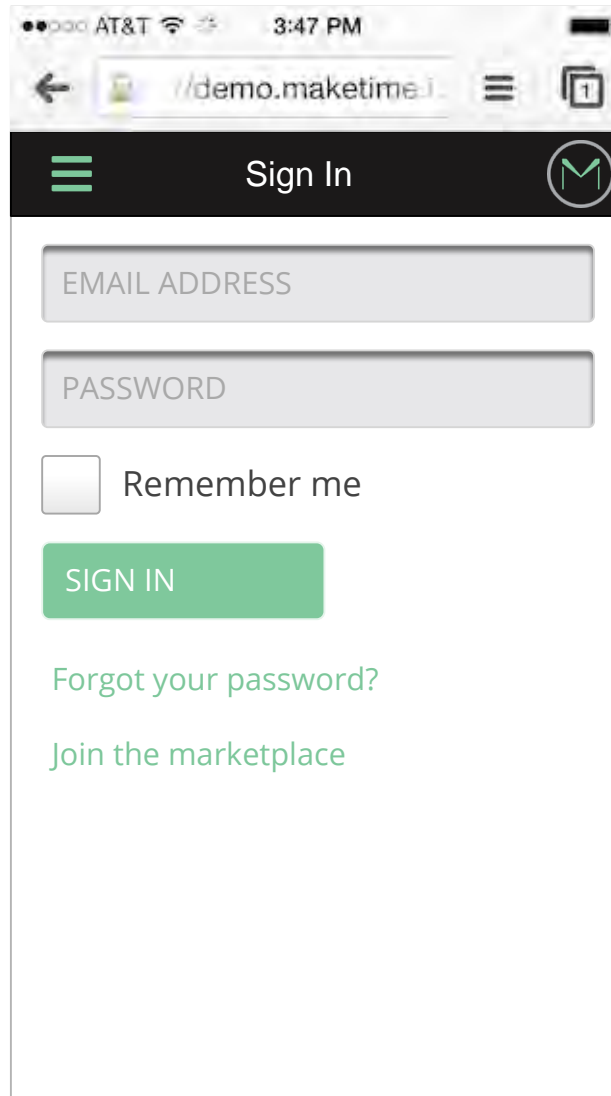


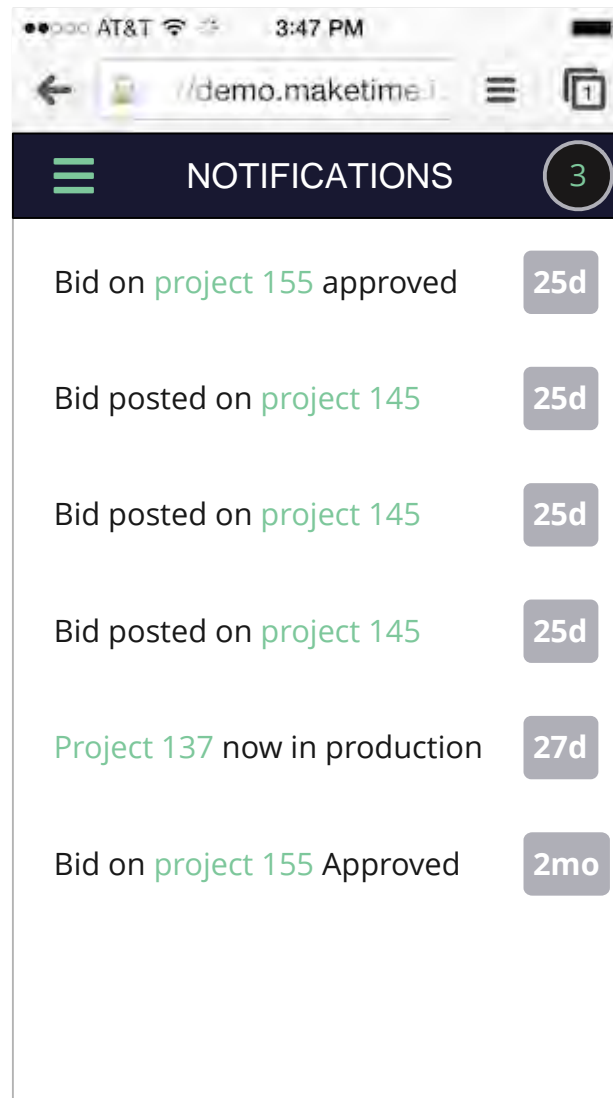
User Experience Design Portfolio  
Rick Spencer

# Mobile Notifications & Detail

Maketime, 2014

A screenshot of a mobile web browser displaying the sign-in page for Maketime. The browser's address bar shows the URL //demo.maketime.i. The page has a black header with a green hamburger menu icon on the left, the text "Sign In" in the center, and a green circular logo with a white 'M' on the right. Below the header, there are two light gray input fields for "EMAIL ADDRESS" and "PASSWORD". Underneath the password field is a checkbox labeled "Remember me". A prominent green button with the text "SIGN IN" is centered below the checkbox. At the bottom of the form area, there are two green links: "Forgot your password?" and "Join the marketplace". The status bar at the top of the phone shows "AT&T", signal strength, Wi-Fi, and the time "3:47 PM".

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.



Additional Costs	\$	Paid
10 palletes of 10CGrade...	1250.25	12/12 2013

FILES

Proj01-Smithereen-Multicam...

Proj01-Smithereen-Multicam...

MESSAGES

Reaching out regarding.... [read more](#)

Follow up with.... [read more](#)

Would you be willing to.... [read more](#)

