Case Study:

Efficient network management
using venue groups.
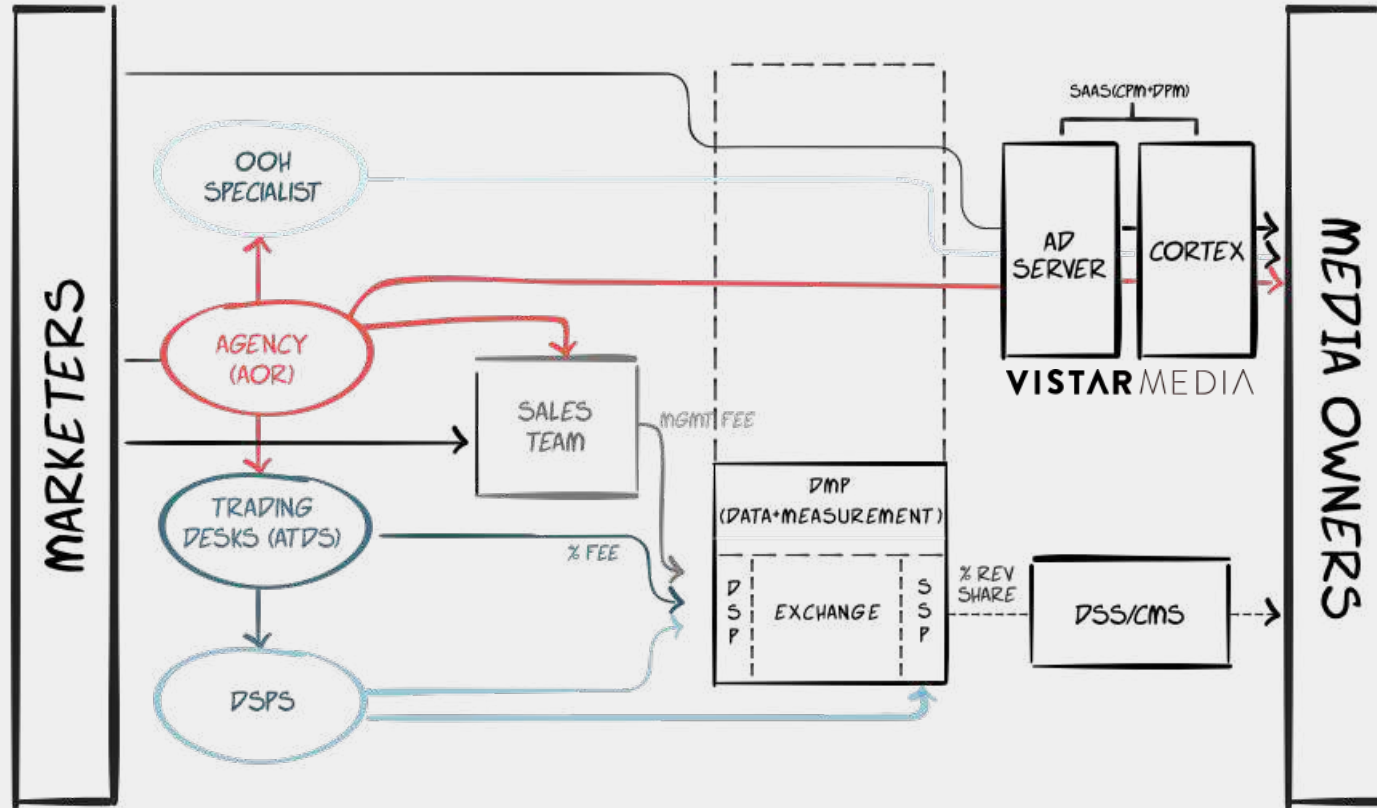
VISTAR MEDIA

Table of Contents

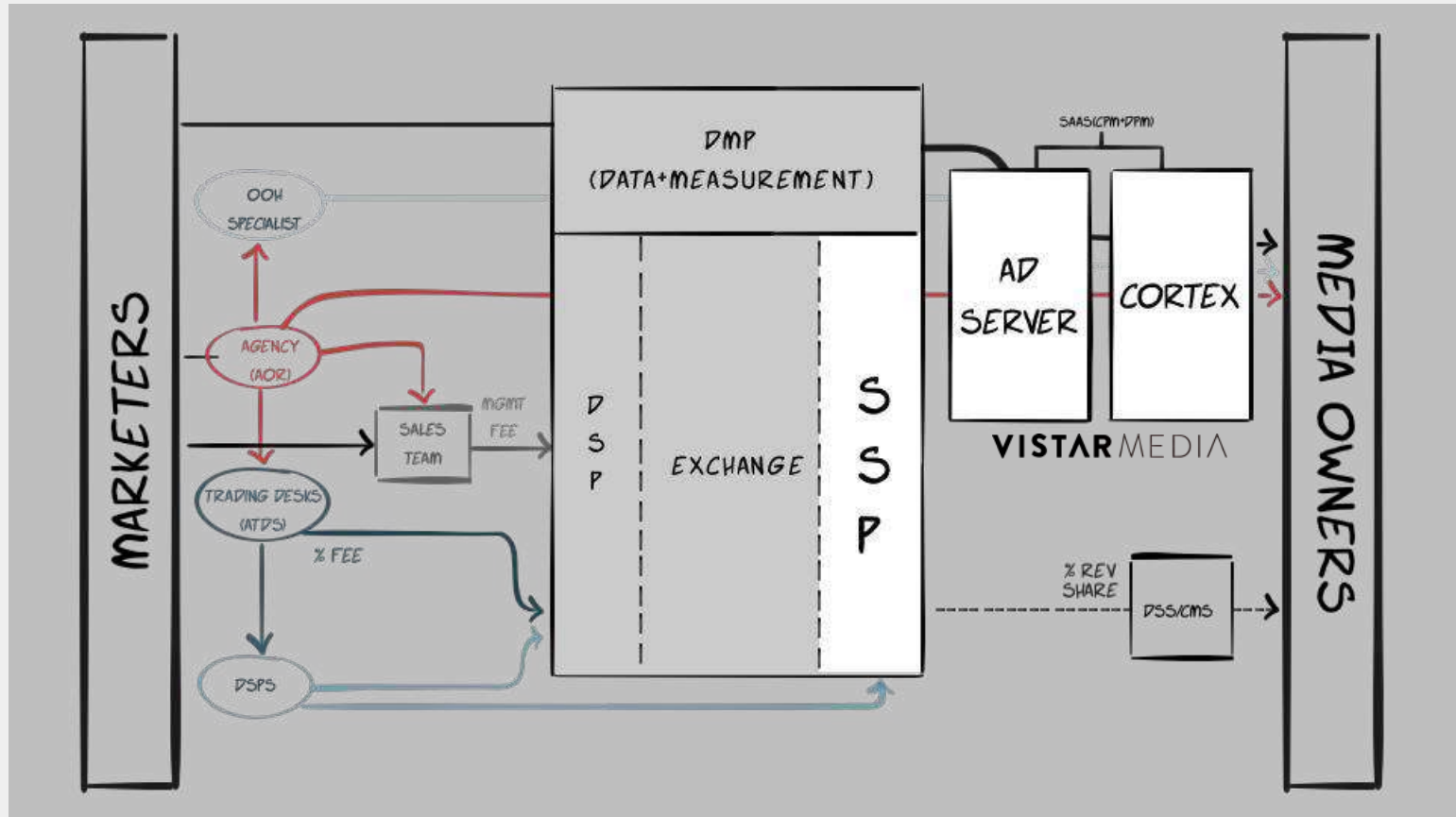# **Company**, Project, and Team Structure

