Design: Story Designer prototype v1

https://juiceanalytics.atlassian.net/browse/JB-2227

Summary

Designing for Story Designer will be a multi-sprint process, integrating different phases of development from other designed views under development.

The goal here is develop more concepts around how the design of Story Outliner, Data Outliner, and Block Browser could be integrated into a guided experience. We would like to develop some digital or paper prototypes where we can run in-person tests for the Story Designer process.

Some questions we're trying to answer:
- What is the best way to order the steps?
- How can block designs be improved? Do the options make sense? What is missing?
- How much does the concept of an Intro, Heart, and Conclusion frame the steps?

Highlights

Activity
- Iterated on some google sheet prototypes for block scoring.
- Created various concepts around fill-in-blank approaches for configuring template hearts.
- Iterated on the process and ran two internal paper prototype tests with Ken and Susan.

Answers to posed ticket questions
What is the best way to order the steps?
- By integrating (and starting with) questions about which data is important for their audience, we can better narrow good eligible heart blocks.
- We ask about who the primary audience is early on, but this could use more guidance. In the future it may make sense to more integrate the concept of

"Teams" with Audiences - which makes a more natural transition towards permissions groups as well / goal, purpose, relevant stories.

- Right now, we ask several questions before bubbling up matching blocks, but this is problematic for those that really have a specific chart in mind. Perhaps the questions feel more like a traditional side panel of filters that helps them narrow the block list.

How can block designs be improved? Do the options make sense? What is missing?

- Since the type of data and potential solutions is fairly broad, we are going to need a broad range of block options for different scenarios. So, the difficulty is not so much in creating more or filling in missing gaps, but rather how to appropriately surface such a large variety and how to organize the blocks in a way that is useful long term.

How much does the concept of an Intro, Heart, and Conclusion frame the steps?

- I think this is a good concept, but there needs to be more guidance around why this is a good approach to data storytelling, and particularly what makes a good intro, heart, or conclusion — and how this relates to different kinds of stories. There are many great guidelines but few hard and fast rules. Deciding what rules to implement is the challenge here.

What's Next?

- Want the design guidance to feel more integrated with the outliner itself
- Want to ensure the outputs and the process of the design guidance will continue to be useful for our target audience, and not something they only will use a few times for educational purposes. It should remain the fastest / best way to get started for Juicebox apps. (Apart from something very custom in mind)
- Need to understand better how address multiple stories
  - We want to avoid people creating long, overwhelming stories and one way to avoid this is to categorize app / data goals into several stories.
  - We should either emphasize guidance around keeping it short and clear, and that this is intentional and we "unlock" ability for multiple stories in Enterprise; OR we guide users towards creating multiple stories in JBO.

Next Ticket, Prototype story designer round 2

- Revise process so that it is more directly integrated with the Story Outliner
- Figure out how to best communicate that blocks from different stories can be combined if desired.

- Need a simpler way to think about configuration from intro blocks to heart blocks. Continue exploring.

Want to ensure the guidance highlights our 3 qualities unique to Juicebox:

1. Clear stories, that build context and a flow around the heart (core comparisons of a chart or two)
2. Solid dynamic text narrative that describes what the story is about, what they are seeing, and summarizes potential takeaways.
3. Beautiful theming that creates an engaging appeal.

Design

Existing Blocks

https://dev.juiceboxdata.com/appdesigner2/home#2xAYzdbcKKS

Ranking Leaderboard story exercise

Attributes
- *Title
- *Description
- *3-6 Measure Ingredients
- *1-4 Ranking Ingredients Groups
- Extra story filters (optional)
- Key filters (optional)
- Actions (optional)

Summary 1
- Lots of 🙋 **People** are **doing stuff**.
- One key way to organize 🙋 is by 🔴📐🔲 Shapes, so let's look at 🔑 Performance by 🔴📐🔲 that ranked highest and lowest.
- By focusing on notable 🔴📐🔲 x 🔑, we can then look at the details for just the 🙋 in those 🔴📐🔲.

Outline
- See Total Performance
- See Top/Btm rankings across performance. Choose ranking group.

- Get more details on group
- Take actions

Fill-in-blank Summary Template Idea

An exercise in fill-in-blank style block template config, that that is summary based.