New Message

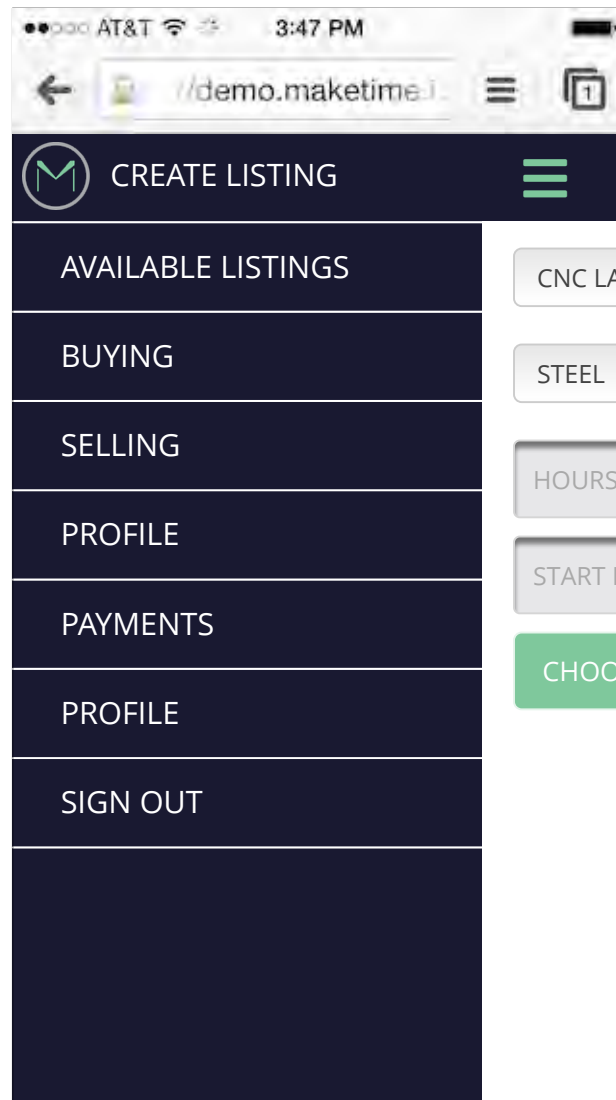
SHIPPING

Tracking No. 1Z 999 AA1 01 2345 6784

Carrier DHL Express

Notes none

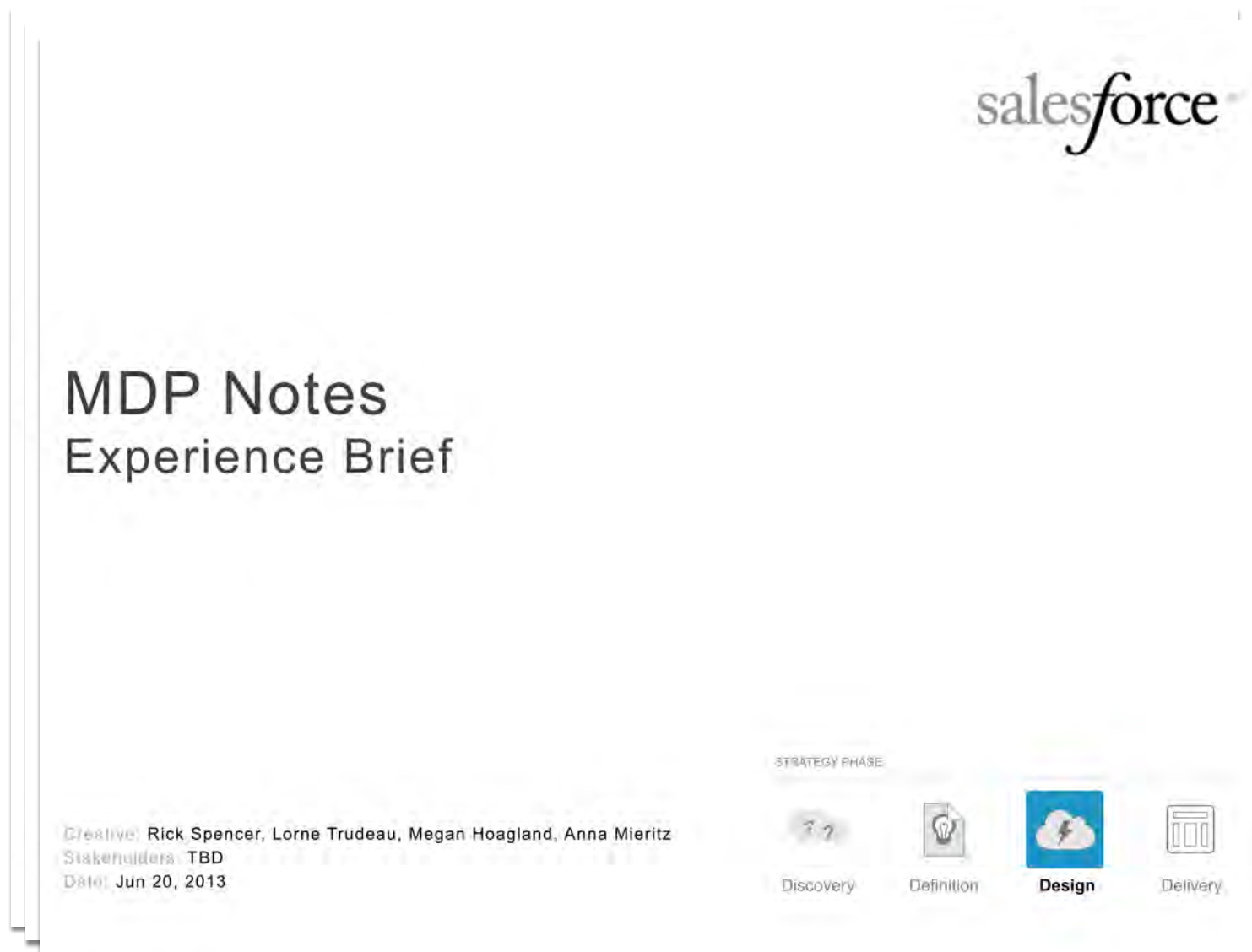
On the left is the top of a project detail screen and on the right is more detail visible by scrolling. A user could get to this detail from a notification or by navigating from a projects index.



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.

