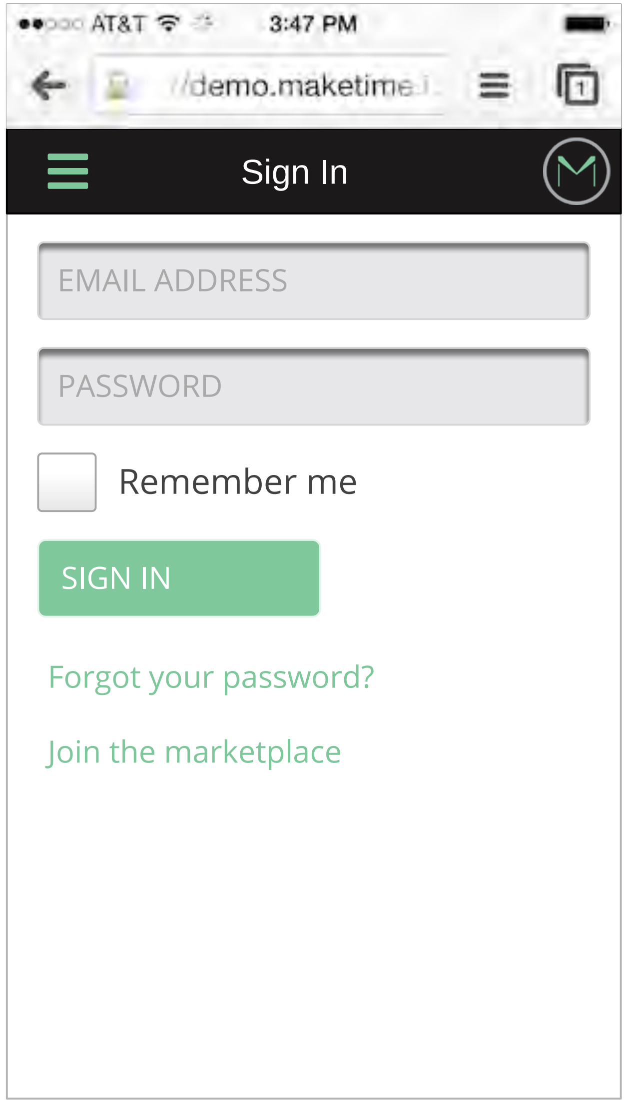
User Experience Design Portfolio

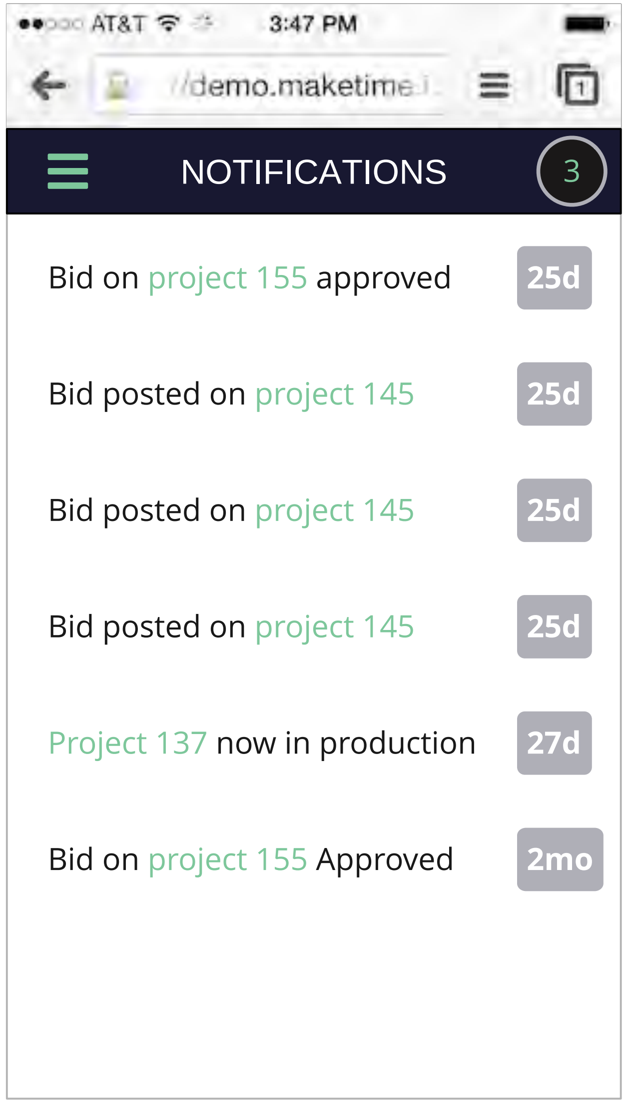
Rick Spencer

Mobile Notifications & Detail

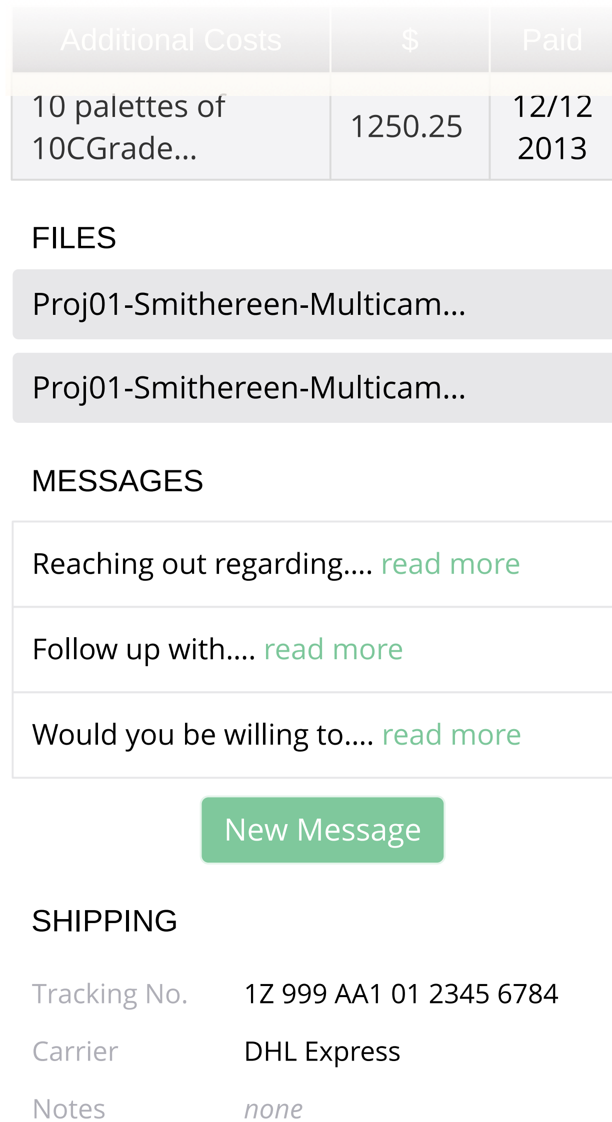
Maketime, 2014



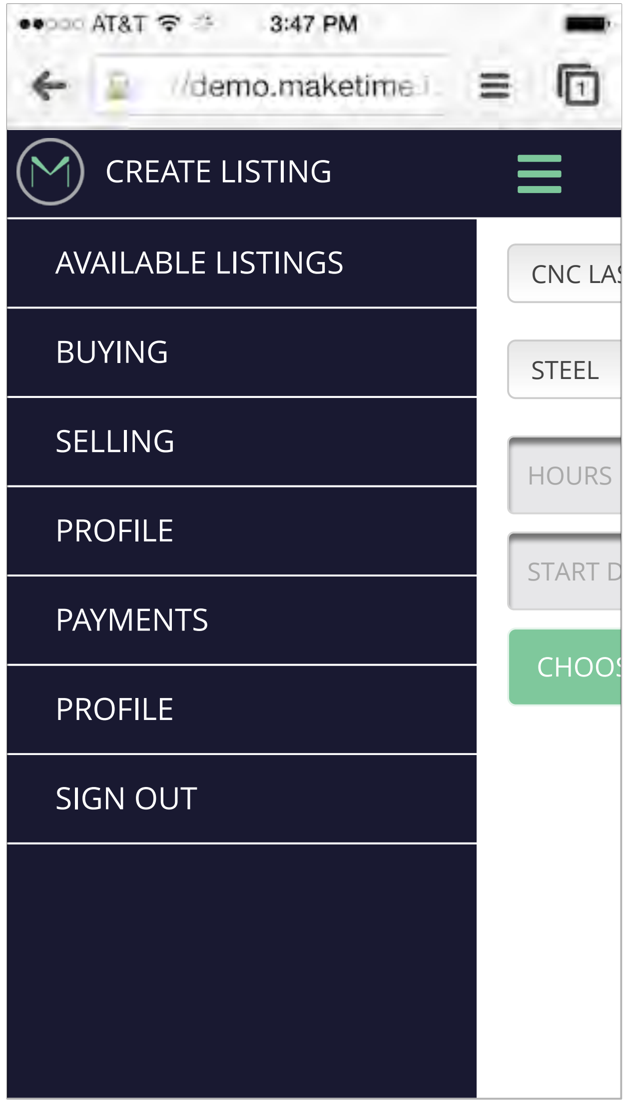
Maketime was wise to think about the mobile experience early. The web-based SAAS application allows machinists to reserve or sell access "time" on CNCs, lathes or other manufacturing and machining tools. The responsive mobile site replicated the web app in a constrained window.