LETS PLAY

🏆 *Who is in the Lead?*

SUMMARY
See which **(+ People, Places, or Things)** are top ranked across **(+ 2-6 Measures)**. We'll focus just on *SELECTION* with **(+ Optional Filters)**. Then, for *SELECTION* of interest, show a detailed view for **(+ Who or What)** and recommended actions for improvement.

SUMMARY (options selected)
See which **(Departments)** are top ranked across **(Measure 3, Measure 4)**. We'll focus just on *Departments* with (**3 Zipcodes** and **2 Age Ranges**). Then, for Departments of interest, show a detailed view for **(People)** and recommended actions for improvement.

GENERATED STORY
🏆 *Which Departments are in the Lead?*

Before seeing **Departments** ranked by your key measures lets get a look at overall performance, *compared to last period*. We'll also just include Departments in **3 Zipcodes** and **2 Age Ranges**.

[Key metrics: Measure 3, Measure 4]

🏆 HOW DO THEY RANK?
Select to highlight the rankings of Departments across your key measures.

[Leaderboard: Measure 3, Measure4 | Departments]

📄 GET THE DETAILS
Let's see which **People** are driving the performance in your selected **3 Departments**.

[Table: People, Measure 3, Measure 4, Zipcode, Age Range]

🏁 TAKE ACTION
Finally, are there any Actions you would like to take or recommend?

[Card: Actions]

💡 GENERATED INSIGHT TEMPLATE (with selections)
In Measure 3, Department A is ranked 3rd (34.5%) and Department B is ranked 1st (28.2%). In Measure 4, Department A is ranked 6th (34.5%) and Department B is ranked 12th (28.2%). This is significant because (*Why?*).

There are 3 People of interest in those Departments, John, Susie, and Ken, because (*Why?*).

A recommended action is **Action 4,** so that (*Why?*).

Prototyping Idea

Give a tester paper printouts of all materials
- Paper prototype of views / UX
- Google sheets to choose from
  - the fields are marked as metrics or dimensions
  - depending on which one they choose, some will get marked as non-valid / said why.
- List of audience needs to prioritize (rank)
- Then take those ranking numbers and fill in sheet cells, returns ordered list of hearts.
- See heart previews, requirements, "best for"
- Choose one to start filling in requirements

- choose options
- fill in requirements
- consider flexibility
- When filling in blanks, prompted to choose/make ingredients.
- When blanks are completely filled in story appears with your data.
- Choose to Add Story to your app or try something else.

April 4, 2019

Sketching and paper prototyping a new flow:

- After uploading data, prompt the Author to "rate their data" by likelihood of importance for their users.
- During this rating process, ask follow-up questions to build basic ingredients quickly. This flow also introduces them to the Data Outliner way of seeing their ingredients.
- Then they are ready to "Create a Story"
- Story Designer is a new view that asks configuration related questions and bubbles up the top recommended hearts/stories. Once they answer enough questions to make a meaningful recommendation, these stories appear above the fold.
- There are different aspects of questions:
  - Theming
  - Block configuration
  - Block filtering
  - Audience goal-oriented
- They can preview a recommended story and begin filling in the rest of the requirements.
- Once the requirements are filled out, they can "Generate Story" to interact with it.
- Then they decide if they want to "Keep & Customize" further or "Discard & Try Another".
- If they keep, they now get access to full editing features of the Story Outliner.
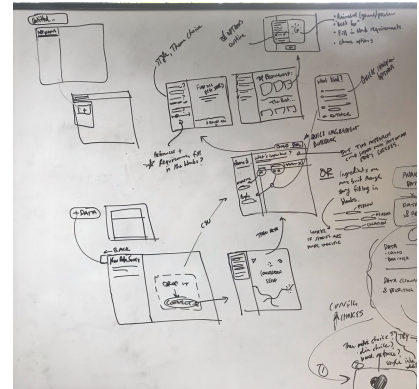
The Story Designer state is saved as its own view, and can be returned to as much as desired to add more stories and adjust search/config criteria.