Vistar Media is a programmatic digital-out-of-home software company.

Platform Overview – What is a SSP?

A Supply Side Platform gives media owners the tools they need to understand inventory availability and maximize yield through a holistic view across direct-sold and Vistar's demand sources.

Company, Project, and Team Structure

What are Venue Groups?

Venue groups let users create groupings of units that aren't based on geography alone.

In the sell side platform, users can group their venues into sets for use in targeting. So if there's a group of venues they'd like to target as a set, it's much easier to create the group and reuse it when necessary.

Example: A venue group called, "High end locations" would comprise a set of venues that share the same characteristic-located near high end stores.
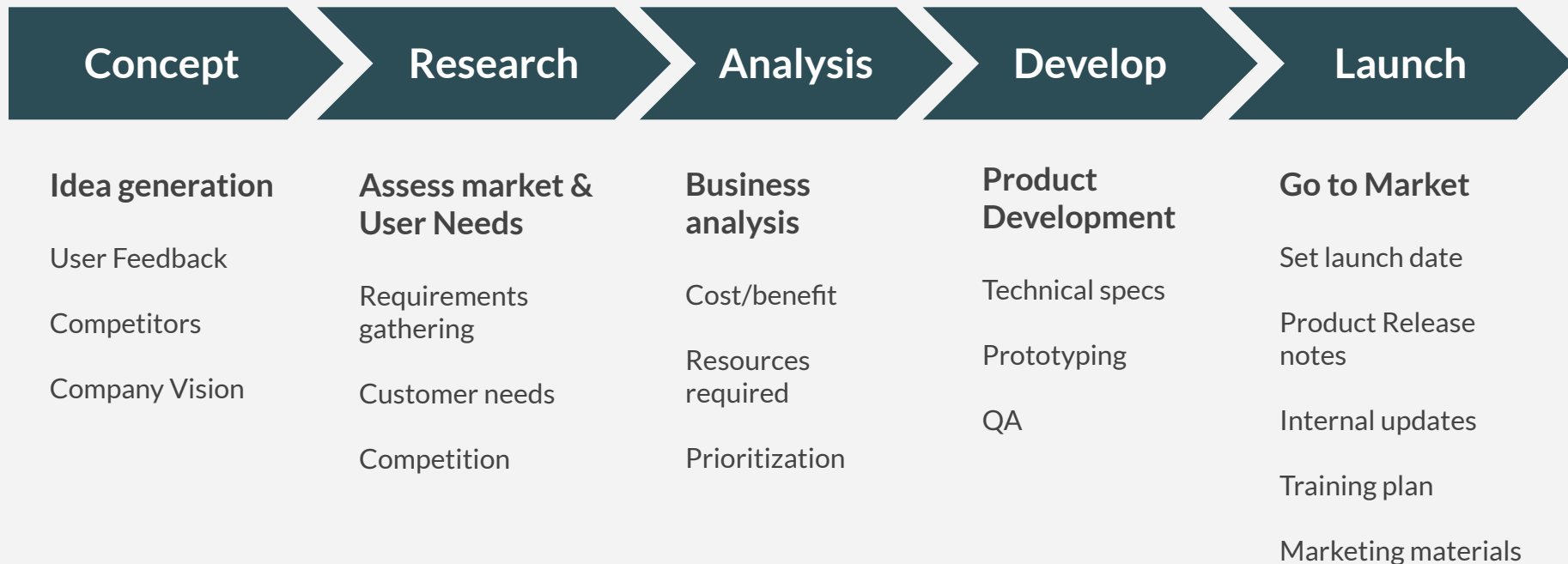
Why are they important?

Core targeting feature

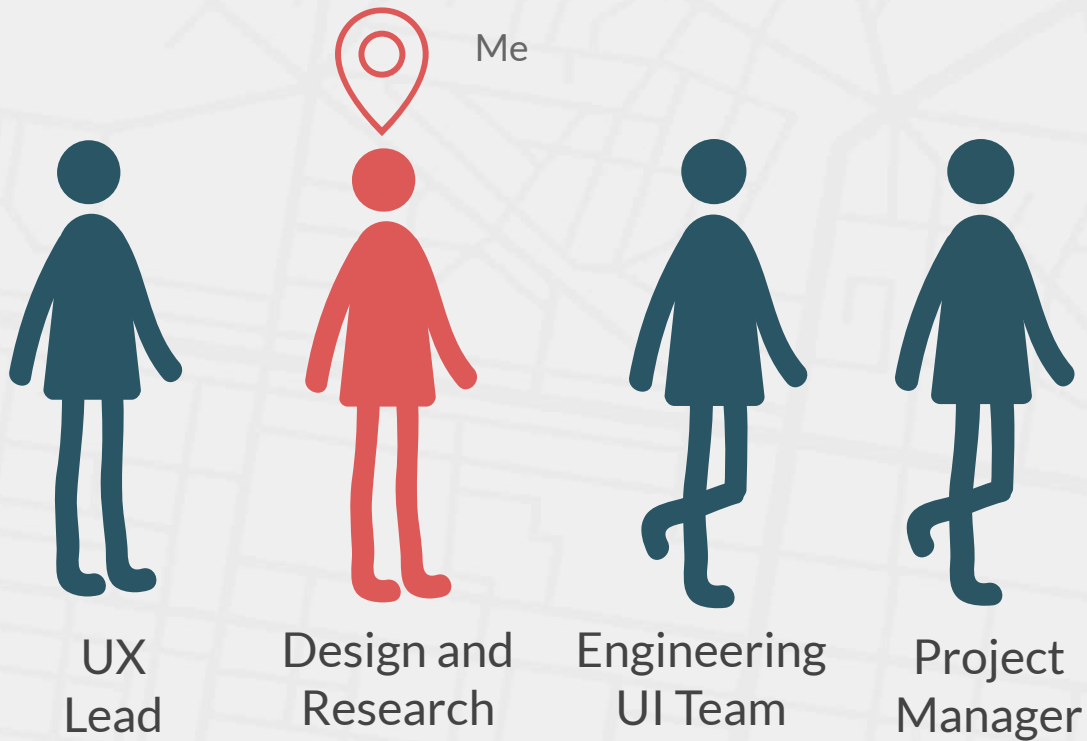**Useful in Private Marketplace (PMP) deal configuration**

