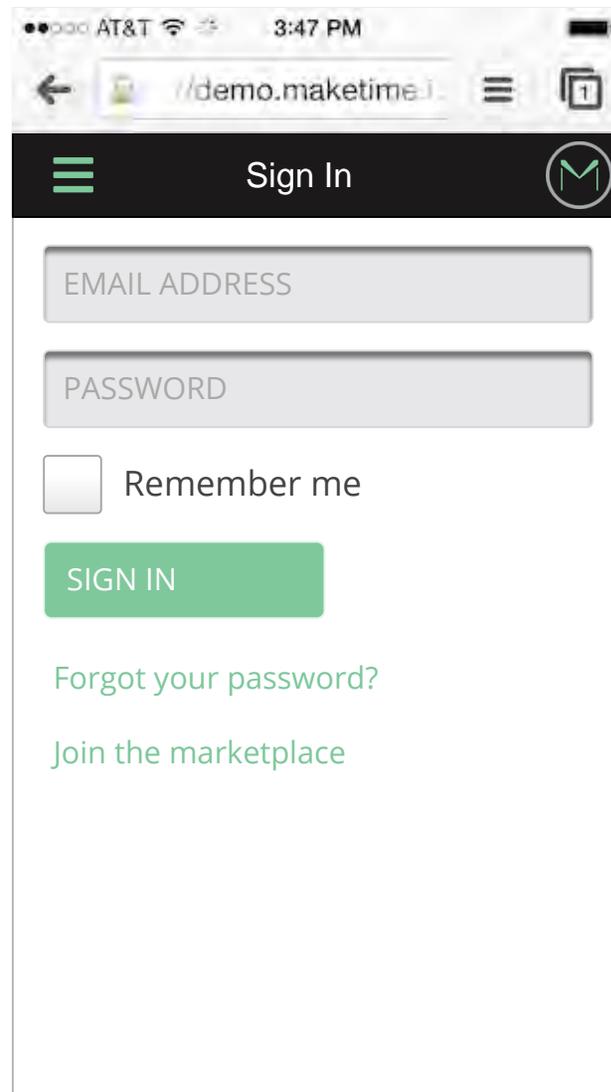


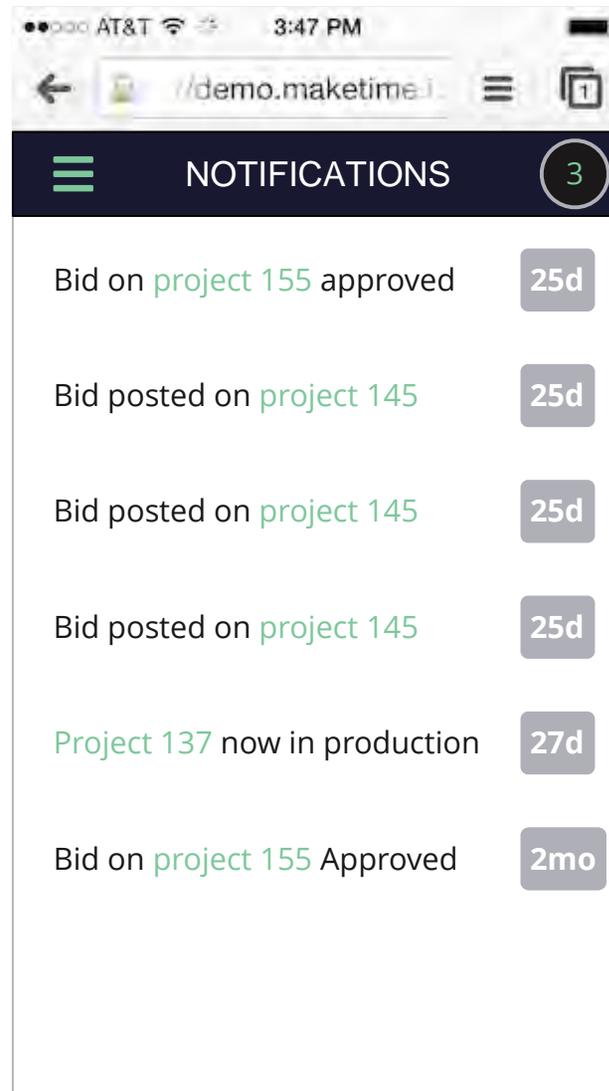
User Experience Design Portfolio
Rick Spencer

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.