Notifications, accessed from the traditional top-right icon allow users to see quick facts about bids for projects, and doubled as personalized history and navigation. Notifications are short and sweet. Messages are something else, and would come later in the app's design.



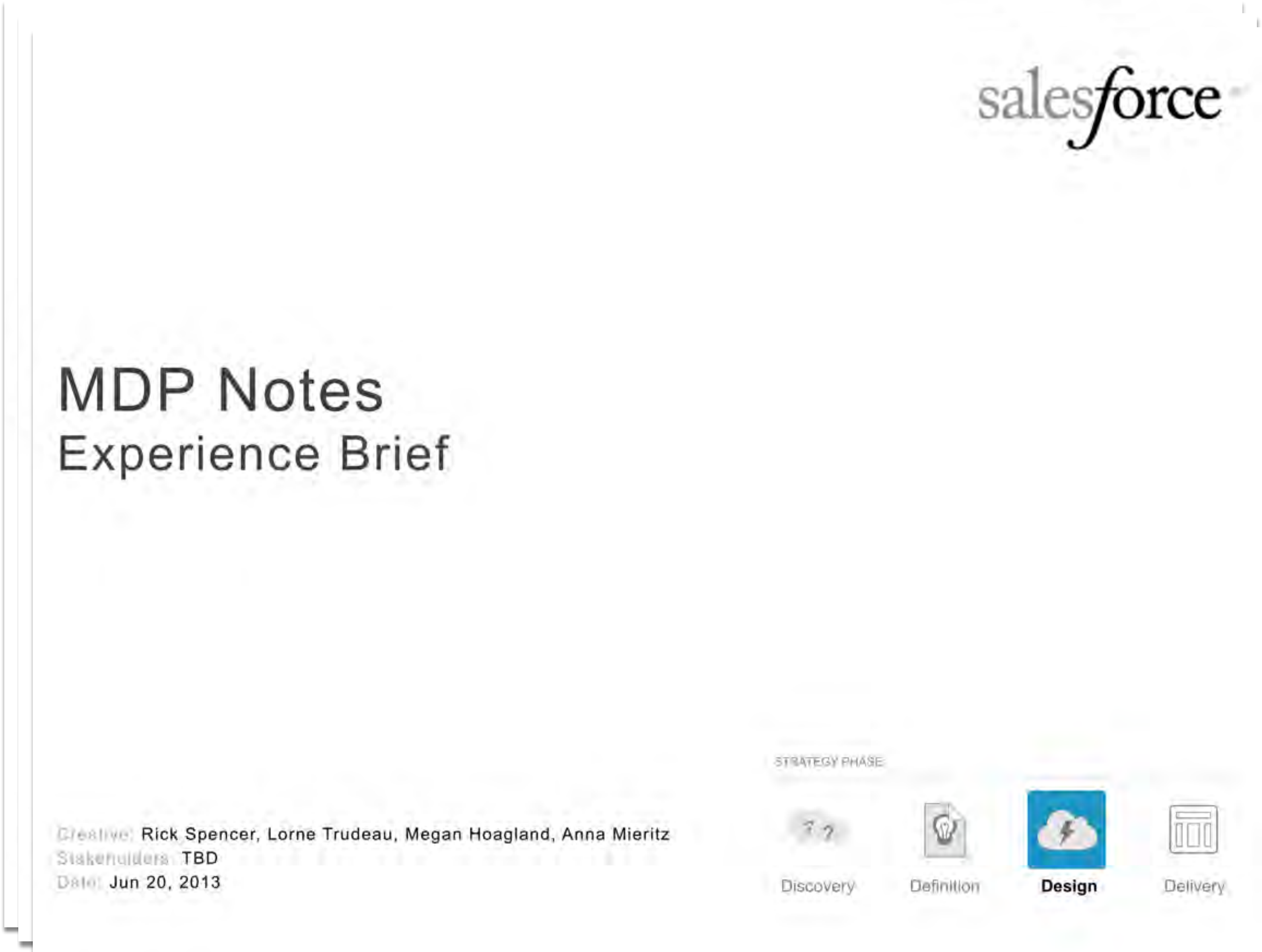
On the left is the top of a project detail screen and on the right is more detail visible by scrolling. A user could get to this detail from a notification or by navigating from a projects index.



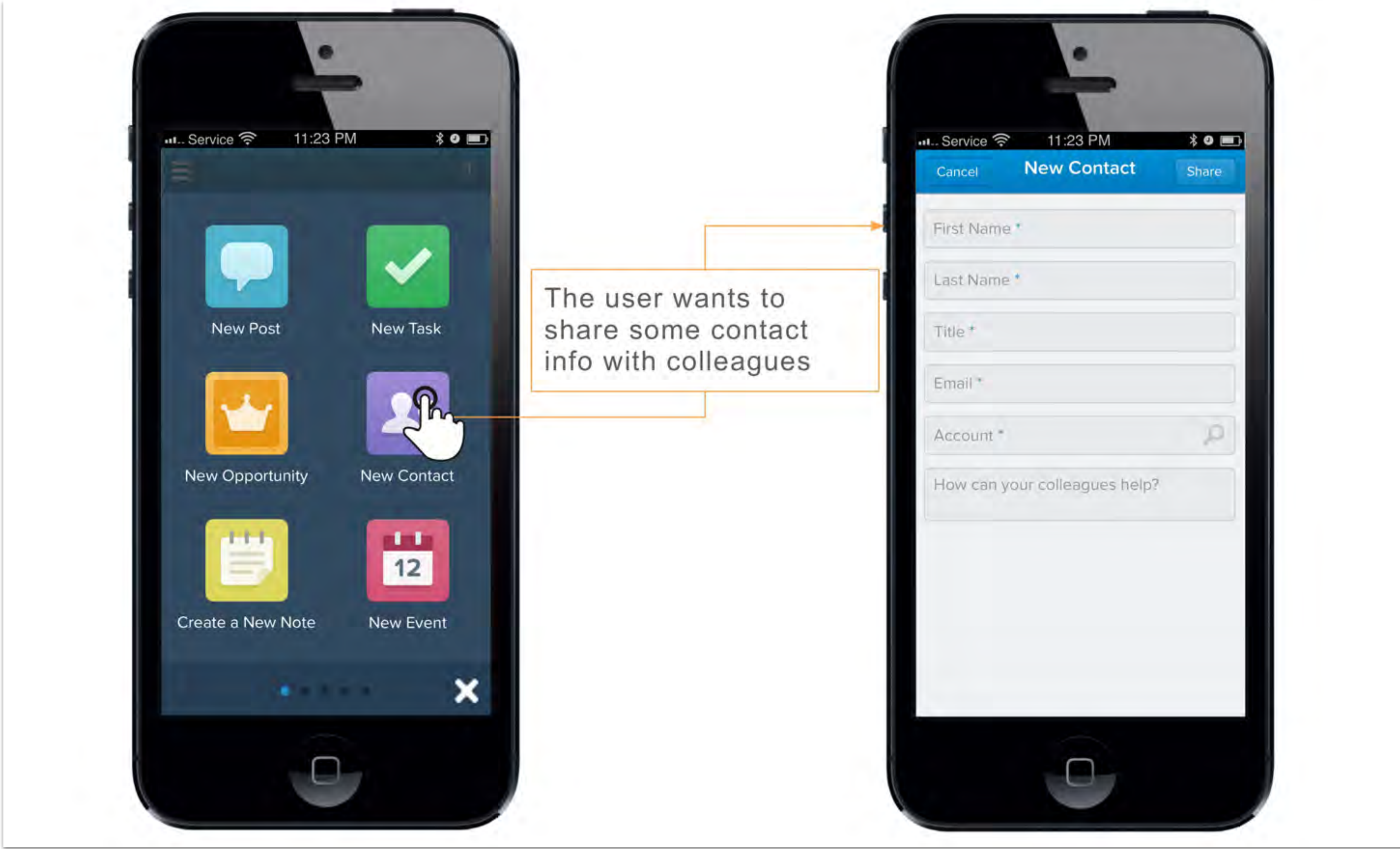
Navigation on mobile devices needs to be simple, predictable, and most importantly, findable. Making users remember or guess can cause frustration or failure in situations of stress or rapid task-switching.