Capabilities?

- ○ Venue group management with csv import directly from network.
- ○ Simple change history.
- ○ Venue group exports.

Company, **Project**, and Team Structure

Concept	Research	Analysis	Develop	Launch

Idea generation

User Feedback

Competitors

Company Vision

Assess market & User Needs

Requirements gathering

Customer needs

Competition

Business analysis

Cost/benefit

Resources required

Prioritization

Product Development

Technical specs

Prototyping

QA

Go to Market

Set launch date

Product Release notes

Internal updates

Training plan

Marketing materials

Company, Project, and **Team Structure**

Me

UX
Lead

Design and
Research

Engineering
UI Team

Project
Manager

My role, Contributions, and Collaborations

Me

Competitor Research

Customer Needs – Personas, Journey Maps, User Flows

User Interface, Prototyping and Interaction Design

Email Templates for Marketing Updates

Tools Used: Sketch, Zeplin, Invision, After Effects,
HTML5, CSS3

Design and
Research

The Problem Statement, Challenges

The current interface for venue group creation needs reorganization.

As it stands, this view is a combination of the venues table (which already exists in the venues tab) the venue groups form, and the venue groups table. See the image on right.

Key Points

- Separate venue management & venue group workflows to avoid confusion.

- Introduce option to export venues from venue group list.

- Allow users to add venues to a group directly from their network.

- To lower the barrier to entry for new users of our SSP.

- To simplify the process of maintaining venue groups in the system.

- To track venue group changes.

The Goals and Assumptions of the Project

Near Term Goals

Components redesign:
Overall fixing as we encounter new cases.

**Forms redesign
(Pop up Modal-like) for:**
Export all in one button + create flow
Networks: Venues, Venue Groups

Tables:
Redesign how Actions work and how tabs look.

Overall renaming of components and different actions.

Combining views and minimizing steps.

Long Term Goals

Add geo targeting filters in view
User can apply filter to sift out venues outside of a certain DMA and select the qualifying venues in addition to venue group.

My Design Process and Methods

SSP Platforms by Review

Review based results

1. **DoubleClick for Publishers**

2. **Open X**

3. **Rubicon Project for Sellers**

4. **ONE by AOL**

5. **Pubmatic**

SSP Network Setup Flows

Vistar	Dashboard > Networks > Venue Groups > Venues
DFP	Dashboard > Campaigns > Networks > Ad Groups > Ads
Open X	Dashboard > Orders > Network Line Item > Network Line Item Details
Rubicon	Dashboard > Ad Networks > Inventory Details
ONE by AOL	Dashboard > Ad Networks > Network Groups
Pubmatic	Dashboard > Transactions > Ad Networks > Ad Groups
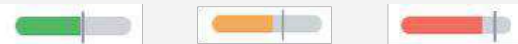
Competitor Research Takeaways

1. Add a breadcrumb nav to improve flow. (Short term)
2. The User Flow is fairly similar everywhere.
3. Make Tables customizable. (Long Term)
4. Include Networks summary in the dashboard. (Long Term)
5. Add tooltips next to components to enhance the UX in Line Items. (Especially when filling in the form as it can be confusing during the Line Item creation process)

Existing UI Components

Tabs	
Dropdowns	
Paginations	Showing 1 to 4 of 4 entries < > 25 ∨
Buttons	SAVE CANCEL CREATE INSERTION ORDER BULK TEMPLATE IMPORT ADD CAMPAIGN Help Chat Edit ASSOCIATE CREATIVES
Checkboxes	☐ Include Archived
Progress Bars	
Search Fields	Q Filter
Input Fields	Click or start typing to view list TestCampain1
Calendar Pickers	4/5/2017, 12:00 AM 📅

My Design Process and Methods

Enhancing the Existing UI Components (Tables)

My Design Process and Methods

Enhancing the Existing UI Components (Forms)
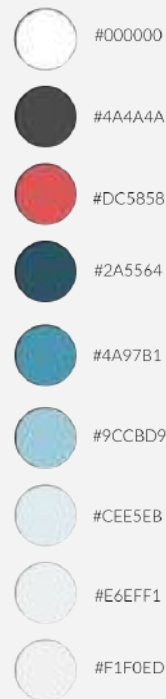
My Design Process and Methods

Loading, Error, Success Indicators

Users see a loading indicator when they upload a new CSV file or process new information. Loading takes around 0.5 to 1 second.

Users see the success indicator when their actions process successfully.

Users see the error indicator when they need to make a change to proceed further.

