

Ruiling “Karen” Bao

PORTFOLIO

包蕊灵作品集

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About me 自我介绍

Selected work 项目选集

1. Flybits - streamlined content templates
2. SAP - plan assortment list visually
3. Harbour Air Website - Help frequent travellers find the best seaplane promotions

Side projects 个人项目

ABOUT ME 自我介绍

Hi, I'm Karen. It's nice to meet you!

I'm a product designer, critical think and tech enthusiast.

I have 5 years of work experience in designing B2B and B2C products. Currently, I'm a Sr. Product Designer at RBC Ventures Inc., with the vision to help Canadian physicians get paid.

你好，我是包蕊灵！我是一名用户体验设计师。

我有5年UX设计工作经验，精通B端及移动端产品设计。拥有海外留学及工作经历，通晓精益UX(Lean UX) 和敏捷 (Agile) 开发。

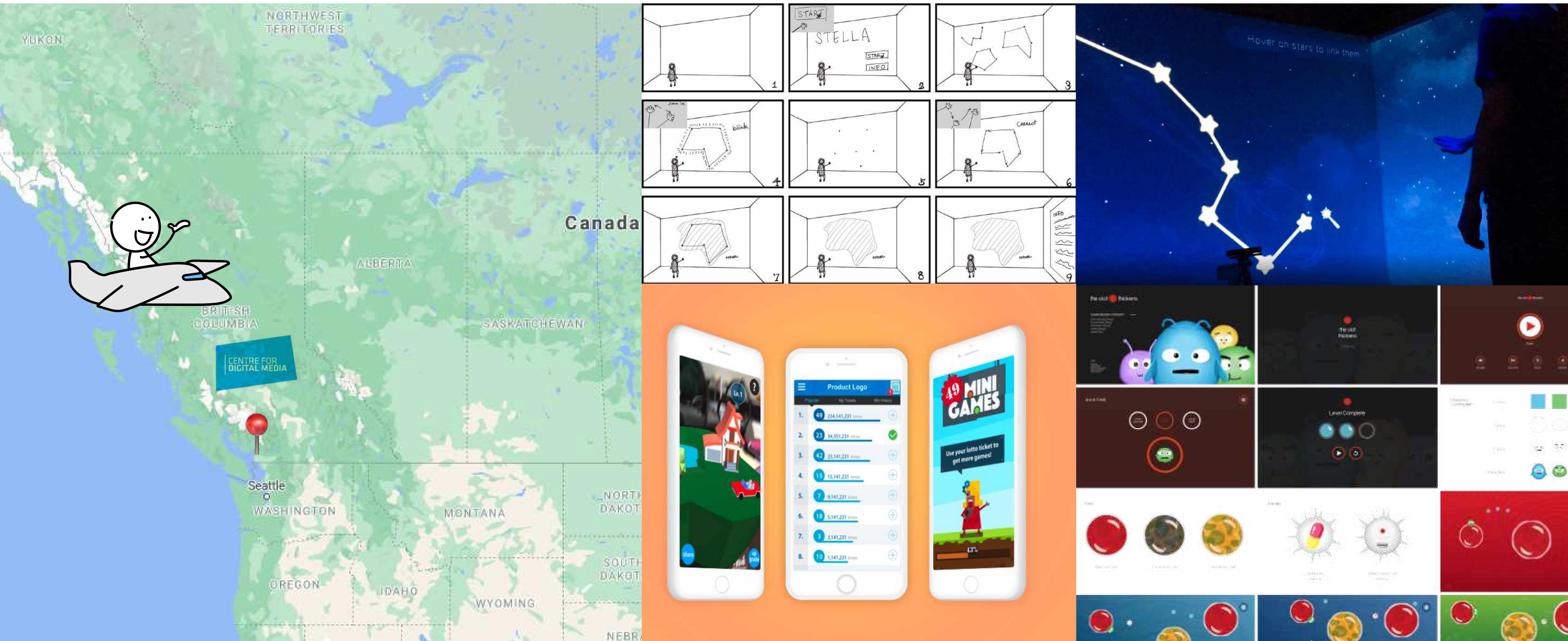


ABOUT ME 自我介绍

A few things to
know about me

I completed my Master of Digital Media degree in Canada, where I discovered my interest to design digital products that help people ⭐.

我在英属哥伦比亚大学完成了的数字媒体硕士学位。攻读学位期间，发现了自己对用户体验设计的热爱。



CAREER JOURNEY 工作经历

Have experience in both B2B and B2C UX/UI design.

我有丰富的B端及移动端产品设计的经历



Help retail Assortment Planners
plan assortments visually

设计零售分配计划应用系统



Design digital solutions for
cross-industry clients

为不同行业客户设计数字化解决方案



Help marketers deliver
personalized content to end
consumers

设计帮助营销人员向消费者推送个性化
内容的系统



Help Canadian physicians get paid

帮助医生开具发票的系统

DESIGN PHILOSOPHY 设计理念

**Design is a speculative
and reflexive profession.**

设计是一种需要思辨和自我反思的职业。

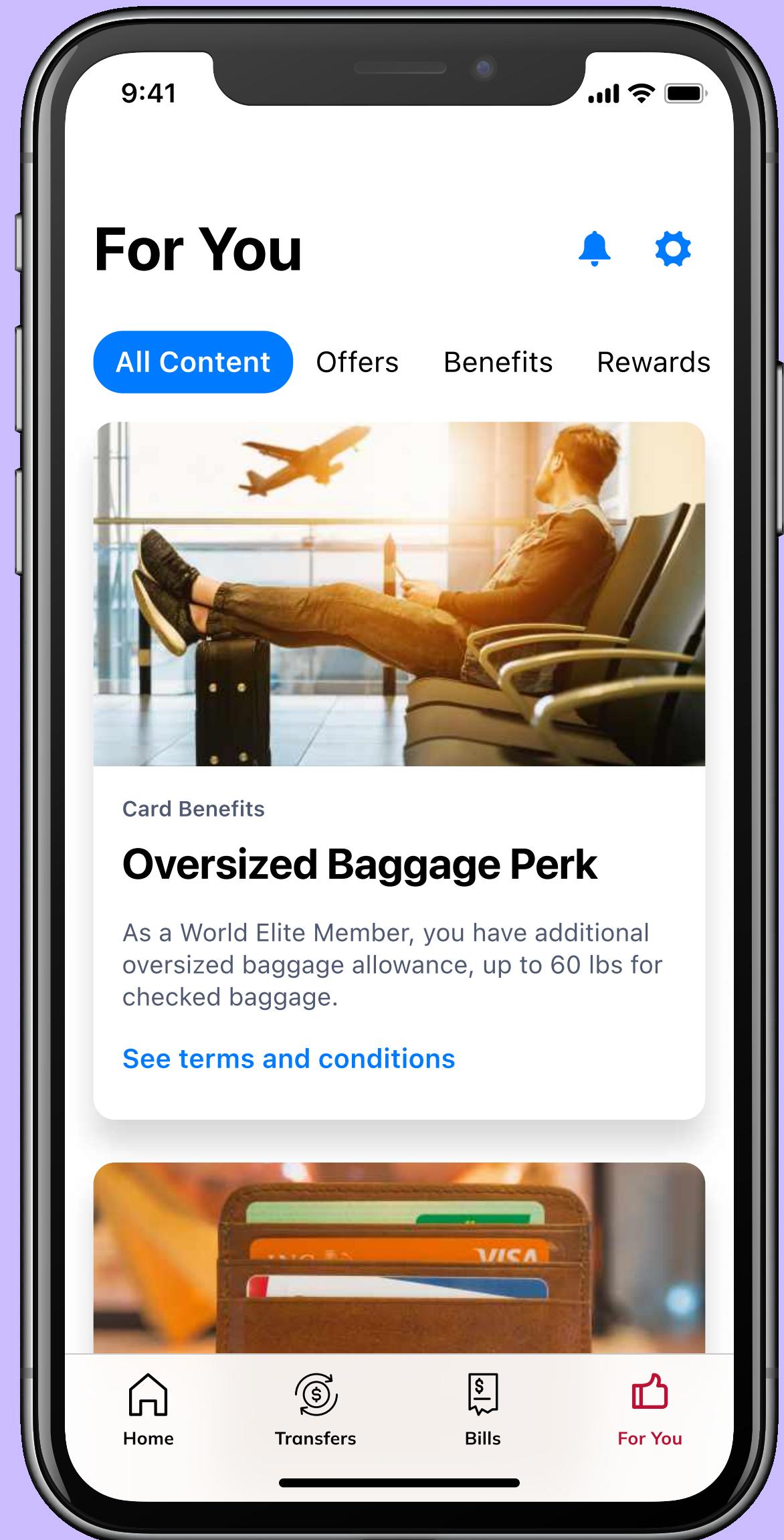
“ If our belief systems and ideas
don't change, then reality
won't change either. ”

“ Design criticism is an art of
improvement. ”

PROJECT ONE 项目选集

Flybits Concierge Starter Templates

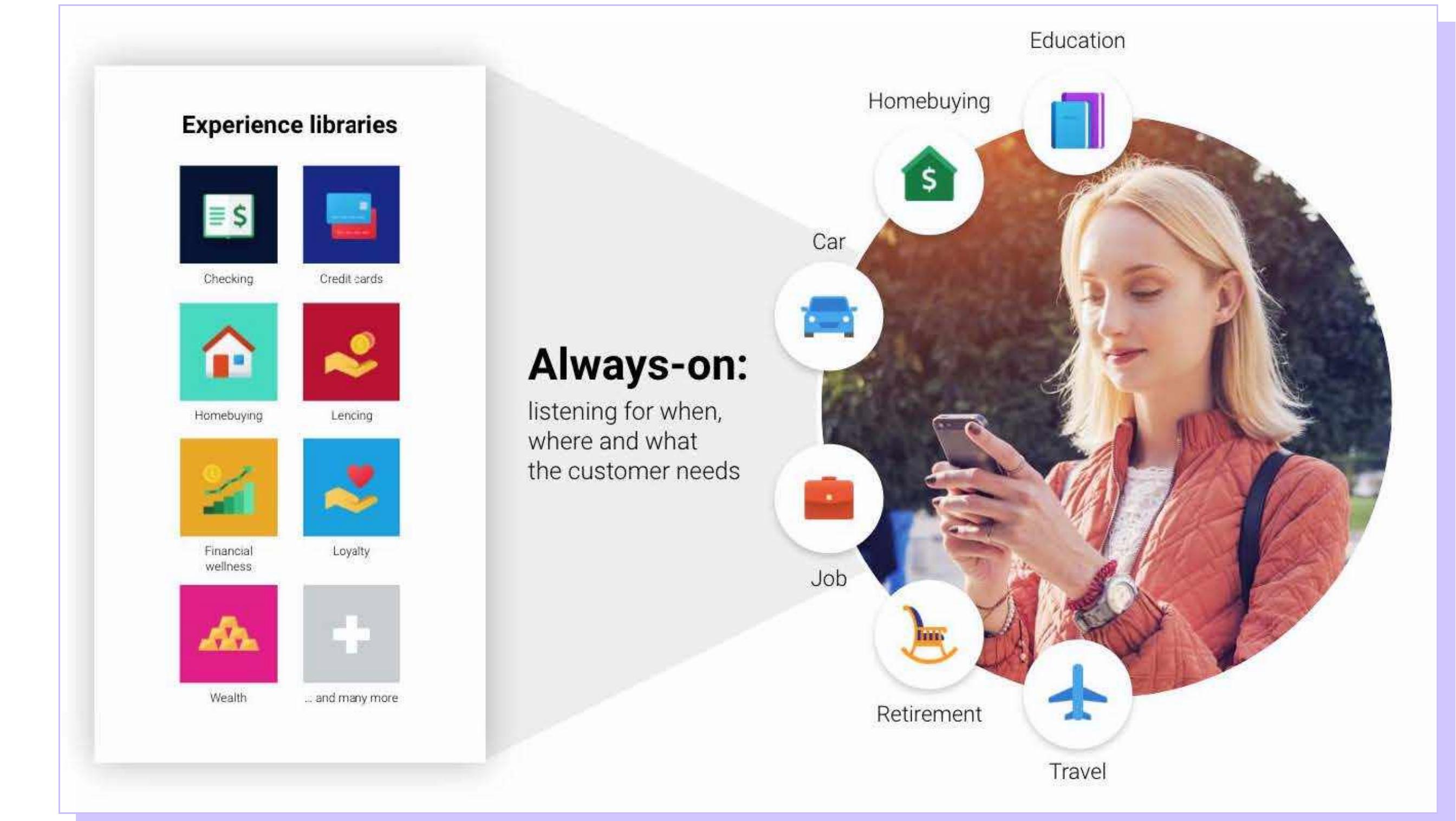
Flybits Concierge移动端入门模版



THE FLYBITS PLATFORM 产品介绍

An end-to-end digital experience platform, designed to help FI's deliver personalized customer experiences.

Flybits平台可以帮助金融机构向消费者提供个性化的用户体验及内容。



THE FLYBITS CONCIERGE 产品介绍

To financial services - a white-label, turnkey integration for iOS/Android that enables financial institutions to embed a personalized recommendation feed within their mobile app.

对金融机构而言，Flybits Concierge能够快速帮助他们在移动端嵌入个性化推荐内容提要。

To consumers - a content feed that dynamically shows insights, recommendations, and advice, personalized to each banking customer.

对消费者而言，Flybits Concierge是一个动态显示个性化推荐及建议的内容提要。



Flybits Concierge Starter Templates: Streamlined content templates for pilot credit card and consumer banking use cases.