| 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

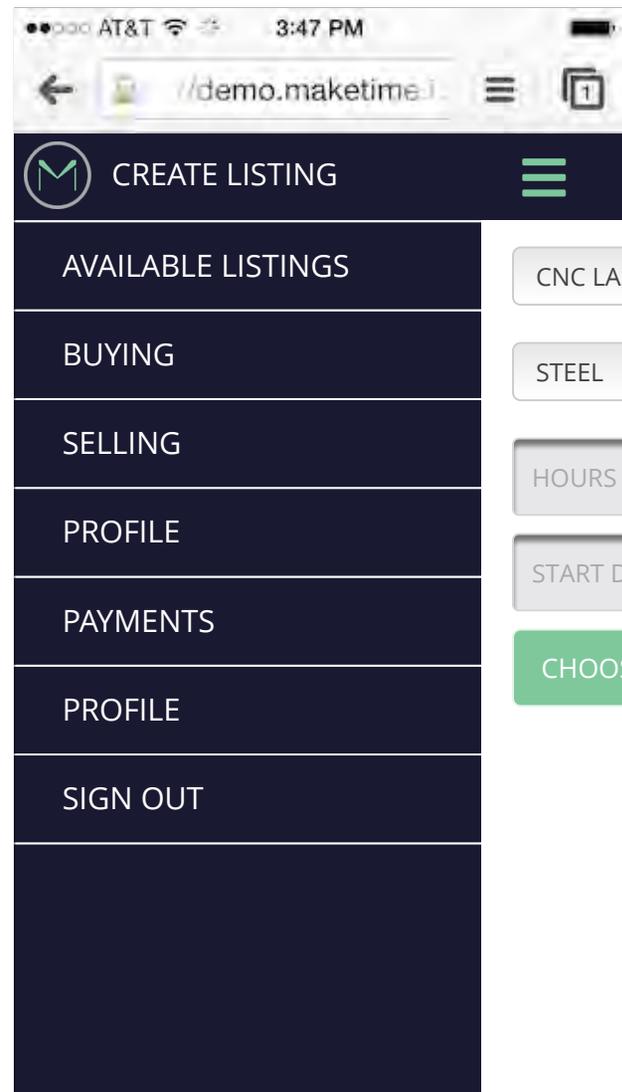
SHIPPING

Tracking No. 1Z 999 AA1 01 2345 6784

Carrier DHL Express

Notes none

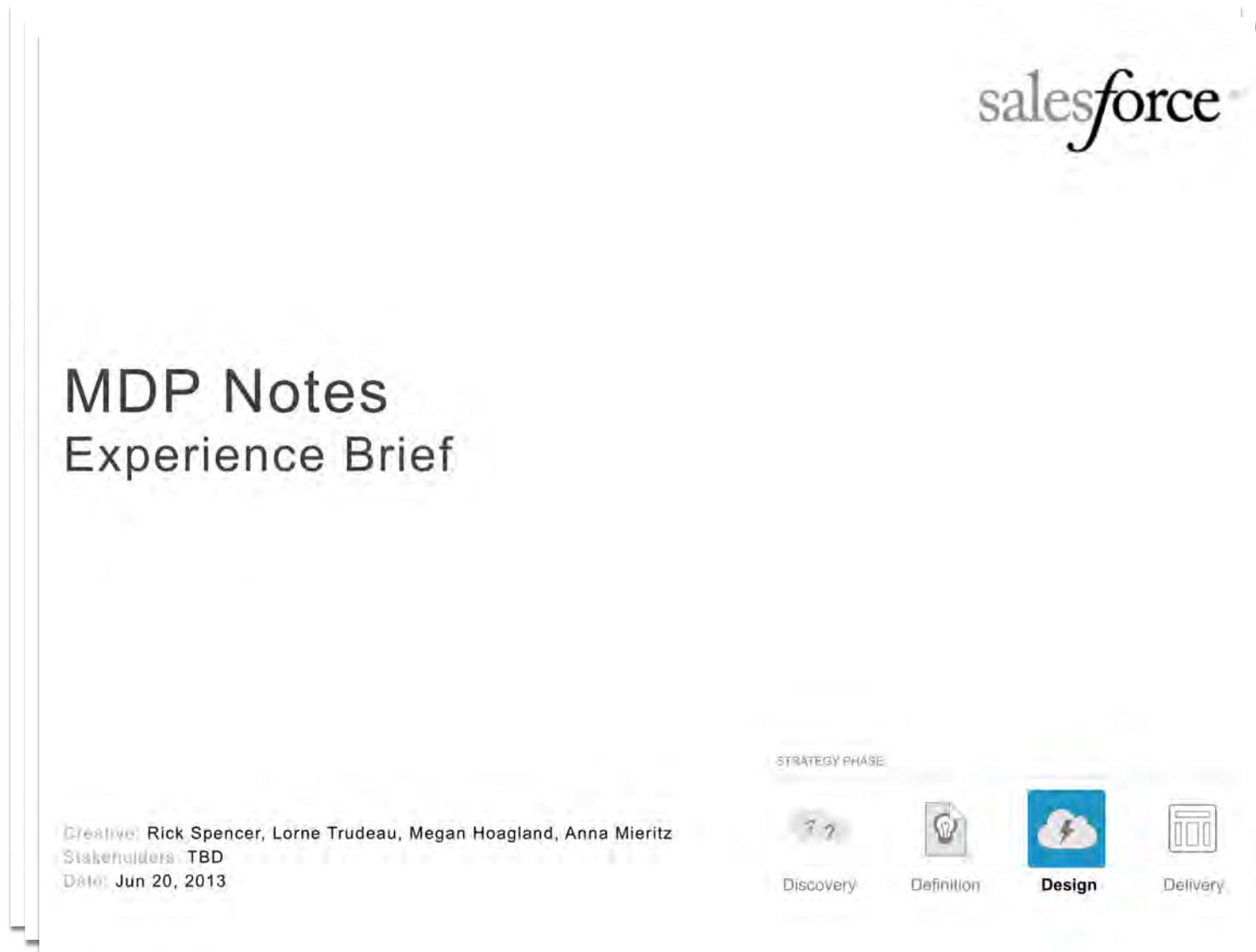
On the left is the top of a project detail screen and on the right is more detail visible by scrolling. A user could get to this detail from a notification or by navigating from a projects index.



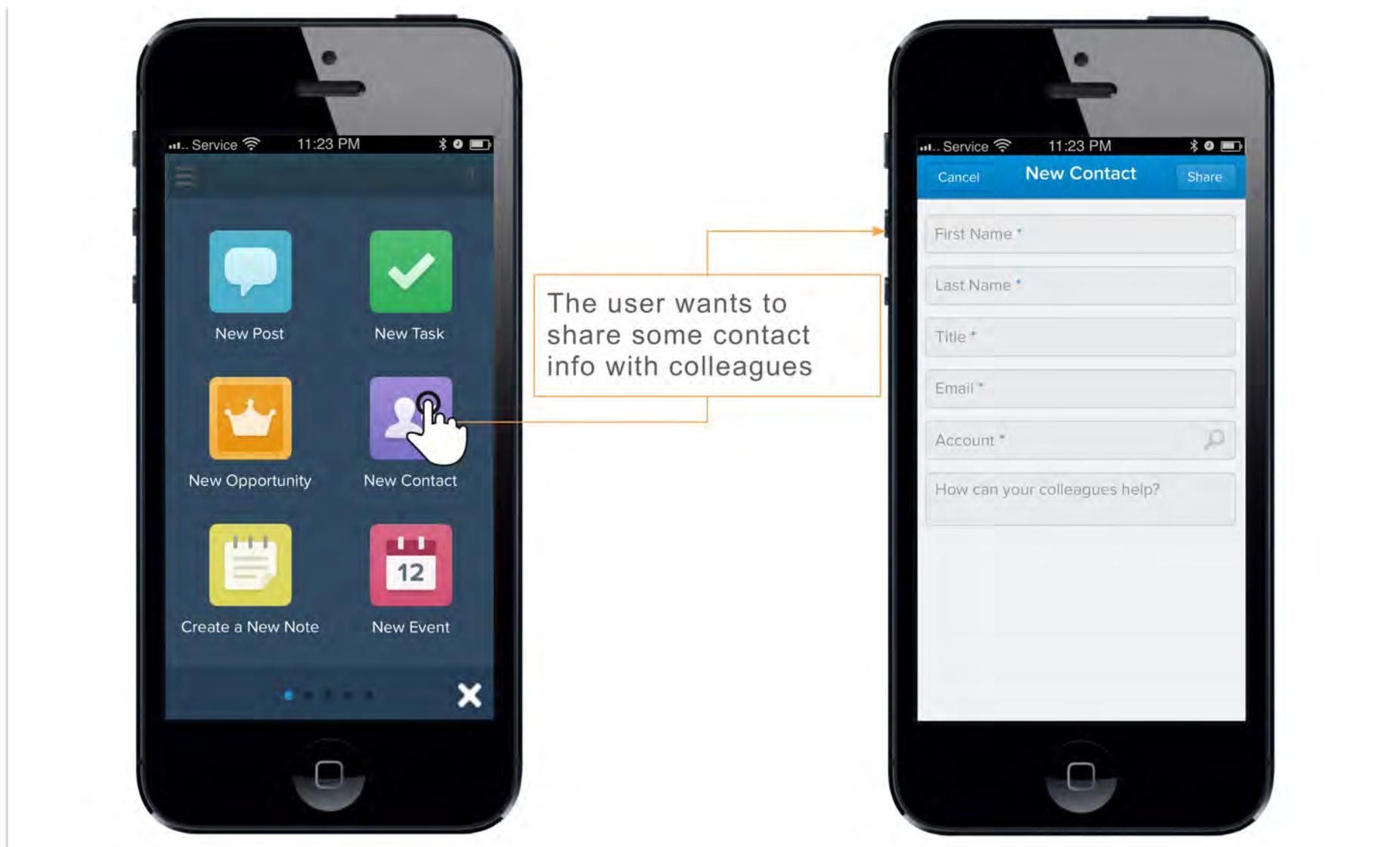
Navigation on mobile devices needs to be simple, predictable, and most importantly, findable. Making users remember or guess can cause frustration or failure in situations of stress or rapid task-switching.