All blocks would have attributes, and in order to be considered a block

Next

- Setup a test scenario with an app, like Notre Dame for example, where the data is already prepared and a tester is instructed to answer questions for the Story Designer.
- We are testing to see if the User can get to a recommended story that would be a good fit for that type of data and audience goals.
- [ ] Work on a library of Story Hearts with attributes that would correspond to Story Designer questions.
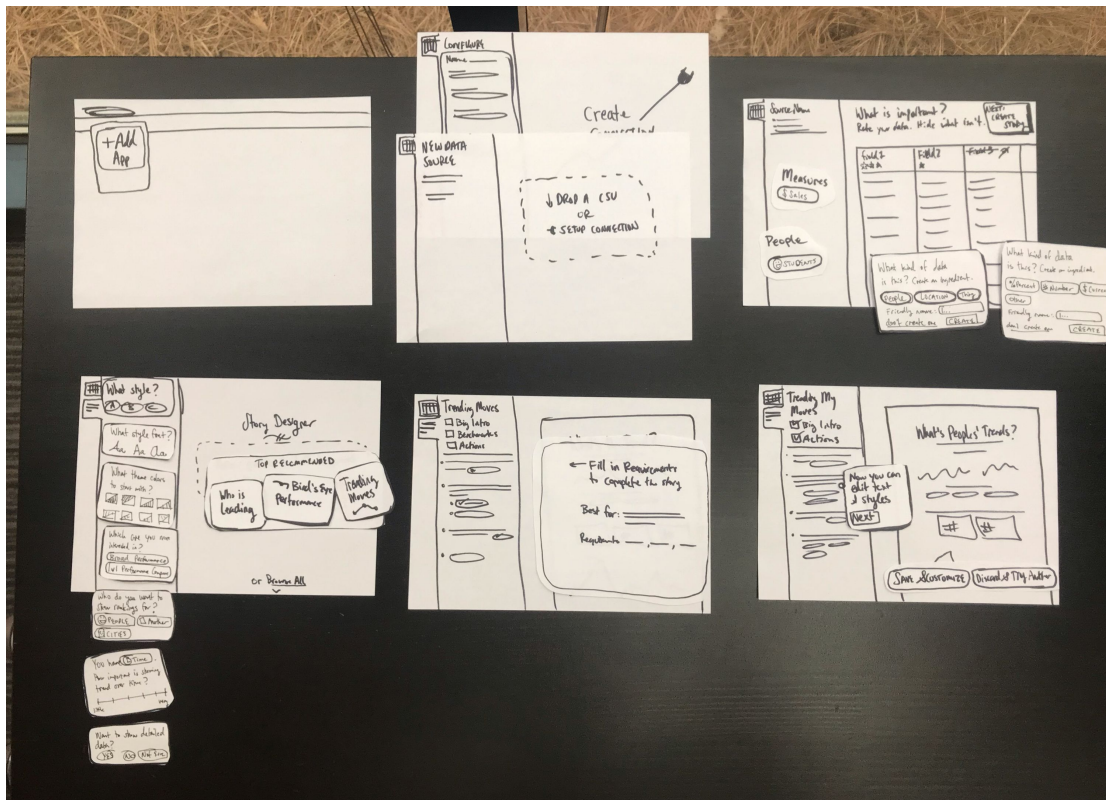
April 11, 2019

Ran through the Notre Dame test first with Ken, and then with Susan.

Observations

- The process for Q&A also may make sense for the **data questions** at the beginning. Perhaps the side panel can sometimes shift into a "Guide Me" state for areas we have guidance for (Creating key ingredients, choosing best starting story, choosing a block?).

- There's a recurring open question around **multiple data tables and multiple stories** as options and when. I feel like it is important to solve for this sooner than later, but only to the degree that it doesn't slow things down a bunch.
- Both Ken and Susan had the question about combining elements of stories. A few important takeaway thoughts:
  - Ensure the feel is, "**This is a starting point and all stories have access to the same features via customization.**" But in a friendlier tone. Squarespace my have some good reference language for this.
  - You can **easily preview** different recommended stories.
  - You can add multiple stories, and you can come back and add a story you didn't before. **ie. this isn't a final decision**.
  - Tell why the story was recommended... "This is **best because...**"
- Measures that have a condition of another field value is common measure type that people want out of their data.
  - Perhaps when creating an ingredient prompt with option config statements they can fill in, like "I'd want to show Amount for (**field**) that has (**value**)."
- When creating ingredients, important to feel like that can ==*move forward and come back*==
- Clarify that **you can switch fields** in the outline, from the recommended ones. This is connected to the tone of customization