Flybits Concierge移动端入门模版项目

Mobile Design Web Design

My role:

Solo designer

项目唯一设计师

Activities:

Stakeholder & user
interview

用户访谈

Interaction & visual
design

交互设计&视觉设计

Usability testing

用户测试

Design specs
handoff

设计规范

Tools used:

Figma

Timeline:

January 2020 (3
weeks)

(Design discovery
phase)

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项目背景及需求

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Scope & not in scope

确立设计范围

4. What

Design ideations & validations

设计落地&用户测试

5. How

Success metrics

衡量项目成功指标

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Where we started: the ask

项目背景及需求

“How can we support content templates efficiently? ”

“我们如何有效地支持产品移动端的内容模板？”

For Flybits mobile team, we're experiencing inefficiencies supporting the variety and styles of our current content templates.

- Spend unnecessary time discussing and supporting content types that are not adopted (e.g. Schedule, Links, etc.) ;
- Actively used “messaging” content types can't satisfy both use case requirements and effective user interaction.

一直以来，Flybits移动端团队不能有效地支持多种移动端内容模版样式。具体体现在：

- 花费不必要的时间讨论及支持不被采用的内容模版（例如时间表、链接等）；
- 经常被使用的“消息”内容模版不能满足用户需求，提供有效的用户交互。

WHO, WHEN AND WHERE

Research & discovery

用户研究

UNDERSTAND CURRENT CONDITIONS 用户研究

I spent three days interviewing SMEs and users

我花了三天时间采访业务专家和用户

What I did:

- Interviewed internal SMEs (product consultants and sales engineers);
采访内部业务专家
- Interviewed marketers using our platforms.
采访使用产品的营销人员

Key learnings:

- We currently support 11 content templates;
当前平台支持11种内容模版
- Some templates are not used at all;
部分内容模版从未被使用过
- Pilot customers only need 1-2 content templates to support their initial credit card and consumer banking use cases.

试点客户只需要 1-2 个内容模板支持初始信用卡和消费银行使用案例



A SURPRISING DISCOVERY

The motivation for less

令人惊讶的用研结果：用户只需要少量的选项



Jessica Brown

An overwhelmed user 用户画像

Jessica is an Associate Manager, Digital Marketing at Four Lakes Bank. She focuses on execution of marketing campaigns for mobile channels. She doesn't have a lot of time to learn the platform, or create and launch individual campaigns.

Goals

- Jessica want to differentiate their digital offerings from competitors;
- She wants to be as efficient as possible when executing on go-to-market strategies. This will allow her team to pivot based on consumer response as soon as possible.

Pain points

- Too many templates to choose from;
- Doesn't have the confidence or time to pick the "right" template for a given use case;
- Current template naming conventions are also confusing.

“

... I like having different options, but I don't have the design expertise to decide which one is better for our use case. I wish it showed me the recommended ones, not all available ones.



Jessica Brown

An overwhelmed user

DEFINE THE SCOPE 确立设计范围

Map pain points to opportunities 将痛点转换为机会

1.

Deprecate the content templates that aren't currently used in customer pilots.

弃用在当前客户试点中从未使用的内容模板

2.

Consolidate the 'messaging' types of content to a set that will satisfy pilot credit card/consumer banking use cases and effective user interaction experience.

整合“消息”类型的内容样式，满足试点信用卡/消费者银行业务使用场景，提供有效的用户交互体验

3.

Create a better naming convention for the content types.

为各种内容类型简历更好的命名规范

WHAT

Design ideations & validations

设计落地&用户测试

CONTENT TYPES AUDIT 审核内容类型

The screenshot shows a 'New Content' interface with a grid of content types:

- Articles**: Share single or multiple links to articles, blogs, etc.
- Schedule**: Share event schedules/timelines, hours of operation, etc.
- Events**: Share event details for current and upcoming financial events, seminars, trade shows, etc.
- Video**: Share a single video or create a custom playlist.
- Tips and Reminders**: A general purpose template for investor tips, reminders, in-app alerts, etc.
- Images**: Share a single image or curate an image gallery.
- Website/URL Links**: Share links to one or more websites/URL links.
- Reward Opt-in Card**: Rewards houses perks that are points driven. A consumer may see perks that require opting-in, or perks that are automatically applied toward relevant purchases. Cancel or Accept.
- Offers**: Offers houses perks that are enabled for a limited period of time, and are not associated with earning or burning, or paying with reward points.
- Benefits**: This is the third view from the top.
- Reward Opt-in Confirmation**: With Learn More and it's already accepted.

A red box highlights the 'Articles' category. A purple callout box to its left states: "Some types can be considered as component/field within a card, i.e. Video, Website, Images, etc." An arrow points from this box to the 'Video', 'Images', and 'Website/URL Links' categories. A red callout box to the right of the 'Events' category states: "Some types are not needed for pilot use cases, i.e. Schedule, Events, Tips & Reminders."

