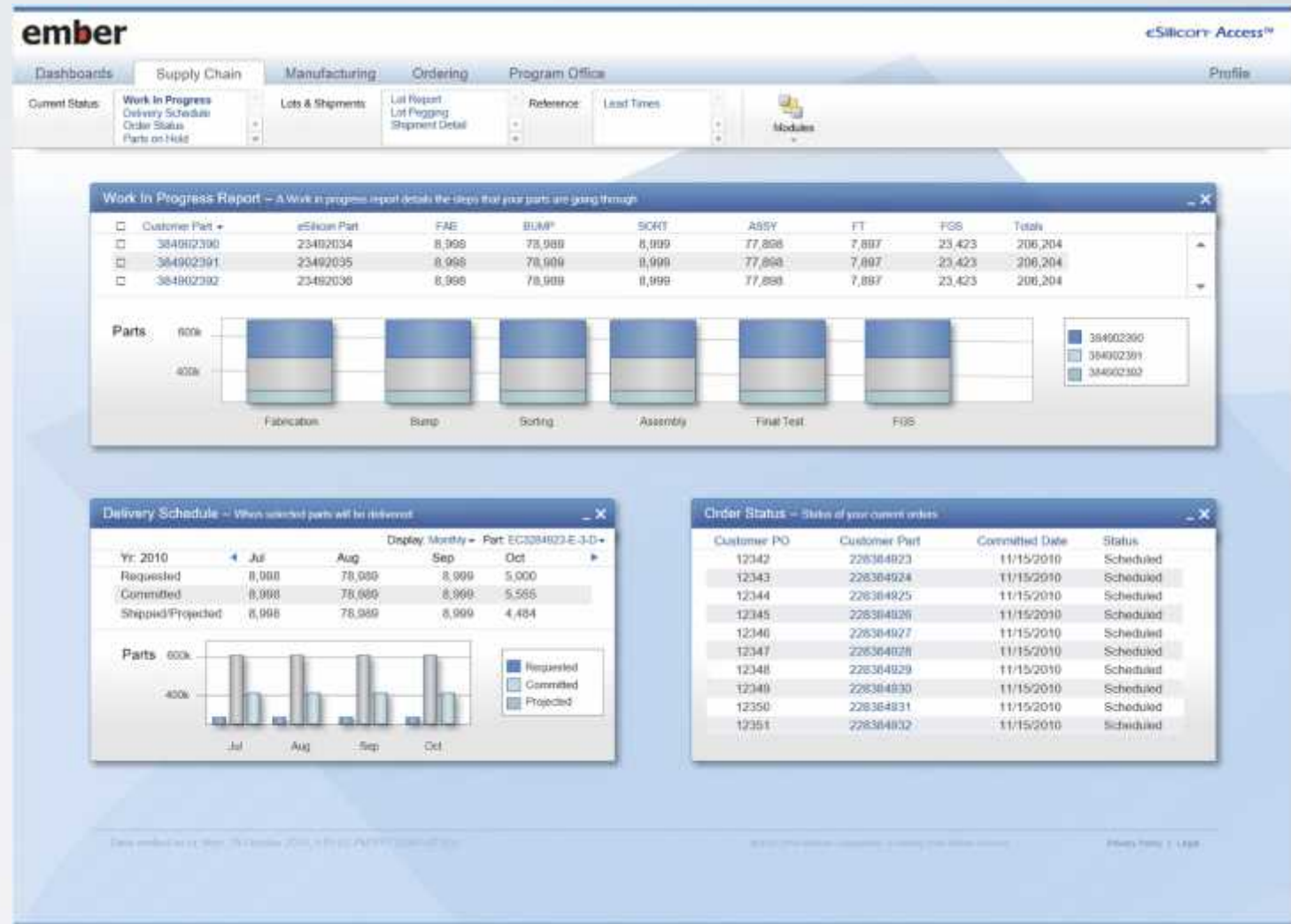
eSilicon SCM Web After

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.