Concept Design: Draft Records

Salesforce, 2013

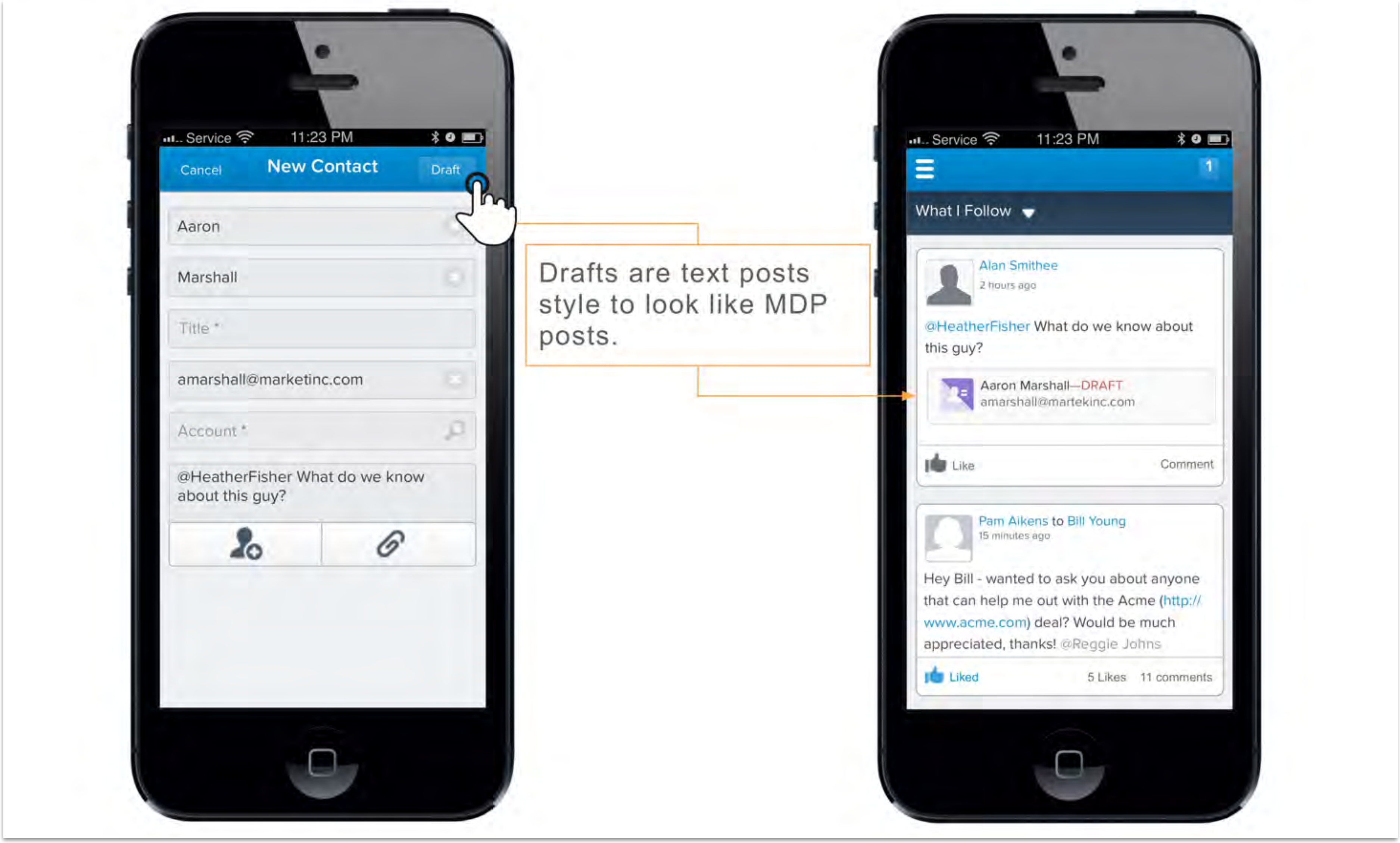


I led a team of designers through a two week project to explore creating form data from loose notes. I began by creating a frame from business needs, user research, audits and more.

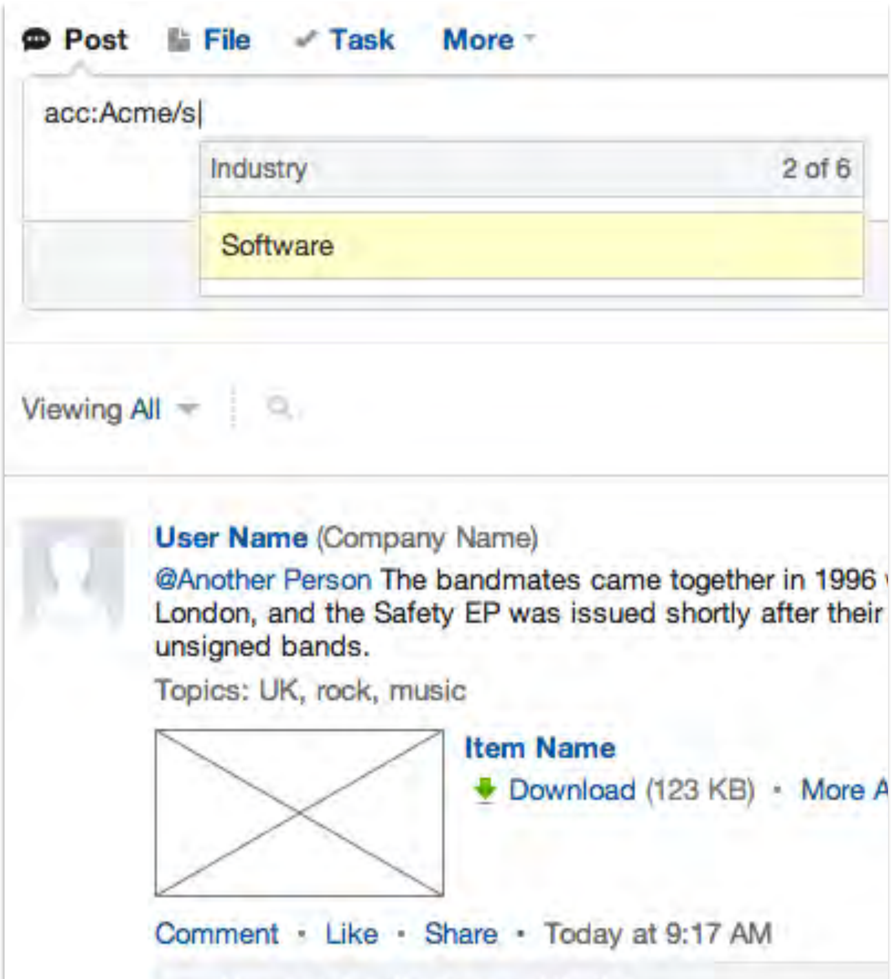


The main use case is the traveling salesman. Always on the go, they often spend after-work hours putting new knowledge into Salesforce. That's painful and slow for them and their colleagues.

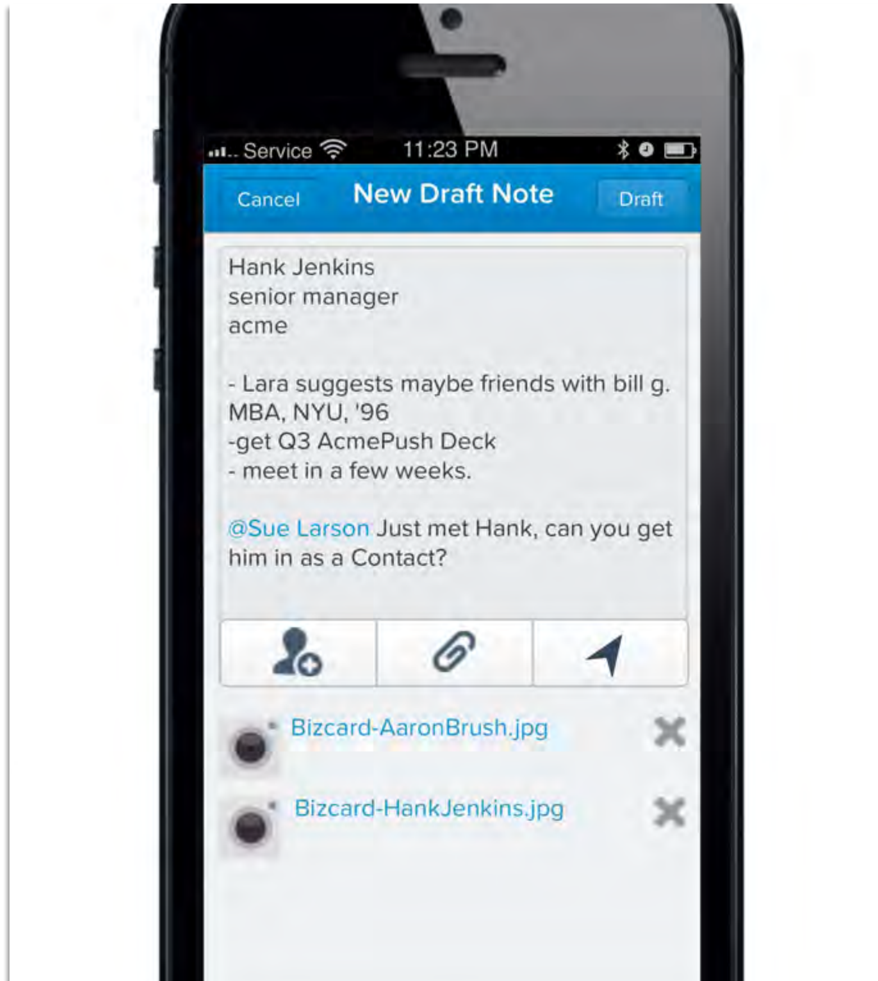
Publishing a draft record to the feed



Drafts allow colleagues to use whatever is provided. Completing the draft makes the record *real* to Salesforce CRM. It's the middle-ground that makes working from the feed truly meaningful.