Link to Codepen 🖼️

My Design Process and Methods

Personas and User Journey Maps
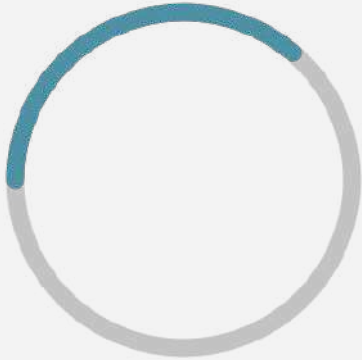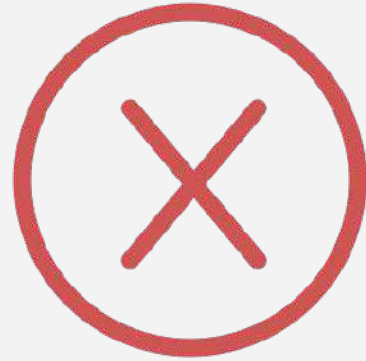

"I am on a time crunch to perfectly execute all of our client's campaigns"

Media Owner - Direct - Ad Ops
Chris Costanza | 24 Years Old | Male | New York NY

KEY NEEDS
Chris has to make sure all campaigns deliver according to the contracts that have been sold by the sales team. He needs to be able to execute whatever crazy request the client has come up with. He wants to make sure there are no problems executing the campaign, but when there are problems, he wants to know before anyone else. Features such as daily/weekly email reports will be needed.

KEY VALUES
Chris is super diligent about his work, and wants to easily double and triple check his campaign set up before his campaigns go live. He does not want to waste time finding issues. He wants to be told where the issues are so he can begin investigating as soon as he gets to the office.

ACTIVE DEVICES
20%   5%   75%

TECH KNOWLEGE
● ● ● ◐ ○ Better Than Average

NEEDS ACCESS TO
Orders (Trafficking)
Creatives (Upload)
Reporting
Networks
Admin (Adding Users, Account Management)

"I've got a business to worry about, so make sure this exchange stuff doesn't create any headaches for me"

Media Owner (Exchange Only)
Sean Kramer | 32 Years Old | Male | New York NY

KEY NEEDS
Sean performs most of his work outside of the Vistar system. His needs are simple. He needs to approve creatives and check overall reporting to see how much money his company is making. He needs quick ways to pull past reports without spending too much time specifying dates. Features such as "last month", "last year", etc... are highly appreciated.

KEY VALUES
Sean values things like email notifications in order to find out if there are new creatives to be approved. He would like some customized reports emailed to him daily/weekly to help him track overall revenue. Sean is only on the exchange to make money, so he wants tools that help him devise new ways to generate revenue.

ACTIVE DEVICES
15%   5%   80%

TECH KNOWLEGE
● ● ● ◐ ○ Average

NEEDS ACCESS TO
Creative approval
Reporting
Networks

"I get pulled in many different directions and am juggling a million requests by lunchtime"

Media Owner - Direct - Sales Planner
Tracy Seinfeld | 26 Years Old | Female | New York NY

KEY NEEDS
Tracy needs to quickly provide information to the most impatient group of people in the organization (the sales team). She often needs to be creative, because the sales team and their clients are creative in their requests! Because of this, she is used to logging into many different systems to get the answers she is looking for. She is okay with becoming a power user of a complex tool, as long as it is flexible enough to meet her needs.

KEY VALUES
Tracy values accuracy and clarity in the data the system presents. The data she gets from the system is used to put together contracts, so it can't be wrong.
Changes to deals are constantly happening - it's critical to Tracy that the system doesn't slow her down when she needs to make changes.

ACTIVE DEVICES
30%   10%   60%
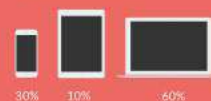
TECH KNOWLEGE
● ● ● ◐ ○ Better Than Average

NEEDS ACCESS TO
Orders (Trafficking)
Creatives (Upload)
Reporting
Networks
Admin (Adding Users, Account Management)

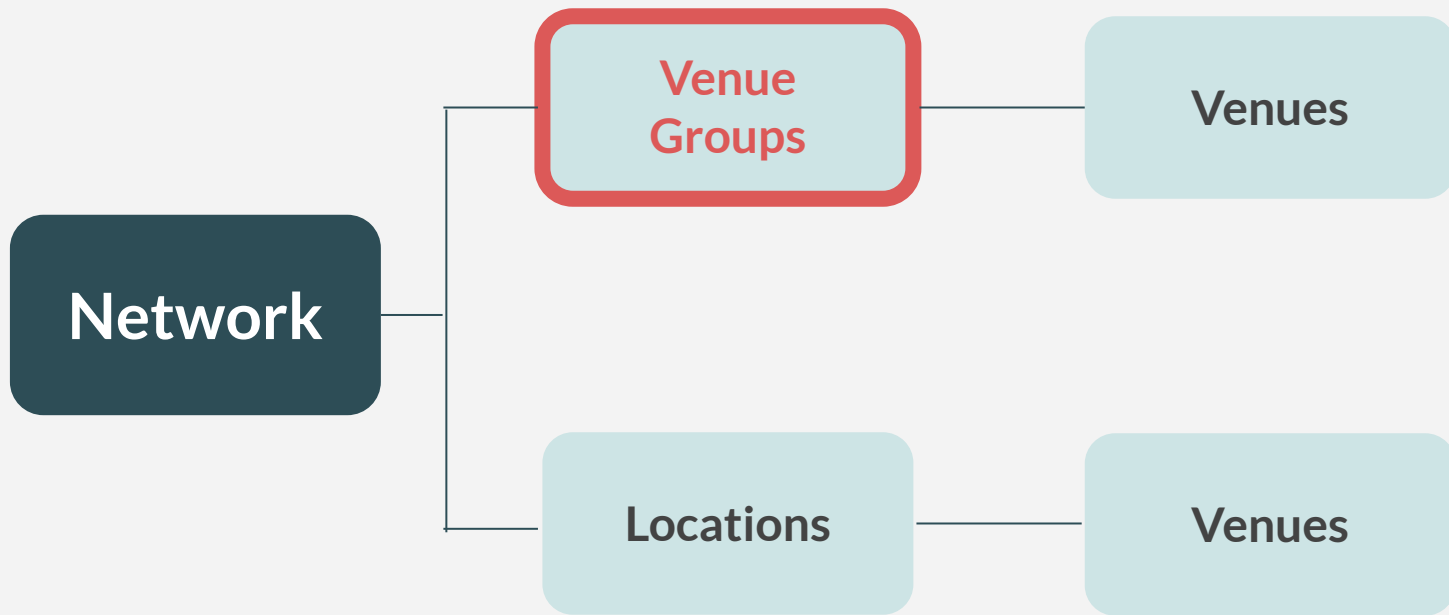# My Design Process and Methods
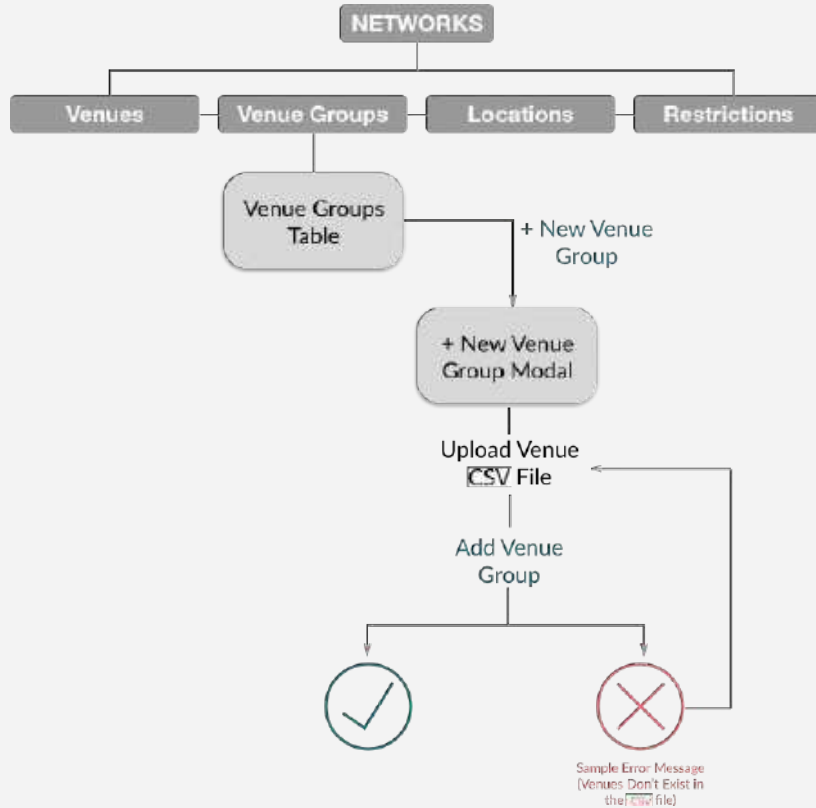
My Design Process and Methods