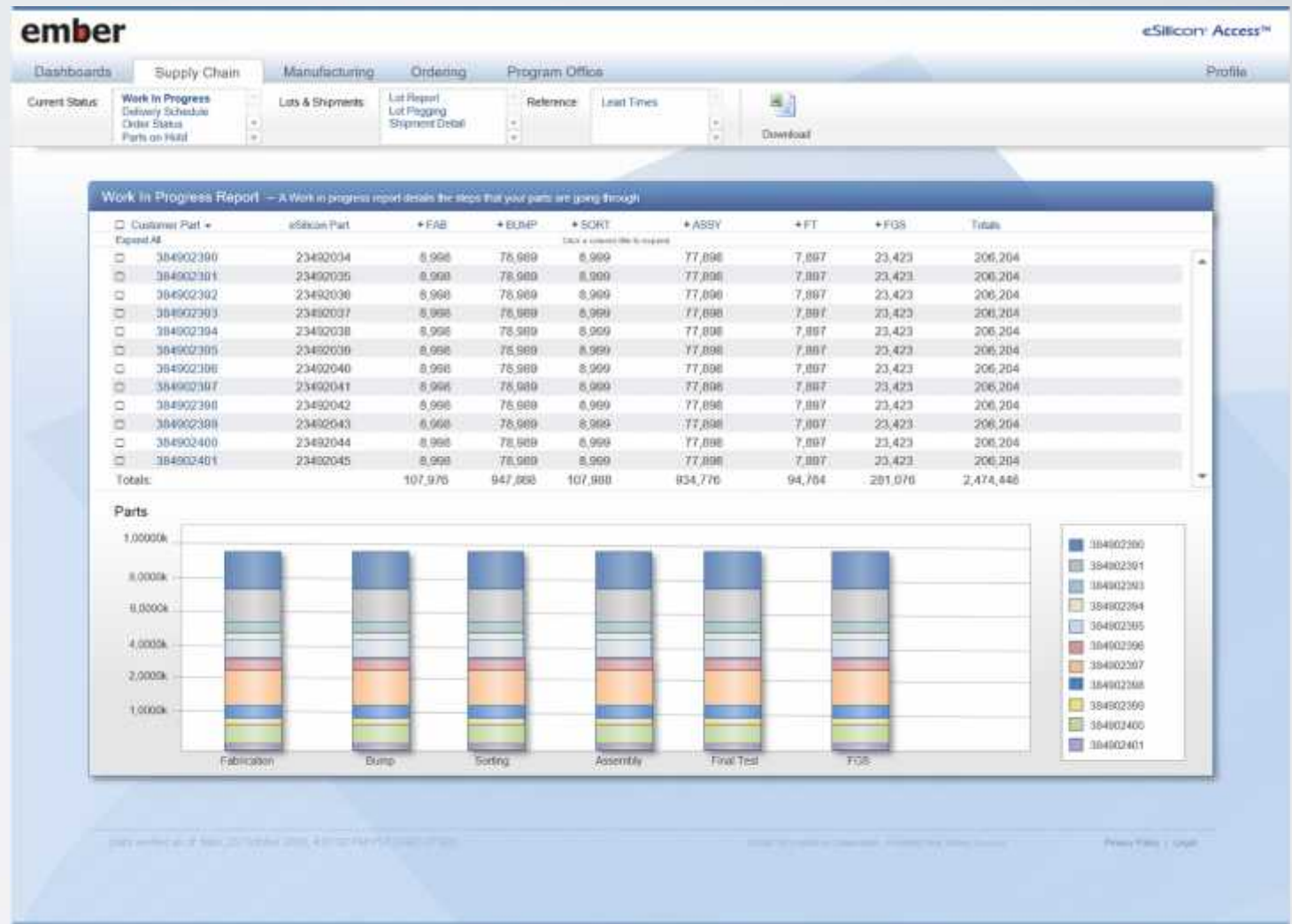




WIP Report Closeup

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

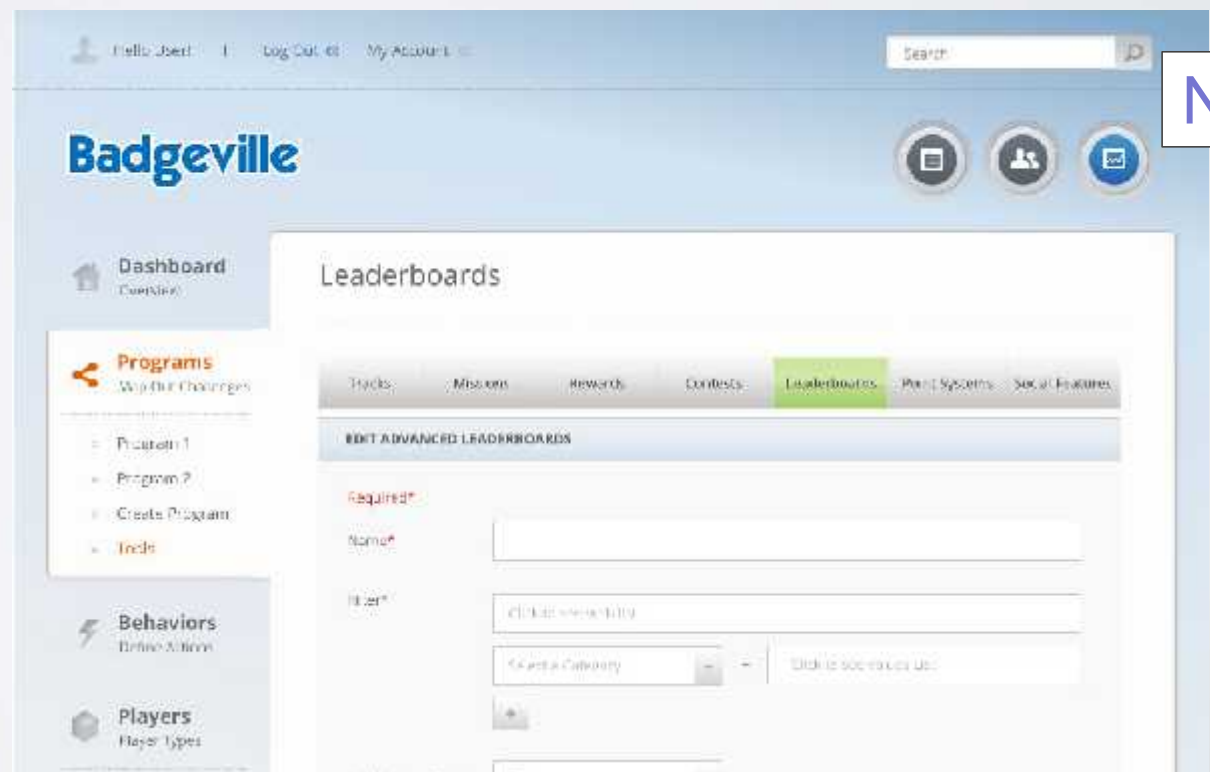
Add game mechanics (leaderboards, goals, badges, points, etc.) to my SaaS product or site.

Solution

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



Old



New

Badgeville Game Mechanics

Core

Behaviors score points
Non-repeatable Missions set goals
Collect Badges



Badgeville Implementation

You're Now a Part of Samsung Nation



Welcome to the exciting new community where you are rewarded by simply exploring Samsung.com and discovering everything it has to offer. You're now free to earn points, unlock and collect badges, boost your ranking, see who's leading, and watch Samsung Nation evolve over time.

Look to the right to check out real-time activity, then dive into the site to see what you can uncover.

Samsung Nation

SETTINGS

Leaderboard

My Rewards



tech advice

Level 1 Novice

125 pts

5 Rewards

Best Reviewed
You've unlocked the Best Reviewed badge! Keep reading to stay in the know this holiday season.
Unlocked 45 minutes ago



Quest

25 minutes ago



Best Reviewed

45 minutes ago



Cruise

45 minutes ago

View Your Showcase!

How do I earn points?

Activities

- fred albers** unlocked the Merit 2.0 badge.
- lori hudson** leveled up to Novice.
- steven to** unlocked the Merit 4.0 badge.
- jennifer pena** unlocked the Cruise badge.
- d korenberg** unlocked the Star badge.
- lilian wolfe** leveled up to Novice.
- jonas njinkeng** unlocked the Merit badge.
- michael day** leveled up to Novice.
- freddy tang** unlocked the Merit badge.

Pause

How do I earn points?