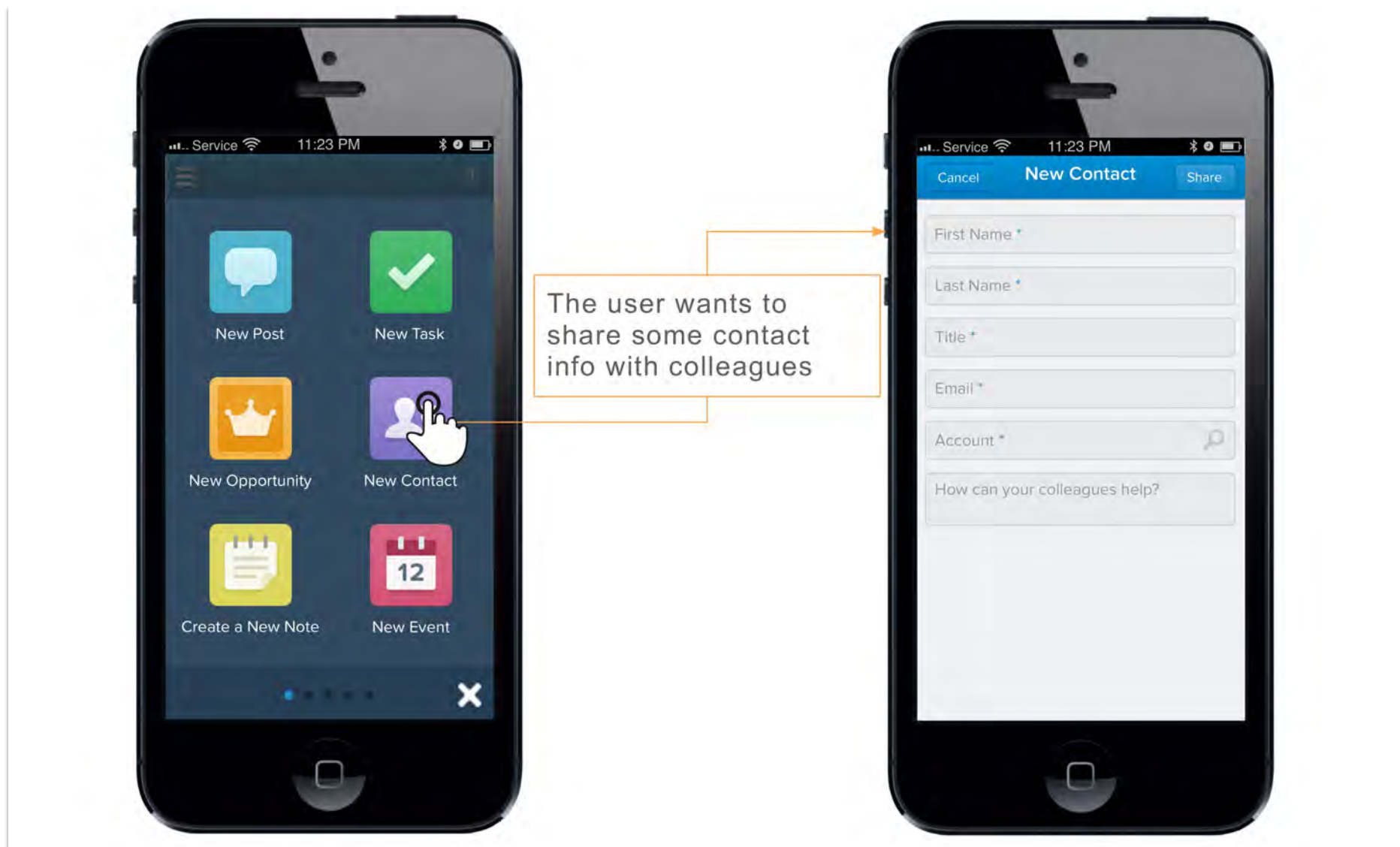
# Concept Design: Draft Records

Salesforce, 2013

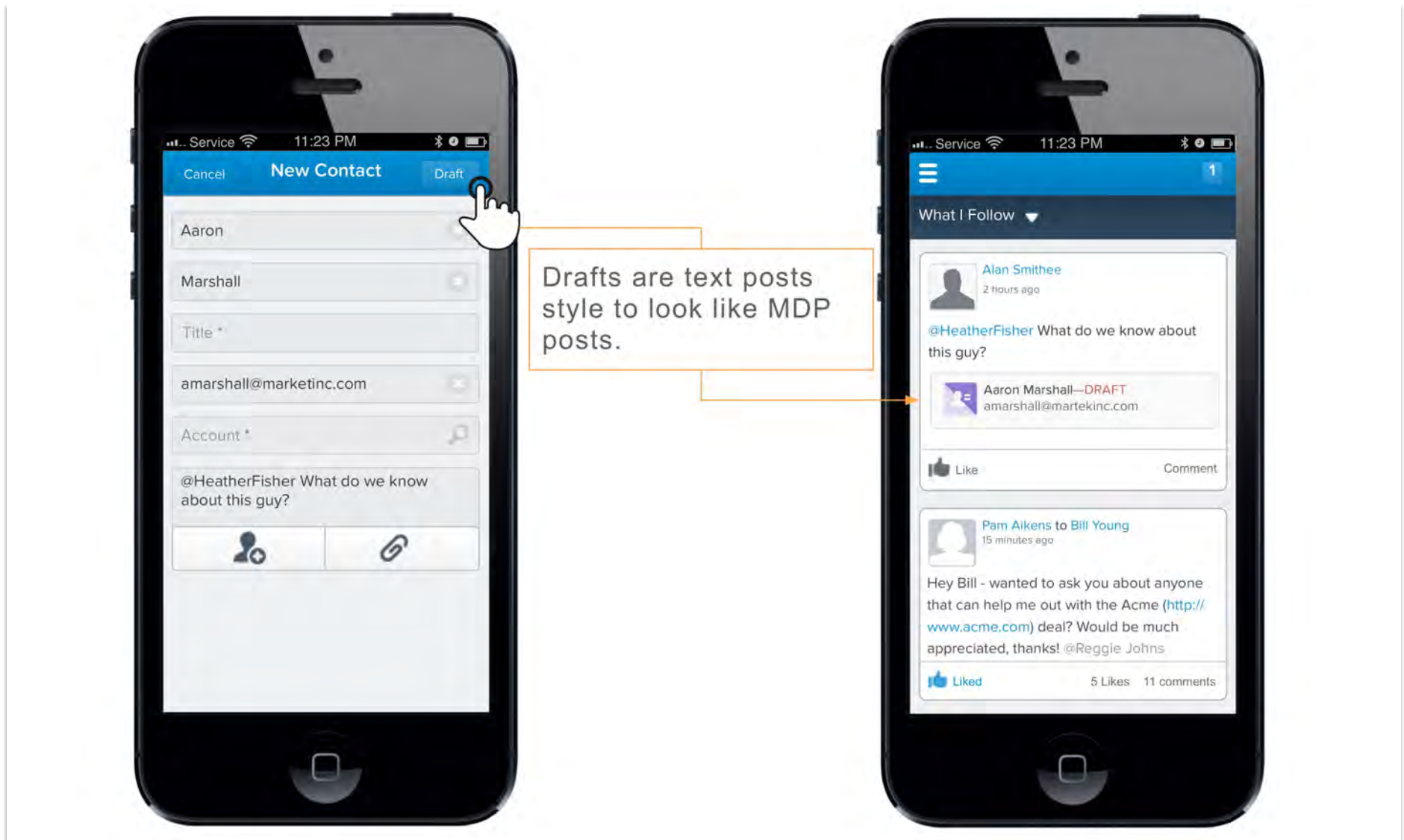


I led a team of designers through a two week project to explore creating form data from loose notes. I began by creating a frame from business needs, user research, audits and more.

