

PORTFOLIO

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Taskly

Project Management Made Easy

A UX Case Study

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Project

For my UX design course at CareerFoundry the brief was to build a project management application from scratch. During this 6 month intensive course project all elements in the UX design process are extensively discussed and implemented.

The course project is called Taskly. Taskly is a project and task management app for teams, small businesses and individuals who need to be able to effectively and efficiently create and manage a project and track it's progress, from start to finish.

Workflow

1. Research by doing competitor analysis, user surveys and user interviews
2. Created a task model, experience map, performed a content audit, defined the MVP, and created user personas.
3. Through card sorting I created the information architecture and site map
4. Creating sketches (i used mobile first approach), user flow and paper prototypes, tested those and made changes where needed.
5. Created wireframes and tested these non-interactive and as clickable wireframes
6. Through the whole process constantly done iterations, analytics and testing.
7. Created the visual design to refine and polish the app

From research I have learned that my potential users are people working with other people professionally, ranging from freelancers to teams in small to large companies. These users are looking for an application that has no overkill in features, but will be basic and functional. Most important to the potential users is that they can create and manage projects and tasks, collaborate and keep track on the progress. It needs to be easy, simple and intuitive to use.

Challenge

The challenge of the course was the limited amount of time for each part of the program. So, instead of creating a lot of features I focused on two features, creating a new project and easily invite and assign a project owner, team member or client in different ways. I also learned that I needed an onboarding process so new users could start using the app efficiently very quickly.

Specific Problems

Problem 1: Red + button

The initial idea was that having a large button visible on every screen will be a great way to act as starting point to create a new project or task, start a conversation, add files or invite & assign people to a project.

I designed a large red + button in a fixed position in the footer of every screen (mobile) or in right sidebar (tablet/desktop).

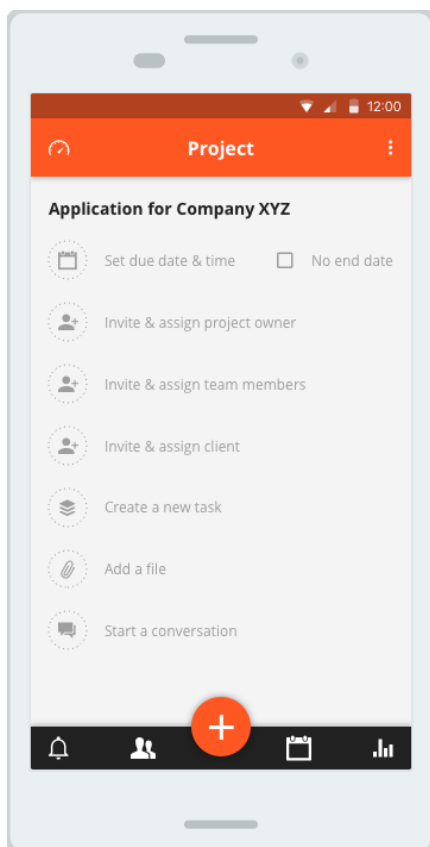
When this button is clicked it will slide and reveal a sub-menu containing the links with an icon to start a new project, task or conversation, add a new file and invite & assign

During testing of the wireframes it became apparent that showing the button on screens where a user would be creating a project, task or adding content to it, the button can be distracting and confusing leaving the user unsure what to do.

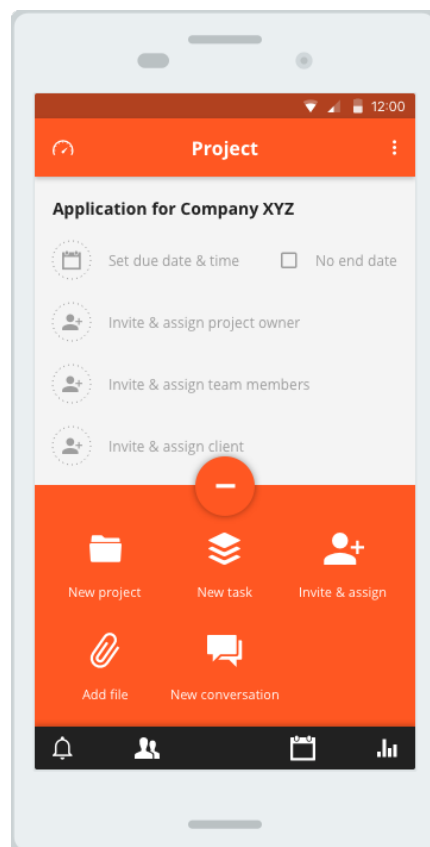
Reason this is happening might be because these screens already contained the options to perform these tasks on project, task or conversation level and having the button showing submenu with same options as well confused the users.

