





UX Roadmap and Strategy

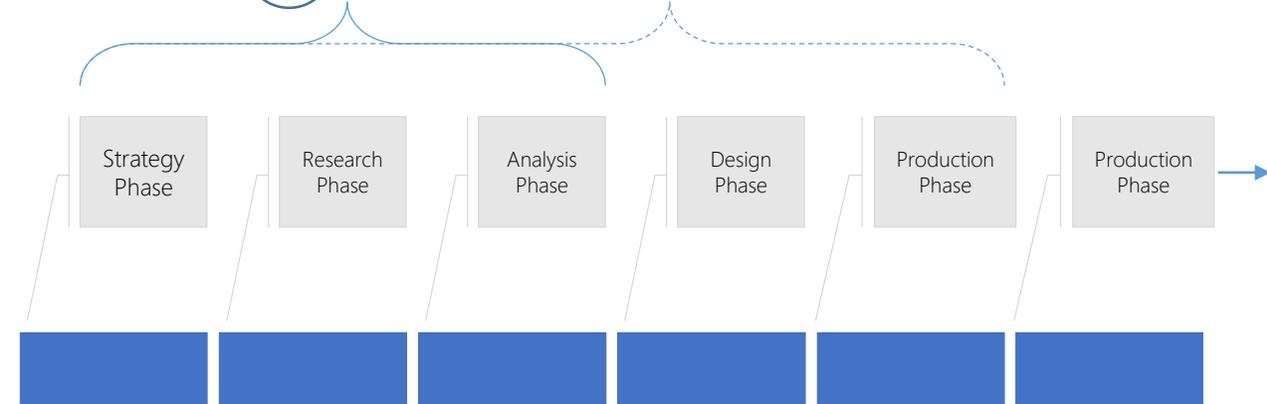


Stages of UX Design for OneRM – Roadmap

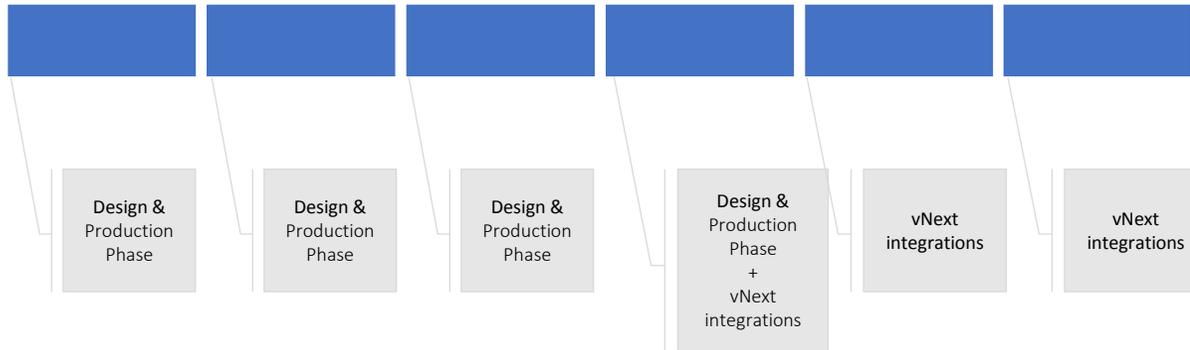
Staging & vNext Environment



Timeframe based on à la carte choices of UX investment in The strategy, research, analysis, and design phases.



PROD Environment



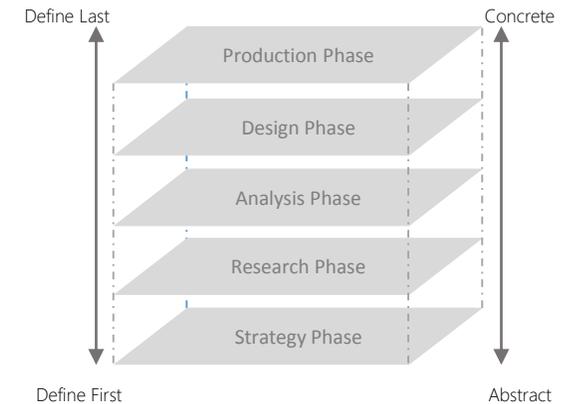
90%

90% - Integrate a full UX strategy and deployment integration with vNext as the leading edge of the OneRM vision.

10%

10% - UX Support goal is to maintain UX Design pace with the current state of PROD and act as a "hot-fix" solution to user confusion points.