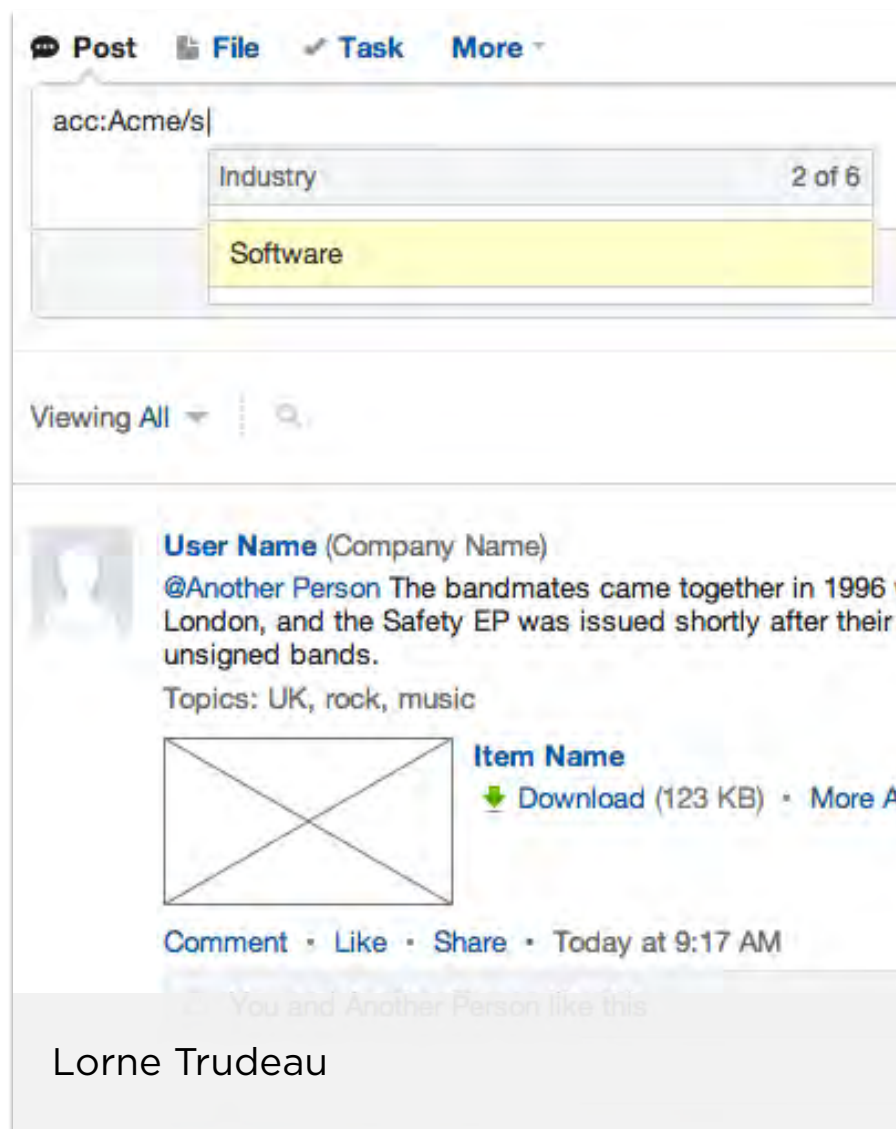




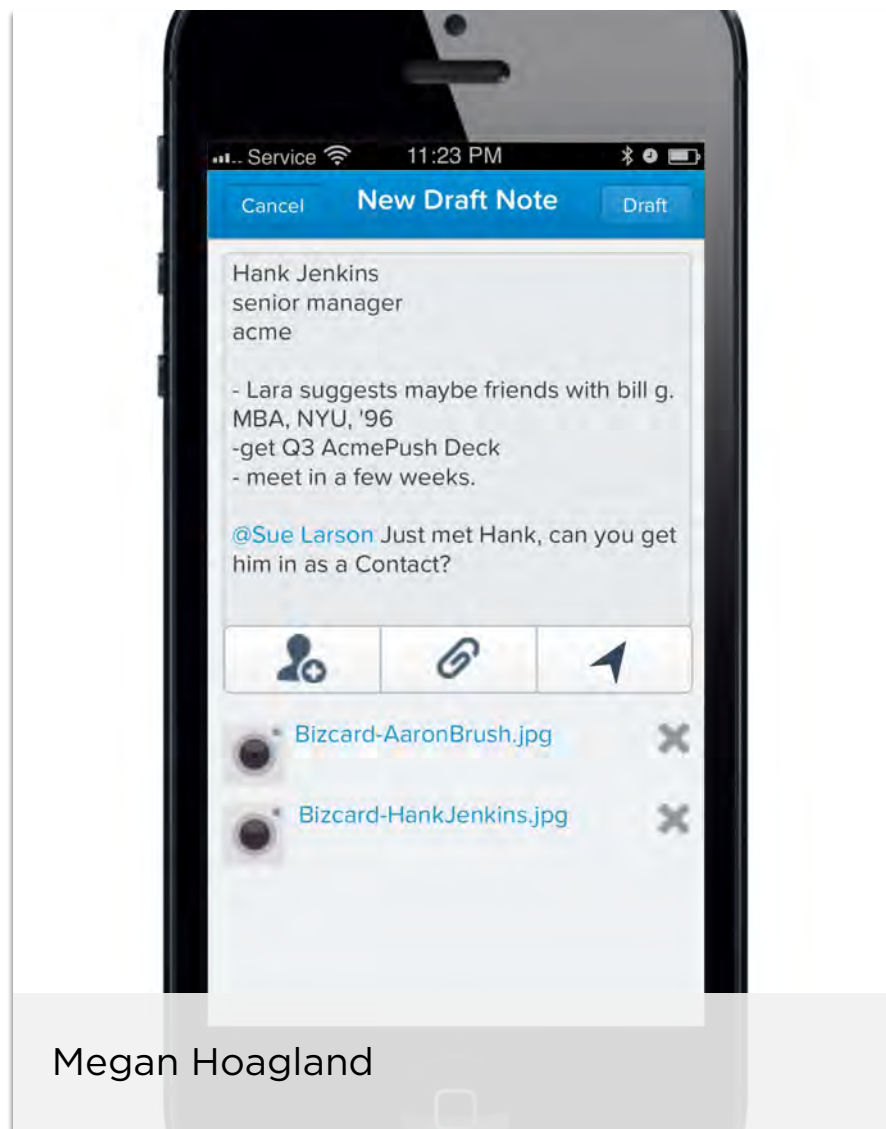
The main use case is the traveling salesman. Always on the go, they often spend after-work hours putting new knowledge into Salesforce. That's painful and slow for them and their colleagues.



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

## UX Guidelines



### **Minimize distraction**

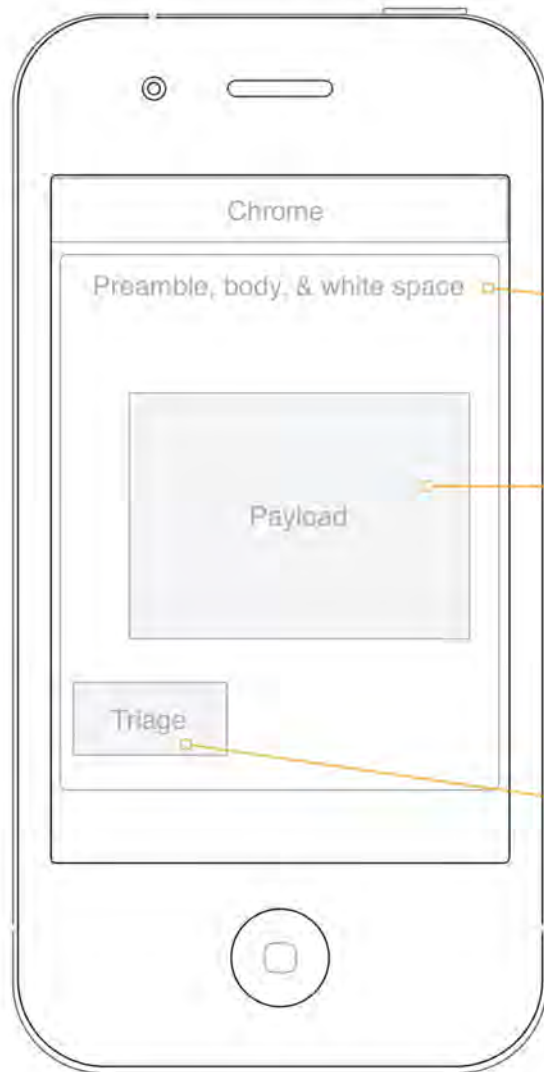
Limit tap targets.