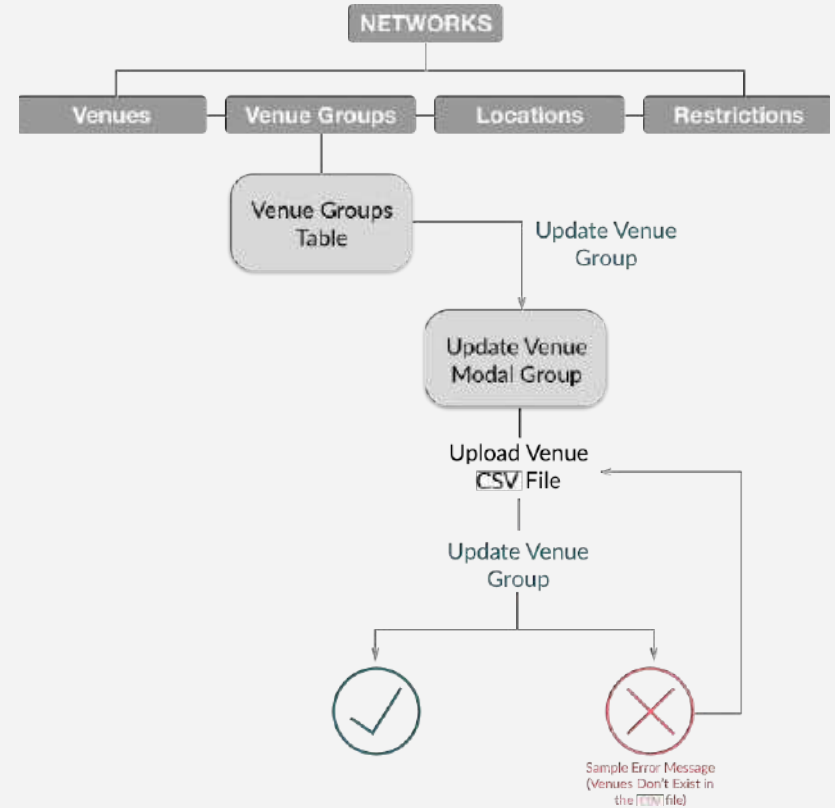**My Design Process and Methods**

Sitemap for Venue Group, User Flows

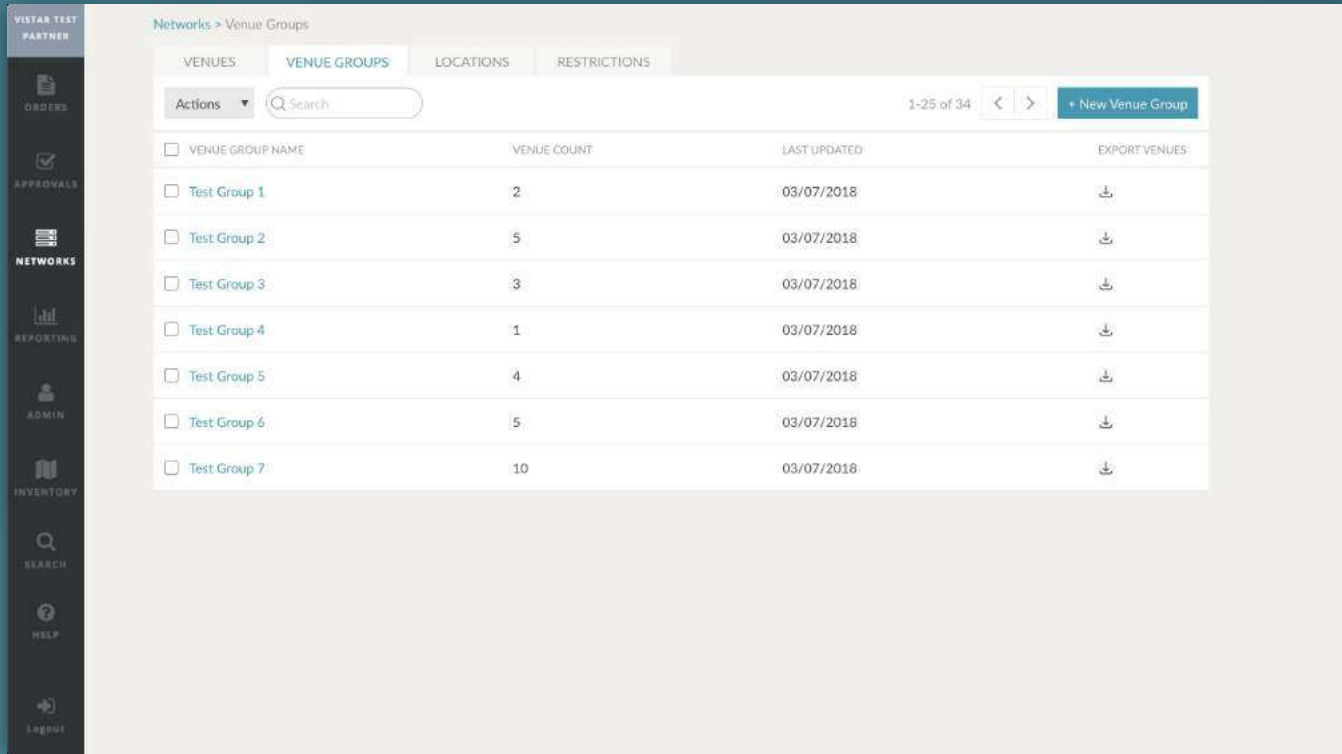# My Design Process and Methods

Desired Workflow A: Creating a New Venue Group

Desired Workflow B: Update Existing Venue Group

My Design Rationale

The point of the redesign was to create a more streamlined interface when adding new venue groups. The following lays out my solutions and process for the rest of the team to refer to.

My Design Rationale

Proposed Solutions

Remove venues table from the venue groups tab
This view will only contain venue group information.

Add "Last Updated" and "User" column:
Because accounts are typically managed by multiple users, this column will serve as a change tracker. Users will be able to tell when a venue group was last modified and by which user.

Add breadcrumbs to the top of the view.
This will let users know where they are in the system for easier navigation in and out of the view. See the first screenshot.
- ○ **Bread crumbs: Networks>Network Details>Venue Groups**

Keep actions drop down menu in above table.