Concept Design: Draft Records

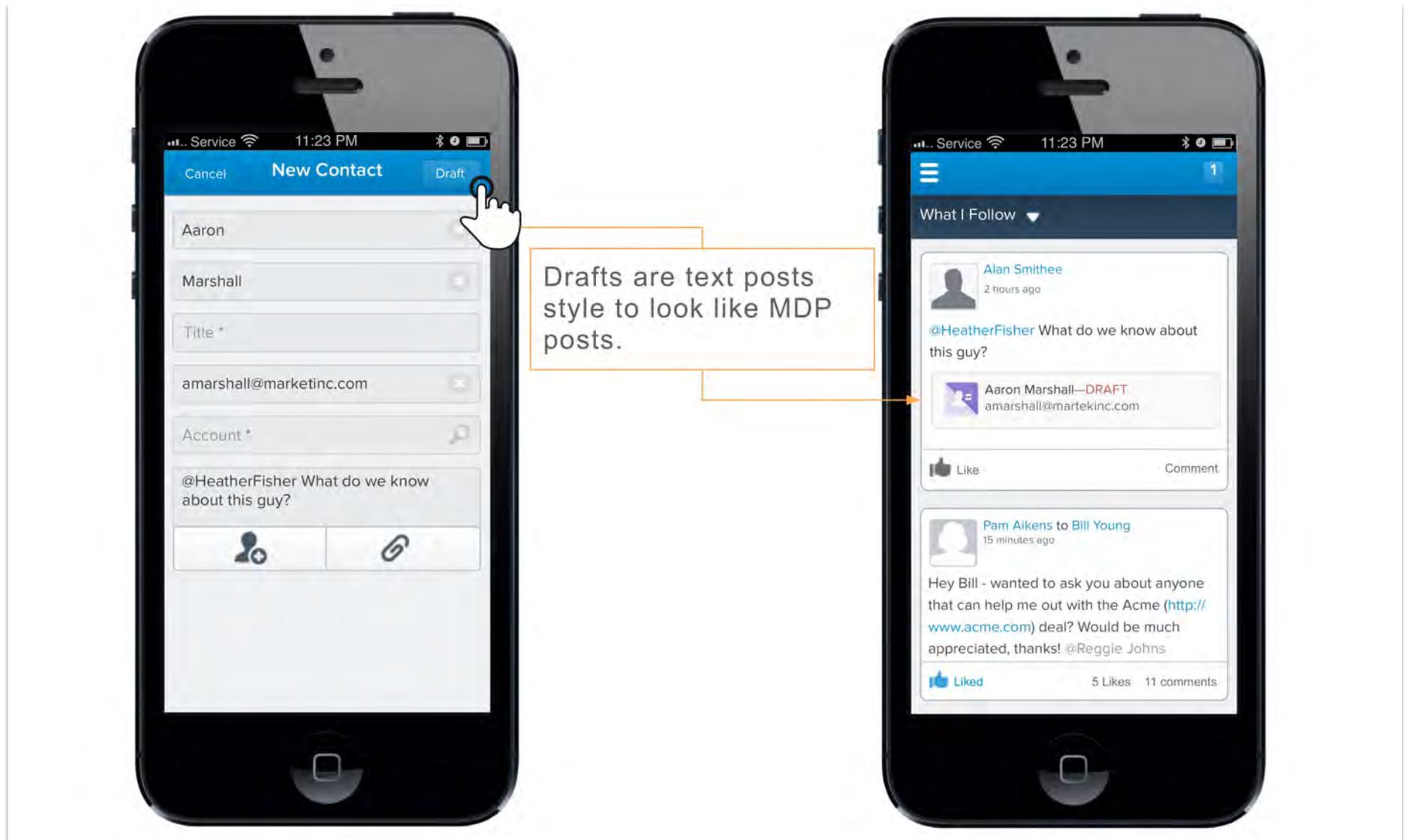
Salesforce, 2013



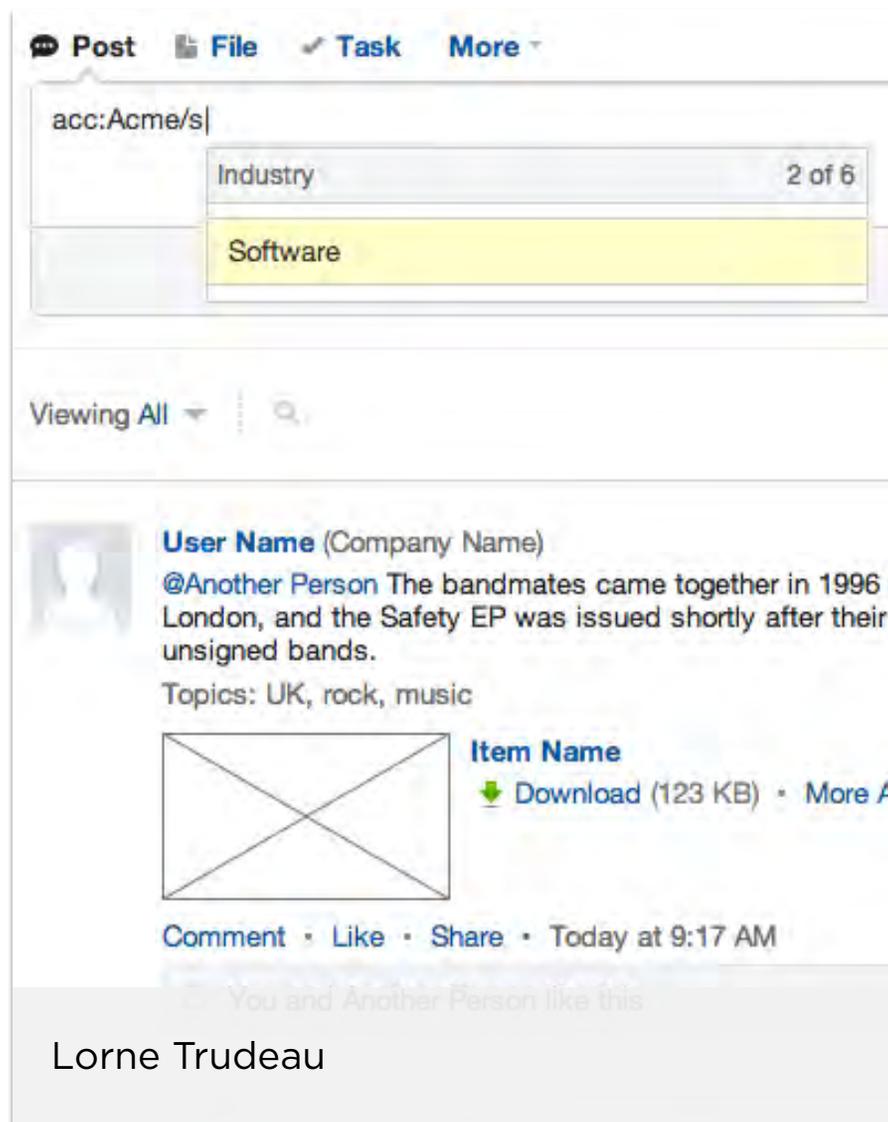
I led a team of designers through a two week project to explore creating form data from loose notes. I began by creating a frame from business needs, user research, audits and more.