One to triage.

One to see content the post can't live without.

One for collaboration.

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

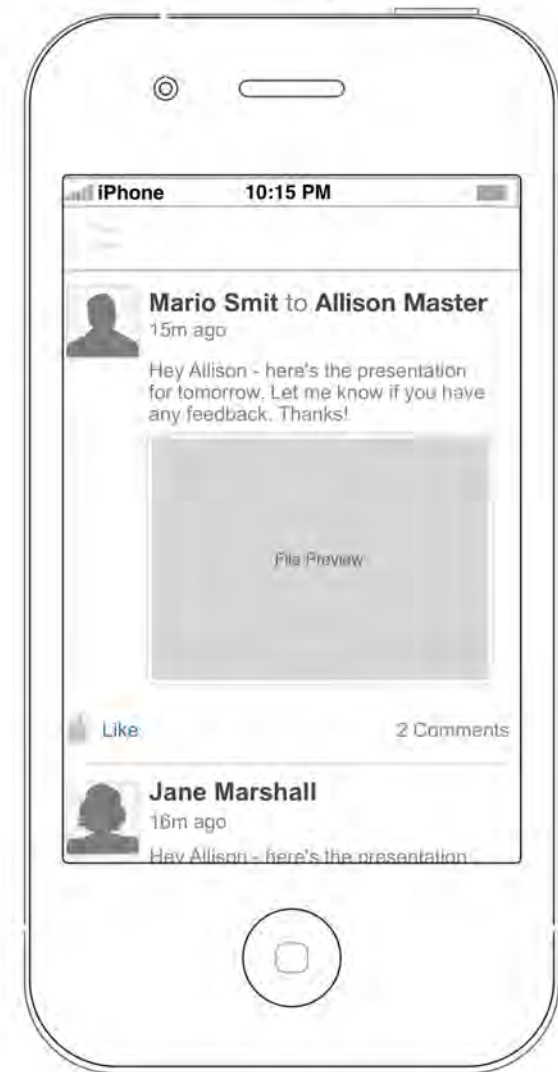


The preamble, body and white space all drill-in to the feed item detail. **Nothing should look tappable if it isn't.**

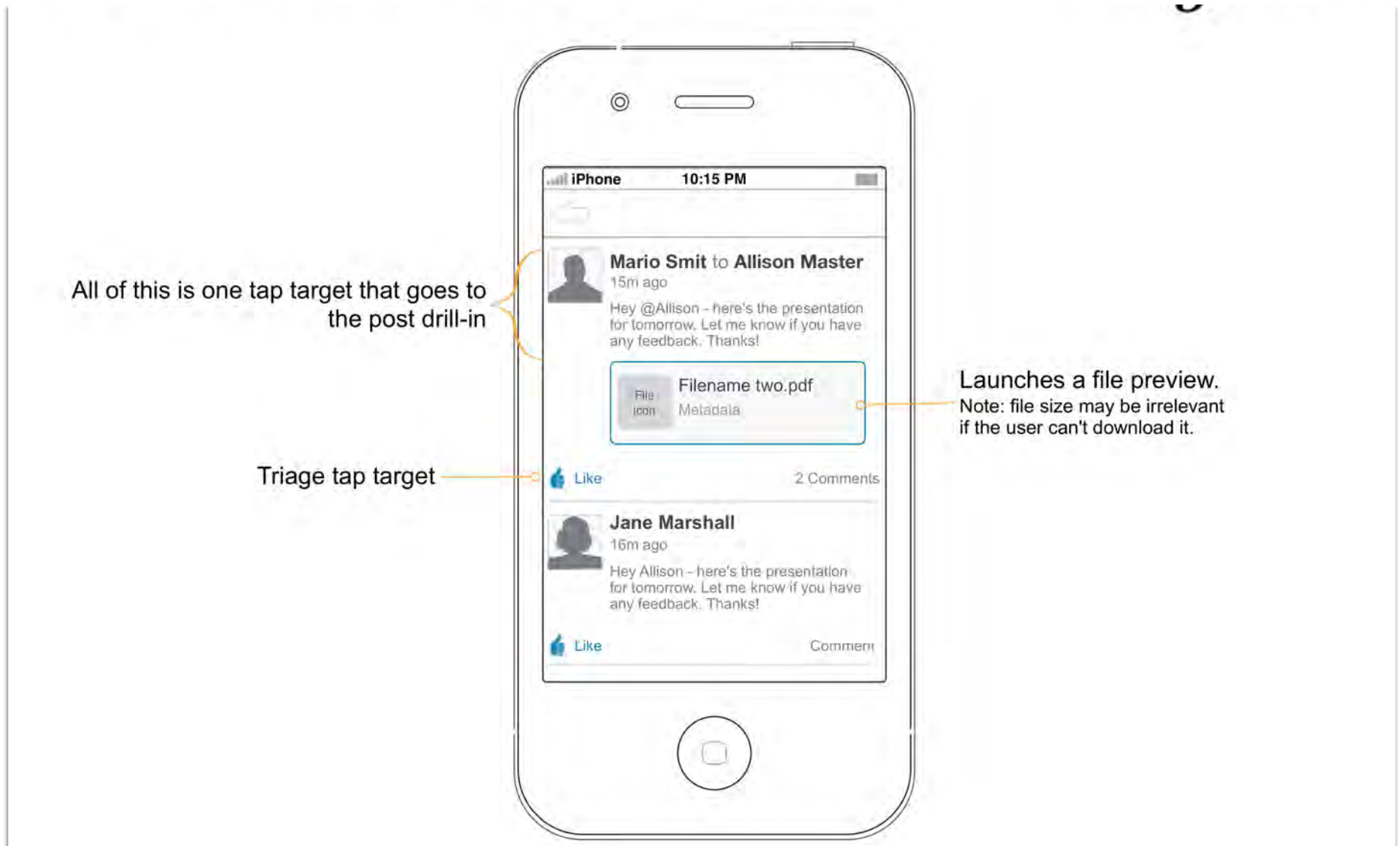
For feed items with an object or URL destination as the payload, like files, records, links, the user can tap through to the preview or detail of that thing.

Payload actions are only available by drilling into the post.