UX Design Process





Strategy Phase

UX Details

1. Stakeholders Interview
2. Key Performance Indicators
3. Value Proposition
4. Ecosystem Map
5. Competitive Audit
6. User Journeys
7. Blueprint



Stakeholders Interview – Stake Holder Attendance needed

At-a-Glance - Stakeholder Interviews

Stakeholder Interviews are conversations conducted with key stakeholder: customers/users, LT at applicable role levels both within and outside the organization. These interviews allows us to step into the shoes of interviewees and see the role through the eyes of stakeholders.

Purpose of the stakeholder interviews

The purpose of a stakeholder dialogue interview is to see your work from the perspective the business. It answers the questions: What outcomes are stakeholders looking for? Future expectations and platform vision.

Outcomes

- Enhanced clarity about how work matters from the viewpoint of my stakeholders.
- An understanding of how stakeholders assess value and will judge success.
- Ideas for quickly improving a situation.
- Identification of barriers and roadblocks that need to be removed.
- Opening lines of communication to improve knowledge transfer.



Stages of UX Design for OneRM – POC Single Role

Strategy Phase

1. Stakeholders Interview
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UX Details

↑ Key Performance Indicators – Will come out of the Stakeholder Interviews

Pre-established criteria to measure progress toward strategic goals or the maintenance of operational goals.

Benefit: KPIs help inform design decisions along the way and measure results of the UX efforts.

Example OneRm CM UX KPI:

Tasks- MOPS User build success rate and speed rate on campaign creation tasks

Task – MOPS User ability to identify the health and status of all current Campaigns and Interactions on OneRm

Task - OneRm's ability to onboard new products/surfaces to it's clients seamlessly

↑ Value Proposition – Will come out of the Stakeholder Interviews

A reductive process in the early stages of the design process that maps out the key aspects of a product: **what it is, who it is for and when/where it will be used**. **Value Add:** This exercise helps the team visualize **everything the product could be**, before narrowing down and creating consensus around what the product will be and what direction it's headed.

* In the case of OneRM the value proposition is a critical consideration that acts like an governance umbrella to all the design and UX decision we make.

↑ Ecosystem Map – Abhishta work sessions with UX Team – [See Example](#)

A map that visualizes the company's digital ecosystem in a way that clearly illustrates their digital properties, the connections between them, and their purpose in the overall marketing strategy. **Why is this done?** Gives UX Team insights around the role of each piece of the system, as well as on opportunities to leverage existing assets to achieve the brand's business goals.

* **This can be a powerful “Visual” tool** not only for the business but also for UX to ensure the work throughput of the user align in accomplishing the business goals.



Strategy Phase

1. Stakeholders Interview
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5. **Competitive Audit**
6. **User Journeys**

UX Details

➡ **Competitive Audit**

UX Team is recommending an informal approach on a **feature by feature** Competitive Audit. **Why?** This agile method is a great way to justify quickly the investment of the feature vs the UX value add to the platform. Audits help UX understand industry standards and identify opportunities to innovate in a given area.

⬆ **User Journeys – [See Simple Example](#) – [See Advanced Sample](#)**

User journey maps are documents that visually illustrate an individual customer's needs **and KPI's**, the series of interactions that are necessary to fulfill those needs, and the resulting emotional states a customer experiences throughout the process.

3 possible journeys for MOPS PODS Team members

- New Campaign creation – Must build out the with mops and analysts – how do we optimize this?
- Manage MOPS Campaign Portfolios – Interactions and occurrences Error checking, Dashboard check (HUD)



Stages of UX Design for OneRM – POC Single Role

Strategy Phase

Research Phase

UX Details

1. Quantitative Survey
2. Focus Group
3. Concept Testing
4. Usability Test
5. A/B Test
6. Card Sorting
7. Wants and Needs

↑ Quantitative Survey

Questions that provide numbers as result. Quick and inexpensive way of measuring user satisfaction and collecting feedback about the product. It could indicate the need for a deeper qualitative test and also serve as a barometer as to the current state, success, and happiness index of the user base. This would be custom designed to suit OneRM CM and other aspects of the platform per client demand such as Scotch. This can be executed on small or a larger scales of the OneRM Platform. (Distribution list dispersion)

↑ Focus Group - Ongoing

Groups of 3+ participants are lead through a discussion about a set of topics or features, giving verbal and written feedback through discussion and exercises. This is a great way to preform a retrospective on OneRM every few sprints in sync with the delivery of new features.