明确可以内嵌在模板重的组件

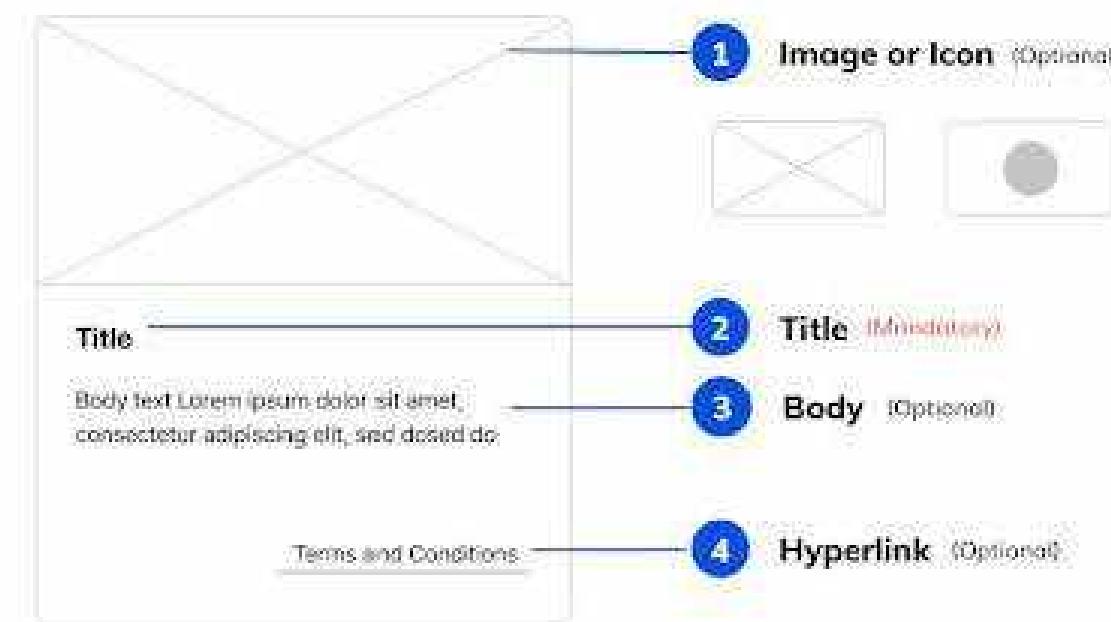
明确不需要的内容样式

ITERATION #1 第一次迭代

From 11 to 3 从11到3

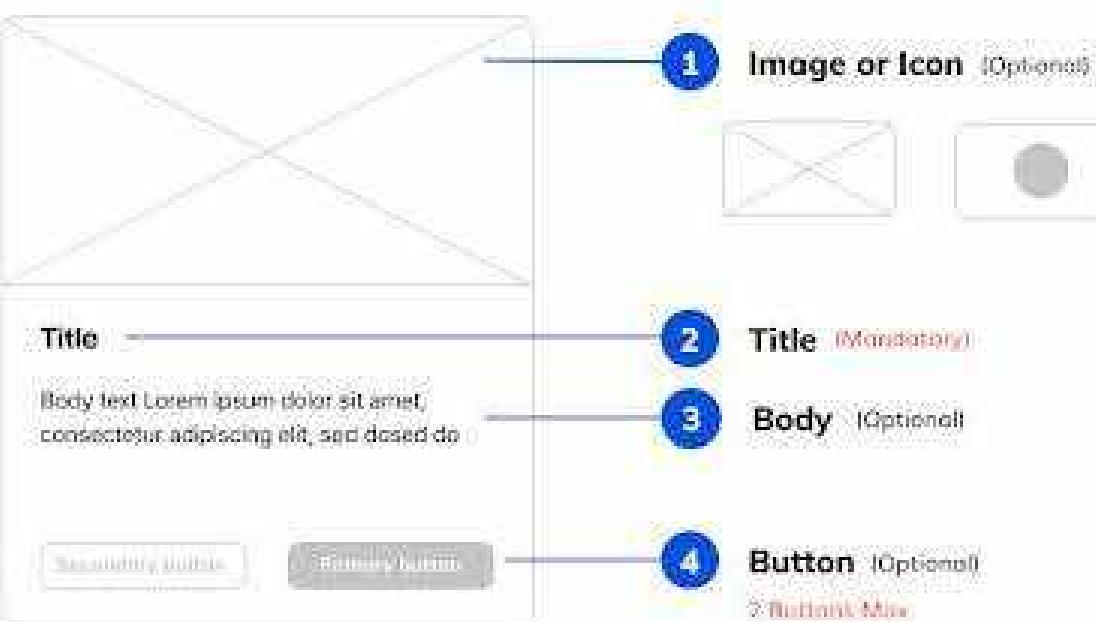
Type 1: Content for Passive Reading

类型1: 适用于被动阅读内容



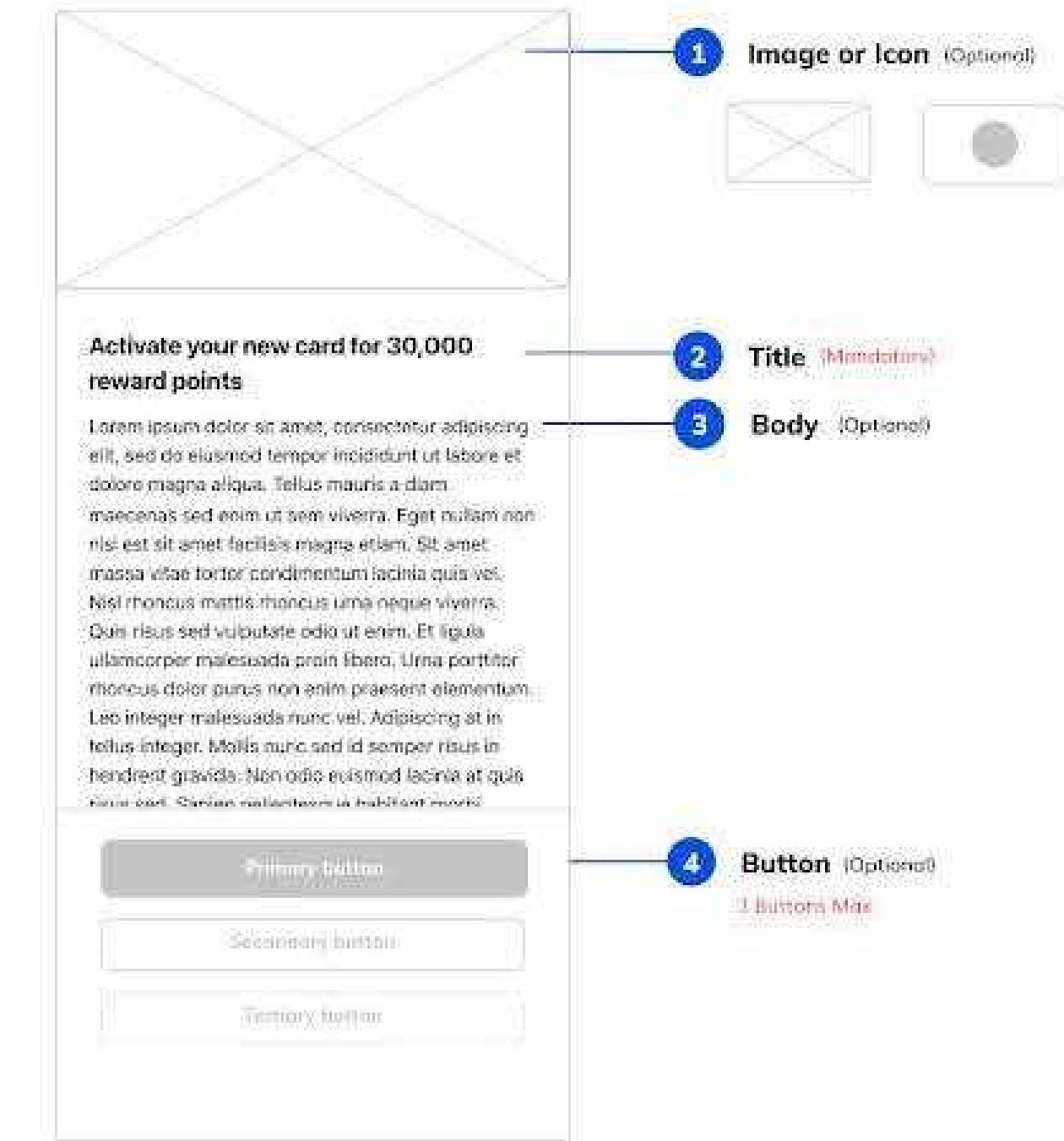
Type 2: Content for Immediate Action

类型2: 适用于需要用户行动的内容



Type 3: Content with More Info

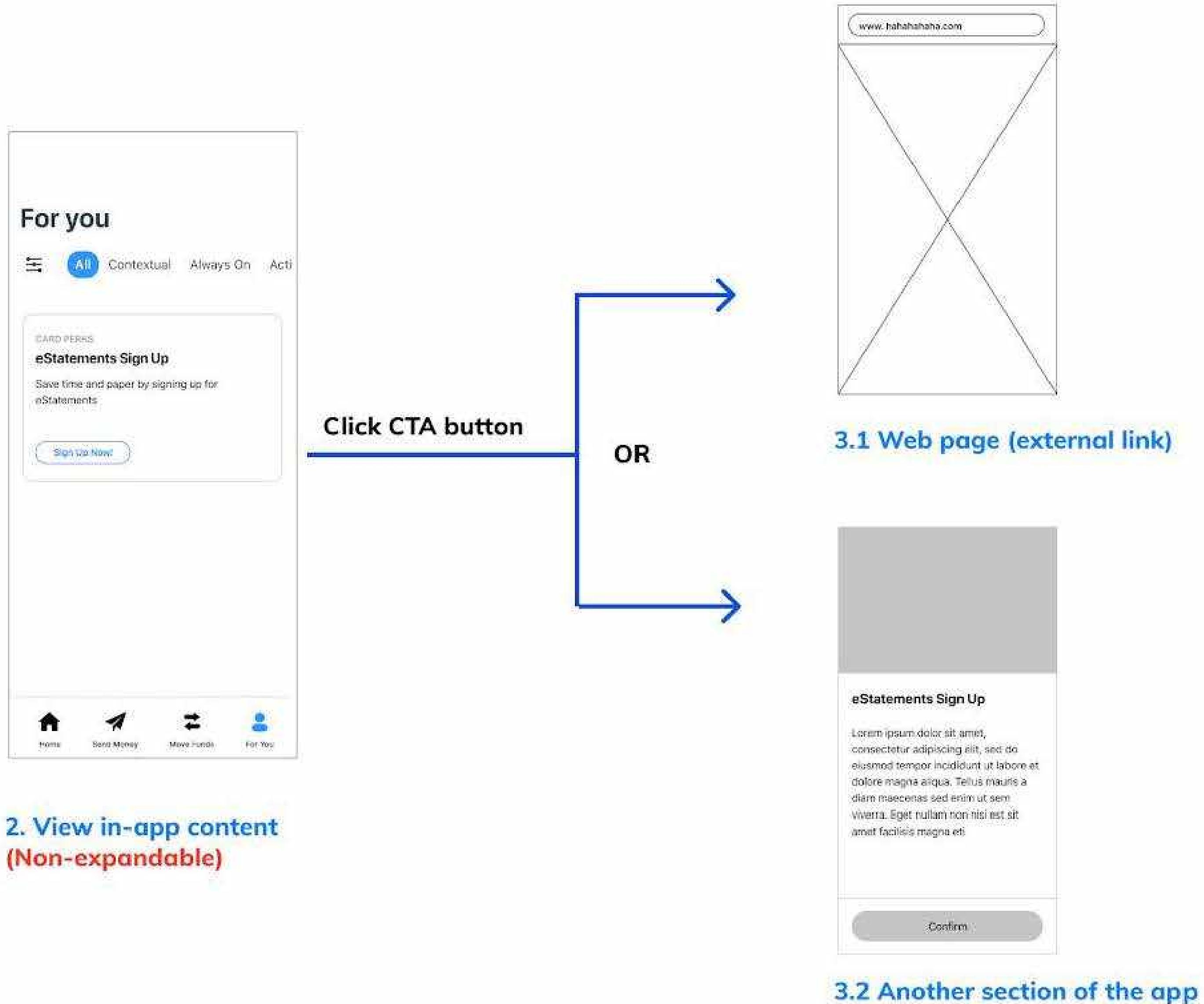
类型3: 适用于包含更多信息的内容



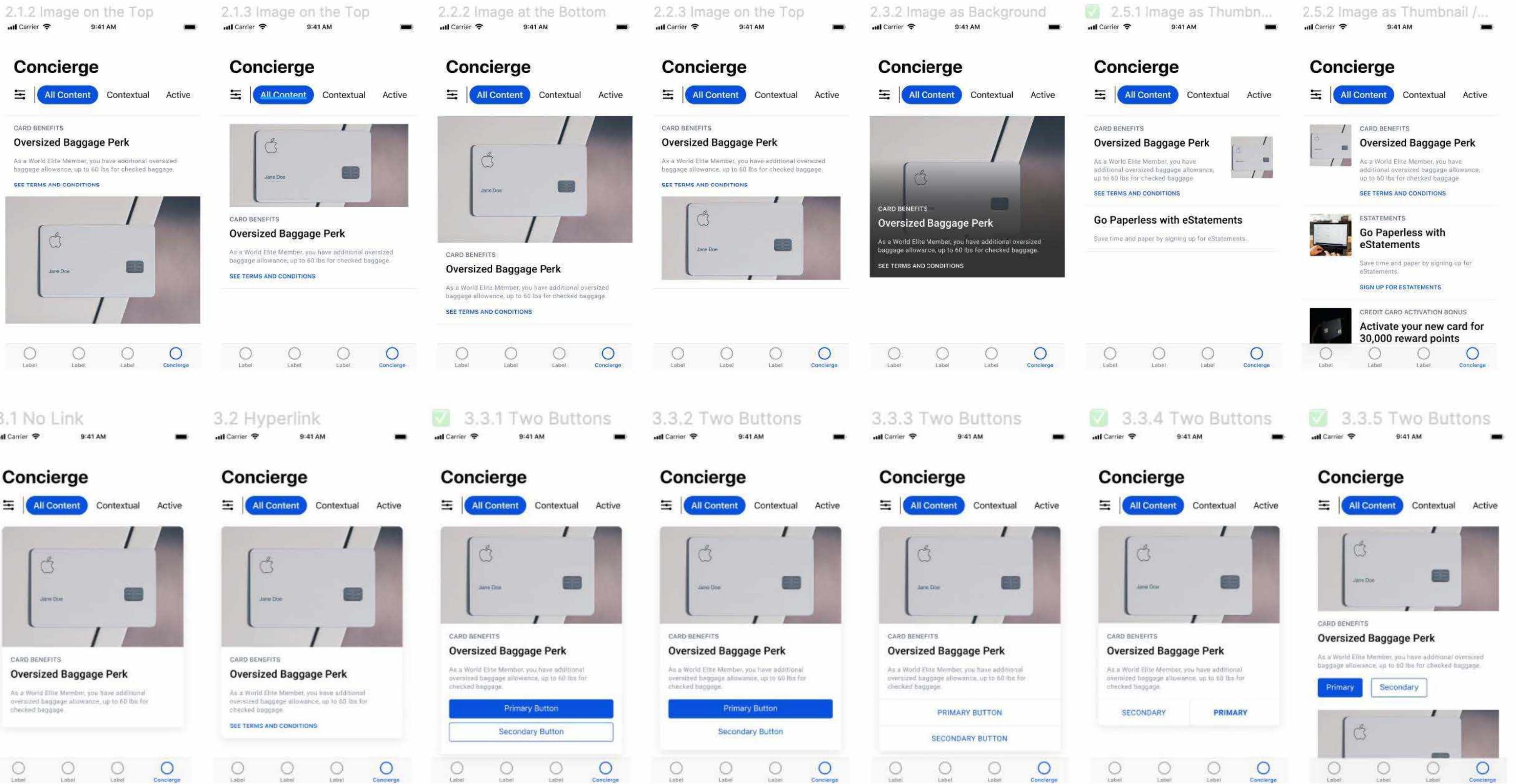
ITERATION #1 第一次迭代

Call-to-actions can either open a web link or another section of the app.

召唤组件可以打开网站链接或者链接到App其他部分。



Design explorations





USER FEEDBACK 用户反馈

“Why not just have 1 template?”

“为什么不只提供1种模版？”

Those 3 content templates are sufficient for pilot use cases;

Content creation: there is an opportunity that we can start with 1 template and allow users to configure at component level:

- Mandatory vs optional fields;
- Add link or button (up to 2 buttons);
- Call-to-action can open in-app detailed view, web link or another section of the app.

The design team will take care of the style (typography and colour). Most likely, they will set up all the styles once and not change it until a rebranding.

ITERATION #2 第二次迭代

1 starter template which can be configured at component level.

只提供1种可在组件级别配置的入门模板。

The image displays two screenshots of a mobile application interface, likely a banking or financial management app. Both screenshots show a 'For You' section at the top with navigation tabs: 'All Content' (highlighted in blue), 'Offers', 'Benefits', and 'Rewards'. Below this is a large image of a brown leather wallet containing several cards, including a VISA card. A call-to-action box is overlaid on the image, containing the text: 'Credit Card Activation Bonus' and 'Activate your new card for 30,000 reward points'. Below this text is a descriptive paragraph: 'TD Aeroplan Visa Infinite card currently offers the most lucrative Aeroplan sign-up bonus on the market: 30000 Aeroplan Miles.' At the bottom of the box are two buttons: a blue 'Activate' button and a white 'Learn More' button. The bottom navigation bar includes icons for Home, Transfers, Bills, and For You (which is highlighted in red).

9:41

9:41

For You

Credit Card Activation Bonus

Activate your new card for 30,000 reward points

TD Aeroplan Visa Infinite card currently offers the most lucrative Aeroplan sign-up bonus on the market: 30000 Aeroplan Miles.

Note that new cardholders get 15,000 miles after a first purchase and an additional 5 points per \$1 spent for the first three months; up to an extra 5,000 miles per month. 30,000 potential bonus points total. When redeemed at Air Canada those 30000 Miles are enough for two premium economy short-haul flights anywhere in Canada or the continental US.

Home

Transfers

Bills

For You

ITERATION #2 第二次迭代

1 starter template which can be configured at component level.

只提供1种可在组件级别配置的入门模板。

New Content

Articles [Name of this Content]

Select the elements that you wish to include in the content.

Select your content image preference

Large Image
 Small Image (Thumbnail)
 No Image

Select your content element

Title
 Category Tag
 Description

Select your Call-to-Action

No Call-to-Action
 Text Link
 Button(s)
 Primary Button
 Primary Button and Secondary Button

Primary Button Link

Type URL link here Choose another content

Secondary Button Link

Type URL link here Choose another content

Edit the element directly below

DELETE DUPLICATE



CARD BENEFITS

Oversized Baggage Perk

As a World Elite Member, you have additional oversized baggage allowance, up to 60 lbs for checked baggage.

Accept the Offer

Read More

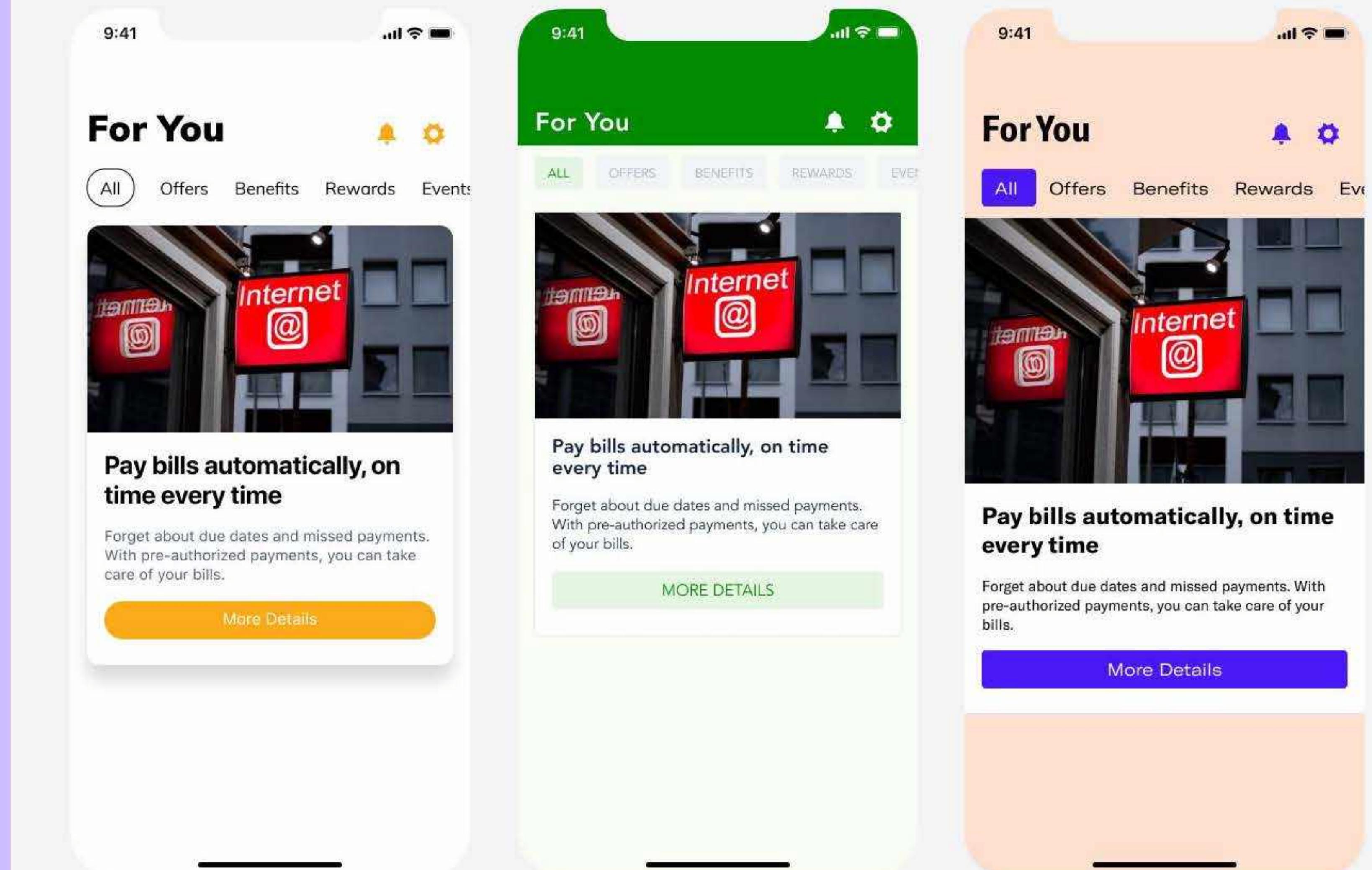
ADD A NEW CARD

CANCEL SAVE

ITERATION #2 第二次迭代

**Client-side
developers can
customize the look
and feel of Concierge
through a JSON
configuration file
(iOS) or XML
Configuration file
(Android).**

客户端开发人员可以通过 JSON 配置文件 (iOS) 或 XML 配置文件 (Android) 自定义 Concierge 的外观。



HOW

Metrics to measure success

衡量项目成功指标

METRICS TO MEASURE 衡量项目成功指标

Post-launch evaluations

发布后指标评估方案

We released the Starter Templates in May 2020. 2 clients will inject this release into their app in July 2021. The product manager and I put together post-launch evaluation plan.