Badgeville Pre-Redesign

Badgeville Admin Console

Analyze **Configure** Manage

Sites **Behaviors** Rewards Missions

Existing Simple Behaviors [Create New](#)

Select: All, None [Delete Selected](#)

Select	Name ↑ ↓	Point Value	Cooldown Hint	Hide in Widgets
<input type="checkbox"/>	Visit	1	1	Yes
<input type="checkbox"/>	Bad Choice	-3	1	Yes
<input type="checkbox"/>	Good Choice	3		
<input type="checkbox"/>	read	2		
<input type="checkbox"/>	##	1		
<input type="checkbox"/>	sdfdfd	3		

Badgeville Admin Console

Analyze **Configure** Manage Develop Administer

Sites Behaviors **Rewards** Missions Units Leaderboards Social Mechanics Activity Streams Emails Widget Studio

Existing Advanced Behaviors [Create New](#)

Select: All, None [Delete Selected](#)

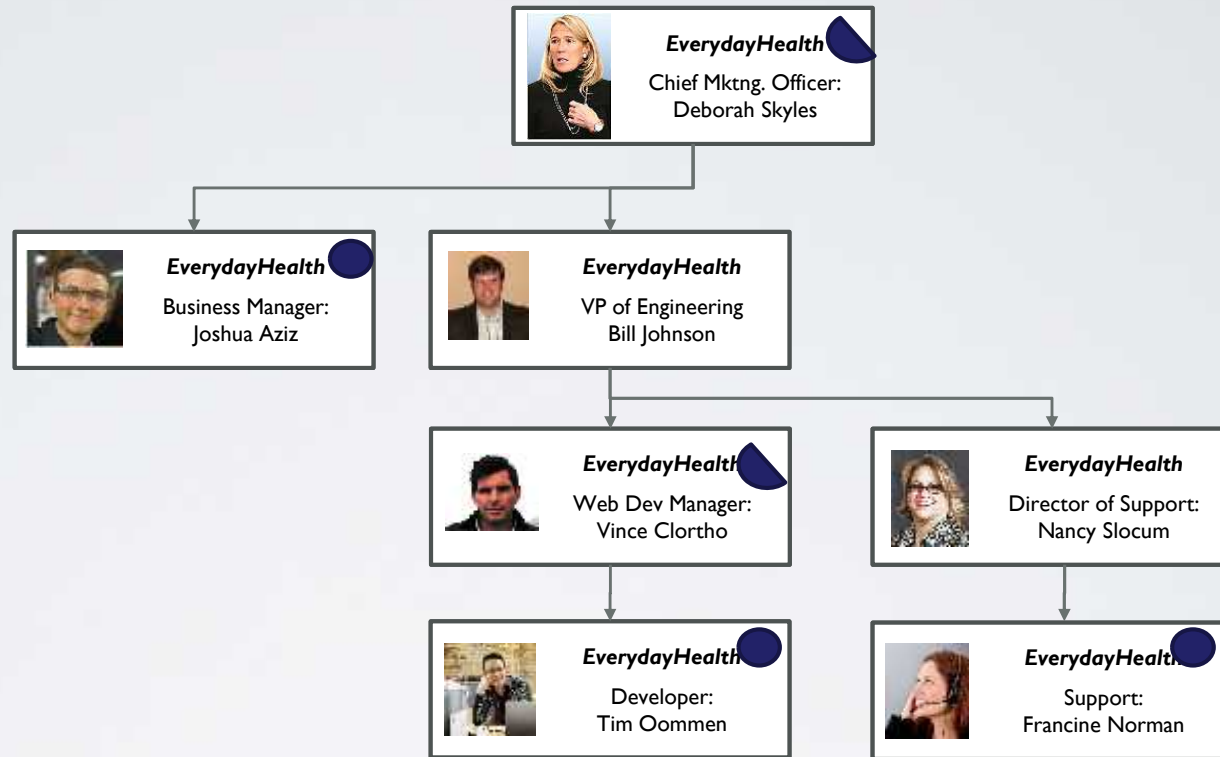
Select	Name ↑ ↓	Point Value	Rate limiting	Count limiting	Hint
<input type="checkbox"/>	Unfollow	0	No	No	
<input type="checkbox"/>	Follow	0	No	No	
<input type="checkbox"/>	Followed	0	No	No	
<input type="checkbox"/>	Unfollowed	0	No	No	
<input type="checkbox"/>	tweet		No	No	

Existing Advanced Rewards [Create New](#)

Select: All, None [Delete Selected](#)

Select	Image	Name ↑ ↓	Verbs ↑ ↓	Message	Active
<input type="checkbox"/>		ApartaOfertas	checkin, poi photo, review	Descontos, cupons, oportunidades... Bem-vindo ao ApartaOfertas: todas as compras coletivas em um único lugar! Avale mais, ganhe mais.	No
<input type="checkbox"/>		ThreeRules	deposit, doone, onepersac		Yes
<input type="checkbox"/>		updated	comment	this is my message.	Yes
<input type="checkbox"/>		howard's test	checkin, poi photo, review		No

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

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

Product Areas

Analyze • Configure • Manage

Role Description

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

Skills

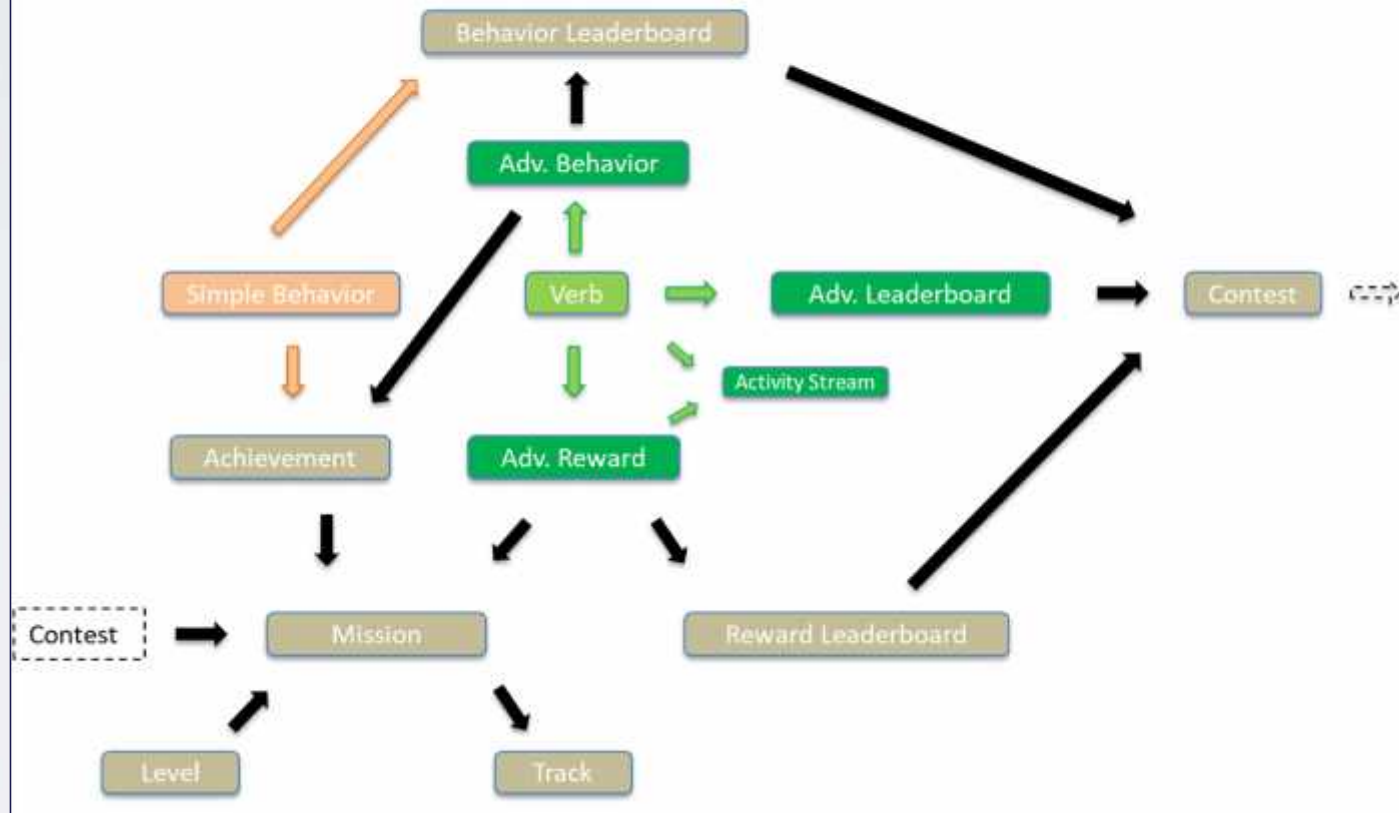
- Technical Skill
1
5
10
- Gamification
1
7
10