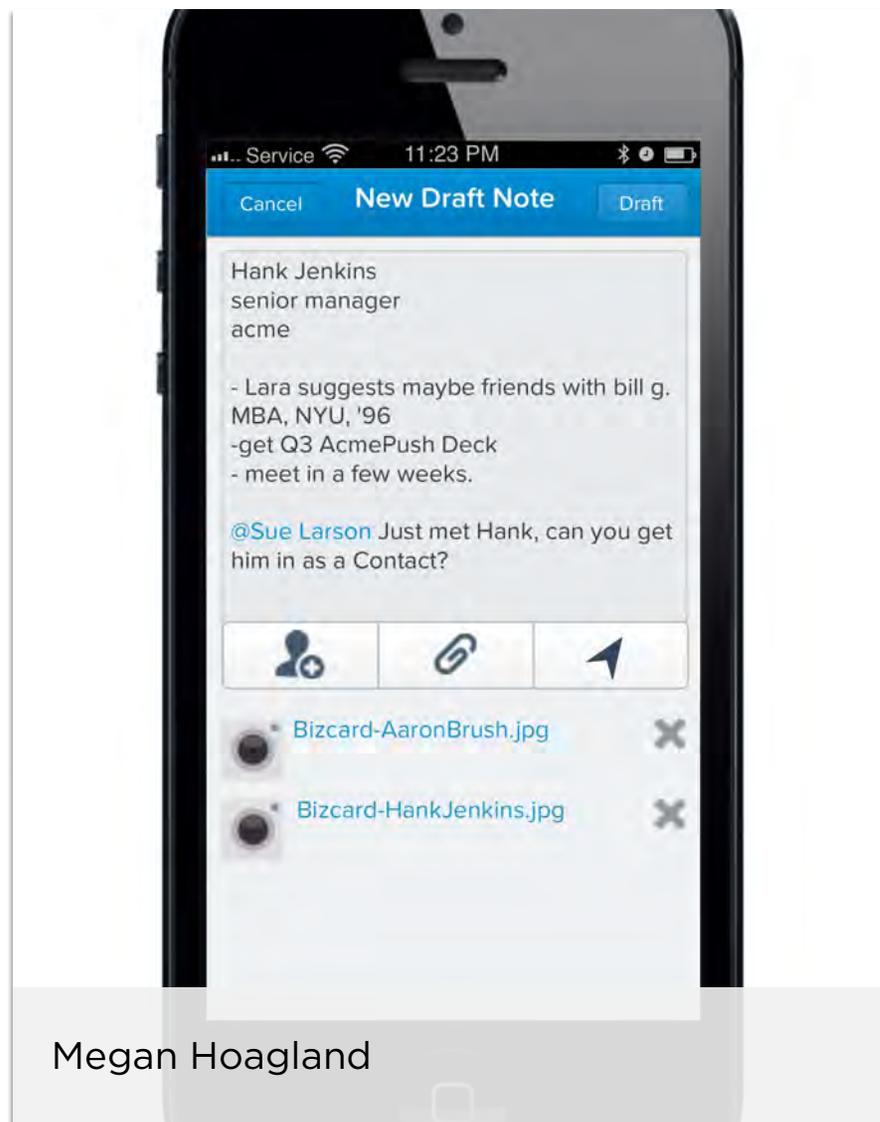
The main use case is the traveling salesman. Always on the go, they often spend after-work hours putting new knowledge into Salesforce. That's painful and slow for them and their colleagues.



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

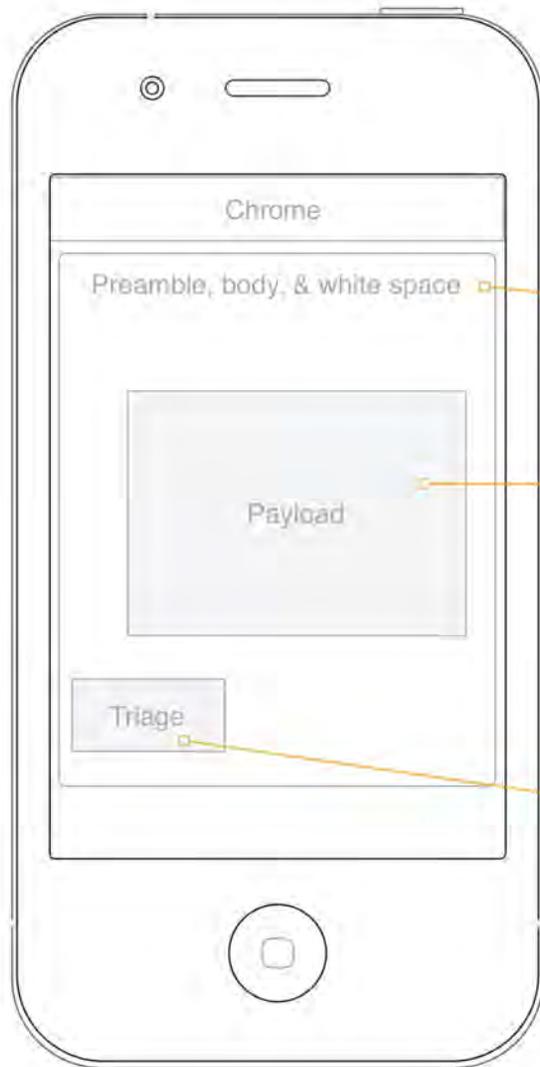
Limit tap targets.

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.

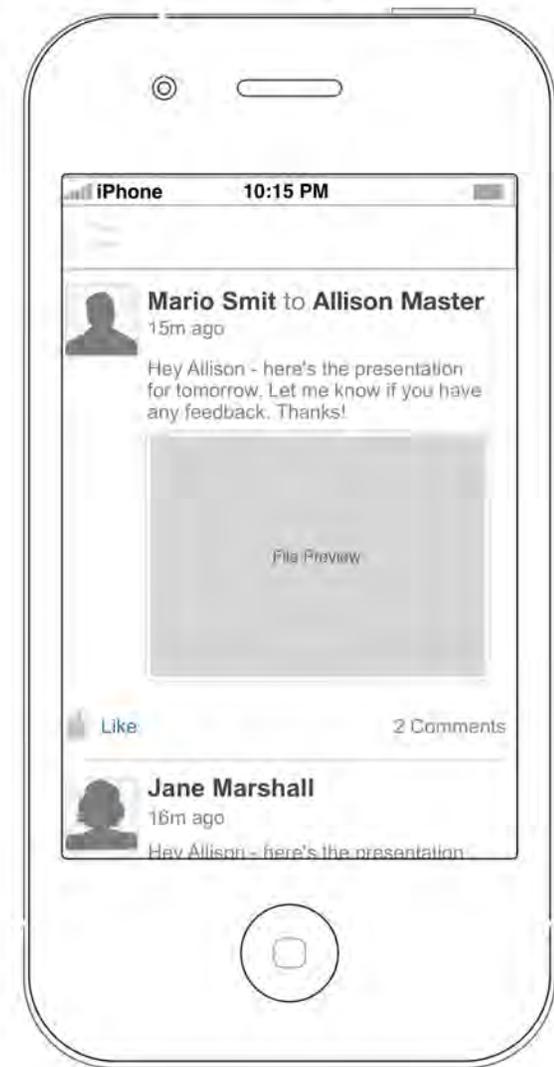


The preamble, body and white space all drill-in to the feed item detail. **Nothing should look tappable if it isn't.**