Menu option should be "Delete Venue Group(s)". User will be able to delete venue groups they no longer need by selecting them and hitting above option.

Table pagination (new design)

Add download icons in the venue group table
Users can export the list of venues in CSV format for each venue group from here. Notice that the venue list should contain ALL venue info, similar to regular venue export. Otherwise users have to do lookups.

My Design Rationale

Rename "Add venue group" button to "+New Venue Group"
Redesign the form here as shown in screenshot below:
- User will have option to add venues by importing a template or selecting the desired venues from their network.
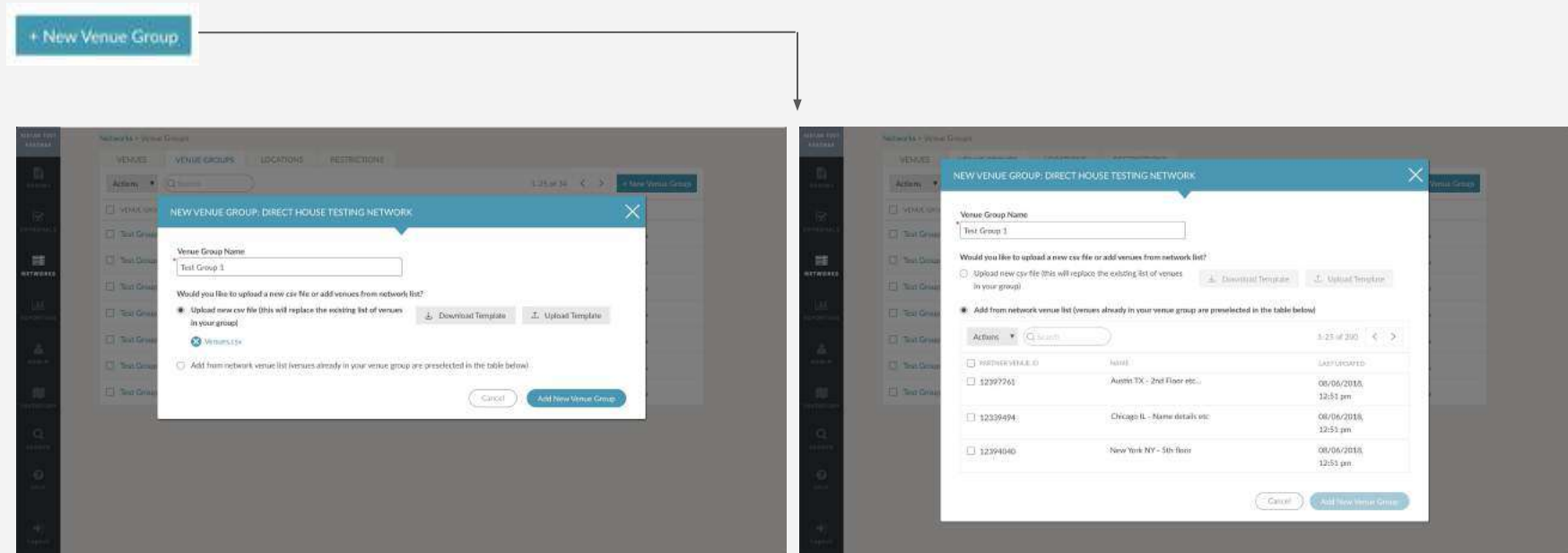
My Design Rationale

Spinner- will run when user hits save.
This will indicate that the system is processing the venue group creation request. Once complete, system should alert the user.

Error message:
- ○ These venues in your template do not currently exist in the <name of network> : <list of venues> e.g. These venues in your template do not currently exist in the Test Direct Network: venue A, venue B, venue C
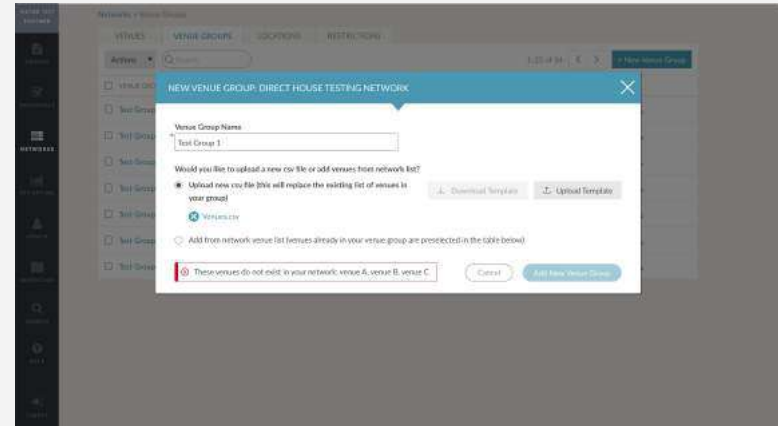
Validation for successful upload:
- ○ Venue group <venue group name> has been uploaded.