User Scenarios

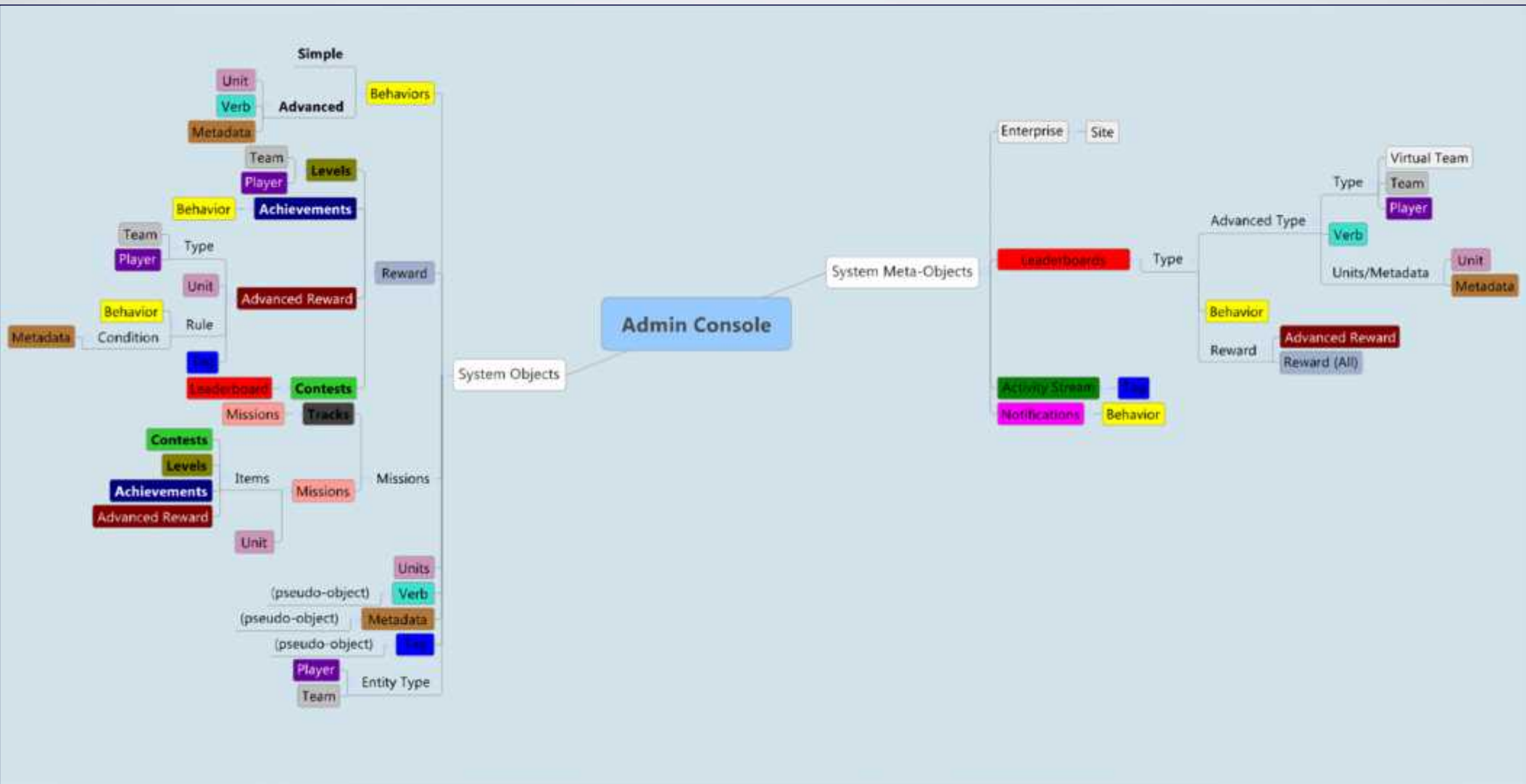
- Joshua needs a new campaign for Jillian Michaels' site. They want to increase retention and have to create a new site in the console.

Analysis of System Objects

BADGEVILLE OBJECT RELATIONSHIPS



Mind-mapping Relationships



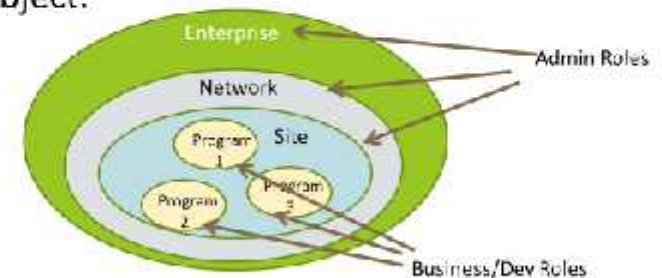
Redesign Proposal

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.