I created a version without the button and with the button disabled on screens where a user would be working in a project, task or conversation. Testing showed that the version not presenting the button was most effective and enabled users to create and complete a project easily without distraction.

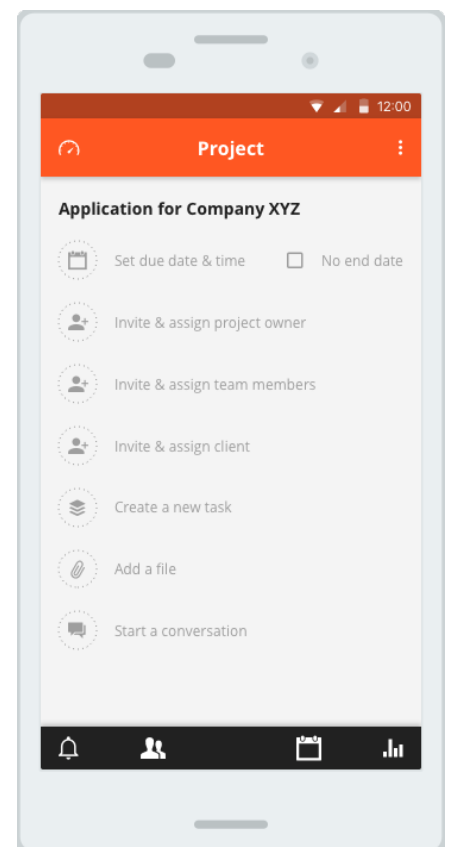
The button is kept on the dashboard because another test showed that people are using the button for example to start a new project, even though there is an option to use a text link as well.



Project screen with + button



Project screen submenu open



*Final design:
Project screen without + button*

Problem 2: Dashboard & Color Blindness

From data gathered during the research phase, creating the task model and user personas I learned that the potential users needed a dashboard that would give them a clear status overview of the projects, tasks and conversations.

To visualize this I created a diagram using colors to match with a certain status. There will be 5 different states and the most important ones are shown on the dashboard with a link to all. (img 1). Testing showed that users, that are experiencing some version of colorblindness, had problems matching the colors in the diagram with the different states leading to the problem that this solution was not the best one.

I created new sketches of different variations to show the different states, created wireframes and tested those including color tests.

Choosing a different green color tone solved the color problems. Instead of the circular diagram and having to match a color with a status, I found the solution in cutting down the number of different states from 5 to 4 and show each status in the dashboard. Each status is color coded and includes the number and title each in it's own section which leaves out the guessing and makes the dashboard usefull for every user including those that have dyslexia and/or experience some version of colorblindness.

Tests validated that users found this version (img 2) very easy to use and to understand.