Expected Workflow

Venue group creation

1. User navigates to networks view > venue groups tab. This launches the below table where the user can view all of their venue groups, download a creation template, and also export venues from selected venue groups.
2. User clicks +New Venue Group button to create a new venue group and the modal is launched.
3. User can either import a template with the venues needed for their venue group or select to add the venues from their network.
4. The latter option would be useful for users that have a specific naming convention which makes it easy for them to pull up venues of a similar type, e.g. Venues that start with "MN-" meaning venues in Manhattan only.
5. Note, if user types in "MN-" in the search box and the list filters accordingly, clicking on the top checkbox (next to partner venue ID) SHOULD only select venues that meet the "MN-" search criteria. Therefore when the user hits "add to venue group" only those qualifying venues (MN-) will be added to the venue group. NOT all the venues in the network.
6. Once the venues are selected, user hits "Add Venue Group" to create the new venue group. Spinner is launched.
7. Once venue group is successfully created, the system provides an update, see below.
8. In case of errors in the import file, the system will an post error message as previously shown.

My Design Rationale

Expected Workflow

Venue group editing

1. To edit a venue group, the user will click on their venue group name from the "Venue Group Name" column.
2. This will launch a view with all the venues in their venue group.
3. User can click on "Venue Group Name" to rename it.
4. User will click on the "Update Venue Group" button to update the group.
5. This will launch the modal (see on the right) with options to either replace all the venues in the group or select/deselect venues for the group.


1

2

3

4

5
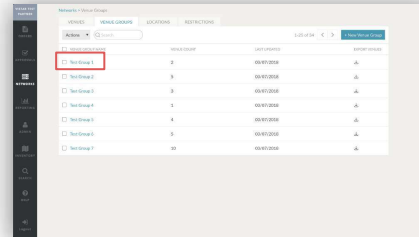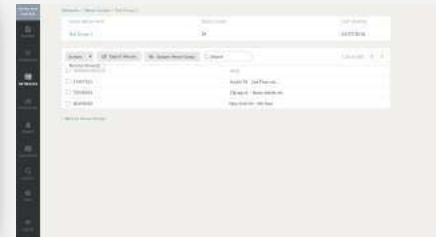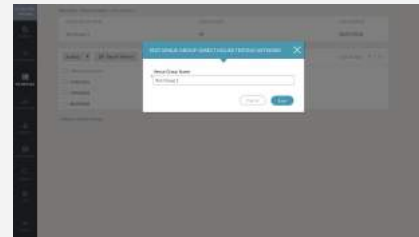
Development in the Testing Environment and QA

After the prototyping stage, we noticed missing steps in the previously planned workflow. Please see additional workflow below:

Case 1: When the user creates or updates the existing new venue group with a new csv file, it takes 24 hours to take effect. The user needs to be prompted with a warning message about the wait.
- ○ Display "New Venues and Venue Groups take overnight to appear in the inventory tool" warning message in the Update Venue Group modal.
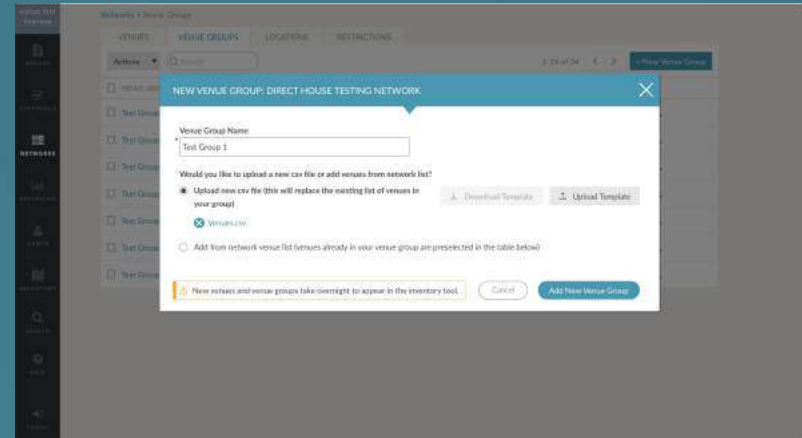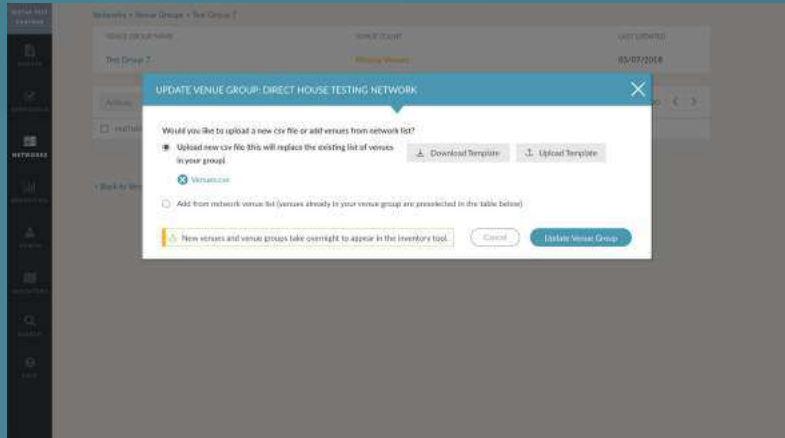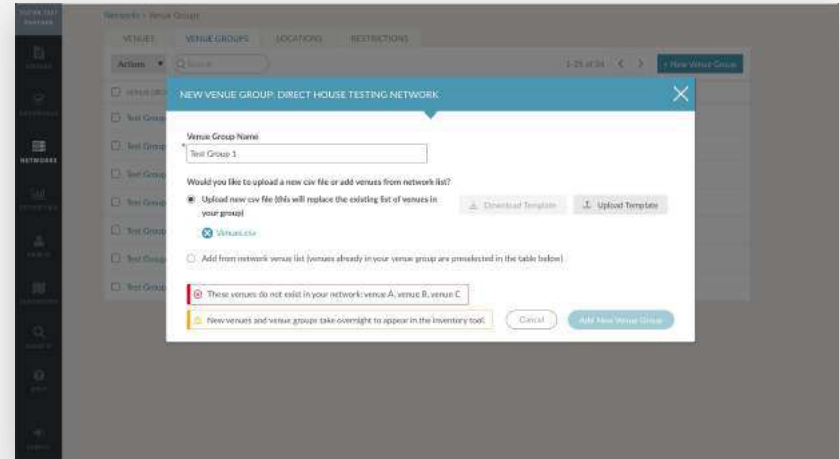
The Final Outcome, Key Insights, and Next Steps

Case 2: When the user creates a new venue group and then creates another venue group within a 24 hour period. User needs to be prompted with a warning message in case if they try to select the existing venue groups.