* Questions would be written by Tim and Michael and video capture of the screen and users faces, reactions and curser movements. Time: 15-45 min each.

↑ Concept Testing

UX Team shares an approximation or a written PPT of a new feature set on the platform that captures the key essence (value proposition) of a new feature improvement in order to determine if it meets the needs of the MOPS PODS and or new roles personnel; it can be done one-on-one or with larger numbers of participants. This is another great way to propose Comps, Wire frames, Ideation to the User before investing time in meetings, ideation, wire framing, UX Design work, and Production development.



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↑ Usability testing

One-to-one interview research by UX Lead and pairing observer in which the user/MOPS is asked to perform a series of tasks in a prototype or a product. This to validate and collect feedback of flows, design and features.

* Recommending we set up an ethnographic workstation for doing this in our MOPS Pit. Dedicated computer for Usability studies.

↓ A/B Testing

Scientifically testing new features by randomly assigning groups of users to interact with each of the different designs and measuring the effect of these assignments on user behavior. Once Roles is set up we can consider offering A/B Testing possibly.

→ Card Sorting

A quantitative or qualitative method that asks users to organize items into groups and assign categories to each group. This method helps create or refine the information architecture of a site by exposing users. Using card sorting exercises within OneRM can offer deep insight into how the user might consider reorganizing the process of how they interact with the product and the different layers and dimensions of the OneRM platform. * This can be particularly helpful come a global offering that small business owners with little CRM experience may engage with.

↑ Wants and Needs

A wants and needs analysis is a special kind of focus group in which participants brainstorm about product features and services they would like to see in an ideal world. e.g. What activities would you like to perform with this product?

What performance and production expectations do you have?

How do you expect to accomplish specific tasks?

* UX Team, Tim, Alex V.



Stages of UX Design for OneRM – POC Single Role

Strategy Phase

Research Phase

Analysis Phase

UX Details

1. **Heuristic Review**
2. Storyboards
3. Personas
4. Scenarios

Heuristic touchstones

- Visibility of system/platform status:
- Match between system and the real world
- User control and freedom
- Consistency and standards
- Error prevention
- Recognition rather than recall
- Flexibility and efficiency of use
- Aesthetic and minimalist design
- Help users recognize, diagnose, and recover from errors
- Help and documentation

Heuristic Review

In a heuristic evaluation, the team will look at the design being assessed and document design elements, functions and flows that break with the heuristic set. The purpose is for the evaluator and the team to uncover usability problems in a design, which can then be fixed. In some ways we do address some heuristic review during our design session and whiteboard meetings, however a “purposeful approach” to this is recommended.

* (This review process can be looked at as filter to user flow changes made to OneRM)



Stages of UX Design for **OneRM** – POC Single Role

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↓ Storyboards

A storyboard is a technique for illustrating an interaction between a person and a product (or multiple people and multiple products) in narrative format, which includes a series of drawings, sketches, or pictures and sometimes words that tell a story. Designers can create storyboards to specify how a user interface changes in reaction to users' actions and to show things that are external to the system. Good storyboards allow design teams to get a feel for the flow of users' experiences. They are generally not very detailed and use the minimum amount of detail required to get key points about the big picture across.



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Personas

The purpose of personas is to create reliable and realistic representations of your key audience segments for reference. These representations should be based on qualitative and some quantitative user research and web analytics. Remember, your personas are only as good as the research behind them.

Effective personas:

- Represent the primary user group, in this case, MOPS or Marketing operations.
- Express and focus on the major needs and expectations of the most important user groups
- Give a clear picture of the user's expectations and how they're likely to use the site
- Aid in uncovering universal features and functionality
- Describe real people with backgrounds, goals, and value

Benefits of Personas

Personas help to focus decisions surrounding site components by adding a layer of real-world consideration to the conversation. They also offer a quick and inexpensive way to test and prioritize those features throughout the development process. In addition they can help:

- Stakeholders and leaders evaluate new site feature ideas
- Information architects develop informed wireframes, interface behaviors, and labeling
- Designers create the overall look and feel of the website
- System engineers/developers decide which approaches to take based on user behaviors
- Copy writers ensure site content is written to the appropriate audiences



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[Scenarios - Example1 – Example2](#)

Scenarios describe the stories and context behind why a specific user or user groups will use the platform and choose to continue to use it over other solutions available. Scenarios capture and note the goals and questions to be achieved and sometimes define the possibilities of how the user(s) can achieve them in the platform or in a software environment.