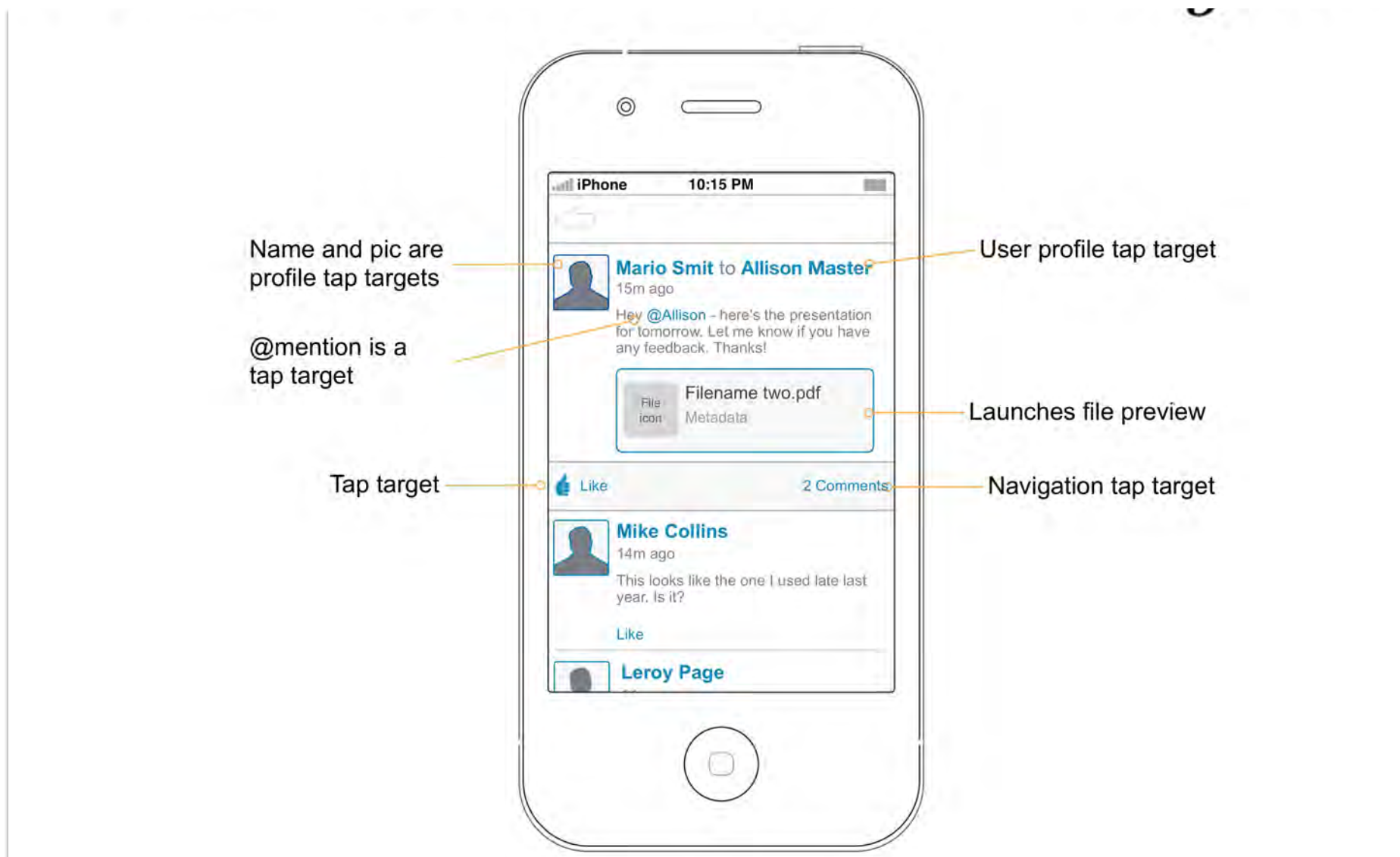
Like is the only "action" available from the main feed.



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



## INSIGHTS

It's easier to call the SRO than to use the online system.

The system is unpredictable and seems to want to keep you out more than help you get in.

Required fields are not often marked.

Next steps are invisible.

Create and login should not be on the same interface.

Problems associated with changing the system too often have created distrust and data integrity issues

System is designed to help people recover their credentials through two different forms of authentication and two different processes.

Usernames and passwords are more of a hindrance than help to infrequent users.

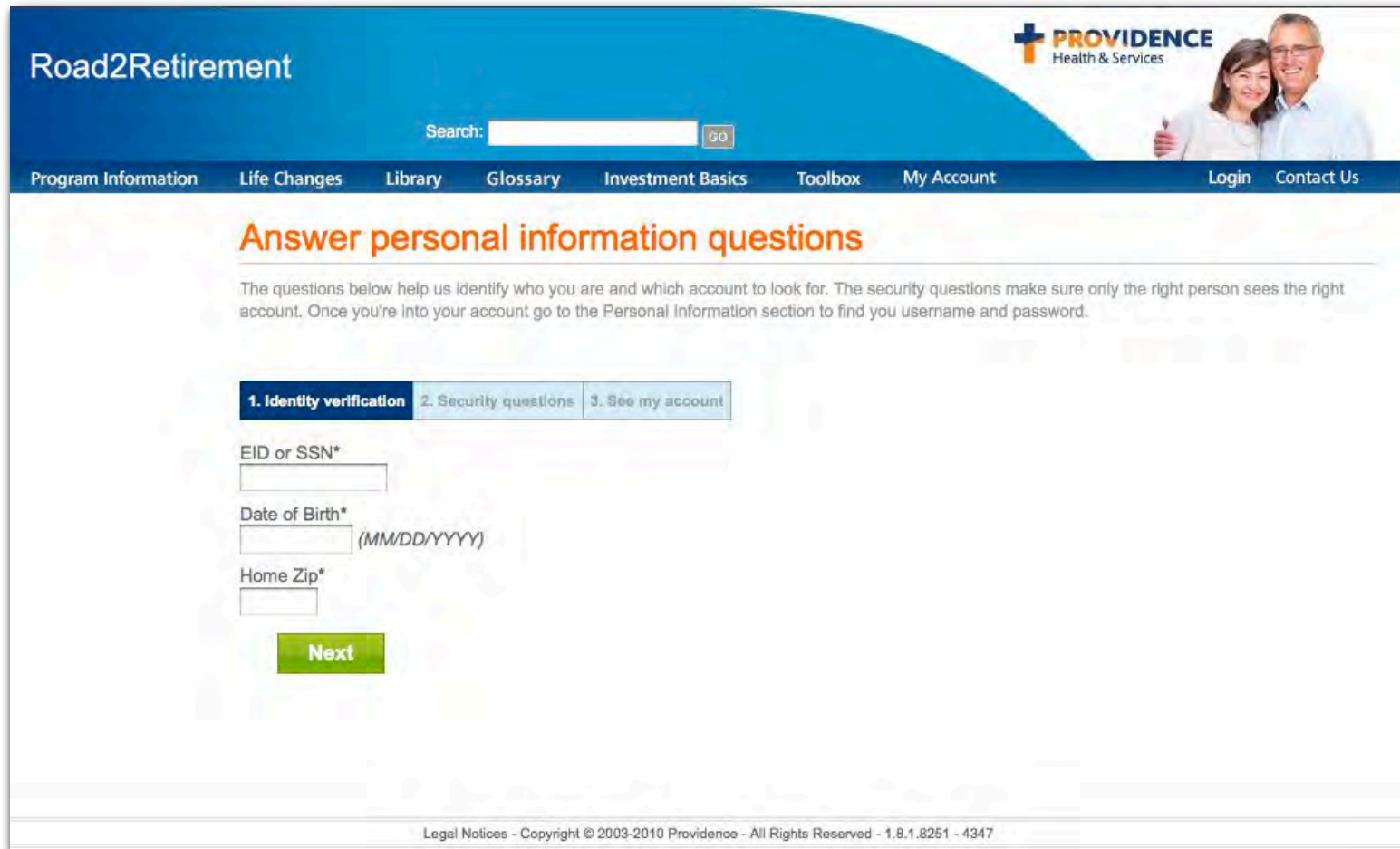
Our client's users were consistently having trouble with login. Rather than just updating the interface, I led research into the problem space. What we learned changed everyone's minds.