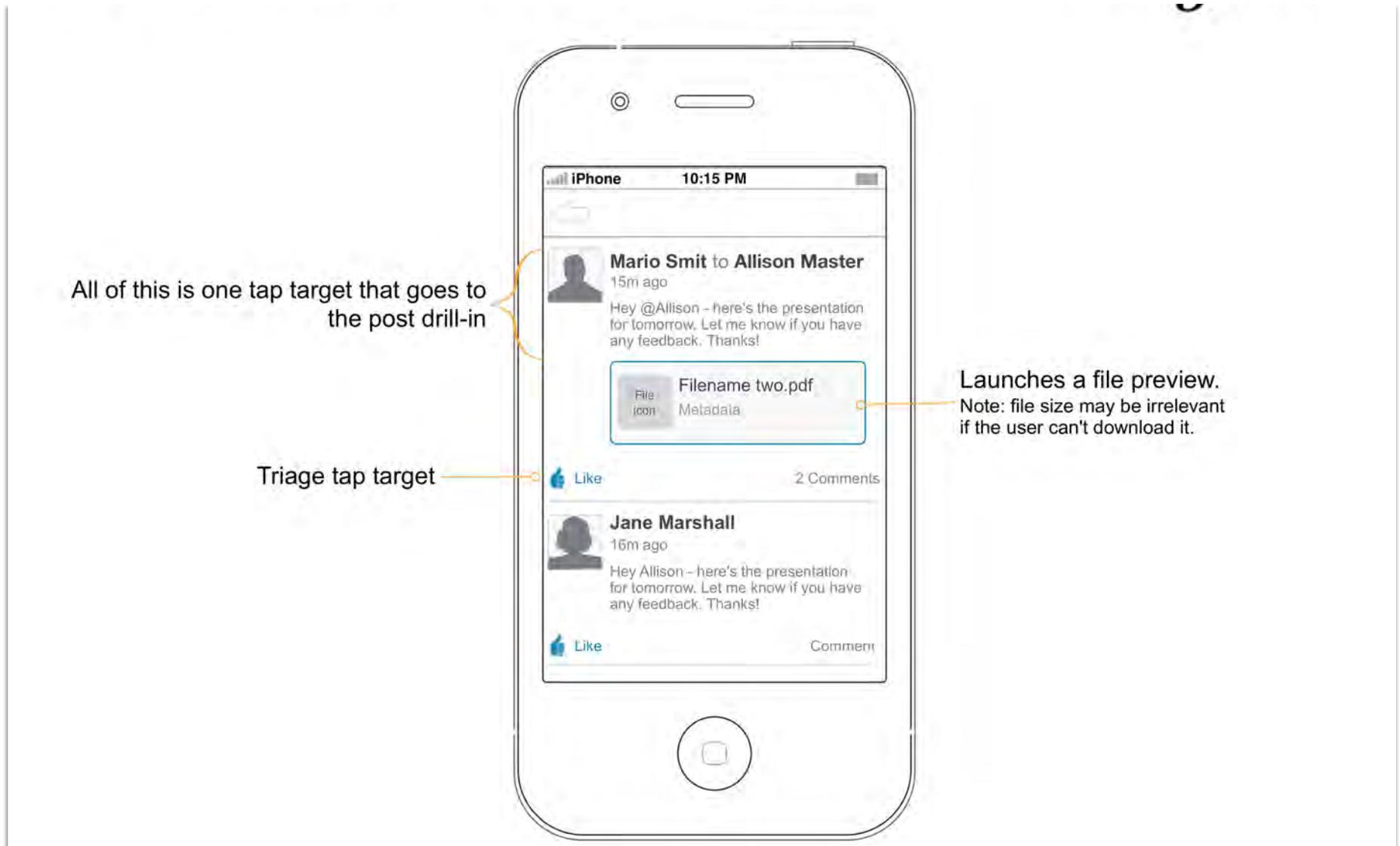
For feed items with an object or URL destination as the payload, like files, records, links, the user can tap through to the preview or detail of that thing.

Payload actions are only available by drilling into the post.

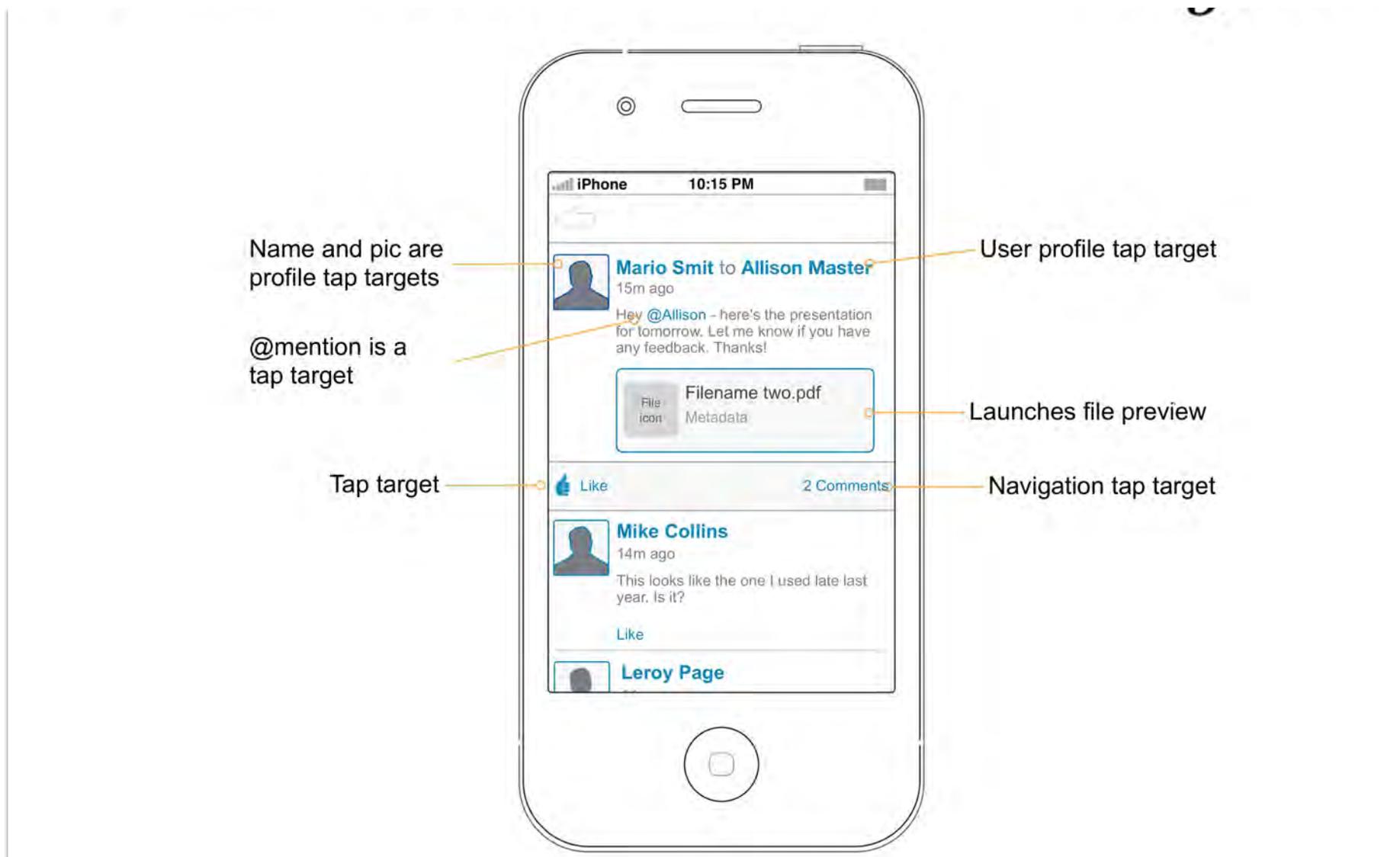
Like is the only "action" available from the main feed.