* With respect to OneRM any Scenario we generate should be looked at as organic and grow in a cumulative perspective. So as the platform capabilities grow so to does the story around the Scenario. These would be updated over time by stakeholders and managers and used as tools during ideation meetings.

Benefits

Scenarios are critical both for designing an interface and for usability testing.

Good user scenarios help to define concrete design requirements and improve our usability and achieve efficiency in user experience.



OneRM UX Design Strategy - Goals



Confirm UX Goals

Following good UX practices will define UX goals

- TBD
- TBD



Stages of UX Design for OneRM – POC Single Role

Strategy Phase

Research Phase

Analysis Phase

Design Phase

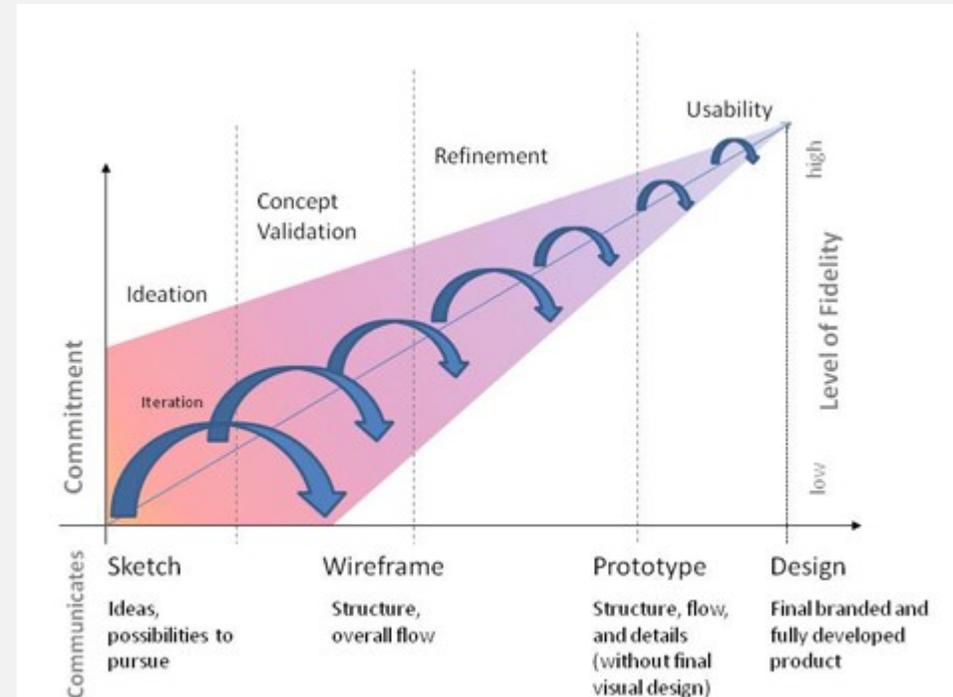
UX Details

1. Sketches
2. Wireframes
3. Prototypes
4. Pattern Library

↑ Sketch

Sketching is a tool that supports the process of making, not the actual design itself. In the context of design, sketching is rapid, freehand drawing that we do with no intention of its becoming a finished product. In fact, many times, sketching is only a foundation upon which we can overlay our actual design work.

The chart to the right depicts the investment of time and commitment to the level of fidelity in the Design Phase.





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Strategy Phase

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↑ Wireframe

A wireframe is a rough guide for the layout of a website or app. A prototype is similar in that while far from being a polished product in terms of visuals or functionality, it gives an indication of the direction that the product is heading. “Mockups” is the term I use for wireframes that have been created in high fidelity, but for some people these three terms are interchangeable.

↑ Prototype

A prototype is a simulation of the website navigation and features, commonly using clickable wireframes or layouts. It's a quick and dirty way to test and validate a product before fully developing it. * A prototype is not the final product. Do not expect it to look like the final product. It need not have a high fidelity or be pixel perfect.

↑ Pattern Library

A hands-on library that provides examples (and code) of interaction design patterns to be used across the website. It not only promotes consistency, but also makes it easier improve elements as needed.