- ○ Display "Missing Venues" warning message in the Venue Count row.
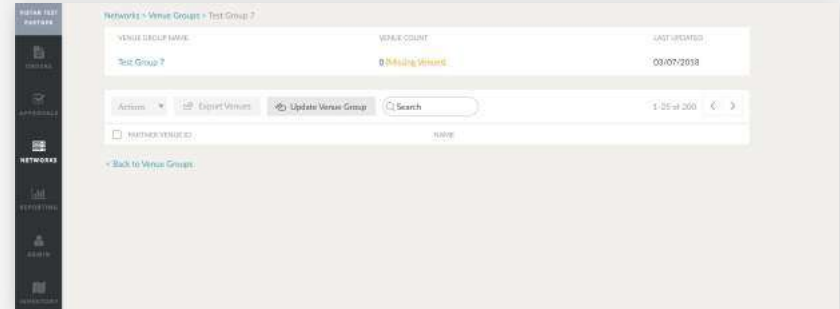
Case 3: Displaying Error and Warning messages together in a modal.

See the Most Recent Workflow

[Link to the Invision Prototype 🖼️](#)

The Final Outcome, Key Insights, and Next Steps

Release Notes and Email Updates

Once the development and QA is finalized, the product manager sends the newest product releases and updates to the Marketing department. The marketing team places the content into the designed email templates. See the image on right.

The email gives information about the features and provides links to the release notes and site. The release notes document the platform and help to guide users about how to use the platform features.

Looking at the email click and open rates in Hubspot's analytics tools helps us to see the engagement with the new release.
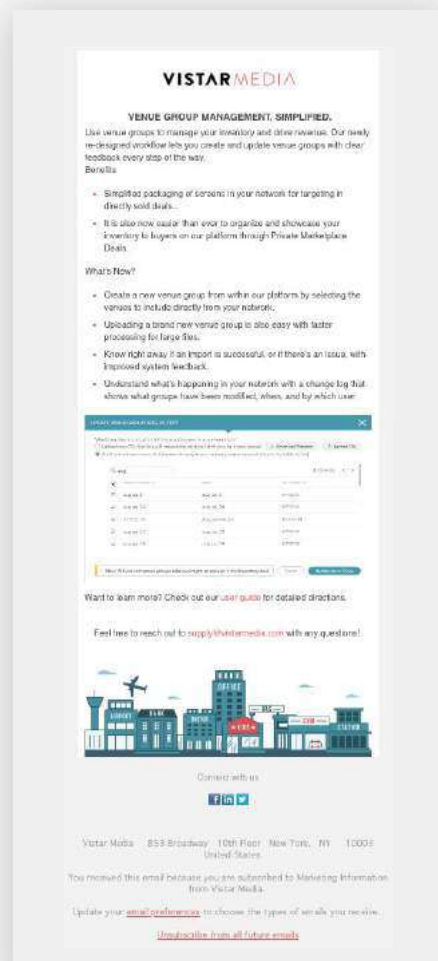
Usability Test:

Tasks Assigned

- ○ Using the navigation menu, search for "Venue Groups".
- ○ Next, check for the "Venue Group Name: A".
- ○ Update the "Venue Group Name: A" inventory with the given CSV file.
- ○ Create a New Venue Group

Results

Less time spent on Venue Groups. Less confusion on what is required and what is optional. Fewer questions related to Venue Group creation.

Fewer line items with delivery issues. Fewer complaints on line items that are trafficked through our platform. Lower time spent in creative's tab and line item edit screens.

Audience Based Buying for Buy Side

Not limiting campaigns to a single venue is proven to bring success.

Data from recent campaigns indicated that targeting more than three venues dramatically increase campaign success. Offering targeted audiences helped suppliers to close more deals compared to the past.
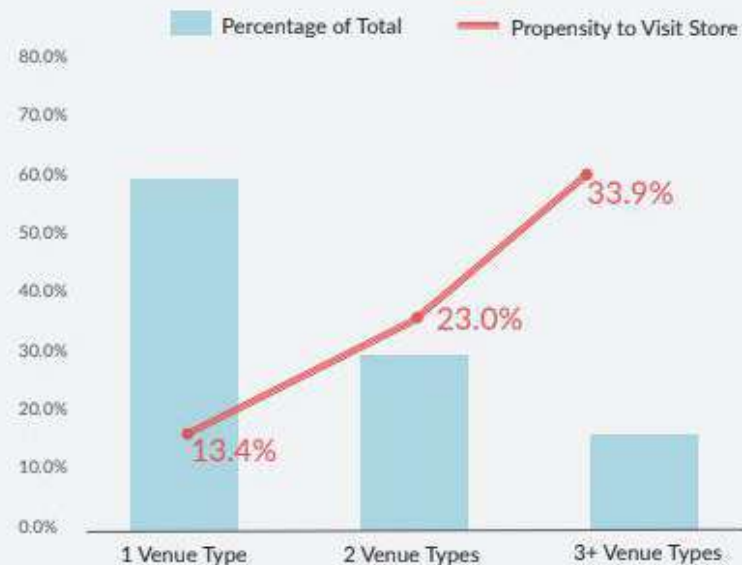
What Users Like the Most ☆☆☆☆☆

Addition of the Venue Groups tab within the Networks page.

New Modal Components allows them to stay on the same page while making their updates.

Saving time to make changes to their inventory.

Thank You!

Contact

Serpe Boyer

boyerserpe@gmail.com