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' and a search bar. Below the header is 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'.

Road2Retirement

Search:

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

Need help?

Send your username and password to your email account

If we have your most current email address on file, we can send your login information to it. You may be prompted to update your username or password to conform to security standards.

[Recover your Login Information](#)

Log in without a username, password or email address

By answering a few questions that only you should know the answers to, you can login. We recommend updating your personal information for an easier login experience going forward.

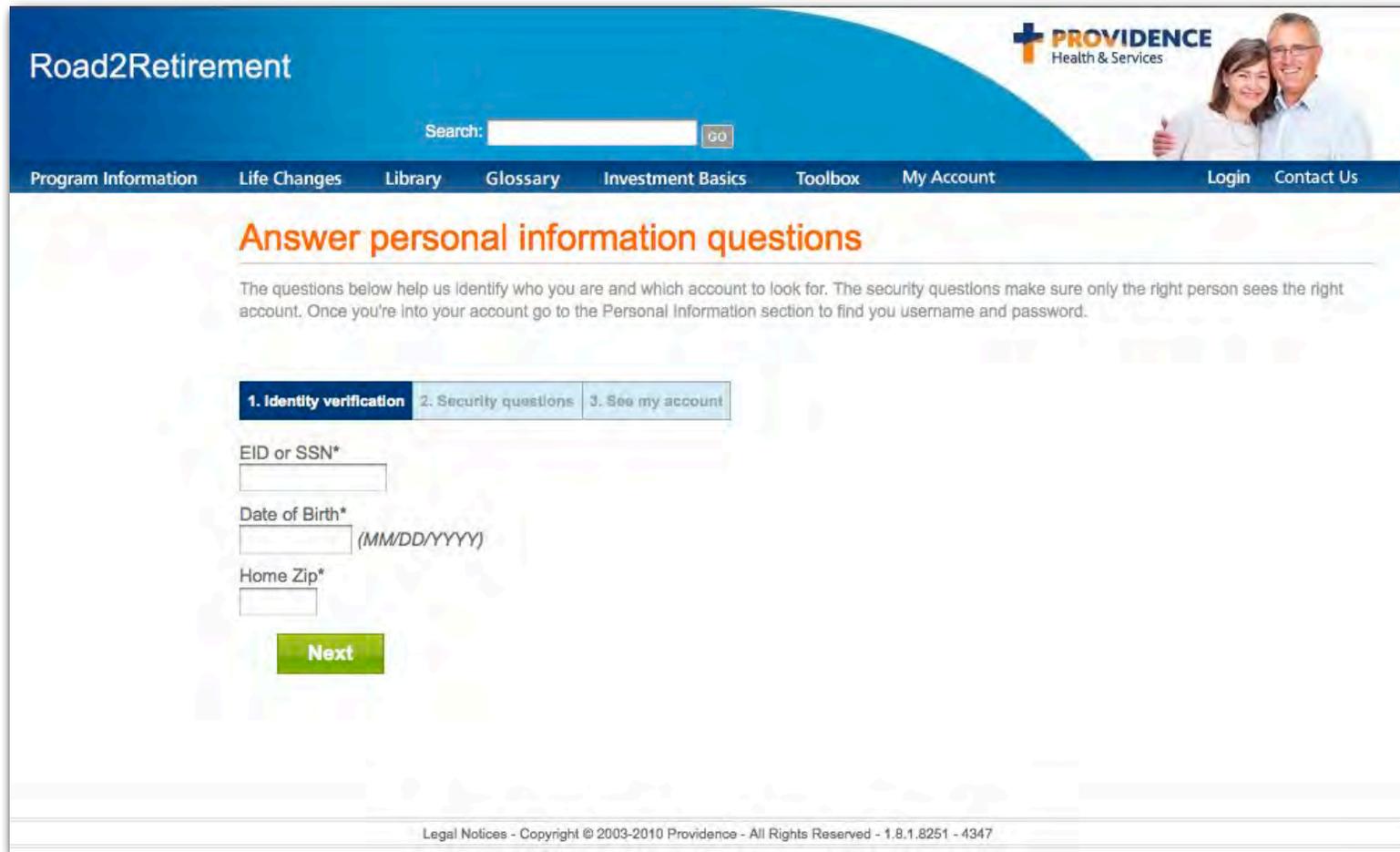
[Log in with your Personal Information](#)

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 and a photo of a smiling couple. Below the header is a search bar with a 'GO' button. A navigation menu includes links for Program Information, Life Changes, Library, Glossary, Investment Basics, Toolbox, My Account, Login, and Contact Us. The main content area features the heading 'Recover your username and password' in orange. Below this is a paragraph explaining the process: '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'. Another paragraph states: '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.



The screenshot shows the 'Road2Retirement' website interface. At the top, there is a blue header with the title 'Road2Retirement' on the left and the Providence Health & Services logo on the right, which includes a cross icon and a photo of a smiling couple. Below the header is a search bar with the text 'Search:' and a 'GO' button. A navigation menu contains links for 'Program Information', 'Life Changes', 'Library', 'Glossary', 'Investment Basics', 'Toolbox', 'My Account', 'Login', and 'Contact Us'. The main content area features the heading 'Answer personal information questions' in orange. Below this heading is a paragraph explaining that the questions help identify the user and their account, and that security questions ensure the right person sees the right account. A progress indicator shows three steps: '1. Identity verification' (highlighted in blue), '2. Security questions', and '3. See my account'. The form includes three input fields: 'EID or SSN*', 'Date of Birth*' (with a format hint '(MM/DD/YYYY)'), and 'Home Zip*'. A green 'Next' button is positioned below the fields. At the bottom of the page, a footer contains the text 'Legal Notices - Copyright © 2003-2010 Providence - All Rights Reserved - 1.8.1.8251 - 4347'.