Marketers (Survey) 营销人员 (问卷)

1. Evaluate the ease-of-use of the new content creation flow and page; 评估新内容创建流程和页面的易用性
2. Understand if the starter templates satisfy the use cases and capture analytic metrics needed; 了解入门模板是否满足使用场景，并捕获所需的分析指标

Metrics to be captured: 需记录的指标

1. Customer Satisfaction (CSAT); 用户满意度

Consumers (Analytics) 消费者 (数据分析)

Metrics to be captured: 需记录的指标

1. Impressions 展示次数 - total impressions, impressions/total users opted-in
2. Engagement 参与度 - engaged/impressions, engaged/total users opted-in
3. Business results 业务成果 - conversion on use cases.

PROJECT TWO 项目选集

My Assortment Lists

我的分类清单

The screenshot shows the SAP My Assortment Lists interface. At the top, it displays "Assortment F/W '17 \ Womens Classic, Teen Girls". Below this, there are two view options: "IMAGE VIEW" (selected) and "TABLE VIEW". The main area is titled "Products (5)" and shows five items:

- Jacket 401 (Thumbnail 5, Status 6)
- Jacket 403 (Thumbnail 7)
- Jeans 405 (Thumbnail 8)
- Shoes 401 (Thumbnail 9)
- Jeans 407 (Thumbnail 10)

Each item has a detailed description below its thumbnail, including the product name, ID, category, and status. A search bar (12) and various management buttons (13-15) are located at the top right of the product grid. To the right, there's a sidebar titled "Modules (2)" containing sections for "Module 1 (36)" and "Module 2 (36)". At the bottom, there are buttons for "Manage Products", "Request Proposal", and "Save".

ABOUT ASSORTMENT PLANNING 项目背景

What is an assortment?

The word is defined as a collection of products that a company offers.

Assortment指一个公司提供的产品集合。

What is assortment planning?

Assortment planning in retail is the process of selecting the products that a retailer wants to sell during a particular period to maximize profitability.

In other words, it means that retailers decide what merchandise they should buy and market to their customers. It is all about having the right goods in the right place at the right time.

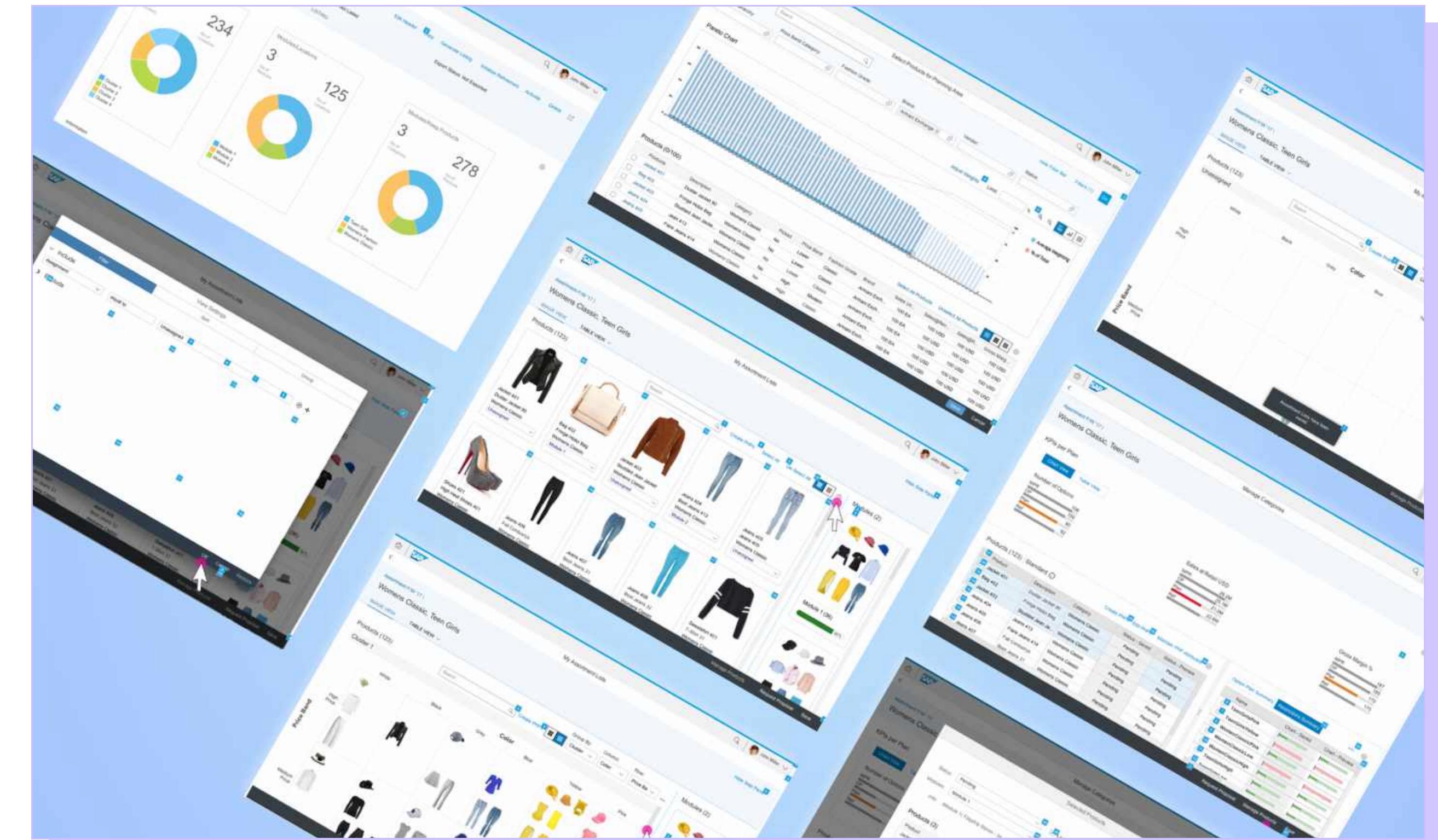
计划零售产品集合是指选择零售商想要在特定时期销售的产品集合的过程。

ABOUT SAP RAP 产品介绍

Retail Assortment Planning (RAP) is an enterprise application for creating **retail purchase order recommendations** in the SAP ERP system.

The result of an assortment planning process is an assortment plan (collections of products) for seasonal and non-seasonal merchandise.

零售分类计划 (RAP) 是一个企业应用程序，用于在 SAP ERP 系统中创建零售采购订单建议。



Retail Assortment Planning App: Build assortment plans visually

SAP Fiori

Web Design

零售分类规划应用程序：帮助用户直观地建立分类计划

My role:

Interaction designer

交互设计师

Activities:

Interaction & visual
design

交互设计&视觉设计

Concept testing

概念测试

UI QA

用户界面质量检查

Tools used:

Axure

Timeline:

Dec 2016 to Jan 2017

(Discovery & Design)

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Where we started: the opportunity

项目背景及需求

“How can we support fashion assortment planners to do the planning efficiently? ”

“我们如何支持时尚品类规划师高效地进行规划？”

The previous RAP application adopted a more numerical representation of data while focusing heavily on forecasting profit and KPI.

However, fashion assortment planners intended to work with more pictures and visuals of products to create assortments.

以前的 RAP 程序采用了更加数字化的数据表示，同时主要关注预测利润和 KPI。

然而，时尚品类规划师需要使用更多的产品图片和视觉展示来创建品类。

WHO, WHEN AND WHERE

Research & discovery

用户研究

USER JOURNEY 用户体验旅程图

What does the assortment planning process look like?

分类计划流程是什么样的？

Research and build a plan

Before building an assortment strategy or plan, retailers have to first analyze each branch and store's historical sales performance, followed by identifying the latest trends.

Retailers can develop a plan according to the data and the information cited.

Store clustering

Store clustering is the process of grouping stores with similar attributes, including location, sales, store size, customer demographics, product features, etc.

By doing so, they can apply a similar assortment plan to stores in the same group.

Decide the breadth and depth of assortments

Retailers have to decide the number of items being sold in each cluster. Product breadth refers to the number of categories, while depth is various styles and items in a particular category.

Create a visual merchandising plan

Visual merchandising is to present products in the most appealing way.

Double-check and execute the plan

After retailers finished the above steps, they have to ensure everything is on track.

LEARNINGS 要点

Comparing with assortment planners from other industries, fashion planners worked with a lot of product visuals to make decisions.

For example, they would like to compare products of different colors visually so that they can pick the colors missing in their current assortment plan.



ABOUT

- 34 years old
- Married, 2 children
- 8 years experience
- Travels 65%
- Likes photography, modern art

WORKS WITH

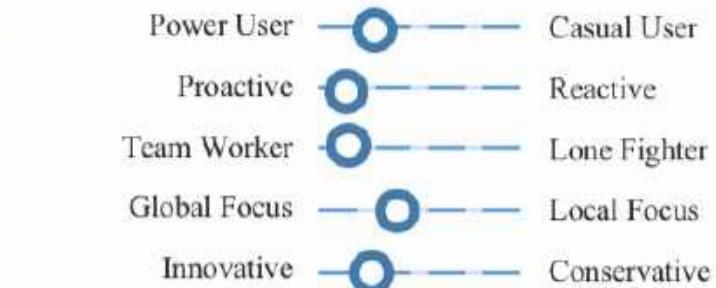
- Strategic/tactical buyers
- Visual merchant
- Central sales planner
- Merchandise planner
- Allocator

"To be able to effectively manage my assortment plans and execute my strategy. I need all relevant product information accessible to make informed decisions."

JANA JONES

ASSORTMENT PLANNER, RESPONSIBLE FOR BUILDING ASSORTMENT PLANS.

COMPETENCIES



MAIN GOALS

- Define and execute best possible assortment strategy together with local strategic buyers for her purchasing category
- Create buy plans to guide the execution of assortment and to track its results

NEEDS

- Plan/product KPI overview
- Reference from assortment lists to create assortments
- Pick categories and products based on KPI performance and rules summary
- Group products into modules
- Create assortment placeholder
- Placeholder-location matching preview

JOB RESPONSIBILITIES

- Manage Open-To-Buy (OTB) report and present monthly results in business assessment meetings
- Develop assortment plans and work with buyers on initial and reorder quantities
- Monitor and evaluate sales of current styles on a weekly basis, partnering with the buyer and the Divisional Planner to effectively manage receipts and inventory
- Analyze and revise the financial strategy based on current trend or actual performance on a monthly basis to maximize sales and profitability.
- Formulate guidelines for style and customer choices based on business analysis

PAIN POINTS

- No product images when selecting the products to build assortment
- No visual representation of products based on color, price band, etc. when comparing
- No powerful filters to control product comparison
- No visual representation of modules

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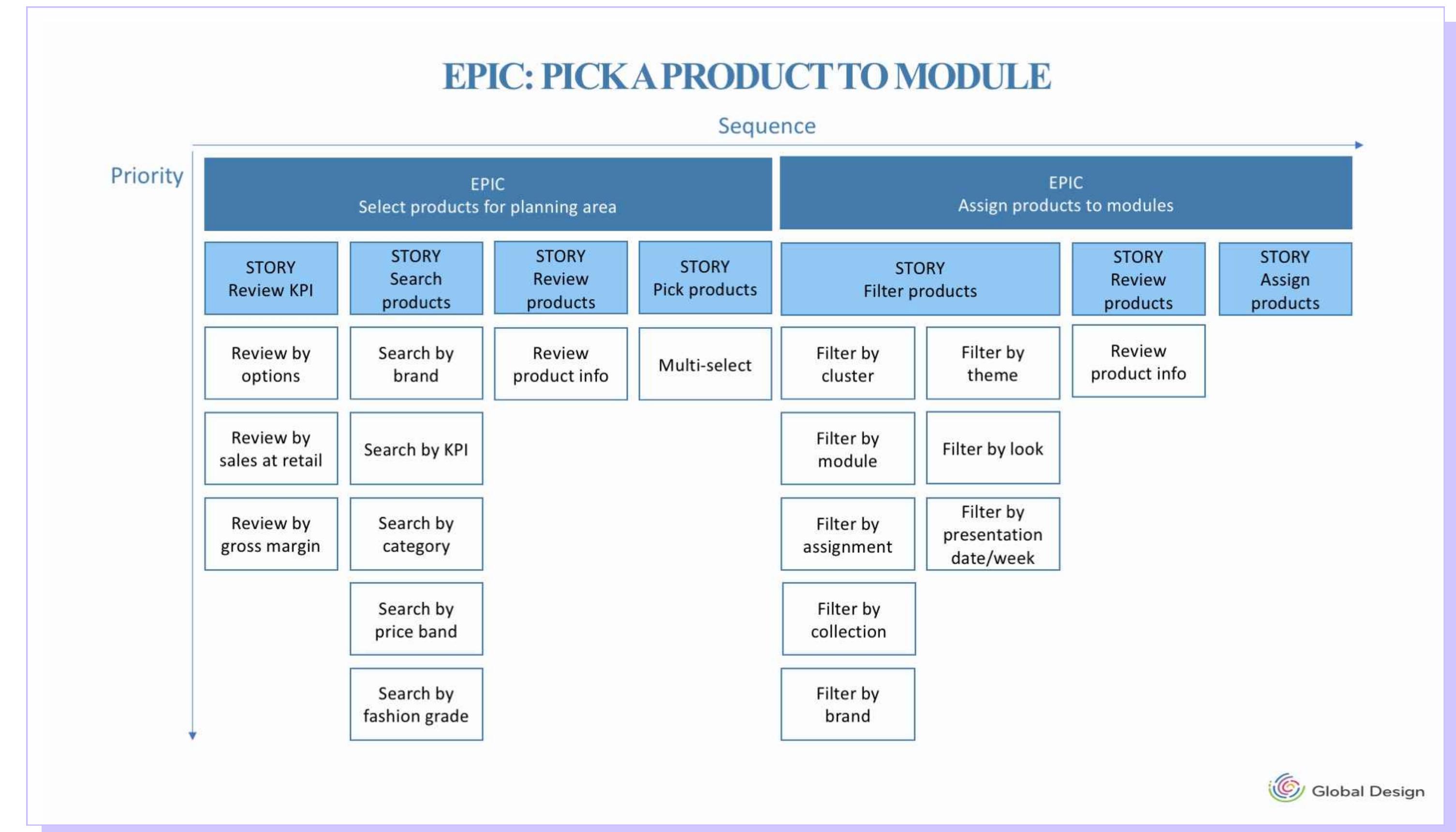
设计落地&用户测试

USER STORY MAP 用户故事地图

I mapped out the scenario of picking and assigning a product into modules in our current system.