image 1 - original version

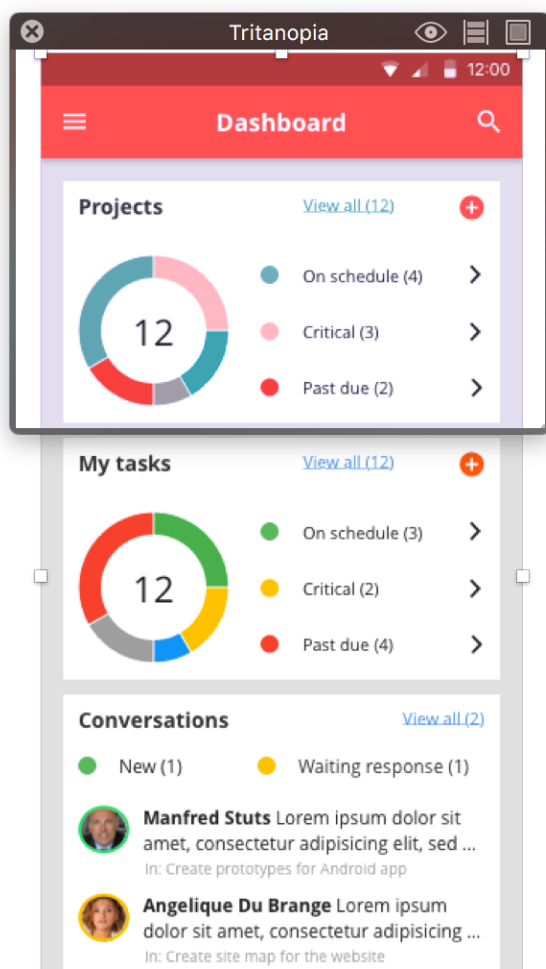
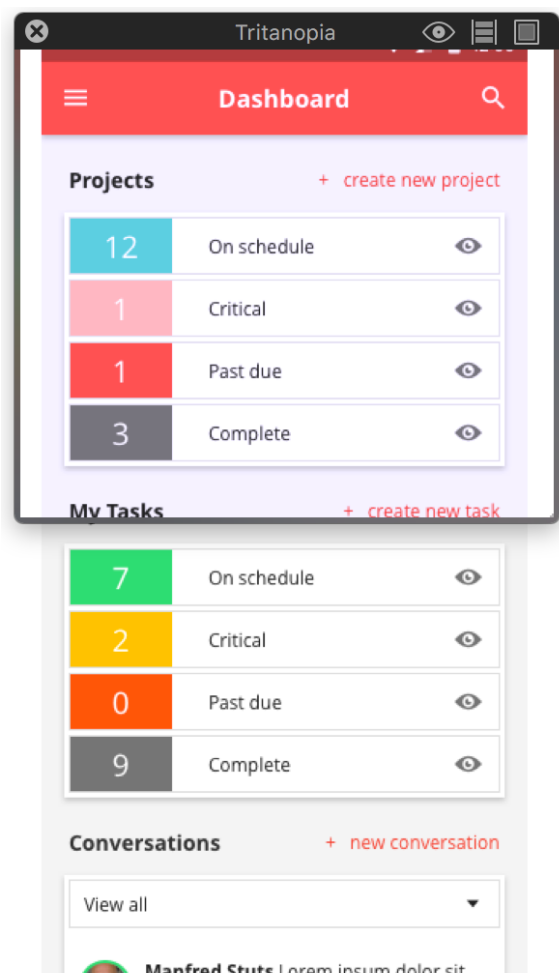


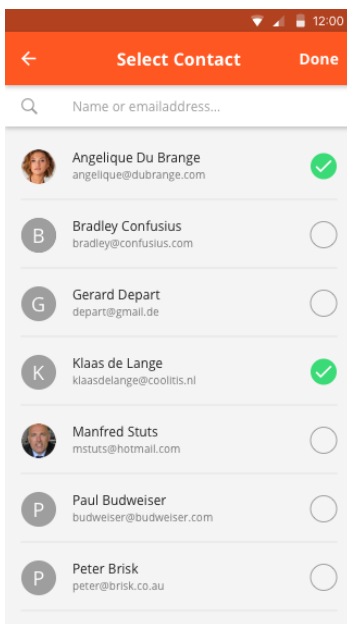
image 2 - iterated version



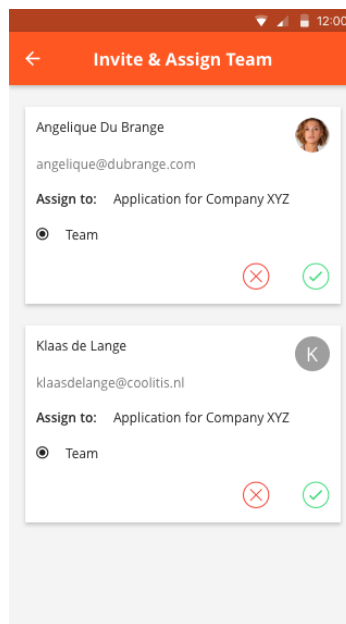
Problem 3: Invite & Assign

From multi-click testing I learned that there were issues in the process of inviting and assigning, for example, new team members.