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

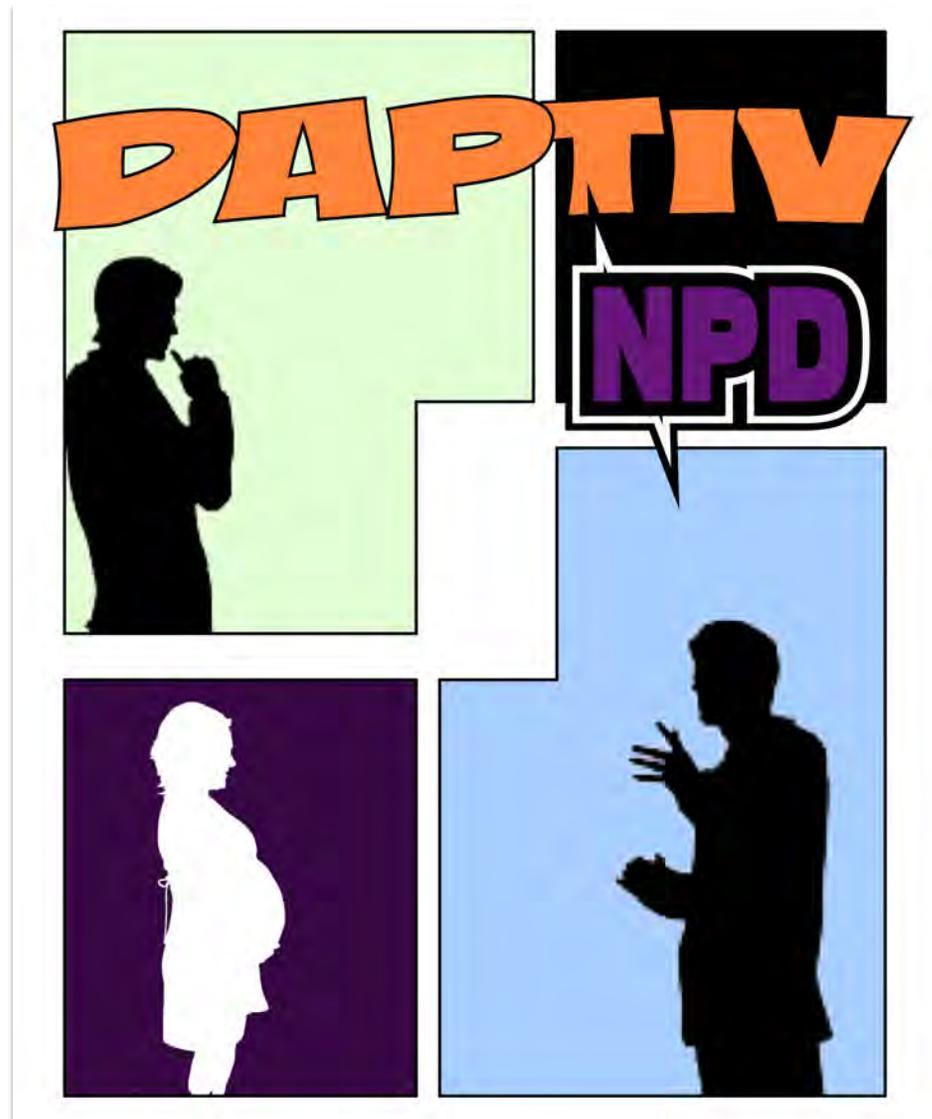
Our irregular users could log in by authenticating. They would get a password out of it, AND see their information on the site. This solution reduced support center calls and met security needs.

Product Concept Comic Book

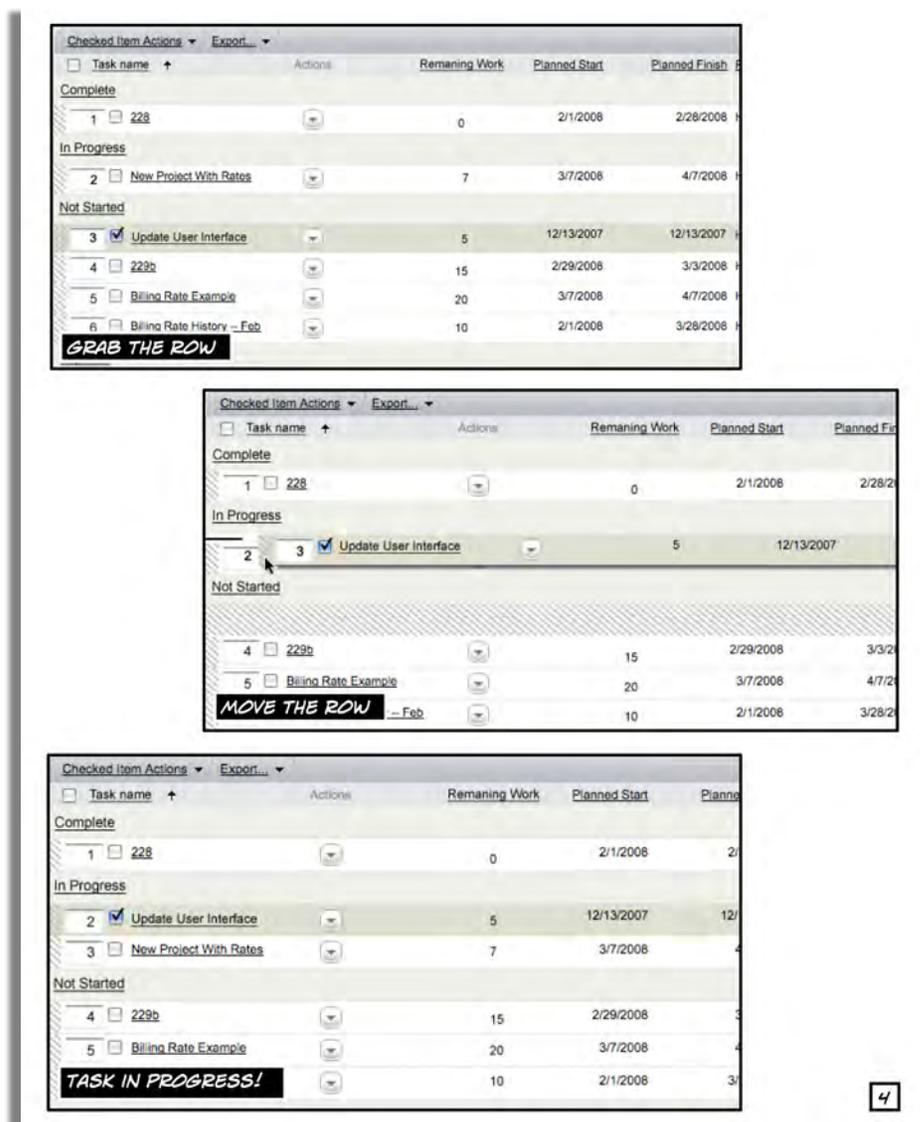
Daptiv, 2008

| COMPONENTS | STORIES: |
|--|---|
| <p>It outlines the NPD process as a lifecycle (Discovery -> Ideation -> Dev -> Launch -> Post-Launch (Support) through a series of actors. These actors include <u>Devs</u>, 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.</p> | <ol style="list-style-type: none"> 1. Development: Dev takes task and a logs hours against it,(Developer, DD4) <ol style="list-style-type: none"> a. Developer picks <u>at_task</u> from his tasks view b. Developer logs hours against tasks (DD4) 2. Development: SM (Scrum Master)(dashboard) <ol style="list-style-type: none"> a. Look at dashboard of <u>burndown</u> (EE) b. Things are going ok. (EE) 3. Development: SM (Scrum Master) <ol style="list-style-type: none"> 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 <ol style="list-style-type: none"> 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 <ol style="list-style-type: none"> a. Unknown? 6. Pm modifies the solution to include the epics DA (AA, BB) <ol style="list-style-type: none"> 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) <ol style="list-style-type: none"> a. <u>show</u> related list for stories (DD1) b. <u>related</u> list for evidence (DD1) c. <u>look</u> 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) <ol style="list-style-type: none"> 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) |
| <ol style="list-style-type: none"> 1. NPD Process Definition <ol style="list-style-type: none"> a. Discovery b. Ideation c. Development d. Launch / Go-to-Market e. Post-Launch 2. Actors relevant to that process, across the organizational hierarchy <ol style="list-style-type: none"> a. Executives b. Developers c. Product Managers d. Scrum Master e. Support Team f. Sources outside of organization 3. <u>Tsavo</u> Backlog 4. Goal-directed Ideation 5. Co-branding is a feature idea that we follow through the whole process. | |

