User Experience Design Process

One of the main tenets of User Experience Design is simply incorporating user feedback in to the design evolution process. That is, co-evolving the system with its users.

The Process:

The user experience design process identifies the user's needs and goals in relation to the project's goals. The process is designed to answer questions and fill knowledge gap between project's sponsors, subject matter experts, requirements gatherers and technology.

Looking at the process in abstract incorrect assumptions can be made that employing the process will increase overall time to delivery or subvert the wishes of project sponsors.

In reality the user experience design process is designed to:

- Minimize requirement gathering by identifying the elements important to the end user
- Maximize product development by raising issues early in the process, avoiding costly re-work.

Project Goal:

The goal of the Agency portal redesign was to enhance the use and usefulness of the portal by Agents. And as part of the redesign, implement the new branding as appropriate for Agency.

Task Analysis

Task analysis is the process of learning about indicative users by observing them in action to understand in detail how they perform their tasks and achieve their intended goals.

Tasks analysis helps identify the tasks that web sites and applications must support and can also help refine or re-define a site's navigation by determining the appropriate content scope.

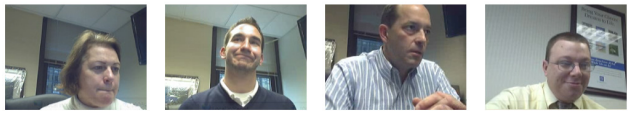
Agency was fortunate to have a history of performing user testing with actual Agents.

There were numerous user testing sessions that could be reviewed and from them, observations and quotes pulled to guide the direction of the redesign. Quotes and observations from 20+ hours over four testing engagements. These quotes were organized in 6 categories including workflow, personalization, information architecture, social, presentation (branding), and new agents.

"If I am looking at it every day for the rest of my career, yes, I want it personalized"

"If you could press a button and it could take you to all your pending cases that would be awesome"

"I'm sure there's stuff in toolbox I should be using that I am not using or don't know how to"



Strategy

A method or plan chosen to bring about a desired future, such as achievement of a goal or solution to a problem.

The art and science of planning and marshalling resources for their most efficient and effective use.

The task analysis pinpointed the applications Agents considered the most used and most important. Observations of the existing site also confirmed what the agents were saying.

One of benefits of speaking directly with the Agents was understanding the and empathizing with the pain they currently experienced in navigating applications and web site content to effectively do their job. We learned not only what applications they used frequently but what the tasks they were trying to accomplish and why. Based on this we were able to set a strategy that would define the wireframes to test our hypothesis.

The Agents wanted less corporate speak and more directed content. They wanted near real time access to anything that was holding up business from being processed. And they wanted access to anything that would help them sell more, including what elements were working for other agents. But they wanted this information in a smart way. If an Agent sold Annuities as their bread and butter they didn't want an over abundance of other product noise. They wanted information that was appropriate by product, length of service, agent classification and other meta data.

This brings us to our next step, a collaboration with the business area to define meta data.