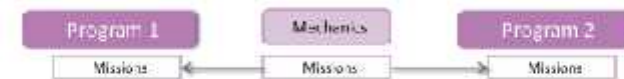


Changes In-depth- 2

8. Create new object: **Programs**

Program* (new)

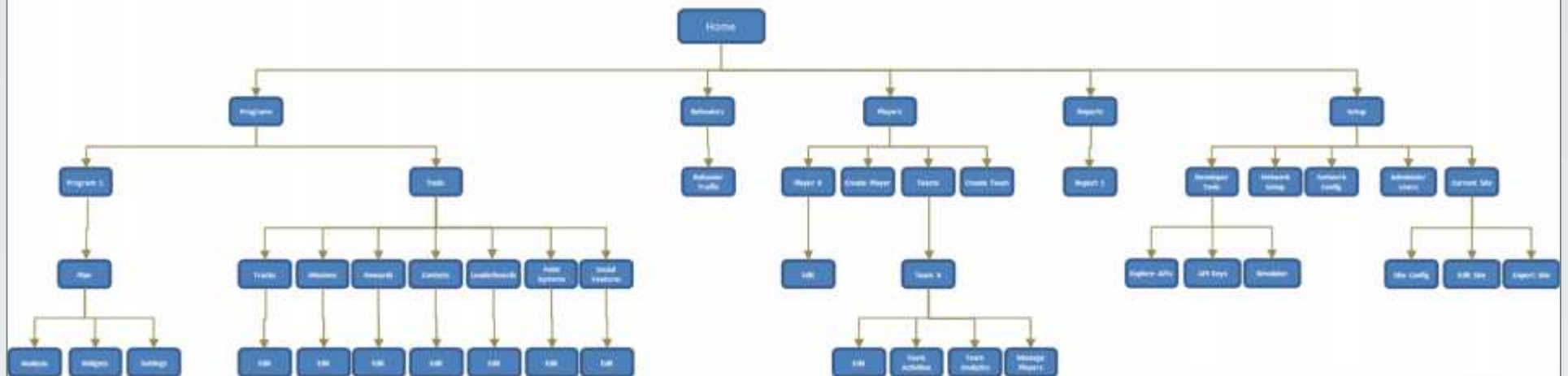
9. Architect the product so that programs can share and reuse common system objects



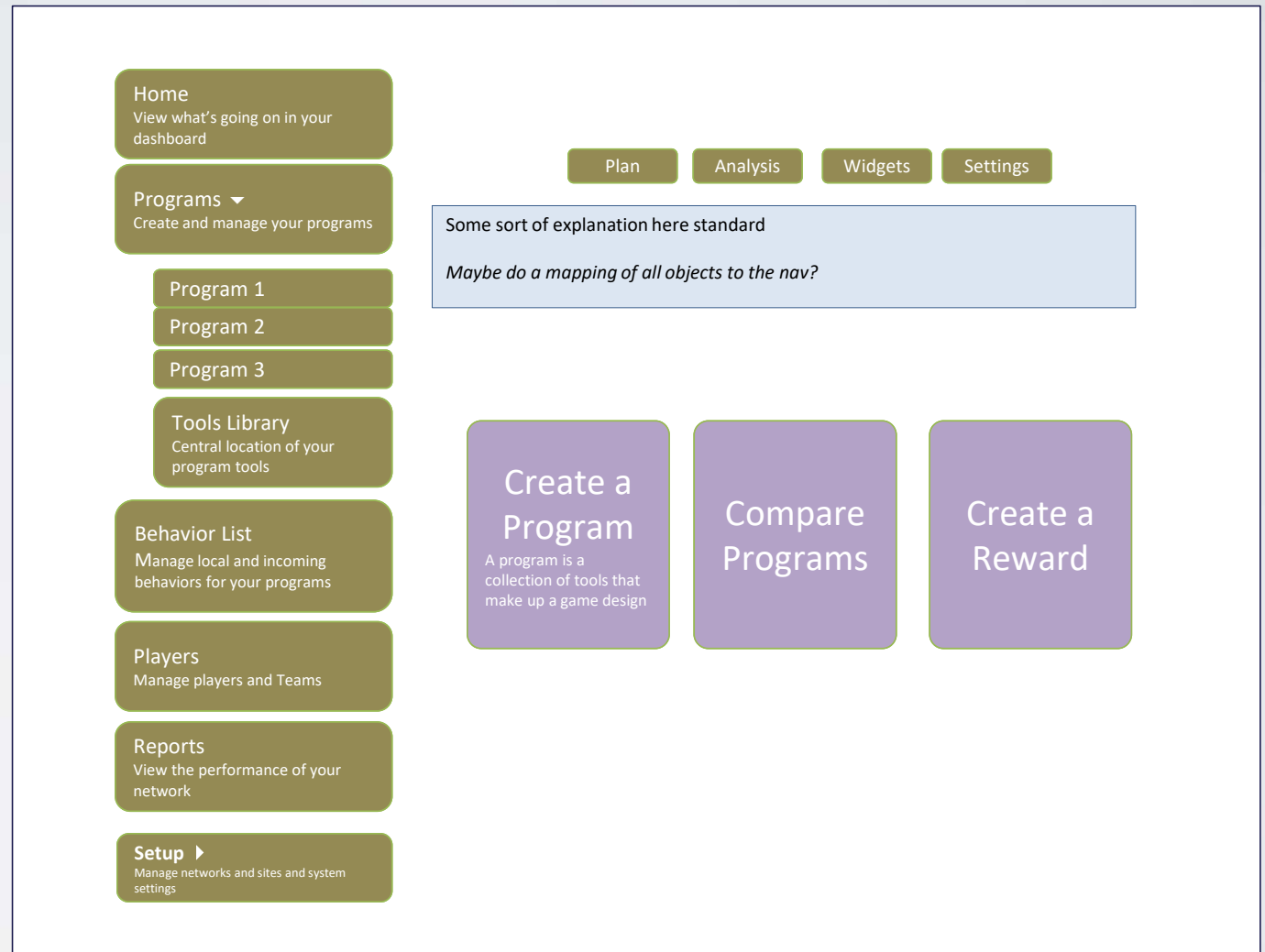
Core User Tasks

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

Sitemap



High-Level Navigation Model



High Fidelity Mockup

The mockup shows a user interface for the Badgeville platform. At the top, there is a navigation bar with a user profile icon, the text 'Hello User!', a search bar, and links for 'Log Out' and 'My Account'. The main header features the 'Badgeville' logo and four circular icons representing different tool categories. A left-hand sidebar contains a 'Dashboard' overview and several menu items: 'Programs' (with sub-items 'Program 1', 'Program 2', and 'Tools'), 'User Actions' (with sub-item 'Define Actions'), 'Players' (with sub-items 'Create Player', 'Teams', and 'Create Team'), 'Reports' (with sub-items 'Engagement', 'Retention', 'Social Mechanics', and 'Metadata'), and 'Setup' (with sub-items 'Network', 'Current Site', 'Users', and 'Development Tools').