Stages of UX Design for **OneRM** – POC Single Role

Strategy Phase

Research Phase

Analysis Phase

Design Phase

Production Phase

UX Details

1. Visual Designs
2. Usability testing

↑ Visual Designs or Comps

Visual design focuses on the aesthetics of a site and its related materials by strategically implementing images, colors, fonts, and other elements. A successful visual design does not take away from the content on the page or function. Instead, it enhances it by engaging users and helping to build trust and interest in the brand.

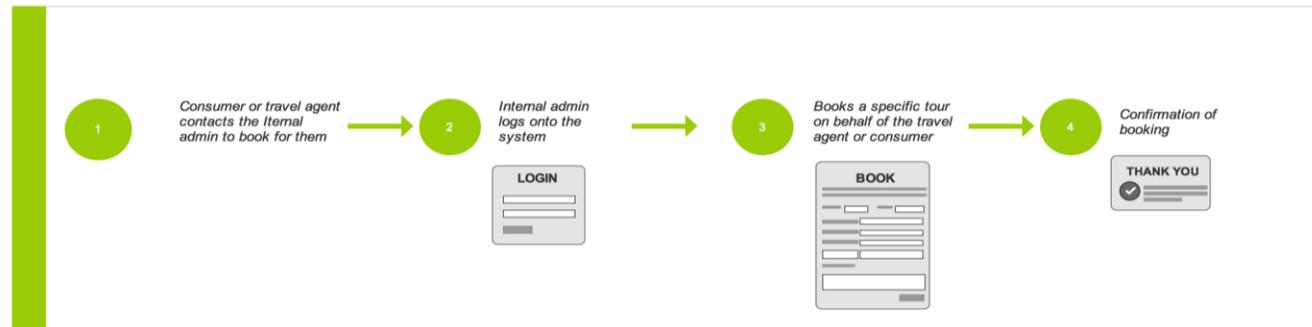
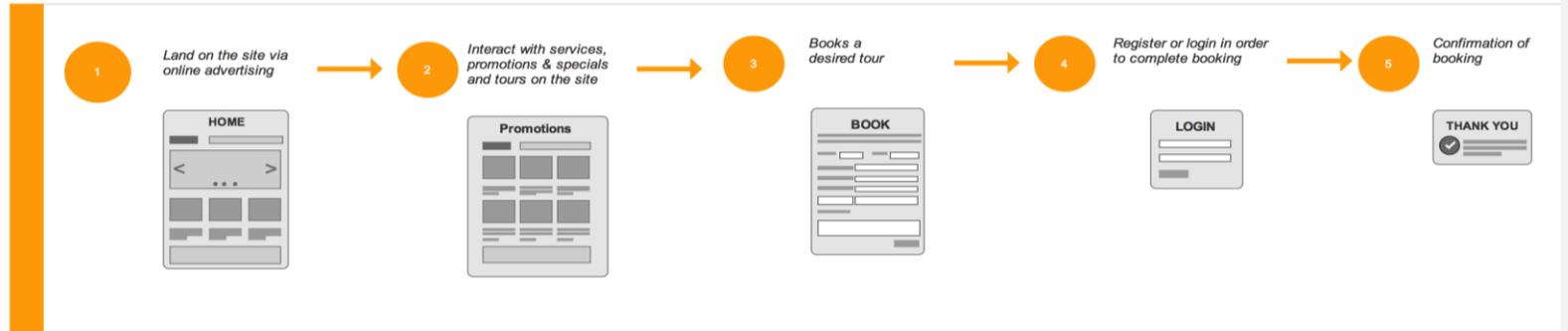
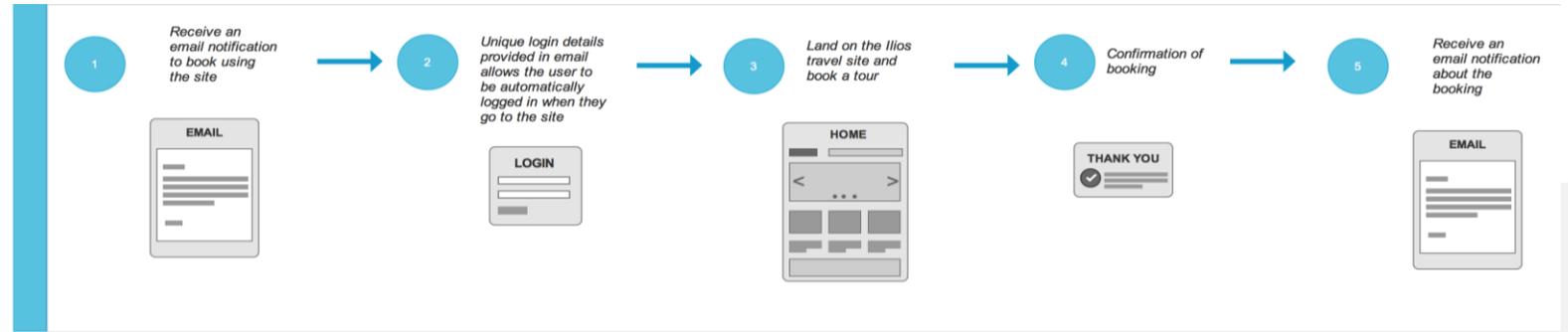
↑ Usability testing