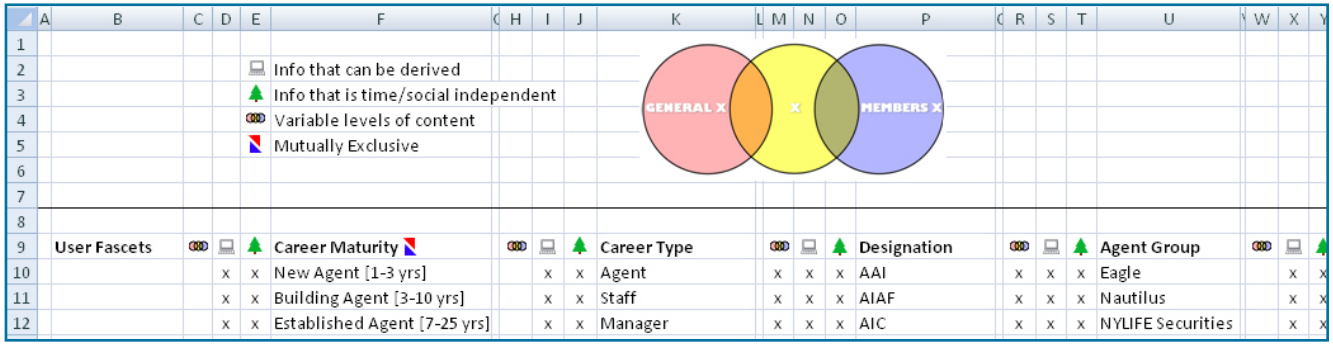
Metadata Definition

Data about data.

Metadata describes how and when and by whom a particular set of data was collected, and how the data is formatted.

Content plays a large part in the Agency Portal. It has been described as too large to fully comprehend by more than one Agent. While many content reorganizations have taken place there have really been little attention given to faceting the data into chunks base on the audience.

What was hypothesized was the creation of three levels of content. Introductory Content could be used to orient users with basic information. General content, to provide detailed information about a subject, and member specific information, which includes detailed information to users immersed in a subject.



User Fascets	Career Maturity	Career Type	Designation	Agent Group
	x x New Agent [1-3 yrs]	x x Agent	x x x AAI	x x Eagle
	x x Building Agent [3-10 yrs]	x x Staff	x x x AIAF	x x Nautilus
	x x Established Agent [7-25 yrs]	x x Manager	x x x AIC	x x NYLIFE Securities

Other user facets were identified, examples include; career maturity, career type and cultural markets. Within these user and content facets was the identification of evergreen content, or content that would need minimal updating as time passes.

Understanding the metadata helped craft the design philosophies through wireframes.

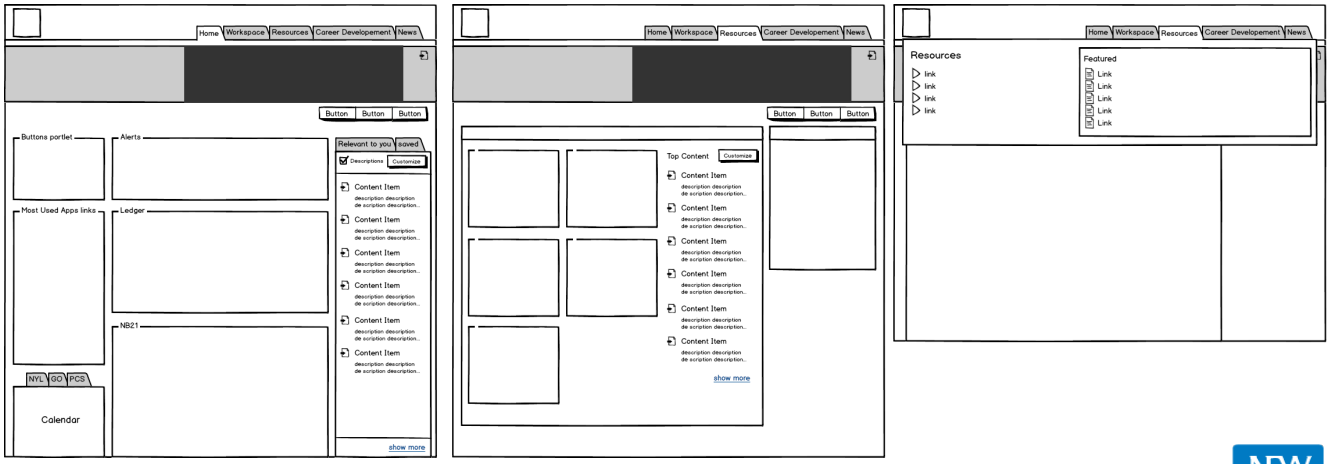
Wireframes

Wireframing primarily allows you to define the information hierarchy of your design, making it easier for you to plan the layout according to how you want your user to process the information.