Lorne Trudeau

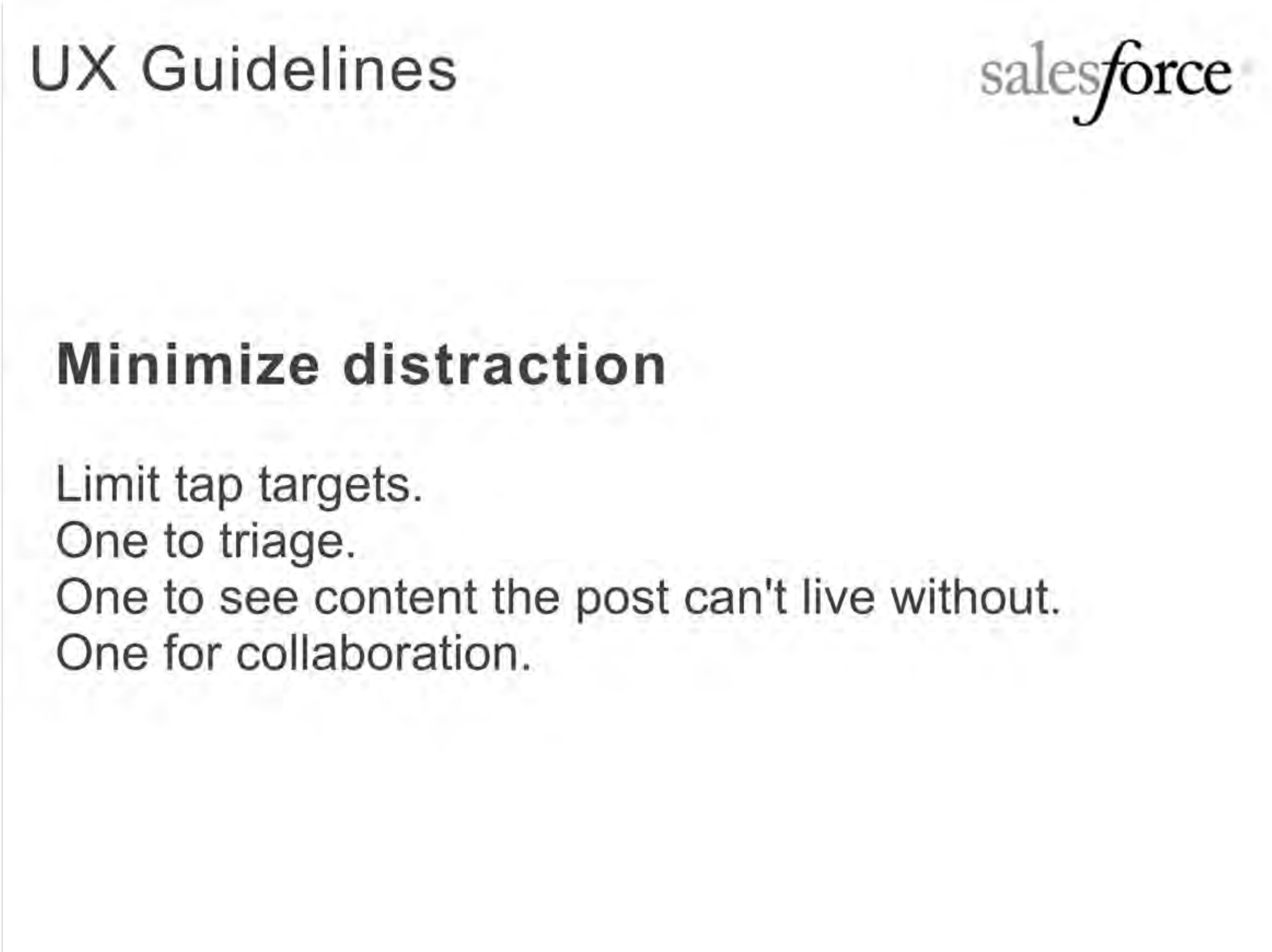


Megan Hoagland

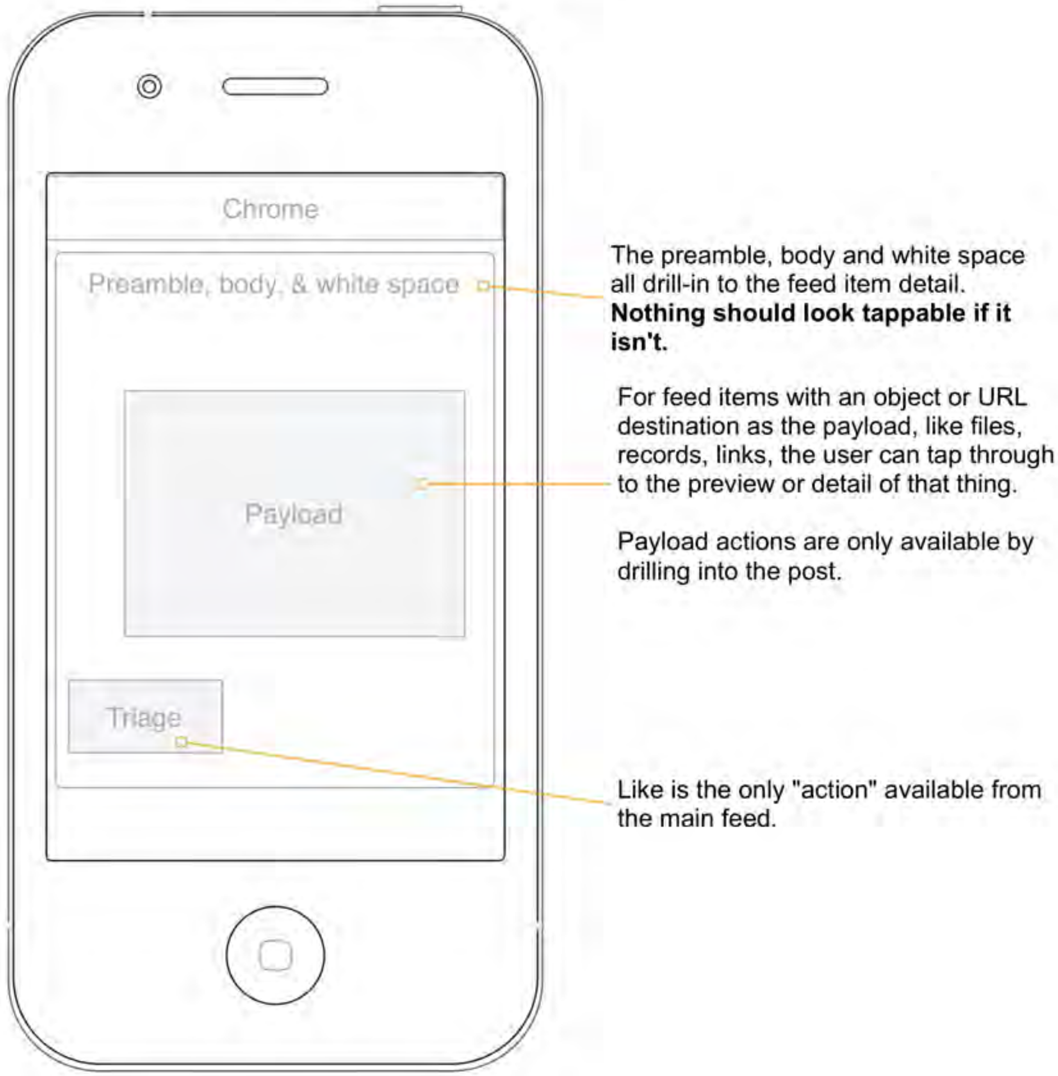
My colleagues had two very different solutions than mine, and both were really great. The work was well-received. One C-Level called the Discovery & Definition portion "genius."