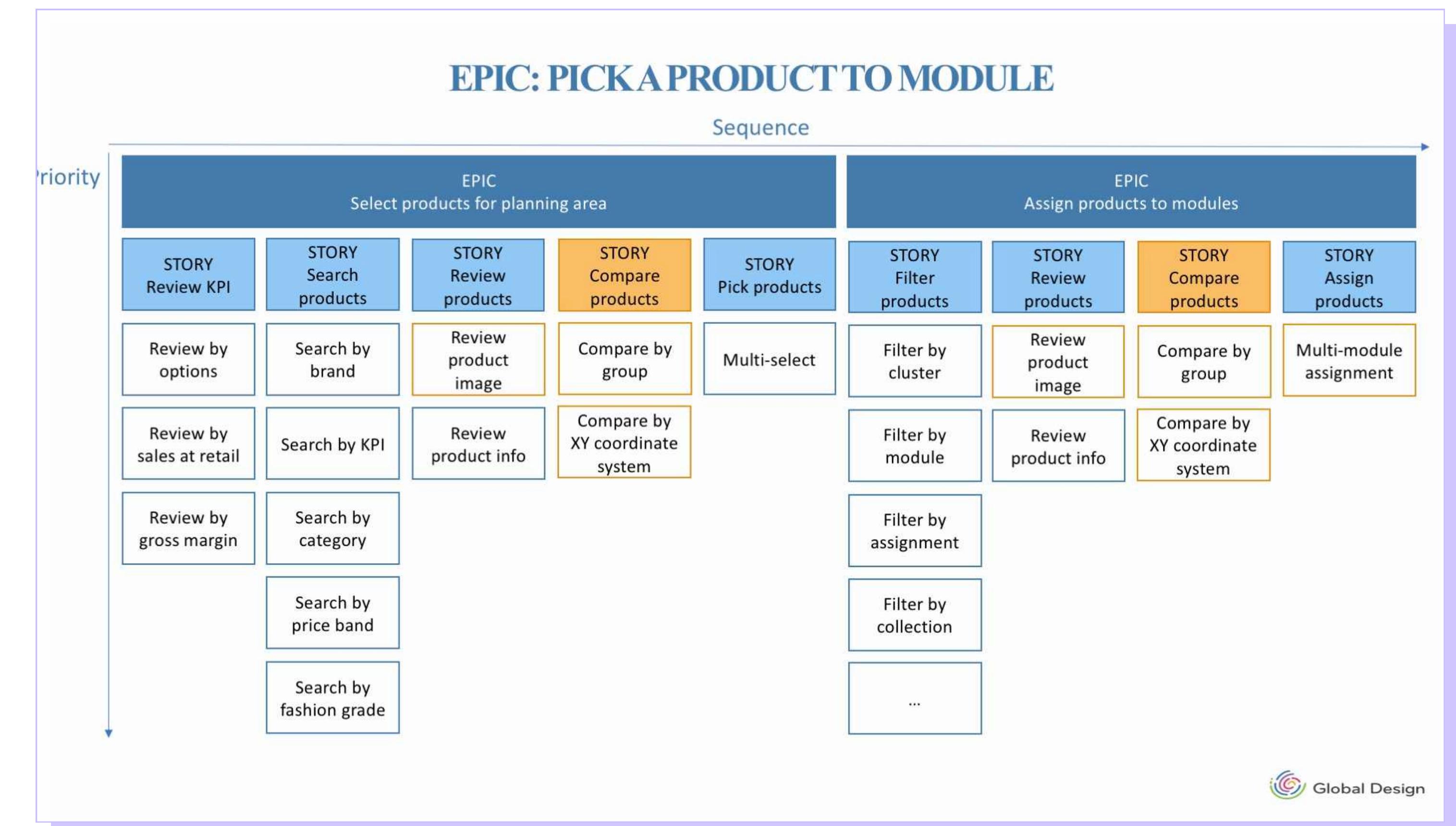
Next, I identified where to add the new functionality.

我首先绘制了在当前系统中挑选产品并将其分配到模块中的场景，接下来确定在哪里添加新功能。



USER STORY MAP 用户故事地图

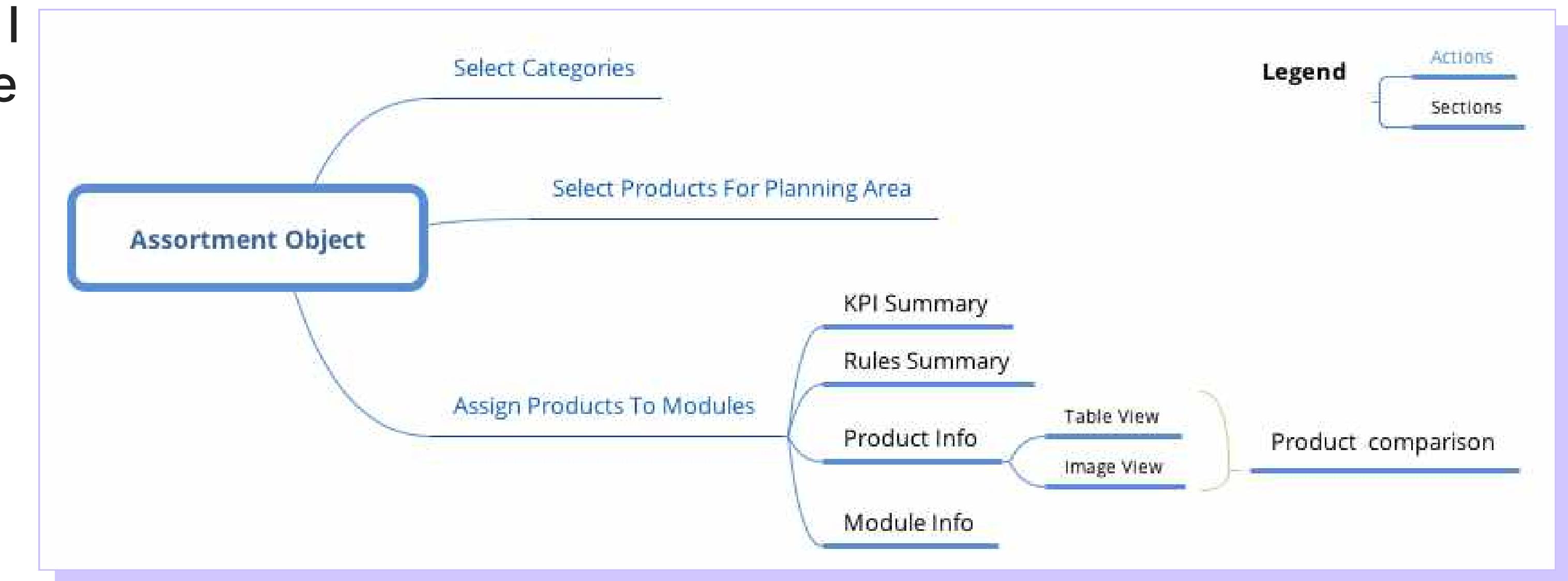
- Use case 1: select and assign products visually.
- Use case 2: compare products visually.
- 使用场景1：直观地选择和分配产品。
- 使用场景2：直观地计较产品。



PAGE HIERARCHY 页面层级

To nail down all the information pieces that need to be included on the **Assortment Object** page, I created the mind map to help me decide the importance and priority of different sections.

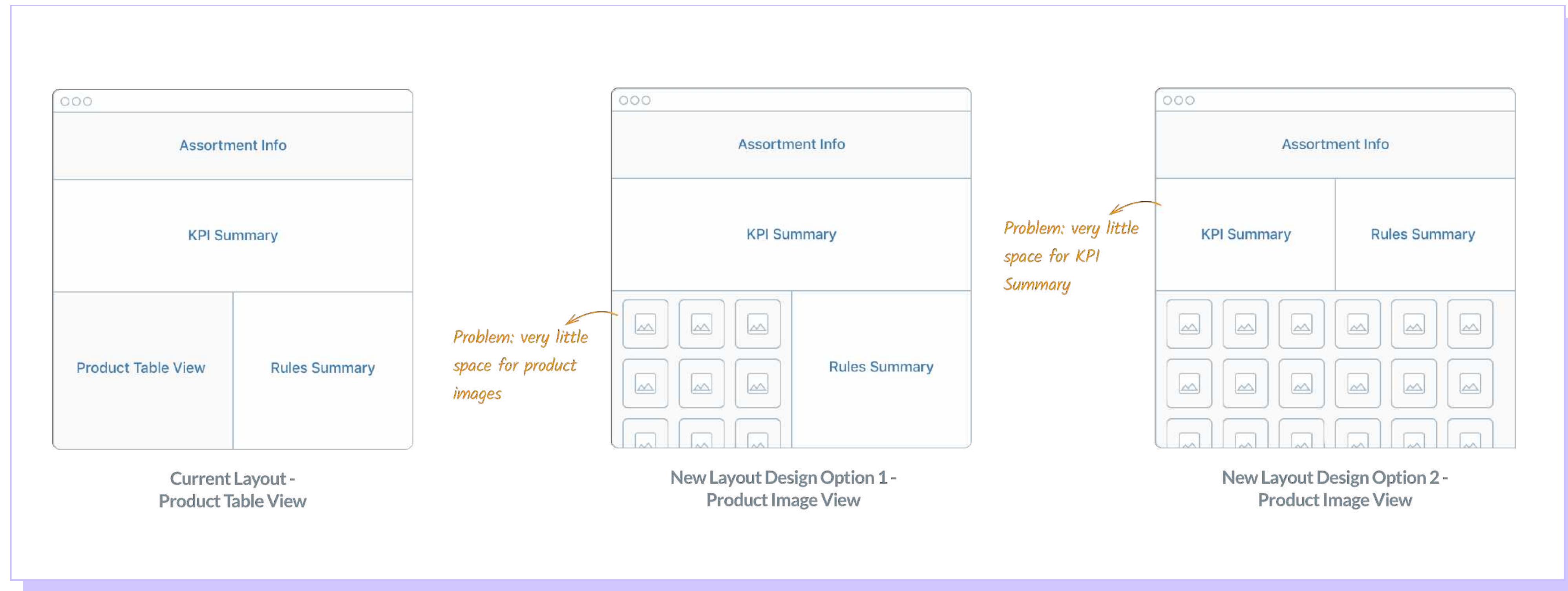
为了确定需要包含在“分类对象”页面上的所有信息，我创建了思维导图来帮助我确定不同部分的重要性和优先级。



LOW-FI WIREFRAMES 低保真线框图

The first design challenge I encountered was to use the **limited screen space** to allow users to see all the information they need to finish their task - assigning products into modules.