The cornerstone of the design philosophy was to provide a narrow view of the 1000+ documents available to the Agent with the ability for the agent increase the field of content manually through a secondary click, through preferences to finely tune the categorization, and through user action.

Another driving principle was access to application content. The initial state required Agents to sign in to applications to get to the information they needed daily. In some instances this required 4 clicks and a search (the search was always the same) to get to where they needed.

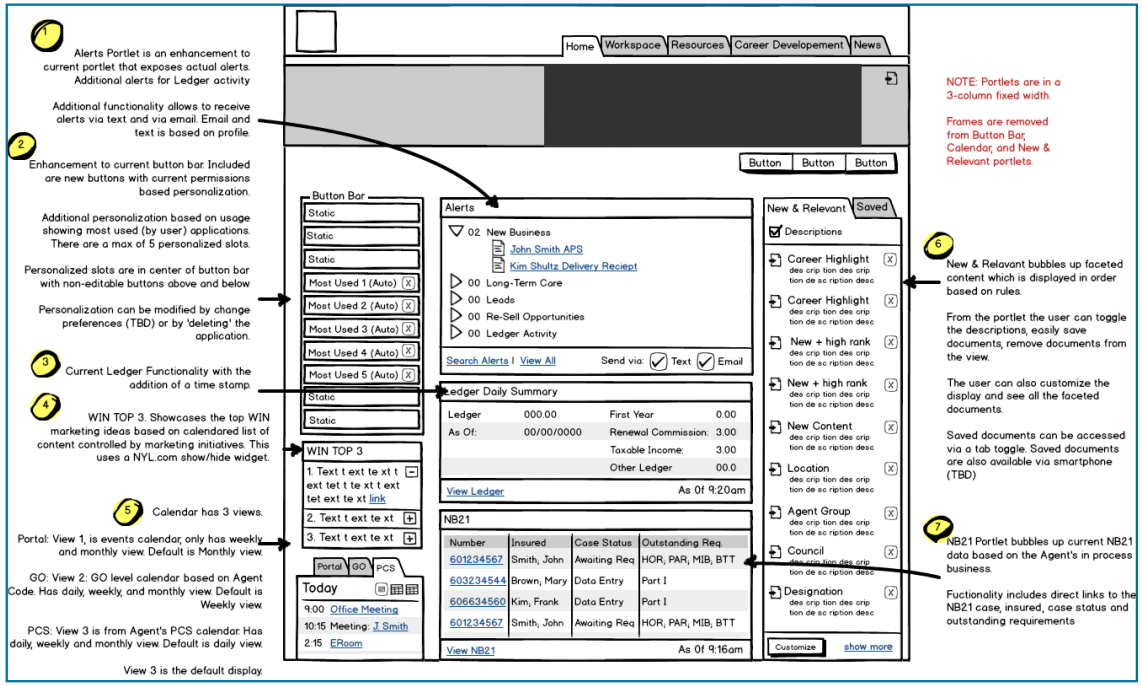
The wireframes below depict the home page (far left) with the organization of portlets and content widgets. An inside page refocusing the content and application of new branding but still utilizing the existing templates, just with added functionality. The far right depicts fly over navigation and a section specific feature area.



Behavior

Wireframes are used to communicate an understanding of a product's functionality using requirements and visual specifications. A large part of defining technical specifications is to outline and show solutions to business requirements.

From initial wireframes, detailed discussions of the specific functionality outlined the pros and cons of application connectivity, content restrictions and put a face on content faceting.