One-to-one interviews performed in which the user is asked to perform a series of tasks in a prototype or a product. Validates and collects feedback of flows, design and features. Also users can be active participants in A/B testing from a usability perspective.

* As OneRM is set to be feature rich considering a fluid manor of performing opinion based testing on feature redesign and new feature roll-outs could be an advantage pre and post design/production phase.



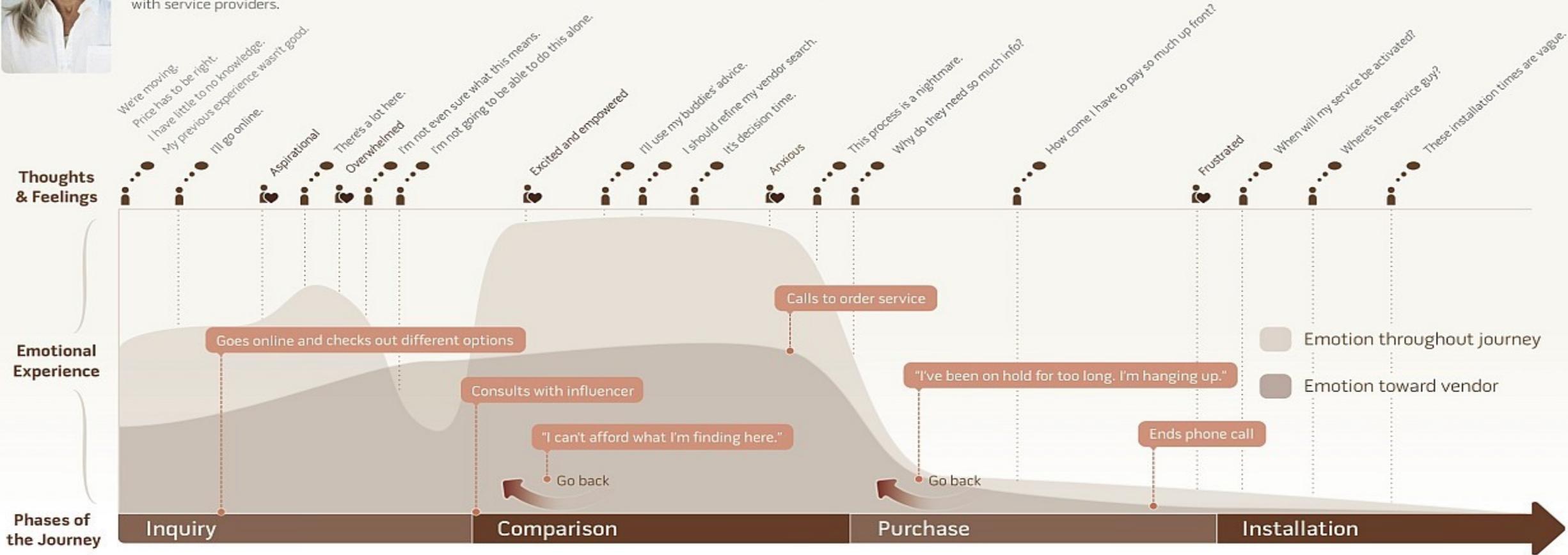
OneRm Simple User Journey Example





Sarah's Broadband Provider Journey

Sarah is moving her family of three. She knows she's going to need phone and Internet service. The effective and contextual factors that will affect Sarah's choice in broadband vendors are price, and her existing knowledge of and previous experience with service providers.