我遇到的第一个设计挑战是使用有限的屏幕空间让用户看到他们完成任务（将产品分配到模块中）所需的所有信息。



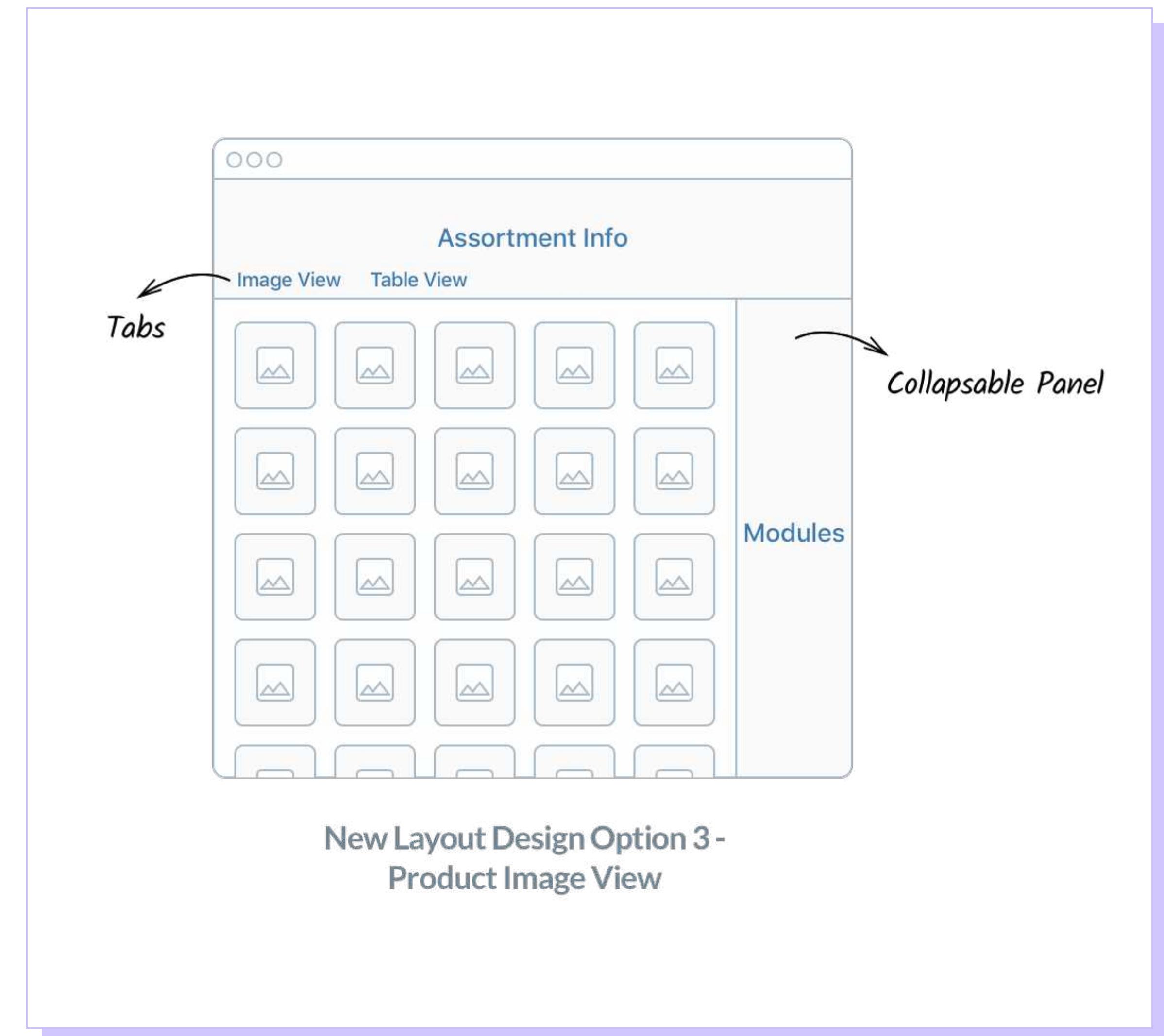
CONCEPT TESTINGS 概念测试

“I would like to use all the screen spaces to review and compare all the products.”

“我想使用所有屏幕空间来查看和比较产品。”

5/5 testers told us that they spent 95% of their time in product table/image sections and would need a workspace only to review as many items as possible, while the KPI and rule summary were only necessary to check when they made updates.

And as a result, I kept the KPI and Rule Summary sections in table view and remove these two sections in image view.



HIGH-FI MOCK-UPS 高保真模型

This high-fidelity mock-up illustrates a user interface for managing assortments, likely within an SAP system. The interface is titled "My Assortment Lists" and displays a list of products under the category "Assortment F/W '17 \ Womens Classic, Teen Girls".

The main area shows a grid of five products:

- Product 1:** Jacket 401 (Thumbnail 5, Label 6). Description: Duster Jacket 90, Womens Classic. Status: Unassigned.
- Product 2:** Jacket 403 (Thumbnail 7). Description: Studded Jean Jacket, Womens Classic. Status: Unassigned.
- Product 3:** Jeans 405 (Thumbnail 8). Description: Jeans 405, Womens Classic. Status: Unassigned.
- Product 4:** Shoes 401 (Thumbnail 10). Description: High Heel Shoes 401, Womens Classic. Status: Unassigned.
- Product 5:** Jeans 407 (Thumbnail 9). Description: Boot Jeans 31, Womens Classic. Status: Unassigned.

At the top of the product grid are several controls:

- Search bar (12)
- Create PHPs (13)
- Select All (14)
- De-Select All (15)
- Grid View icon (16)
- Table View icon (17)
- Settings icon (18)

To the right of the products, there is a sidebar titled "Modules (2)" containing two sections:

- Module 1 (36):** Shows a collection of items including hats and clothing.
- Module 2:** Shows a collection of items including hats and clothing.

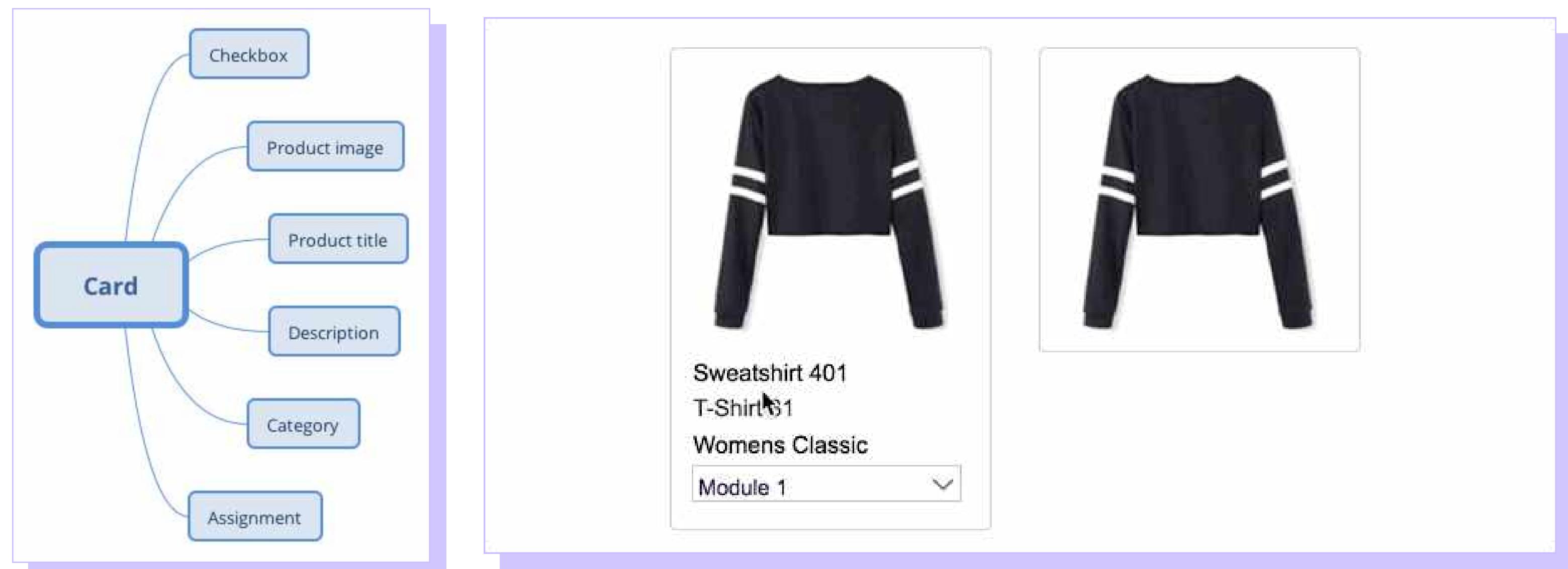
At the bottom of the screen, there is a navigation bar with three buttons:

- Manage Products
- Request Proposal
- Save

INTERACTION DESIGN 交互设计

To design the product cards, I started with summarizing different information I need to include on the card. Then I prototyped different versions to generate feedback among teammates.

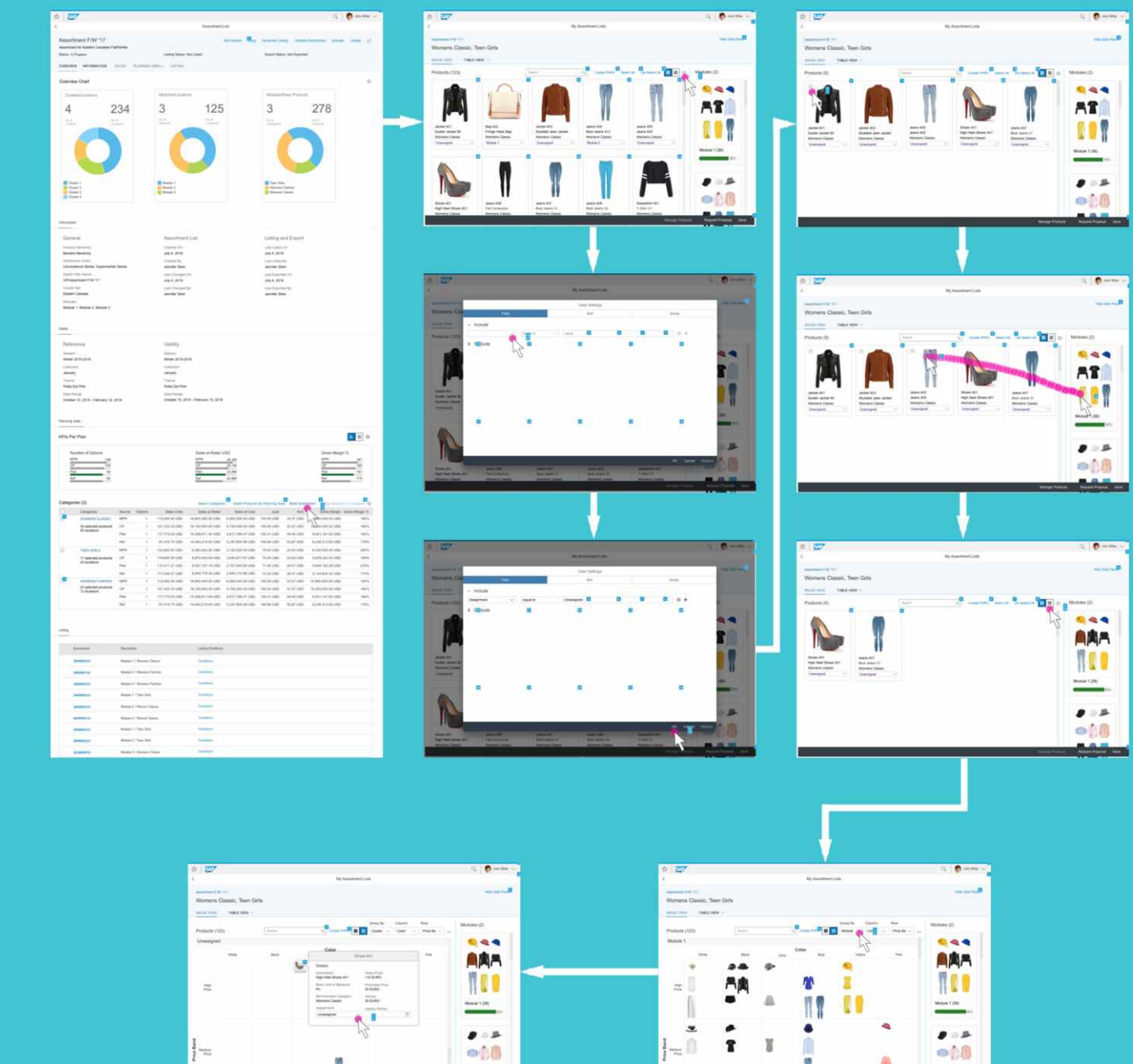
为了设计产品卡片，我首先总结了卡片上需要包含的不同信息，然后制作了不同版本的原型来收集用户反馈。



FINAL DESIGN 设计终稿

After deconstructing the page and component, as well as ideating different solutions, I started to compose the designs into the complete screen flow in Axure to guide front-end development.

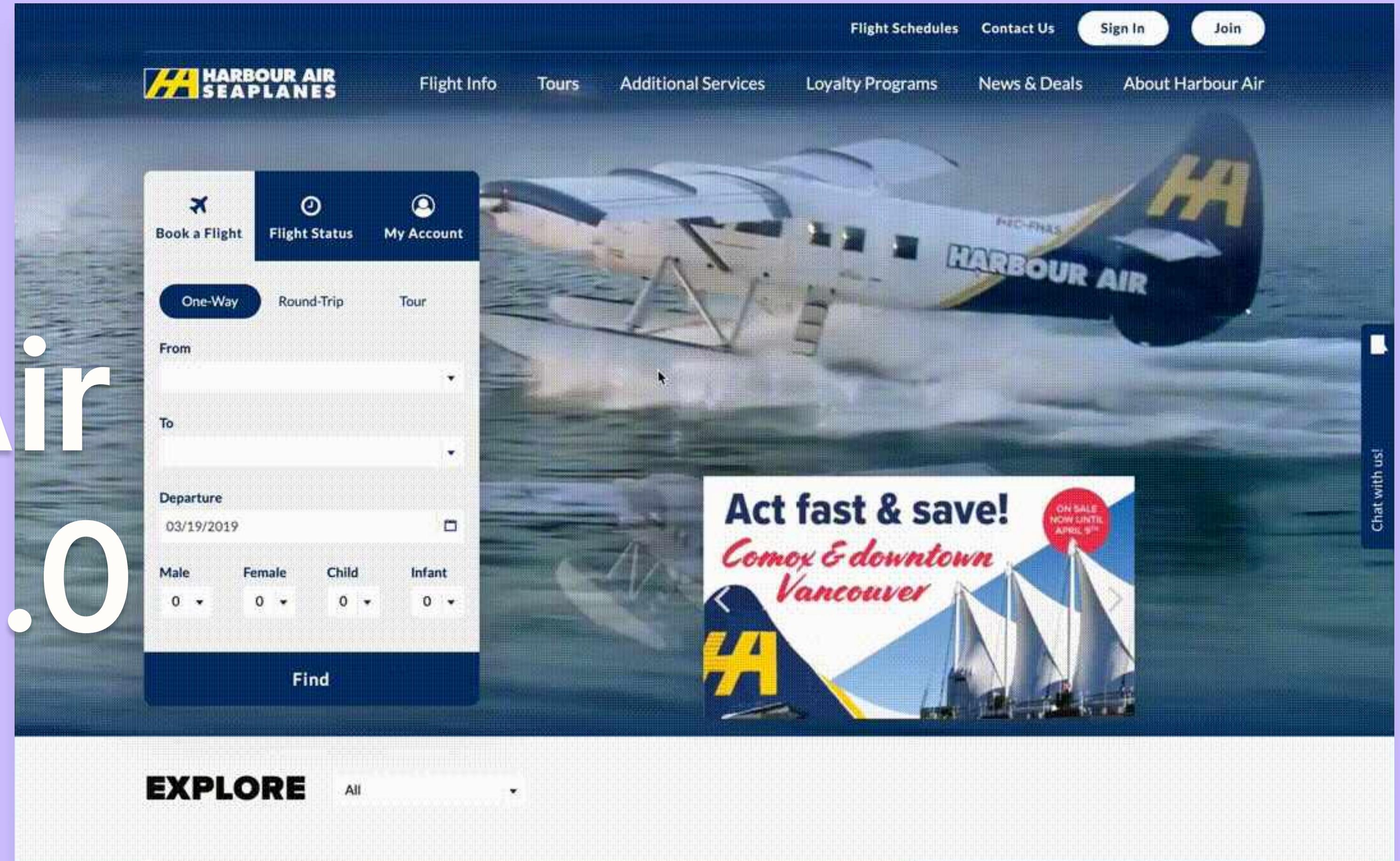
在对页面和组件进行解构、构思不同的解决方案后，我开始在 Axure 中将设计组合成完整的屏幕流程，用以交付前端开发。



PROJECT THREE

Harbour Air Website 2.0

Harbour Air网站设计



ABOUT HARBOUR AIR 项目背景

Harbour Air Seaplanes

Harbour Air Group is North America's largest seaplane airline.