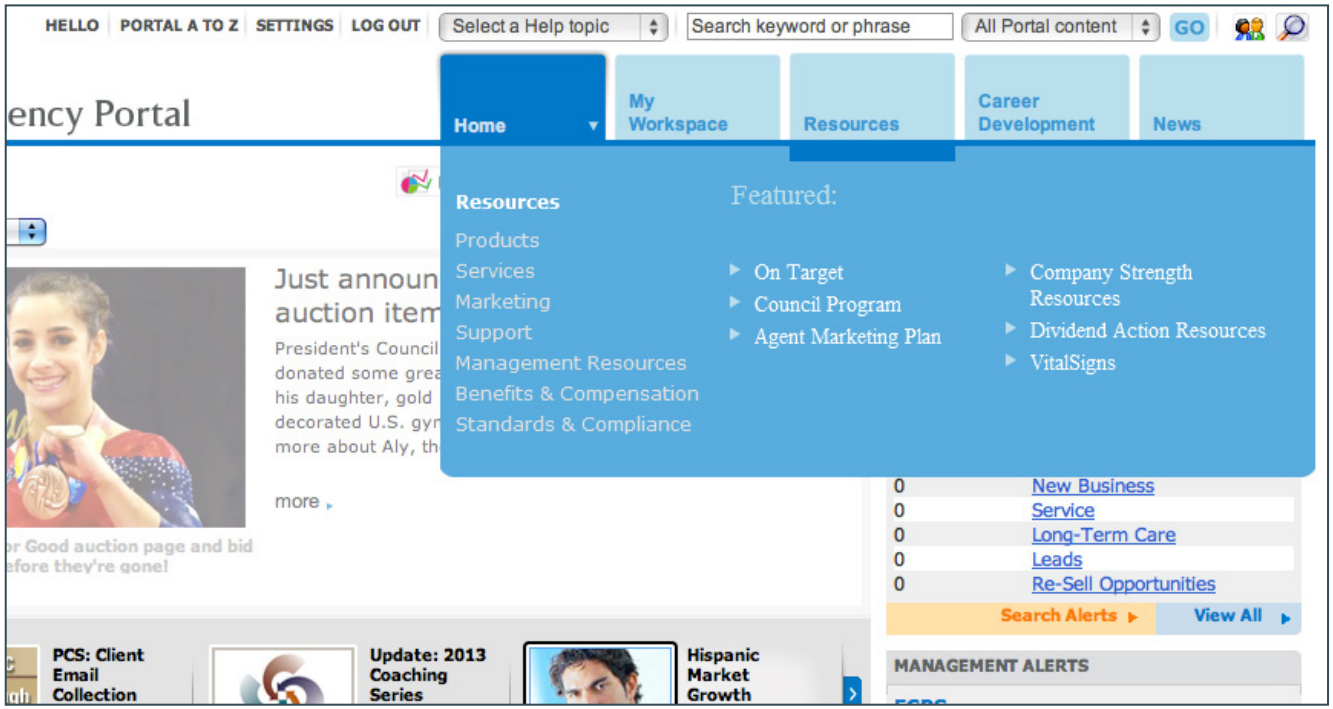
Wireframes were then iterated and directionally confirmed with subject matter experts, and users.

Usability Testing: Round 1

Usability testing is a technique used in user-centered interaction design to evaluate a product by testing it on users.

This can be seen as an irreplaceable usability practice, since it gives direct input on how real users use a system.

Concurrent to defining the behavior, usability tests were conducted on navigational elements. This was done to judge user acceptance of fly out navigation, and the re-aligning of content. These tests were done utilizing the existing branding in an semi-interactive prototype, where PhotoShop pages were strung together to mimic the interaction desired.