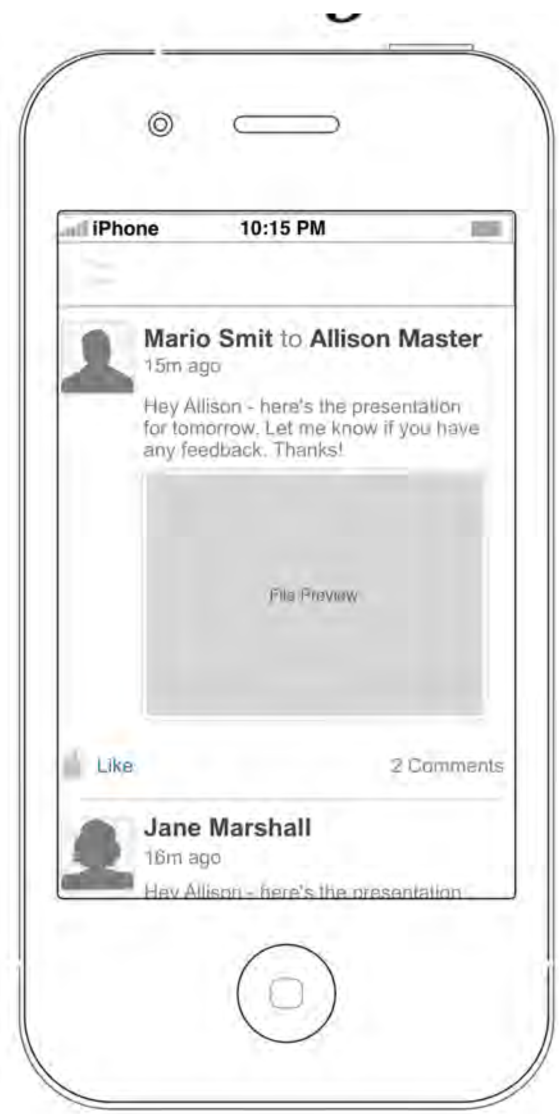
Mobile Feed Item Guidelines

Salesforce, 2013

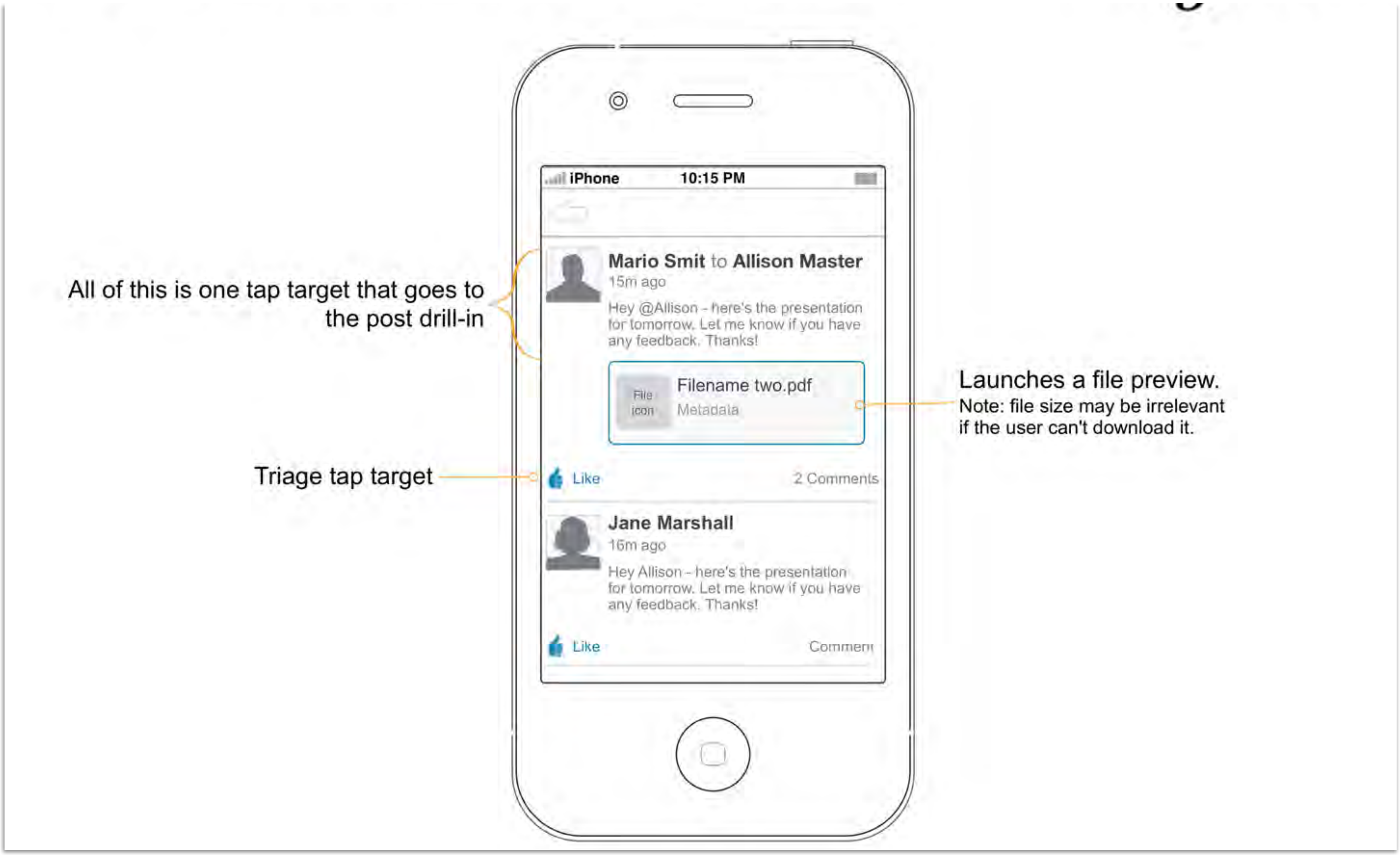


With three hours to work I was asked to express "our opinion" on how mobile feed items should work.

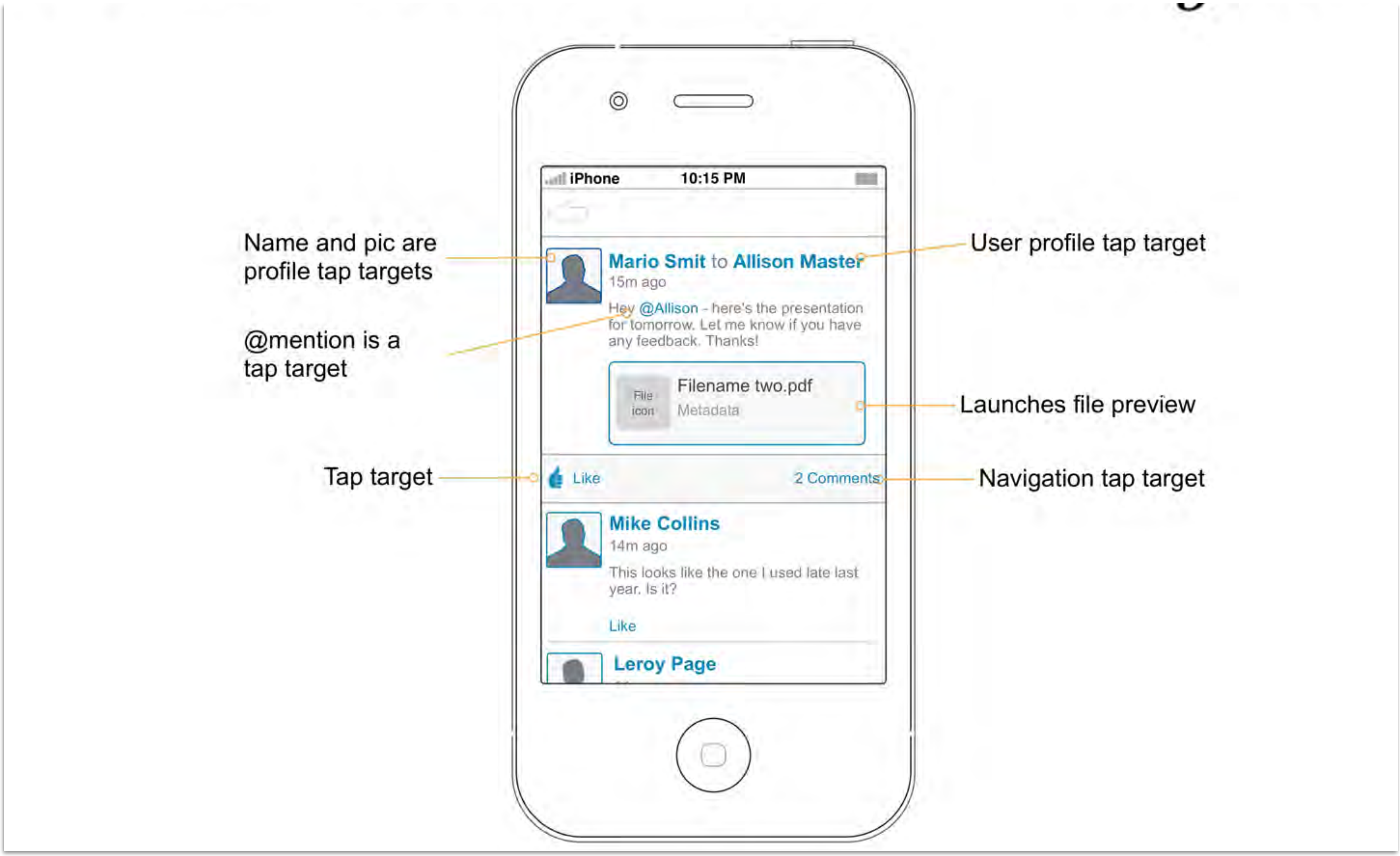




I created a deck with a strong expression of simple principles. Supported with diagrams of increasing detail and specificity.