They offer scheduled flights, as well as scenic tour packages in different regions across British Columbia.

Harbour Aire Group是北美最大的水上飞机航空公司。
他们提供定期航班以及不列颠哥伦比亚省不同地区的
观光旅游套餐。



Harbour Air Website 2.0:

Redesign and build the marketing website from the ground up in 5 months

Harbour Air网站设计：在 5 个月内从零开始重新设计和构建营销网站

Web Design

WordPress

My role:

Solo UX/UI Designer

项目唯一设计师

Activities:

Focus Group

焦点小组

Survey

问卷

Information

Architecture

信息架构

Interaction & Visual

Design

交互设计&视觉设计

Tools used:

Sketch

InVision

Timeline:

May 2018 -
September 2018

(Design &
Development)

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Design ideations & validations

设计落地&用户测试

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衡量项目成功指标

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What can be done better?

设计反思

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设计反思

The project brief

项目背景及需求

“We have some budget, but we don't know what/how to improve?”

“我们有一些预算，但我们不知道如何改进？”

Redesign and build the whole website from the ground up within 5 months.

The old Harbour Air website was launched in 2013. The clients from Harbour Air were 100% sure that the website needed improvement, however, they didn't know what to fix and how they should do it.

在 5 个月内从零开始重新设计和构建营销网站——Harbour Air 旧网站于 2013 年推出。客户非常确定旧网站需要改进，但他们不知道要改进的重点以及该如何改进。



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设计反思

PERSONA ONE 用户画像1

Business travellers

商务旅客

Most Harbour Air website visitors are business travellers between Vancouver and Victoria (where most Government ministries are located).

大多数 Harbour Air 网站访问者是温哥华和维多利亚之间的商务旅客。

Goals 目标

- Spend less time booking travels; 花更少的时间预订旅行
- Get timely updates about trips; 获取有关旅行的及时更新
- To maximize the loyalty points and rewards; 最大化忠诚度积分和奖励
- To narrow the options when it comes to shop. 在购物时缩小选择范围。



[Illustration from blush.design](#)

PERSONA TWO 用户画像2

Tourists

游客

The second biggest user group who comes to Harbour Air website are tourists who wants to experience the unique seaplane experience.

来到Harbour Air网站的第二大用户群是想要体验独特的水上飞机体验的游客。

Goals 目标

- Look for deals and promotions; 寻找优惠和促销活动
- Need more information about the tours to make the informed decision. 需要有关旅行的更多信息以做出明智的决定



[Illustration from blush.design](#)

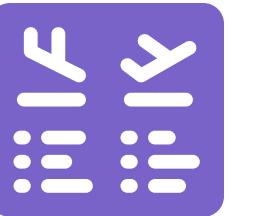
SUMMARY 总结

Core user goals 核心用户目标



Book seaplane tickets

预订水上飞机机票



Check flight schedules
and status

检查航班时刻表及状态



Look for information like
luggage policy,
promotions, loyalty
programs, etc.

查找行李政策、促销、忠诚度计划等信息

RESEARCH & DISCOVERY 用户研究

Keep an eye on how the users use and feel about the current website.

密切关注用户对当前网站的使用和感受

1. Analytics 数据分析

The business analyst and I looked into **Hotjar** heatmap to understand the user behaviour.

BA和我查看了 Hotjar 热图以了解用户行为

2. Online survey 问卷

The online survey was active for one month in which over 400 responses were recorded.

From the results I identified several key findings that assisted me in formulating our questions for the focus group.

在线问卷持续了一个月，记录了 400 多份回复

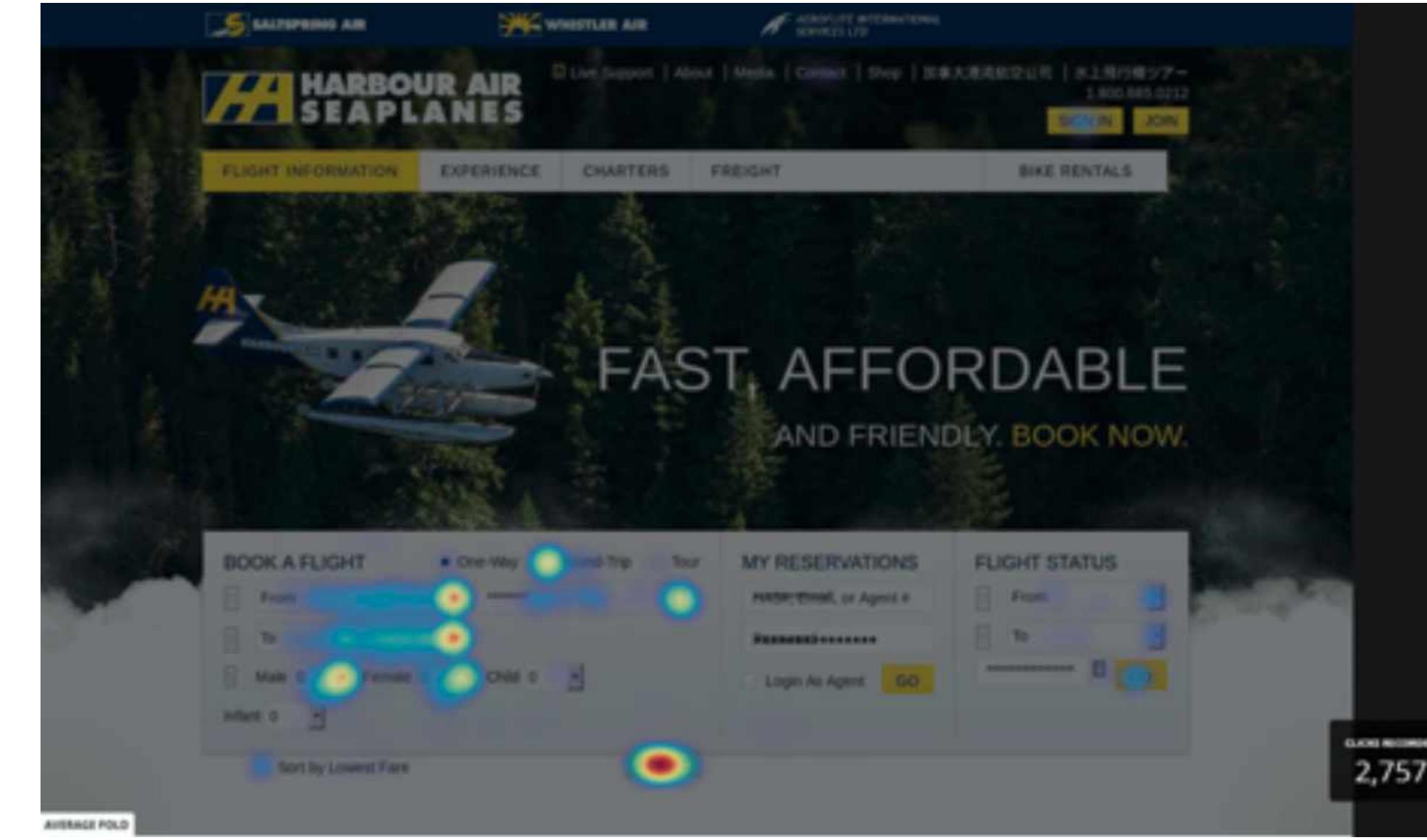
3. Focus group/usability testing 焦点小组/测试

We hosted a focus group/usability testing session with around **10 people** to understand people's goals and frustrations in depth about the current website.

我们举办了一个大约 10 人参加的焦点小组/测试会议，以深入了解用户对当前网站的看法

Hotjar heatmap

Hotjar热图



1. The heatmap indicates a very low percentage of users clicking on the main navigation bar (flight information, experience, charters, seaplane tours, and freight). Possibly because these features are not as widely used or not easily found.
2. A large percentage of users are not scrolling past the booking feature on the homepage suggesting most users are only seeing content from the first fold and missing out on promoted content.

Survey results

问卷结果

1. Generally, HA web visitors had a **pleasant** experience on the HA site.
2. Most users were able to locate desired information. There were some who encountered **difficulty around the fare types and loyalty programs**.
3. Approximately 30% of the participants felt **the layout of information** is cluttered and difficult to navigate.

The following questions made up the online survey:

1. *Can you easily find the information you were looking for?*
2. *How are you finding the booking experience?*
3. *How likely is it that you will return to the Harbour Air Website?*
4. *What did you enjoy about the Harbour Air Website?*
5. *What features do you think can be improved?*

Focus group/usability testing results 焦点小组/测试结果

#Keep 保留

- Booking (the primary objective for most) was felt to be **relatively straightforward**; 预订 (大多数人的主要目标) 相对比较简单

#Fix 修改

- Overall, participants felt the website was **too busy, too chaotic**, with a large number of subpages; 参与者觉得网站太忙、太乱，子页面很多
- There is an opportunity to better **highlight tours** as the current construct isn't optimized; 有机会更好地突出游览(tours)
- **Promotions** are unfortunately not easily found with the current layout. 目前的布局不容易找到促销活动

#Change 改变

- **Loyalty programs** are not fully understood or optimally used. 忠诚度计划并未得到充分理解或得到最佳利用

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设计反思

DEFINE THE SCOPE 确立设计范围

Scope 在范围之内

1. HMW help website visitors locate the content they are looking for quickly?
如何帮助网站访问者快速找到他们正在寻找的内容?
2. HMW improve the layout so it feels less busy?
如何改进布局让用户感觉不那么拥挤?
3. HMW highlight promotions and deals more up-front for tourists?
如何为游客突出促销和优惠?

Not in scope 超出范围

1. HMW provide a better booking experience?
如何提供更好的预订体验?
2. HMW provide a simpler loyalty program?
如何提供更简单的忠诚度计划?

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设计反思

HOW MIGHT WE

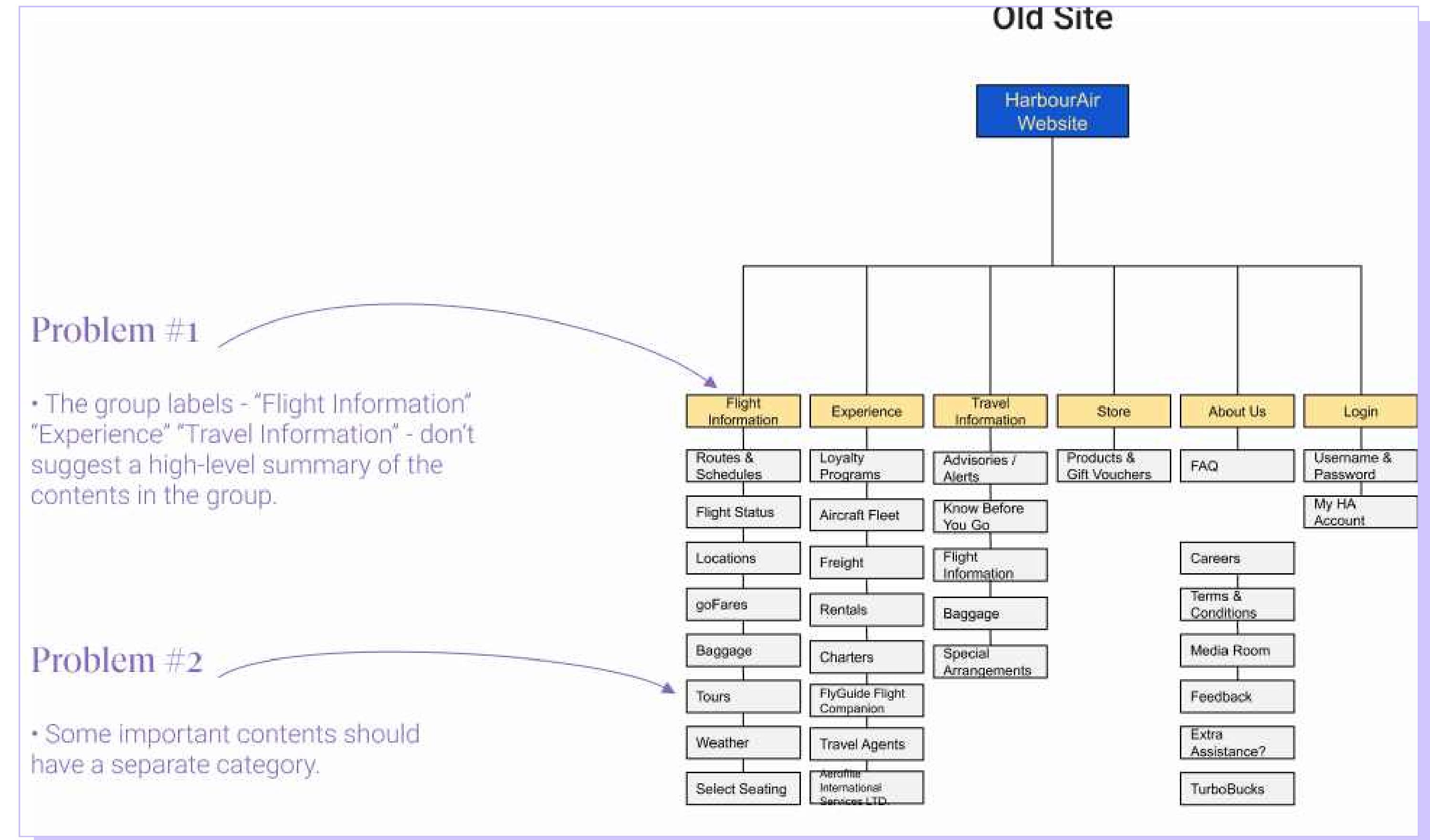
Help website visitors locate the
content they are looking for
quickly?