The main content area is titled 'Tools' and contains a tabbed interface with categories: 'Tracks', 'Missions', 'Rewards', 'Controls', 'Leaderboards' (selected), 'Point Systems', and 'Social Features'. Below the tabs is a 'LEADERBOARDS' section with a '+ New' button. It contains a table with the following data:

Name	Status	Updated	Has Data	
Team Yahoo	✓	13 minutes ago	✓	🗑️
Tip Documentor	✓	10 minutes ago	✓	🗑️
Speed Demon	✓	8 minutes ago	✓	🗑️
00 Texas Average Longest Drive	✗	13 minutes ago	✗	🗑️
San Francisco	✓	12 minutes ago	✓	🗑️
Chicago 1	✓	20 minutes ago	✓	🗑️
Main vs Team 2	✓	10 minutes ago	✓	🗑️
Self Promoter!	✓	8 minutes ago	✓	🗑️

New Reporting & Analytics

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



API Explorer Redesign

Badgeville Admin Console

Analyze | Configure | Manage | Develop | **Administer**

Home | Simulator | **API Explorer** | Logs | Widget Builder | Async Jobs

API Explorer

Endpoint: required

Operation:

Format:

[Next](#)

API Documentation

Endpoint: Create for Activities

Usage:

Activities are the behaviors players perform registering a behavior. Listing activities. Activities can match one or more specific activities directly. You can delete a player activities performed by the player and...

Examples:

- **Format (RECOMMENDED)**
POST /api/behavior/private_api_key/player_id=4d66d13a51c21c33d600
- **Using site and user instead of player**
POST /api/behavior/private_api_key/site=site.com&user=seu@badgeville
- **Failed validation**
POST /api/behavior/private_api_key/user=peut@badgeville.com&site=...

REST API

Resource > Documentation > DOW

Search

Go to:

Badgeville REST APIs REST API • updated March 1, 2013 **1** Vote

Headline: Players Endpoints

Sub-headline: Activity definitions define valid behaviors and crediting constraints. Incoming activities are matched against existing definitions. You can update an activity definition, but it does not update all activities registered using its previous definition. You can delete activity definitions.

Object Management

- Overview
- Endpoints**
- Test 1
- Test 2
- Activities
- Test
- Activity Definition
- API Key
- Async Job
- Export
- Groups
- Leaderboards
- Level
- Network
- Players**
- Reward Definition
- Reward
- Site Contents
- Site
- Teams

VERB	REQUEST URL	Description
GET	/players/<user id>	Description
GET	/players/<user id>	Description
GET	/players/<user id>	Description
GET	/players/<user id>	Description
GET	/players/<user id>	Description

Response Codes

DESCRIPTION

Description

The descriptions are key to the success of the reference documentation. We need to provide as useful and detailed descriptions as possible.

SUB TABLE: EXAMPLE CURL COMMAND AND RESPONSE DATA

```
curl -i 'http://sandbox-V2.badgeville.com/api/behavior/activities.json?site=site.com&user=seu@badgeville.com&player_id=4d66d13a51c21c33d600'
```

[Show](#)



My Oracle Support Portal - Before

The screenshot displays the My Oracle Support Portal interface for a service request (SR) titled "SR 2-1235253 - Sales - Opportunity Search - Personalize content". The page is divided into several sections:

- Header:** Includes navigation tabs (Inside Sales Active, Fusion UI Fixes, Main Worklist Sp, Design Work, Oracle Review, Responsive Desig) and a search bar.
- SR Details:** A central area with fields for customer information (Last Name: yqcohr-01-msk, Owner: TONY.DRIVER@ORACLE.CO), status (Closed), and product details (PeopleSoft Enterprise CRM S).
- Activity List:** A table showing a list of activities related to the SR. A dropdown menu is open over this list, showing a search for "Sev1" and a list of activity types such as "Sev1 Activity - IC/IV/FC (global)", "Oracle Web Conference (OWC) (global)", "Eval Severity - Mgr Callback (global)", "Reopen Requests (global)", "Mgr Help Requested (global)", "Manager Request/Review/Speak to Manager, Escalation (global)", "Technical (global)", "ODM Phases (global)", "Customer Updates (global)", "ODM DC & Action Plan (global)", "ODM QA (global)", "This Week's Activities (global)", "Escalations (global)", "ODM All (global)", "All Activities (global)", "CE Critical Update (global)", "Interoperability Summary (global)", "ODM Research (global)", "Sev1 Speak to Mgr Request (global)", "ODM DC (global)", "Email - Inbound (global)", and "Email - Outbound (global)".
- Customer Visits:** A section on the right side of the page showing a list of customer visits, including dates and contact information.



My Oracle Support Portal - After

The screenshot displays the Oracle Support Portal interface. On the left, a list of service requests is shown, sorted by TPS Score Ranking. The selected request is SR 3-154468051, titled "Simp - Unable to Re-CAL workstation after version upgrade". The main content area shows the details of this request, including the problem description, activity history, and attachments. The problem description states: "Attempting to Re-CAL a workstation results in the workstation becoming non-functional. During the Re-CAL process, it won't complete the reconfig/reload of configuration (will not launch SAROPS). Secondly, the app server 1 is no longer functional (due to the upgrade) and is only working as the mymicros server, we have noticed that the CAL packages between the app servers (01 & 02) do not match up. We believe this may be a carryover/downstream effect of the upgrade, possible incomplete and/or missing configuration". The interface also shows the customer reference identifier (ME SDP 257514), problem category (HOSU Symphony All), severity (2-Significant), and TPS (2704). The request was created on 12 months ago (Aug 16, 2017 11:45am).