The image shows a web page mockup for 'Road2Retirement' by Providence Health & Services. The page features a blue header with the title 'Road2Retirement' on the left and the Providence Health & Services logo on the right, which includes a photo of an elderly couple. Below the header is a search bar and a navigation menu with links: Program Information, Life Changes, Library, Glossary, Investment Basics, Toolbox, My Account, Login, and Contact Us. The main content area is titled 'Need help?' and contains two columns of options. The left column is titled 'Send your username and password to your email account' and includes a green button labeled 'Recover your Login Information'. The right column is titled 'Log in without a username, password or email address' and includes a green button labeled 'Log in with your Personal Information'. At the bottom of the page, there is a footer with the text: 'Legal Notices - Copyright © 2003-2010 Providence - All Rights Reserved - 1.8.1.8259 - n/a'.

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.

The screenshot shows the 'Road2Retirement' website interface. At the top left, the title 'Road2Retirement' is displayed. To the right is the Providence Health & Services logo, which includes a cross icon and a photograph of a smiling couple. Below the logo is a search bar with the text 'Search:' and a 'GO' button. A navigation menu is located below the search bar, containing links for 'Program Information', 'Life Changes', 'Library', 'Glossary', 'Investment Basics', 'Toolbox', 'My Account', 'Login', and 'Contact Us'. The main content area features a heading 'Recover your username and password' in orange. Below this heading is a paragraph of instructions: 'Please provide the last four digits of your SSN and email address and we'll send your login credentials to that address. After logging in, you may be asked to update your username or password to meet security standards.' A progress indicator shows three steps: '1. Submit email address', '2. Check your email' (which is highlighted in dark blue), and '3. Return to login'. Below the progress indicator is another paragraph: 'Two emails have been sent to the address you provided – one each containing your username and password. You can use the username and password to login to the Road2Retirement Web site. You may be asked to update or create new login credentials to meet security standards.' A green button labeled 'Return to Login' is positioned below the text. At the bottom of the page, a footer contains the text: 'Legal Notices - Copyright © 2003-2010 Providence - All Rights Reserved - 1.8.1.8259 - n/a'.

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.



**Road2Retirement**

Search:

Program Information Life Changes Library Glossary Investment Basics Toolbox My Account Login Contact Us

## Answer personal information questions

The questions below help us identify who you are and which account to look for. The security questions make sure only the right person sees the right account. Once you're into your account go to the Personal Information section to find your username and password.

**1. Identity verification** 2. Security questions 3. See my account

EID or SSN\*

Date of Birth\*  
 (MM/DD/YYYY)

Home Zip\*

Legal Notices - Copyright © 2003-2010 Providence - All Rights Reserved - 1.8.1.8251 - 4347

Our irregular users could log in by 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**

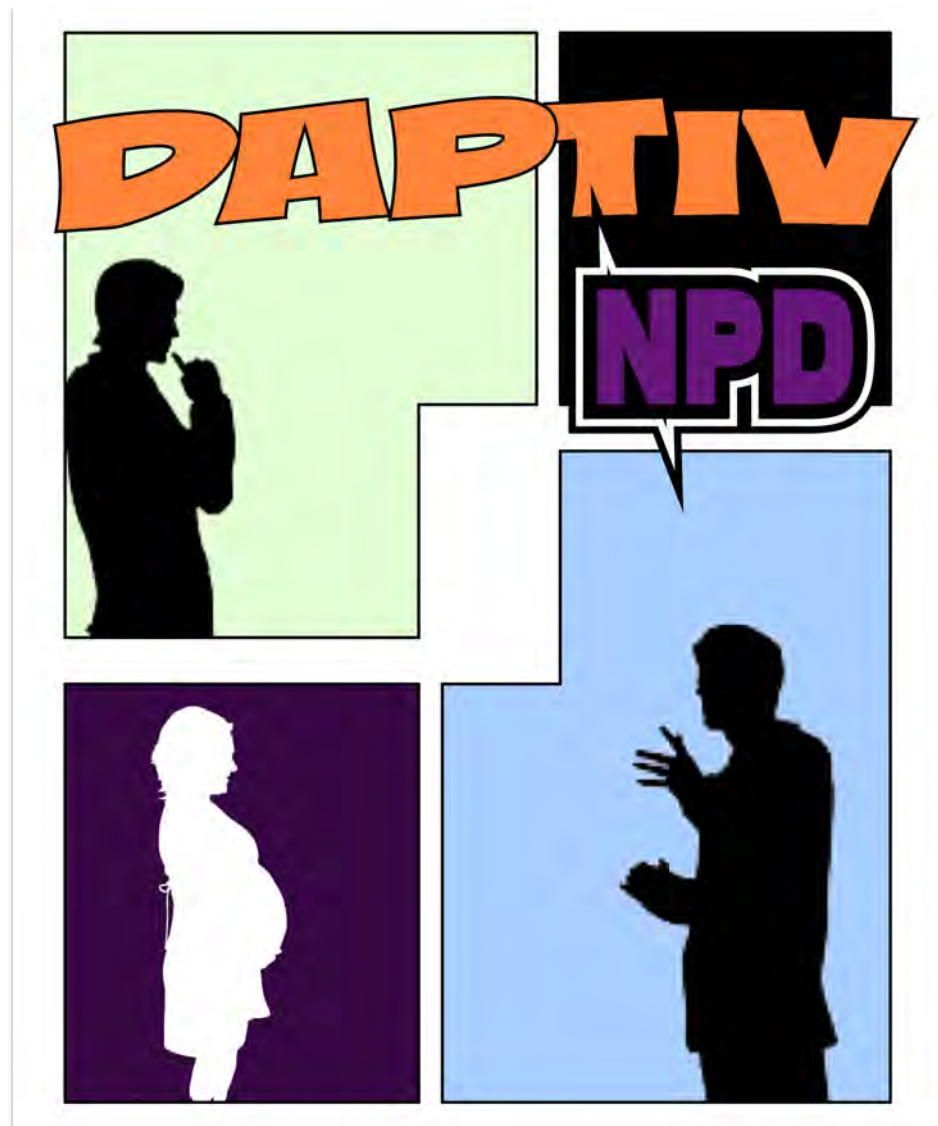
It outlines the NPD process as a lifecycle (Discovery -> Ideation -> Dev -> Launch -> Post-Launch (Support) through a series of actors. These actors include Devs, Scrum Master, Product and Program Management as one character, and Executives. What we're attempting to show is that with a select said of 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:**