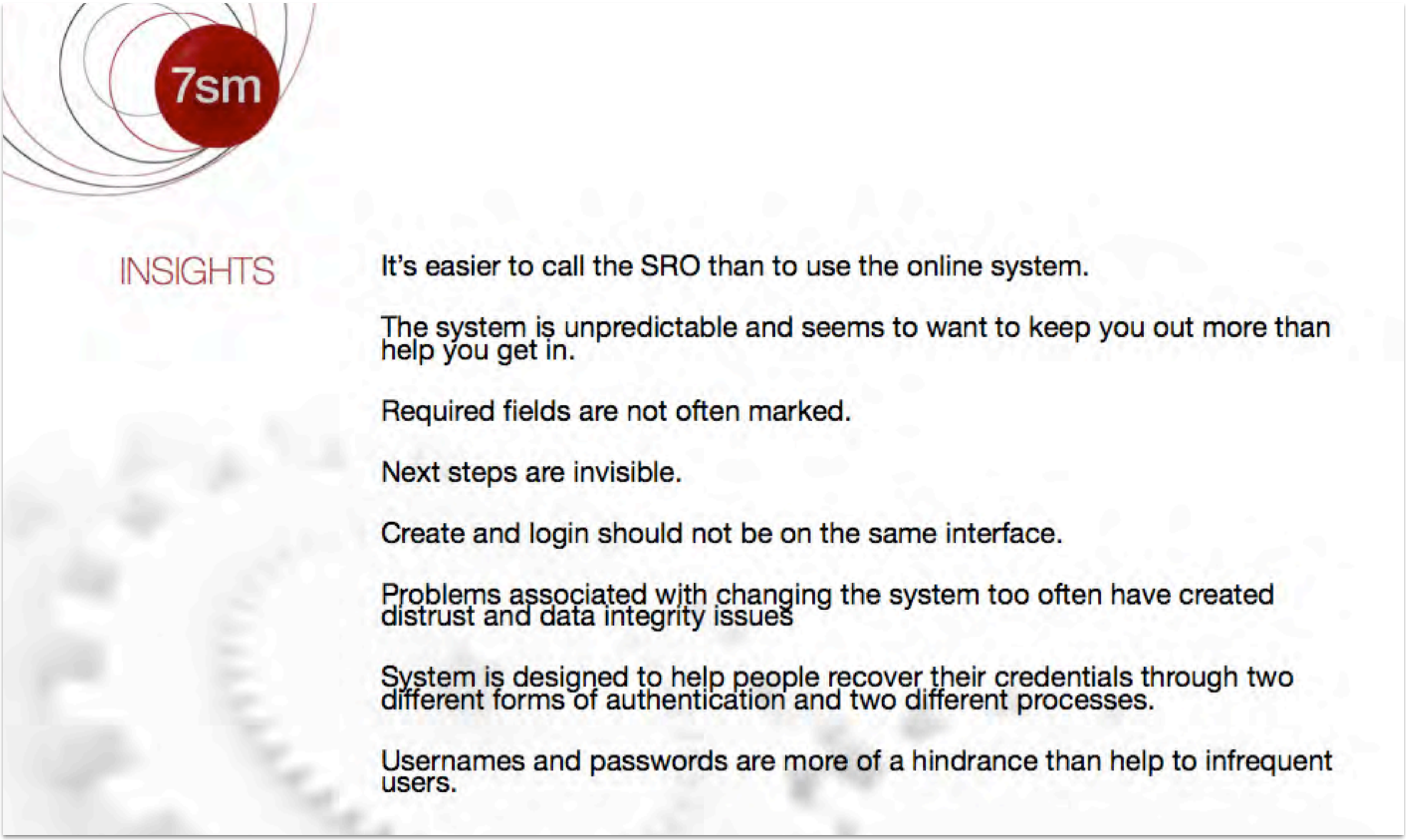
Focusing on my goals of simplicity, predictability and modern mobile patterns, I created a model for a file post with reduced interaction in the main feed view.



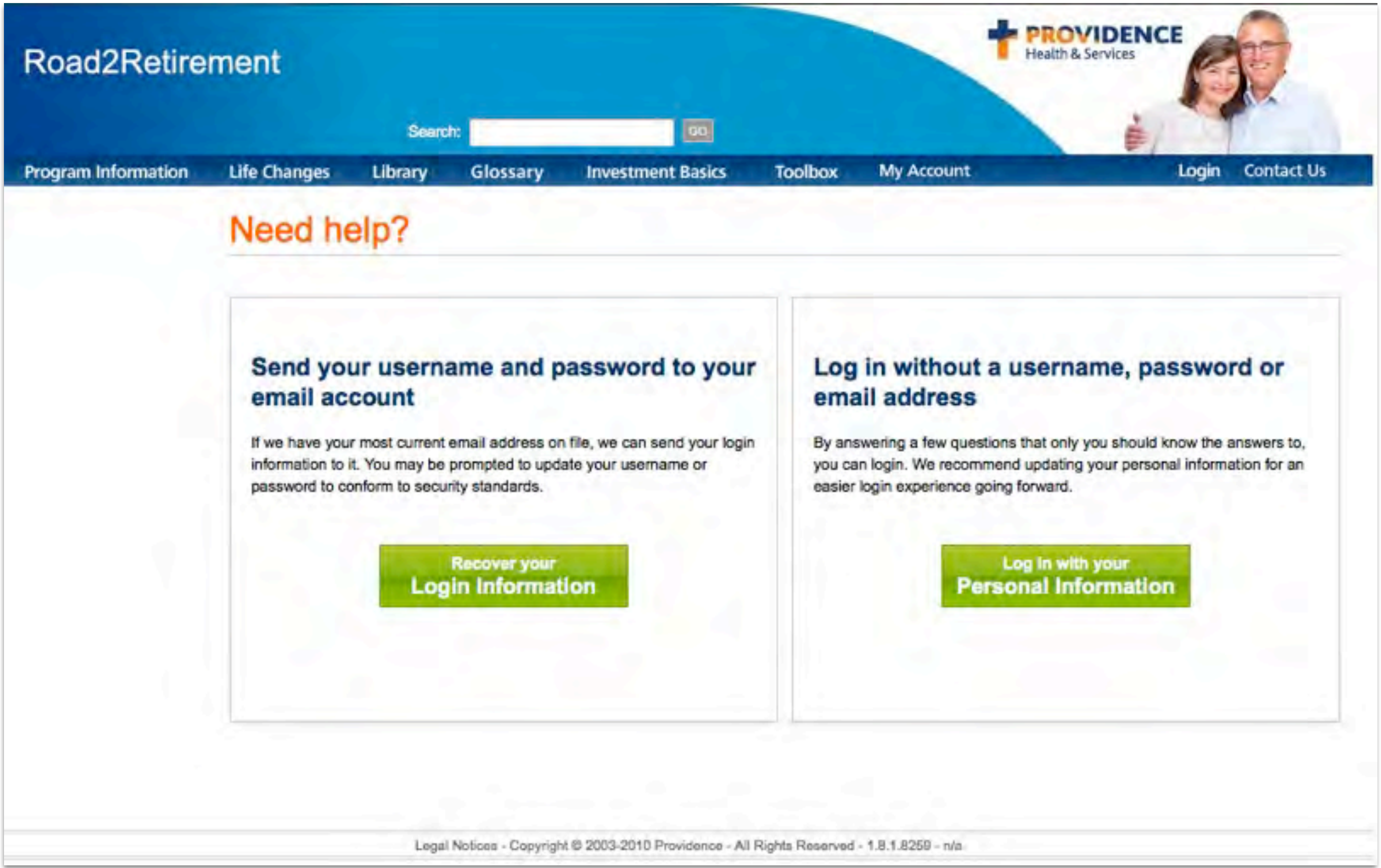
And more involved levels of interactivity on the detail view. Simple explanations allowed my team to influence decision makers the same day.

Road to Retirement Login

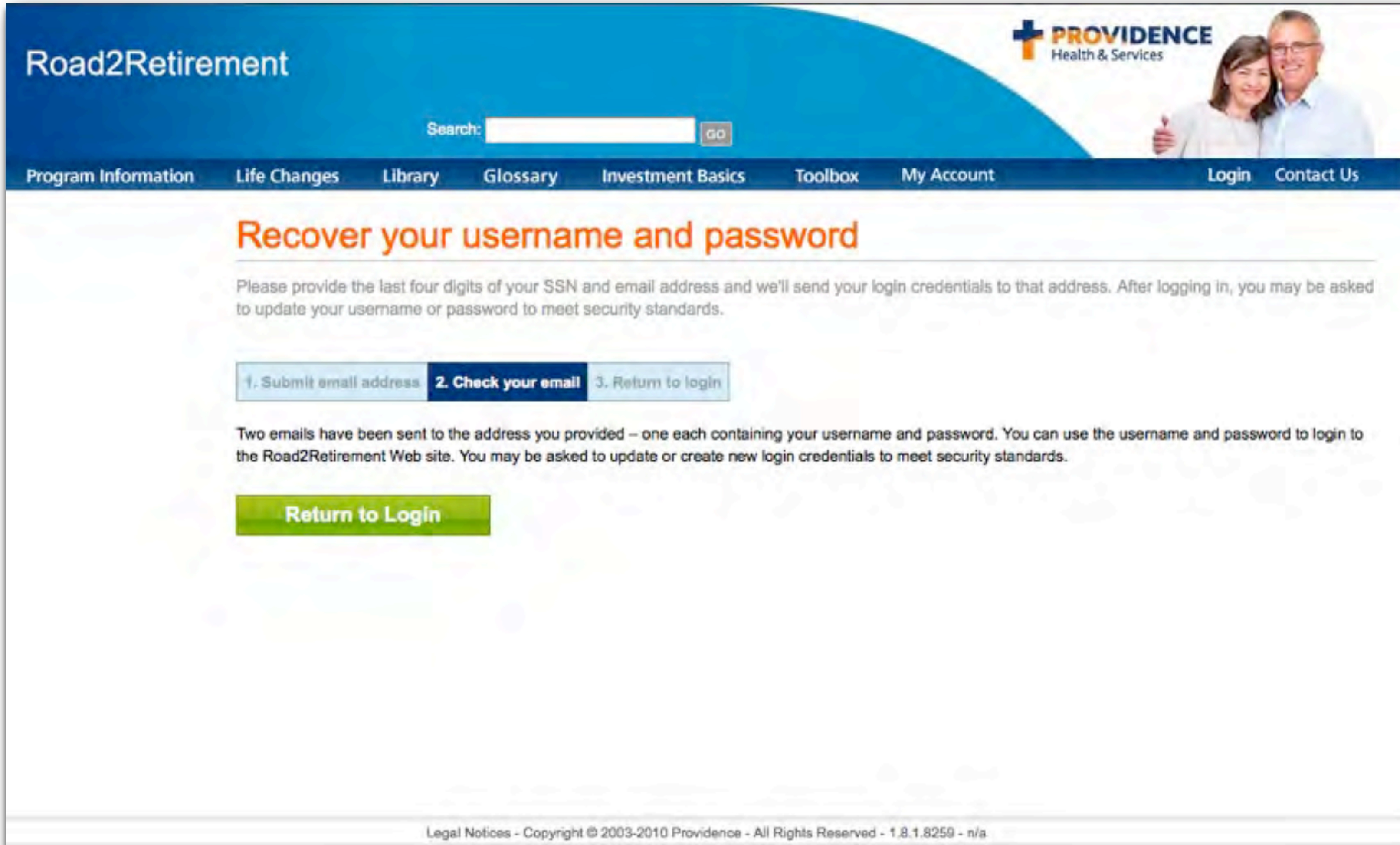
Providence Health & Services (via 7SM), 2011