Description
 The Inquiry phase features the reasons people are shopping around for new service. These are usually related to moving and relocation, an upgrade to existing service or hunting down new deals. Moving is the biggest reason.

Recommendations
 Design homepages with separate, targeted call-out areas lying above the fold, tailored for residential and tech-savvy customers. Internal product areas should include basic plain-English product descriptions and large price points with a clear call to action. Bullet points should include keywords that summarize options and features typically found in product datasheets.

Description
 The potential customer comes into the Comparison phase usually armed with the right info and tech jargon and is looking for the lowest cost. Customers tend to be brand agnostic. If they can't find the right price or the right services, they may leave and go back to Inquiry.

Recommendations
 Use IP location services to geo-locate customers – removing the current service address roadblock. This allows users to configure services before adding them to the cart and reflects bundled price discounts in a clear and obvious manner.

Description
 The Purchase phase involves the provider requiring quite a bit of personal info. The order flow tends to be complex, and the process can be all over the map. There is a sense of delayed gratification – waiting on service installation and activation.

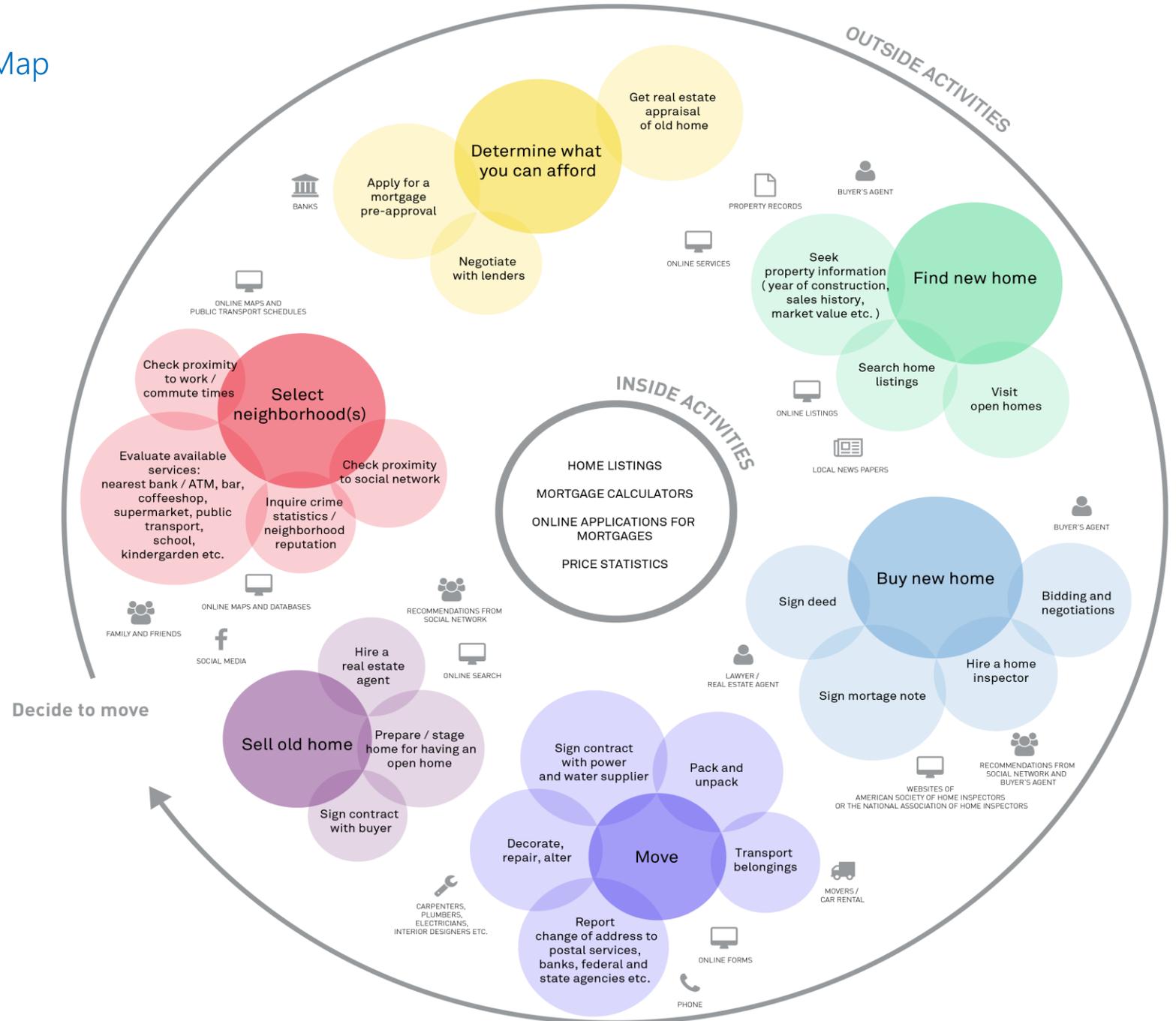
Recommendations
 Reduce the amount of information required by streamlining and improving any areas that contain form fields, using industry best practices. Work on setting expectations for the Installation phase with phone customer service reps to improve the overall experience with your brand.