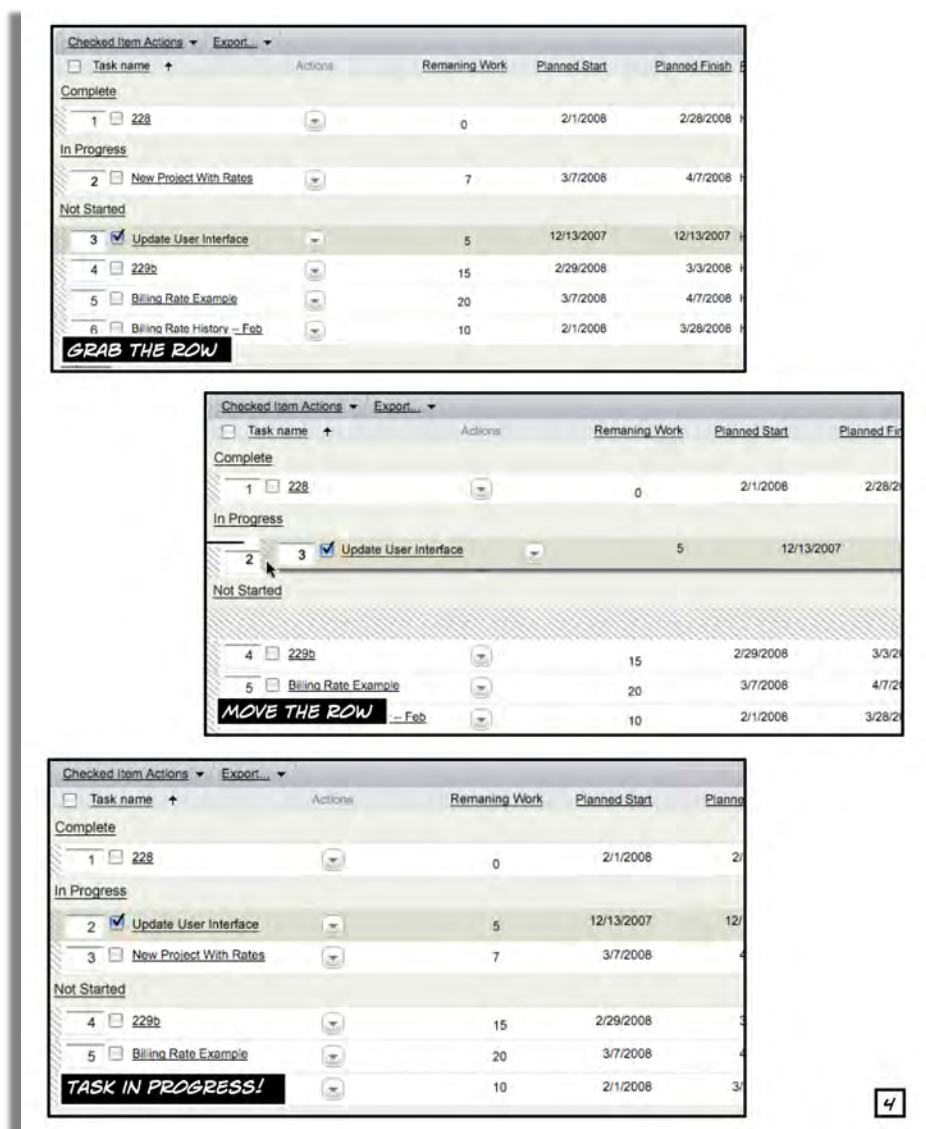
1. **Development:** Dev takes task and a logs hours against it,(Developer, **DD4**)
  - a. Developer picks at task from his tasks view
  - b. Developer logs hours against tasks (**DD4**)
2. **Development:** SM (Scrum Master)(dashboard)
  - a. Look at dashboard of burndown (**EE**)
  - b. Things are going 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 (**DD1s**)
  - 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.

**AFTER A LONG DAY OF PROGRAMMING**

I SHOULD LOG MY HOURS ON THAT UI TASK

board Projects Product Backlog Greenhouse Help Desk User Stories Reports Documents [See All](#)

User Stories Tags:

Created by: John Doe, 4/28/08 Last Modified By: Rick Spencer, 5/12/08 [View](#)

Item Details

[Edit Item](#) [Delete Item](#) [Notification](#) [Update Work](#) [Relate to](#) [Create](#)

Title	Story Points	Business Value	Business Weight
Co-Branding	43	56	10

Problem Description:

Assignees

User	Application	Item name / description	Worked On	Work	Comments
William Blake	Tasks	Update User Interface	5/18/08	4	Finished the initial pass but still needs a few more hours
Abraham Maslow	Tasks	Update User Interface	5/19/08	6	Finished the second pass but still needs a few more hours
John Locke	Tasks	Update User Interface			

[Click here to add a new one.](#)

**▼ Assignees**

<input type="checkbox"/> User	Application	Item name / description	Worked On	Work
<input type="checkbox"/> William Blake	Tasks	Update User Interface	5/18/08	4
<input type="checkbox"/> Abraham Maslow	Tasks	Update User Interface	5/19/08	6
<input type="checkbox"/> John Locke	Tasks	Update User Interface		

[Click here to add a new one.](#)

5

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.

**DAPTIV'S PLATFORM GIVES THE SCRUM MASTER ALL THE TOOLS SHE NEEDS TO MODIFY THE PURCHASED SOLUTION**

**METADATA**

Agile Development  
Creating a Form

Create a form to collect and organize the information you want to track

Form Name \*  
Business Problem Tracker

Item Name \*  
Business Problem

Short Text

Item Details

Form Description  
Basic information for tracking Problems including other information.

Item Name Plural \*  
Business Problems

**A LIST OF STORIES**

Percent

Members

Pick List

Record #

Display

Attachment

Image

▼ User Stories

Co-Branding Epic

Example Entry

Example Entry

Example Entry

Value to EA

Value to LM

Value to EM

Value to Lagards

Target Release

Total Impact

These values total impact of cost fields are optional, but they target segment

▼ Evidence

Evidence Name

Co-Branding Epic

Example Entry

Example Entry

Example Entry

**A LIST OF EVIDENCE**

12

The screenshot displays the Daptiv platform interface, which is used for creating and managing forms, user stories, and evidence. The interface is divided into several sections:

- Form Creation (Metadata):** This section allows users to create a form to collect and organize information. It includes fields for Form Name (Business Problem Tracker), Item Name (Business Problem), and Item Name Plural (Business Problems). There are also options for Short Text and Item Details.
- User Stories:** This section shows a list of user stories. The first story is "Co-Branding Epic" with an "Example Entry" selected. There are also fields for Value to EA, Value to LM, Value to EM, and Value to Lagards. A "Target Release" dropdown and a "Total Impact" field are also visible.
- Evidence:** This section shows a list of evidence items. The first item is "Co-Branding Epic" with an "Example Entry" selected. There are also fields for Evidence Name and Evidence.

The interface is designed to be user-friendly and intuitive, with clear labels and a logical flow of information. The "A LIST OF STORIES" and "A LIST OF EVIDENCE" sections are highlighted with red boxes, indicating that they are key features of the platform.

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.