Goals to Solutions (Tasks & Data)

Goal

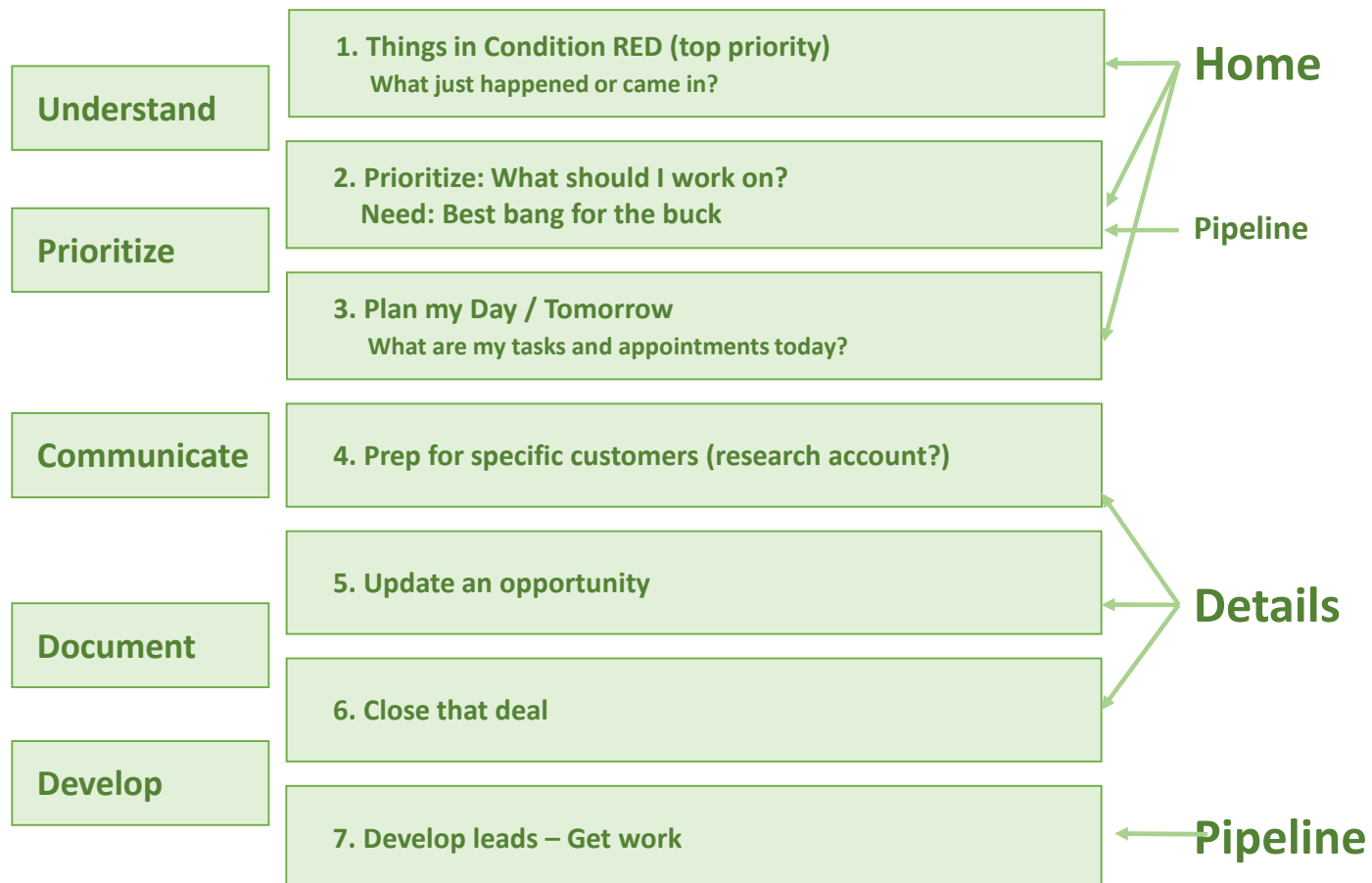
Solutions

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

What Architecture satisfies those flows?

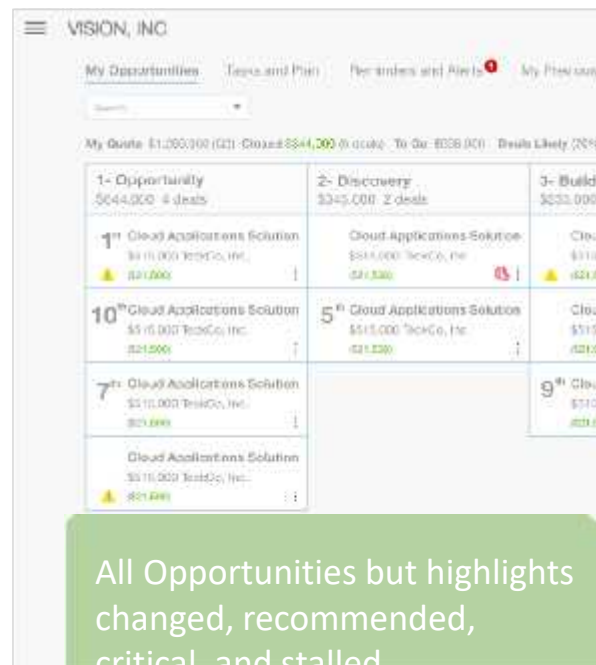


Home Page



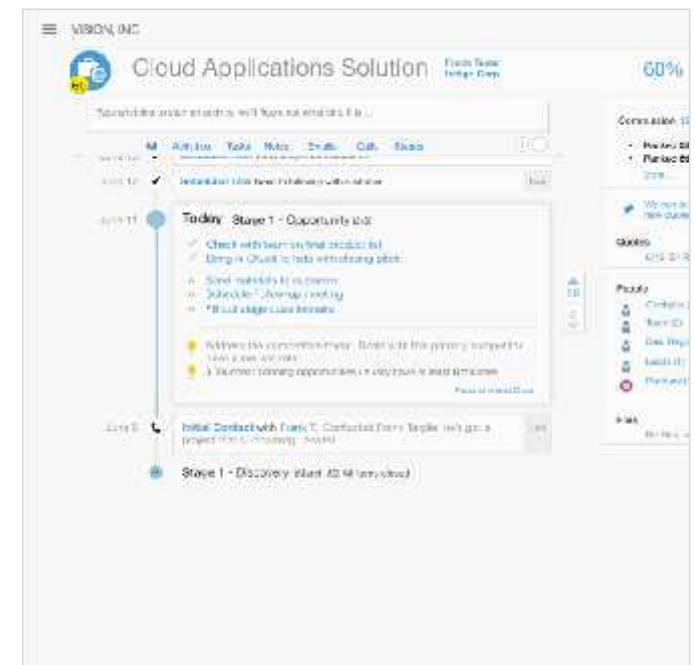
Surfaces favorite & critical opportunities