Description
 The Installation phase is the handoff from customer service to the installer. There are usually scheduling conflicts among all parties involved. This phase can be somewhat painful for the customer in dealing with the installer.

Recommendations
 Many factors converge to make this phase of the customer journey unpleasant. Providing accurate arrival times, courteous technicians and clear instruction materials during Installation can help alleviate the negative experience in this phase. Also, consider having leave-behind customer comment cards so customers feel empowered to give feedback into the process.



OneRm Simple User Ecosystem Map





OneRM UX Scenario Example

Scenario

Performs a Campaign filter On OneRM Landing page

Persona

Alex - MOPS Personnel

Scenario Steps Overview

1. Alex goes to OneRM to make updates to their campaigns they created days ago
2. After Login Alex lands on Campaign Landing page and is overwhelmed by 100+ Campaigns to sort through to find his campaign to change
3. Alex navigates to the Filter Campaign button and selects last 10 days and LOB Consumer and Product of 0365
4. Alex notices that the campaign listing automatically updates as he uses the filter below
5. Alex continue the refinement process and drill down to the campaigns he created in the last 10 days
6. Alex Found the Campaign he was searching for
7. Alex selected and modified the campaign and interaction he was seeking and successfully moved on to the next task.

[Back](#)

Cheryl – The seasoned assessor



"Being an assessor helps my students and helps me to pay for our summer holiday"

Age: 42

Job: Teaches History at Grammar School

Teaching experience: Over 20 years

Assessor experience: 10 years (off and on)

Computer & IT experience: Not very confident using computers

Personality: Outgoing, considerate, dependable

Likes: Social aspect of being an assessor

Dislikes: All the admin associated with marking

Needs to be able to:

- Be reminded of tasks, dates and milestones
- Easily get in contact with OCR
- View details of her commissions and activities
- Find out exactly what a commission entails
- Get help and advice

Scenario 3 – Cheryl marking a June 2011 GCSE History question paper (using Scoris)

Cheryl initially started marking when she had her second child and has been an assessor off and on for the last 10 years. She has previously marked paper question papers (i.e. sent to her) and is a little bit nervous about having to mark on screen.

Importance: High

Frequency: Low

Id	Scenario steps	Comments	Outstanding questions	Required functionality
3.1	Cheryl receives an email informing her that OCR have an opportunity for her to undertake some assessor activities (i.e. marking answers for a GCSE history paper) that she might be interested in.	<ul style="list-style-type: none"> ○ Assuming that Cheryl has already had her system checked to ensure that it's compatible with Scoris (e.g. as part of the sign up process) ○ Assuming that Cheryl already has an assessor account with OCR (i.e. for the assessor portal) and has agreed to receive email alerts from OCR – she can switch these off in her preferences (or even request to receive Text alerts) 	<ul style="list-style-type: none"> ○ When would this happen? ○ Is Cheryl likely to sign up with a work email address or home email address? ○ How do we ensure that alerts don't go to Cheryl's spam inbox? 	<ul style="list-style-type: none"> ○ Send email alerts to assessors (e.g. commission opportunity)
3.2	Cheryl logs in to the assessor portal (using a link in the email) and can see the new commission opportunity.	<ul style="list-style-type: none"> ○ If Cheryl hadn't seen the email she might also see an alert on logging in to the assessor portal to inform her that a new commission opportunity is available ○ If Cheryl has forgotten her password 	<ul style="list-style-type: none"> ○ What will 'commissions' be called on the assessor portal? ○ How often is this likely to happen for Cheryl? 	<ul style="list-style-type: none"> ○ New commission opportunity alert on login (e.g. like email) ○ Forgotten password option to reset a password using a registered email address ○ View commission