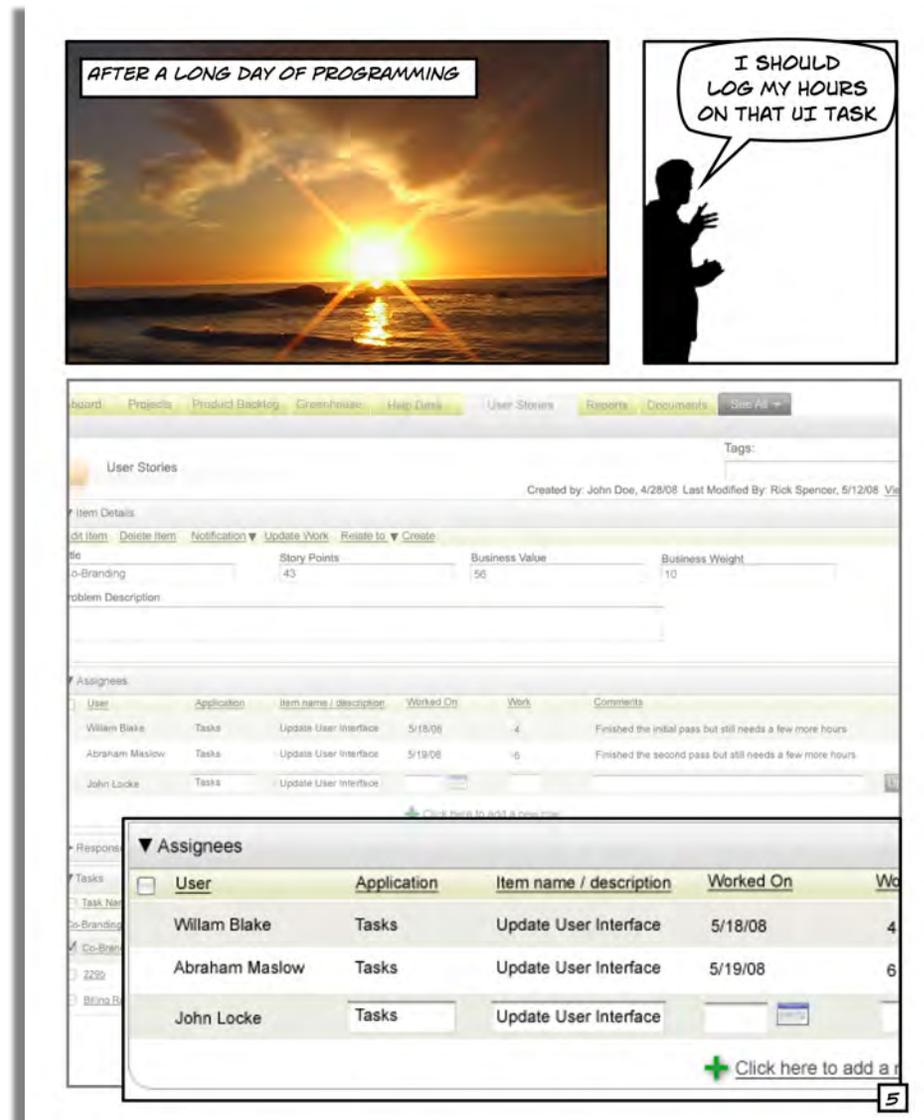
How do you communicate what the user experience for an imagined product will be? Talk to everyone, tie together their expectations, imagine the feature requirements and expected use cases. Show it.



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

Created by John Doe, 4/28/08 Last Modified By Rick Spencer, 5/12/08

Item Details

edit Item Delete Item Notification Update Work Relate to Create

| Item | 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 | | | |

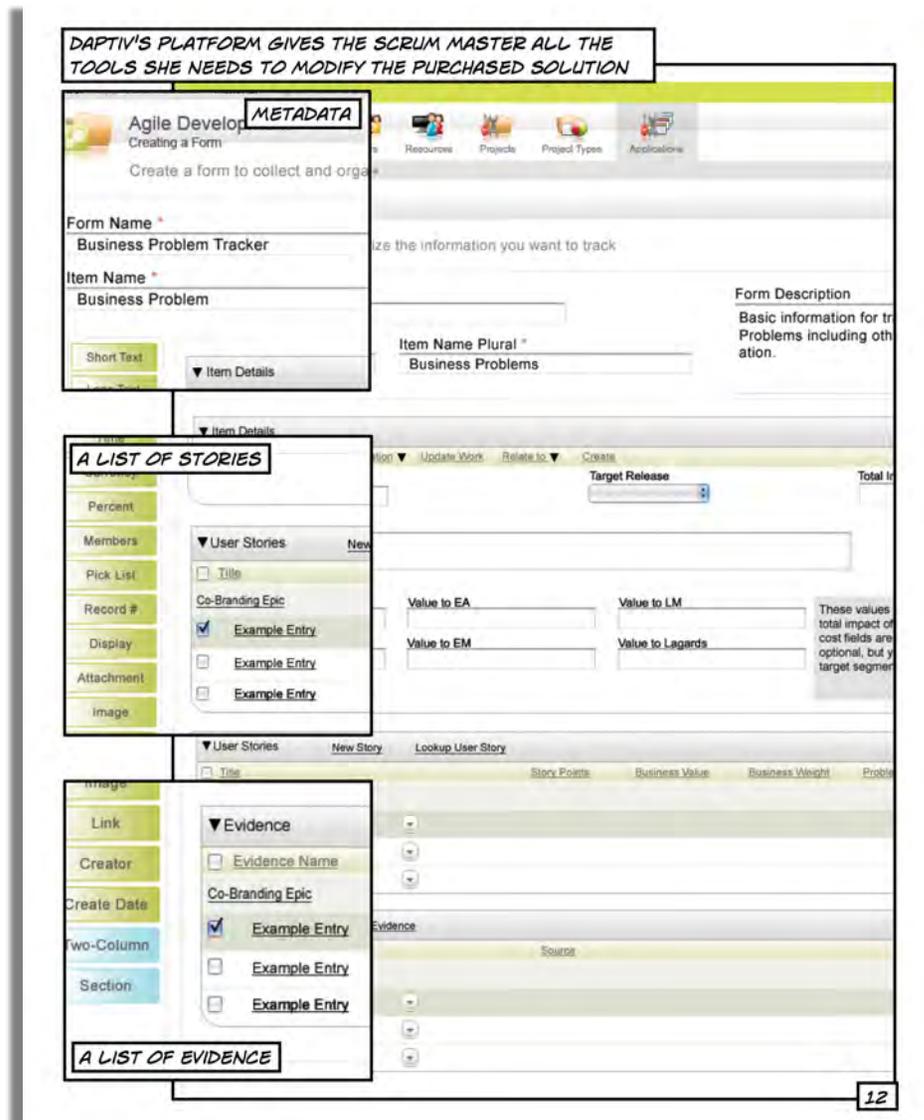
▼ Assignees

| User | Application | Item name / description | Worked On | Work |
|----------------|-------------|-------------------------|-----------|------|
| William Blake | Tasks | Update User Interface | 5/18/08 | 4 |
| Abraham Maslow | Tasks | Update User Interface | 5/19/08 | 6 |
| John Locke | Tasks | Update User Interface | | |

+ Click here to add a new assignee

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.



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.