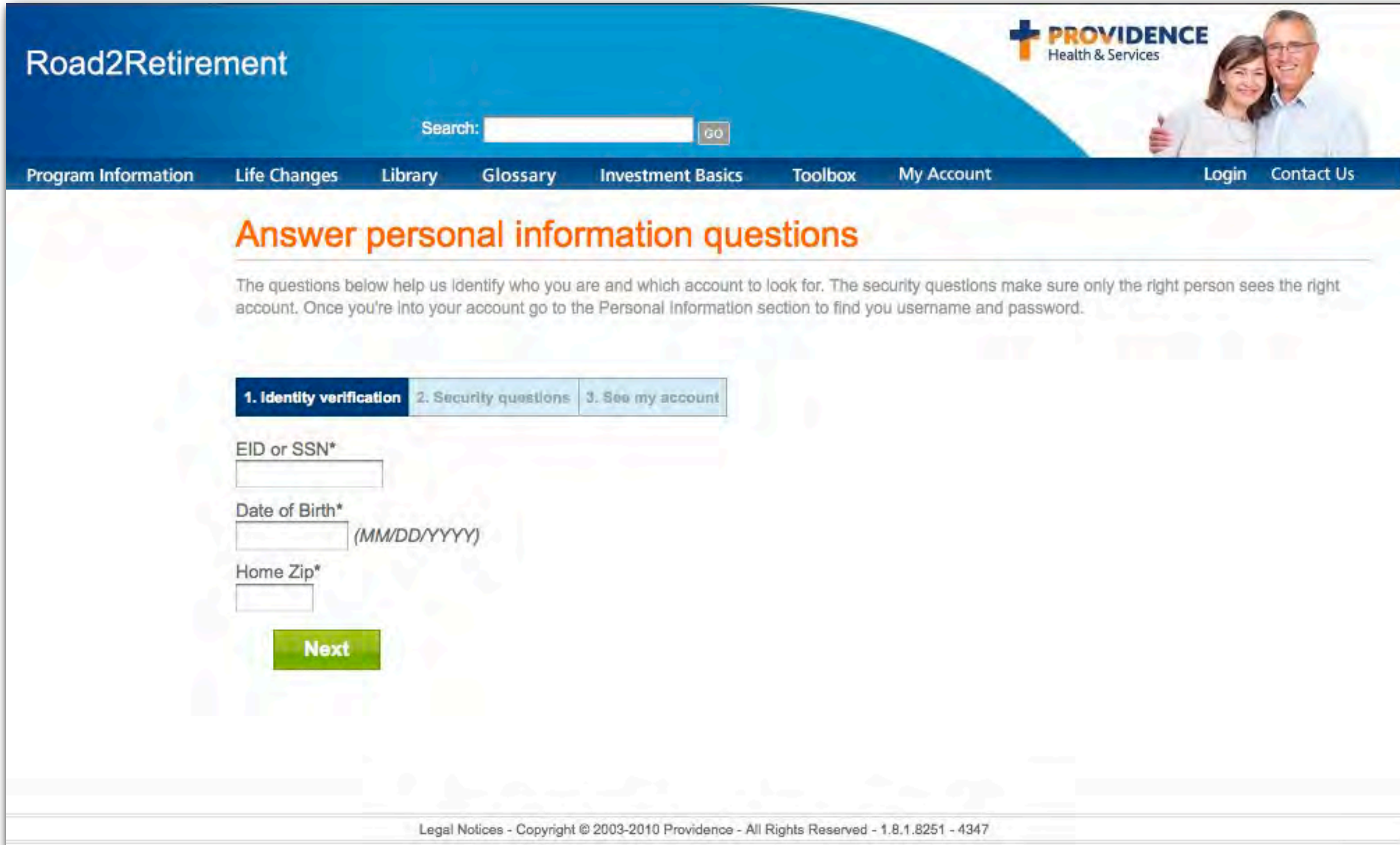
Our client's users were consistently having trouble with login. Rather than just updating the interface, I led research into the problem space. What we learned changed everyone's minds.



For regular users modernizing password recovery helps. Many users are seniors and email was going to be harder than using a phone. Their option had to stay away from email.



I wanted to show the client that the user could see what was going to happen all the way through. Predictability leads to comfort, and comfort leads to completion.



Our irregular users could log in be authenticating. They would get a password out of it, AND see their information on the site. This solution reduced support center calls and met security needs.

Product Concept Comic Book

Daptiv, 2008

COMPONENTS

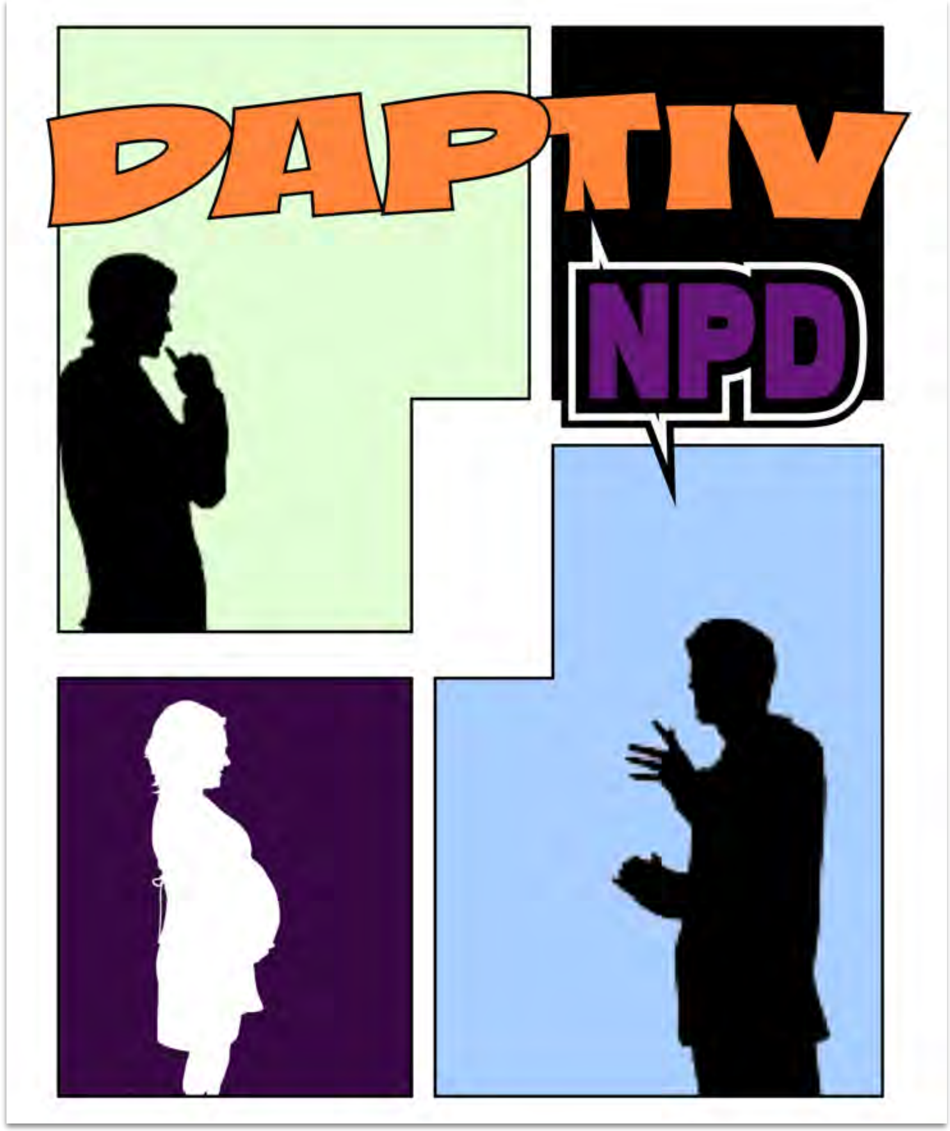
It outlines the NPD process as a lifecycle (Discovery -> Ideation -> Dev -> Launch -> Post-Launch (Support) through a series of actors. These actors include Devs, Scrum Master, Product and Program Management as one character, and Executives. What we're attempting to show is that with a select said of capabilities which can be realized as features, we can provide a platform for the development and deployment of a compelling NPD solution.

1. NPD Process Definition
    a. Discovery
    b. Ideation
    c. Development
    d. Launch / Go-to-Market
    e. Post-Launch
2. Actors relevant to that process, across the organizational hierarchy
    a. Executives
    b. Developers
    c. Product Managers
    d. Scrum Master
    e. Support Team
    f. Sources outside of organization
3. Tsavo Backlog
4. Goal-directed Ideation
5. Co-branding is a feature idea that we follow through the whole process.