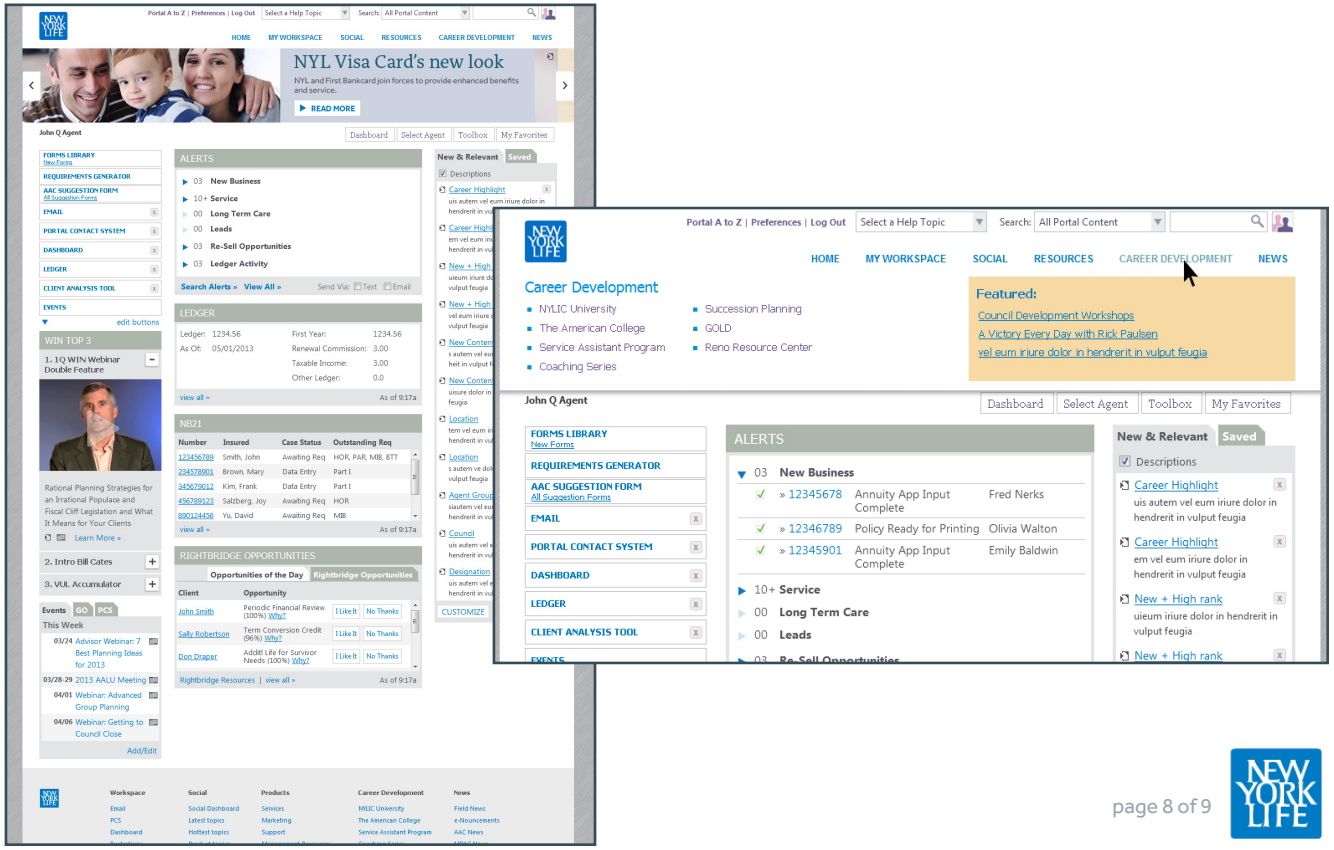


Prototype development

A high fidelity prototype is an interactive prototype that behaves as the real system will in terms of interaction and functionality.

The prototype serves multiple purposes, including facilitating more robust usability testing, clarification to business requirements with stakeholders, and jump-start to development efforts. Elements including base HTML code, some JavaScript and Cascading Style Sheets (CSS) can be utilized in the development process.

The most important use for the prototype however is visualizing how functionality works .



Usability Testing: Round 2

Usability is a quality attribute that assesses how easy user interfaces are to use.

The word "usability" also refers to methods for improving ease-of-use during the design process.

Usability is defined by five quality components: Learnability, Efficiency, Memorability, Errors, and Satisfaction.

Once an interactive prototype is created, robust usability testing clarify areas of concern regarding functionality proposed. These areas included the use of fly over navigation, because the user base is an older audience and this would be something they would be unfamiliar, and the surfacing of application information from policy systems. The main concern here was to confirm we surfaced all of the necessary information to replace the need to visit specific applications.