Pipeline (Kanban)



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

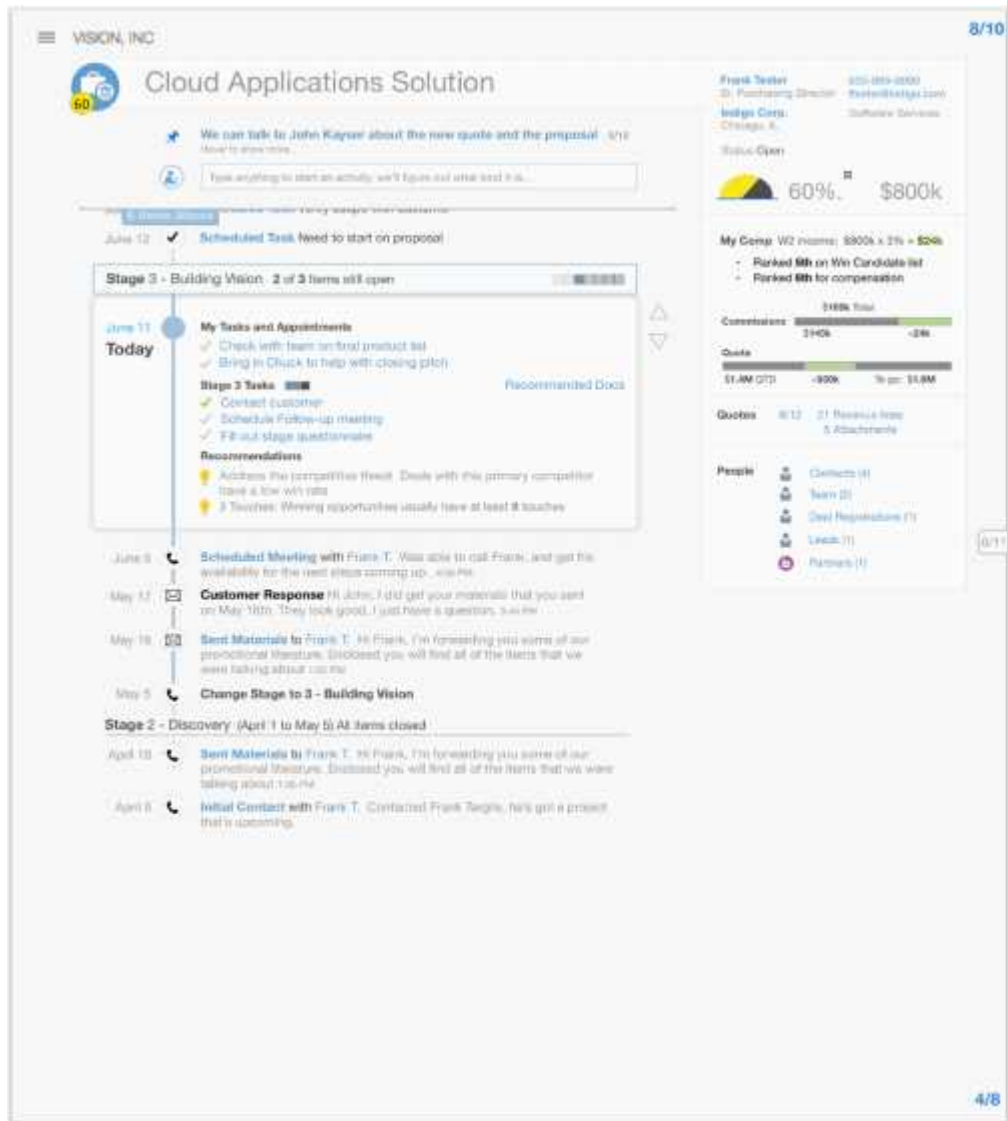
Detailed Opportunity



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 3

VISION, INC

Cloud Applications Solution \$800k 60% Stage 3

Frank Tester, Sr. Purchasing Director | 800-248-0282 | frank@vision.com | Heligo Corp., Chicago, IL | Software Services | Status: Open

1: Where It's At

Last Step (10 days ago)
Phone Call to Frank T. 6/6 2:13 pm
 Got a hold of Frank, we had a good conversation. I was able to get him to buy into my vision for the solution...

Notes
 We can talk to John Rappier about the new quote... 3/17
 Think we'll need to move the date of the closing d... 3/17

2: What To Do Next

Next Step (within 8 days)
 ✓ **Schedule Follow-up by July 25th with Frank T.**
[Schedule Follow-up](#)

Tasks and Appointments

JULY 11	Meeting with VP Purchasing
JUNE 11	Schedule Task Verify scope with customer
JUNE 11	Scheduled Task, need to start on proposal

[View Dates](#)

Stage 3 - Building Vision
 2 of 3 Items still open

- Contact customer
- Schedule Follow-up Meeting
- Fill out stage 3 email/criteria

[Recommended Docs](#)

3: What Will Seal the Deal

Things to Address
 Address the competitive threat. Deals with this primary competitor have a low win rate.

How Many Touches
 3 Touches: Winning opportunities usually have at least 8 touches

4: What Else to Know

Stats

- WY Income: \$800k x 3% = **\$24k**
- Ranked 9th on Win Candidate list
- Ranked 6th for compensation: \$198k, \$300
- Commission: \$140k, -24%
- Quote: \$1.4M (OT) - \$30k, To go: \$1.4M

Quotes

WY	2T Revenue	3 Attachments
Revenue 2017	\$20k	
Revenue 2016	\$17k	
Quote	\$1k	
Quote 2017	\$2k	
Quote 2016	\$1.2k	
Quote 2015	\$1.2k	
Quote 2014	\$1.2k	
Quote 2013	\$1.2k	
Quote 2012	\$1.2k	

People

- Contacts (4)
- Team (2)
- Deal Negotiators (1)
- Leads (1)
- Partners (1)

Timeline

- June 6: Scheduled Meeting with Frank T. Was able to call Frank, and get his availability for the next
- May 17: Customer Response Hi John, I did get your materials that you sent on May 15th. They look good. I just have a question. See file
- May 16: Sent Materials to Frank T. Hi Frank, I'm forwarding you some of our promotional literature. Enclosed you will find all of the items that we were talking about last file
- May 5: Follow-up with Frank T. Called Frank and he agreed to review some of our sales materials.
- April 9: Initial Contact with Frank T. Contacted Frank. Again, he's got a project that's

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?