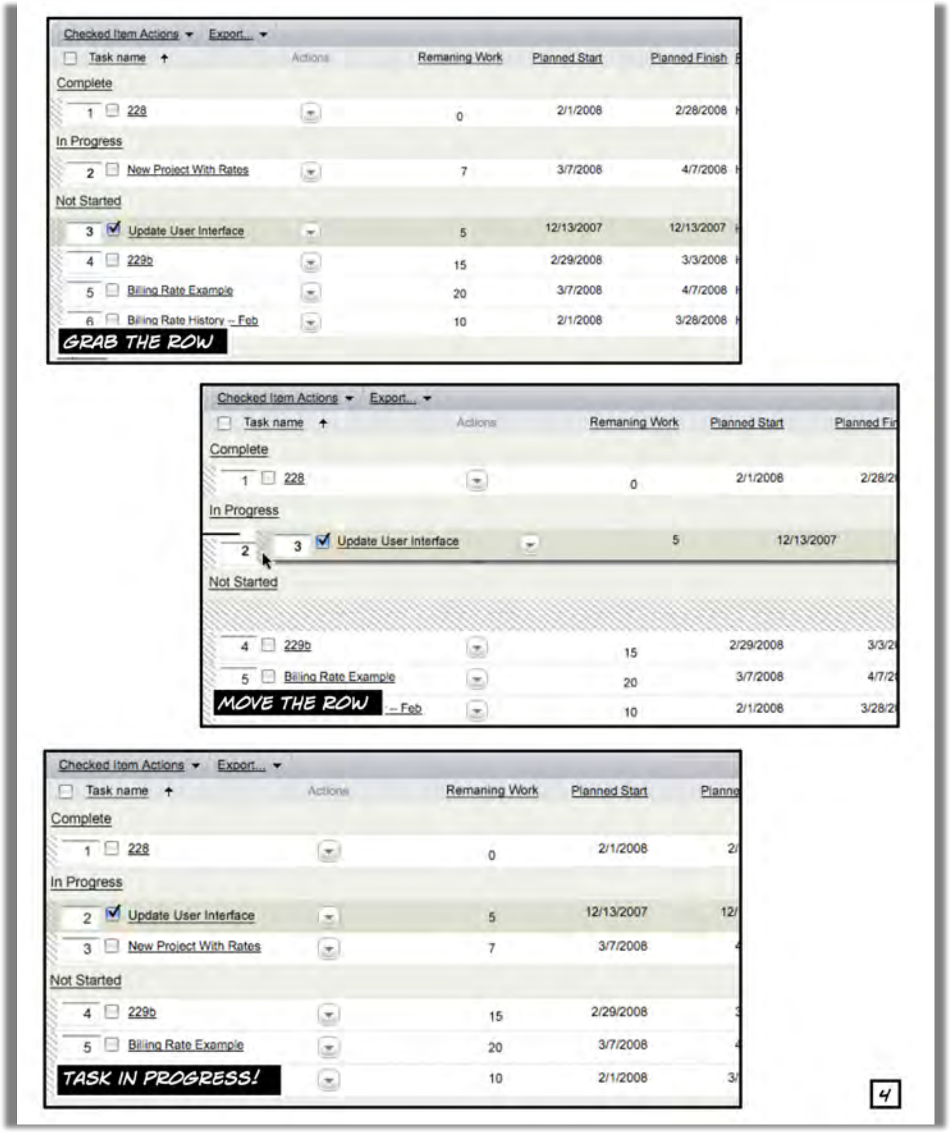
STORIES:

1. **Development**: Dev takes task and a logs hours against it.(Developer, **DD4**)
    a. Developer picks at task from his tasks view
    b. Developer logs hours against tasks **(DD4)**
2. **Development**: SM (Scrum Master)(dashboard)
    a. Look at dashboard of burndown **(EE)**
    b. Things are going ok. **(EE)**
3. **Development: SM (Scrum Master)**
    a. Look at dashboard for impediments (custom view of tasks marked as impeded) **(EE)**
    b. 2 new impediments **(EE)**
    c. Send notification about impediment to PM **(FF)**
    d. Drills into item details for 1 impediment **(DD5)**
    e. Sees discussion of impediment **(DD5)**
    f. Re-assigns item to another dev. **(DD5)**
4. **GTM** – As sprint nears end, a project is launched for this release
    a. PM views item details for Epic **(DD1)**s
    b. PM converts it to a project **(DD1)**
    c. PM views project screen with Epic Info **(from Nichole)**
5. **GTM** - Executive meeting results in need for co-branding
    a. **Unknown?**
6. Pm modifies the solution to include the epics DA **(AA, BB)**
    a. PM navigates to Apps area, sees Agile app under NPD solution by Acme Agile **(BB)**
    b. PM opens DA Designer in edit mode to create new record type "epic" **(AA)**
    c. Show epic with all pieces including evidence related list and stories related list. **(AA)**
    d. Pm changes tab view from stories to epics **(CC1, CC2)**
7. **Discovery, Ideation** - Pm creates an epic for co-branding from evidence list **(EE, DD1)**
    a. show related list for stories **(DD1)**
    b. related list for evidence **(DD1)**
    c. look up for related project **(DD1)**
8. **Ideation** - Pm queues epics **(CC3)**
9. **Development** - Pm presents co-branding epic **(DD1)**
10. **Development**: Dev tasks a story (Developer; **CC1 DD3**)
    a. Dev sees list of stories grouped by sprint. **(CC1)**
    b. Dev tasks the story by adding tasks to the related list area for that record. **(DD3)**

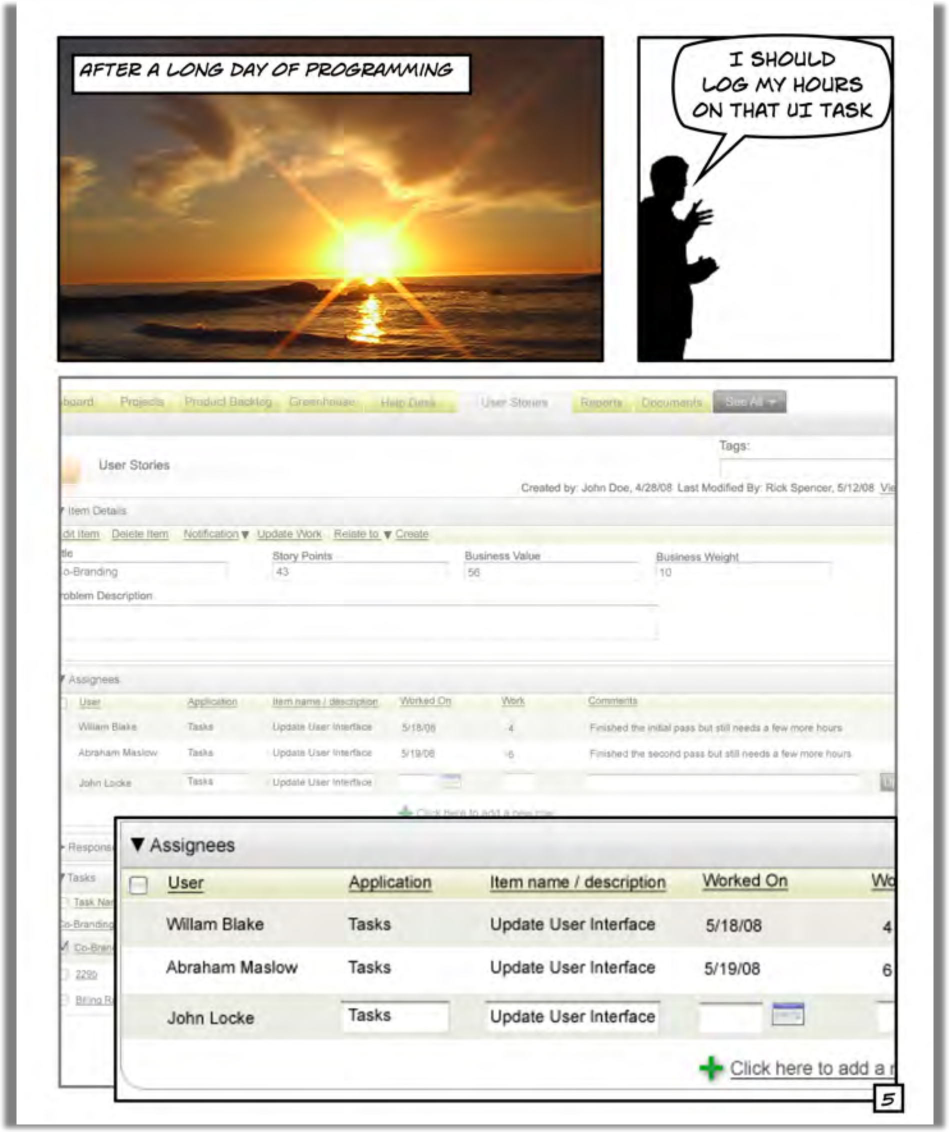
How do you communicate what the user experience for an imagined product will be? Talk to everyone, tie together their expectations, imagine the feature requirements and expected use cases. Show it.



Daptiv wanted to show that our new epic feature was going to allow a team of users to customize our product into something complete for a new domain. It needed to address specific personas.



Using the language of our actors helped people connect to the interface. It suggested complex and powerful functionality along with the use-case it satisfied.



Because this needed to sell "up" and sell "down" we need to show the story of people as well as interfaces and interactions that were real enough to build towards.

The mixture of explorable detail, changes in depth from UI to story, flowing plot and scope all lead to a document so successful department heads argued who it was *really for*. That's alignment.