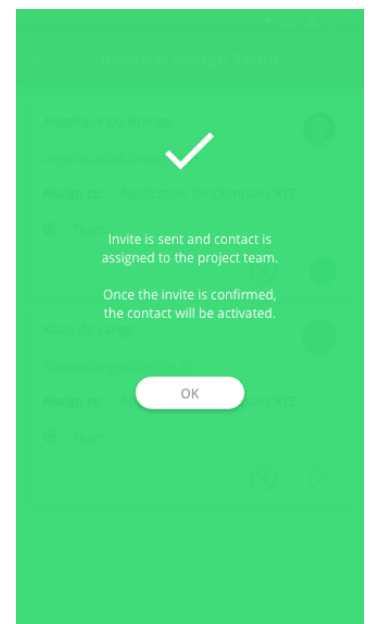
To add a member to the team a user has to select the members for the project team. After clicking "done" they would see a screen with cards showing the details of each selected member. Then the user could verify or delete each contact separately which would be confirmed by a screen notification. For one or two members it wouldn't be a problem, but when you need to add a larger team this can be very time consuming and annoying. Testing has validated this.



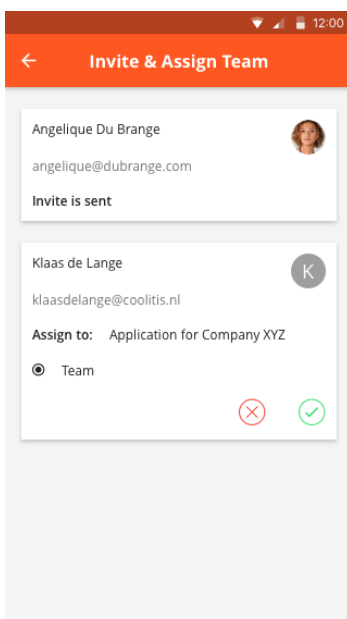
1) Two contacts selected, tap "done"



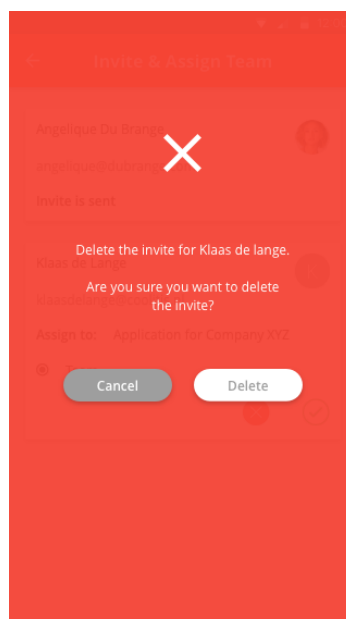
2) Cards with details of chosen contacts



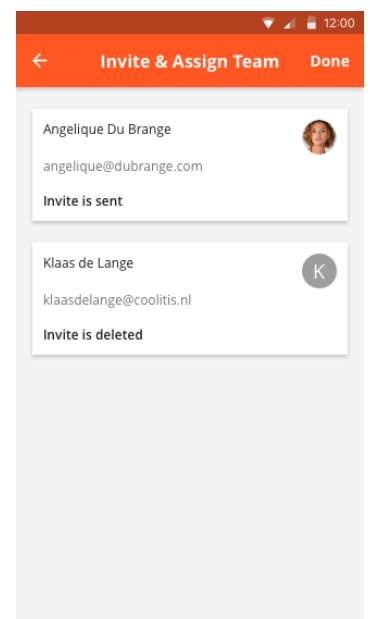
3) Clicked the confirm button for Angelique. Confirmation screen is shown.



4) Card shows that invitation is sent



5) Tap delete button for Klaas. Confirmation screen is shown.



6) States are shown for actions performed. Now tap "done" to complete the action and add contact to project.

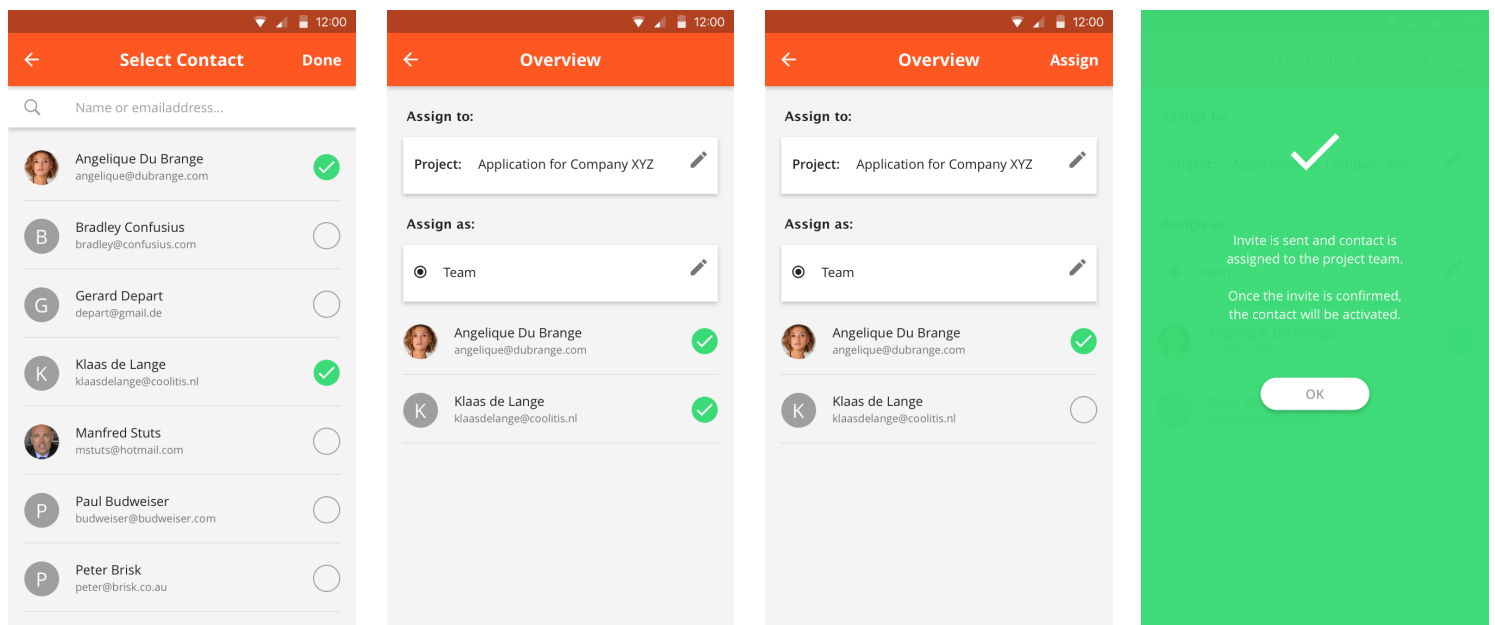
I went through the whole process and sketched different flows on paper. This resulted in a shorter user flow that is optimized to what the test learned.

Now when team members are selected , the user will see an overview of all those selected and will have the option to remove members from the list if needed.

It's also possible to view the project (or task) the members are assigned to and a section showing that they are assigning the selected members to a team, both with the option to edit.

The user can deselect the ones that would have been added by mistake and, when done, invite all that remain in just one “click” and get one confirmation screen.

Below is the revised version which is much more friendly to use when having to add multiple members to the team. Now it's also possible to edit “assign to” and “assign as”. In the end the user just needs to confirm once.



1) Two contacts selected, tap “done”

2) Overview

2a) Overview, deselected one contact and tap “assign”

3) Confirmation screen

Conclusion

It's not about you. You can have the best ideas in the world, but only when validated during tests with portential users and focus groups the idea can be proven to work or not.

I also learned that paper prototyping can significantly reduce the time to create new visions and ideas to be tested, validated and developed.

Using the mobile first approach during the project allowed me to create a better experience on tablet and desktop as well.