如何帮助网站访问者快速找到他们正在寻找的内容？

IA AUDIT 信息架构审核

Take-aways 重点

1. Some group labels are not self-explanatory, i.e. “Experience”; 一些标签需要更改
2. Some group labels and subpages are not connected logically; 一些组标签和子页面的逻辑联系不够紧密
3. Some pages can be archived. 有些页面可以存档



CARD SORTING 卡片分类

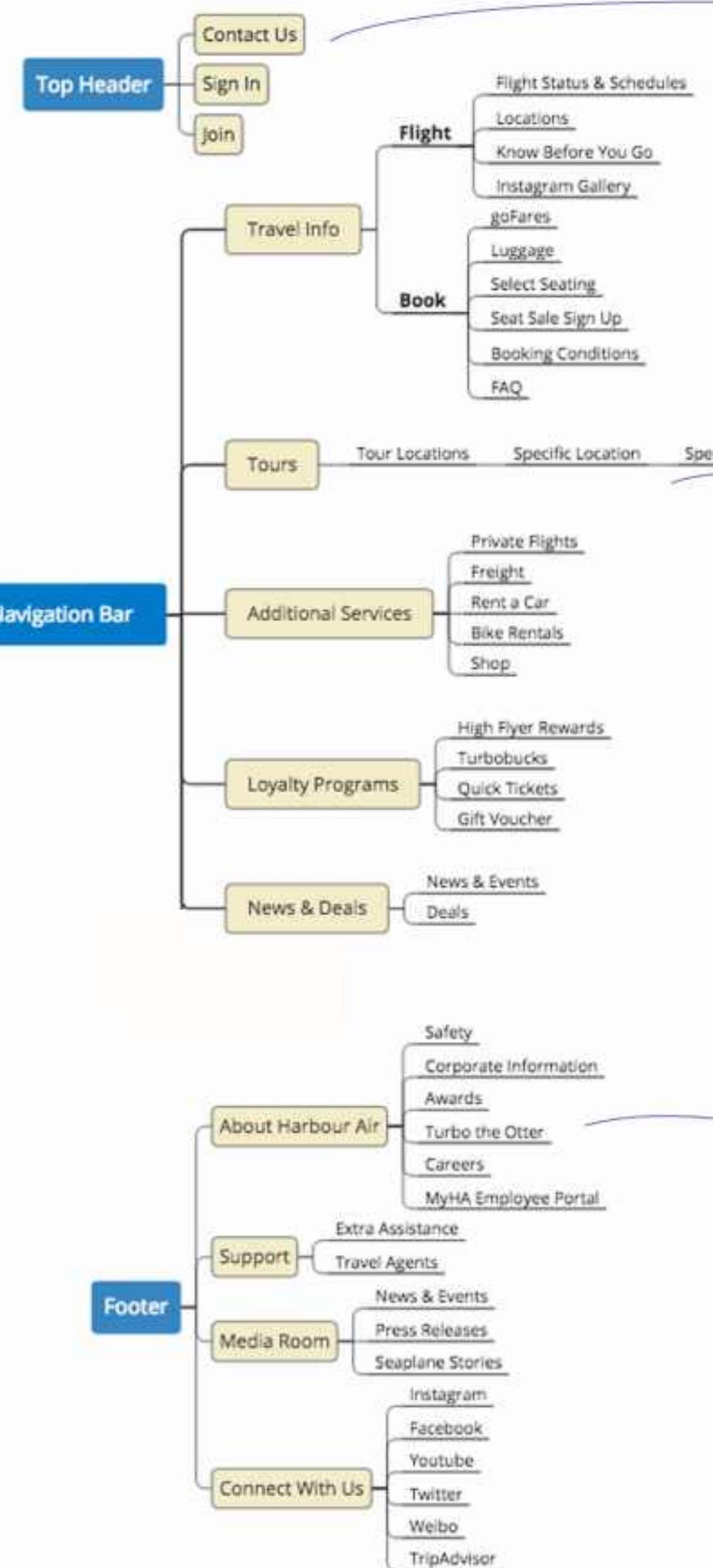
Process 过程

Due to time constraint, I asked a few employees at FreshWorks, who have used other airline websites before, to complete a card sorting exercise with me.

I consolidated the results and came up with the revised site map.

由于时间关系，我请了几位曾经使用过其他航空网站的 FreshWorks 员工和我一起完成卡片分类练习，然后合并了结果并提出了修改版的站点地图

New Site



Update #1

- Add a top header section to highlight frequent

Update #2

- Rename the group labels to match the conte

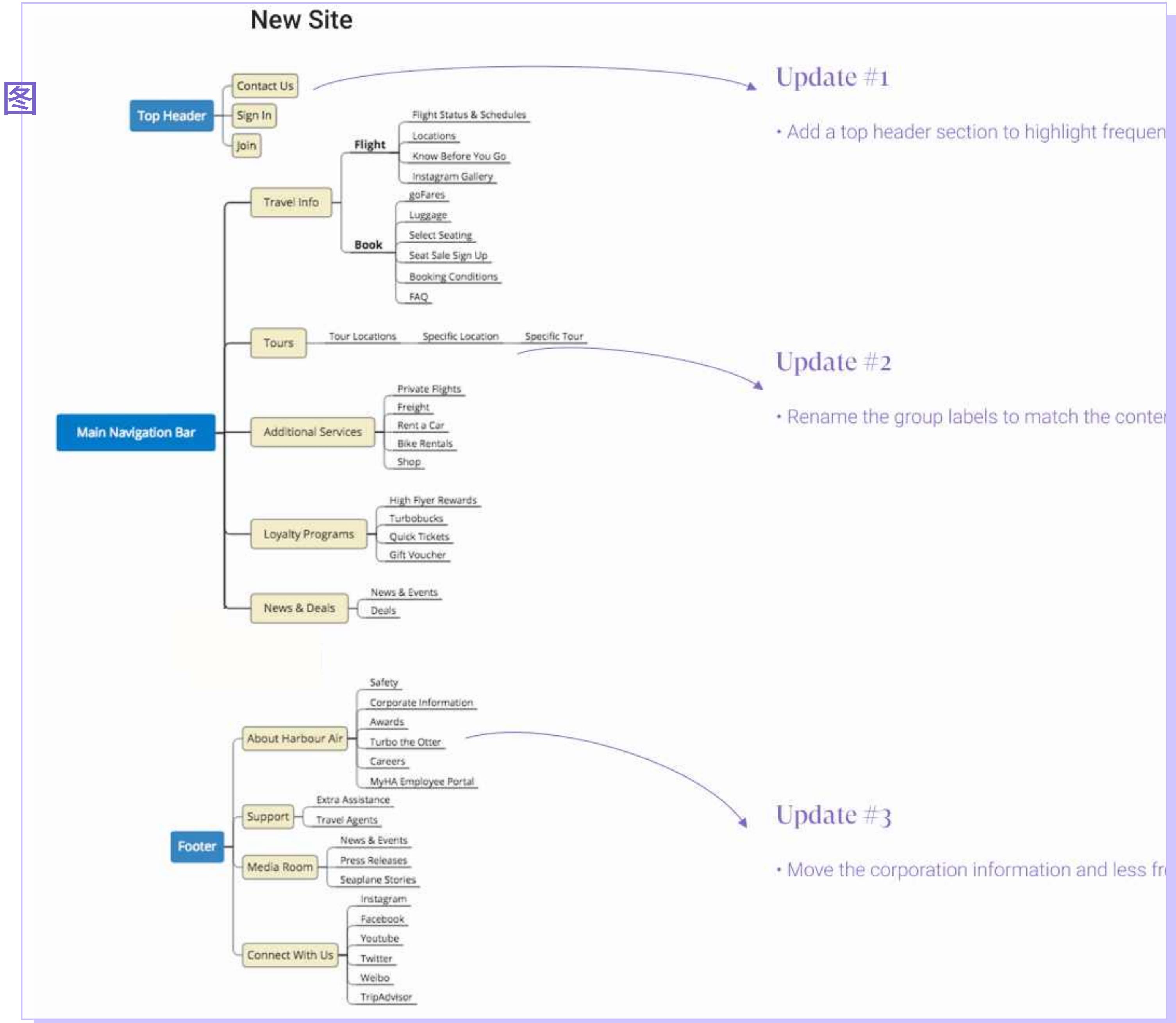
Update #3

- Move the corporation information and less fr

REVISED IA 改版后的信息架构图

Updates 更改的部分

1. Move “Contact Us” “Sign In” and “Join” into a top header section;
2. Rename the group labels to match the content inside;
3. Some information, like corporate information, are moved to footer, while other important information like “Tours” and “Promotions” deserve their own first-level navigation title.



HOW MIGHT WE

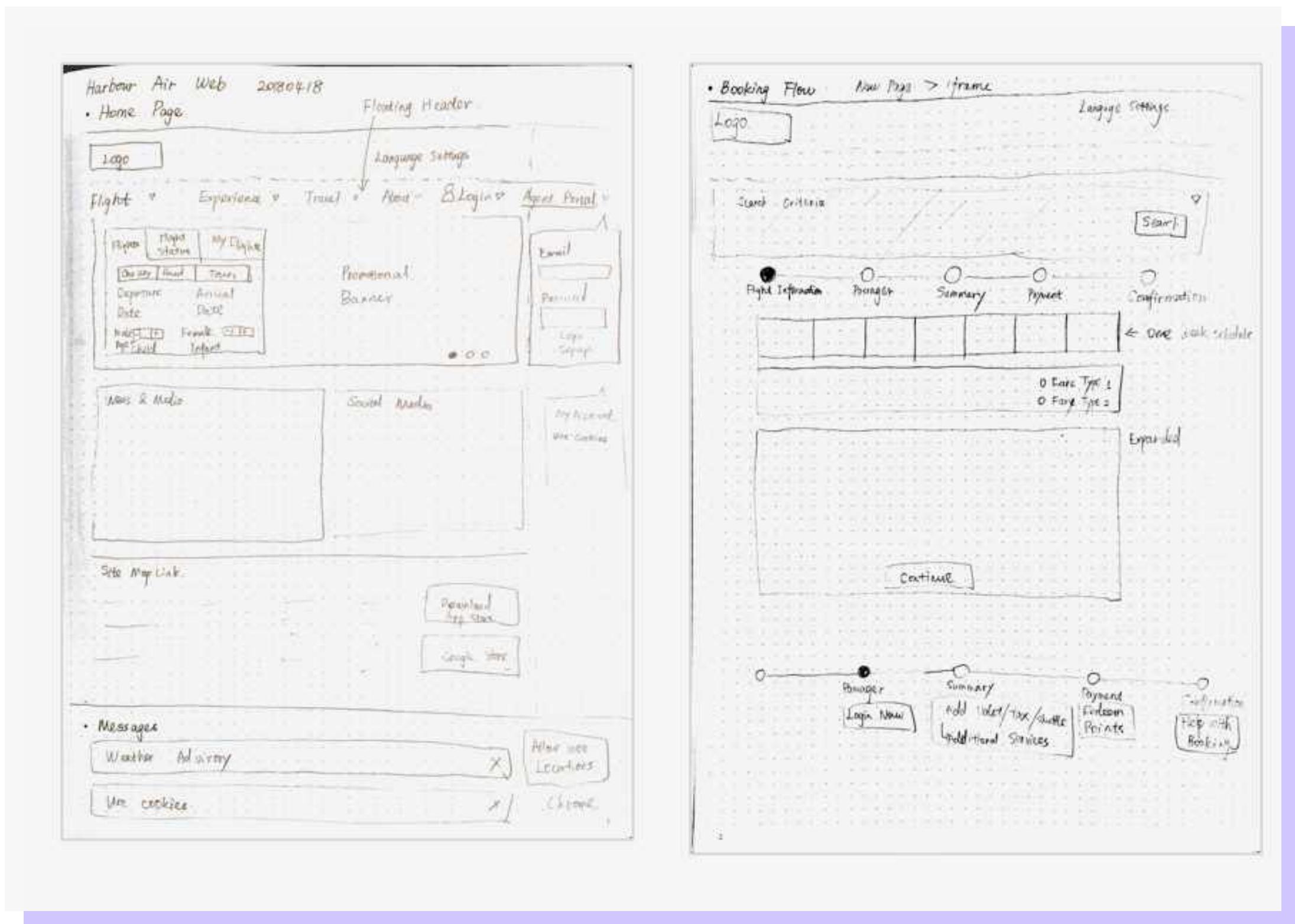
**Improve the layout so it feels
less busy?**

**Highlight promotions and deals
more up-front for tourists?**

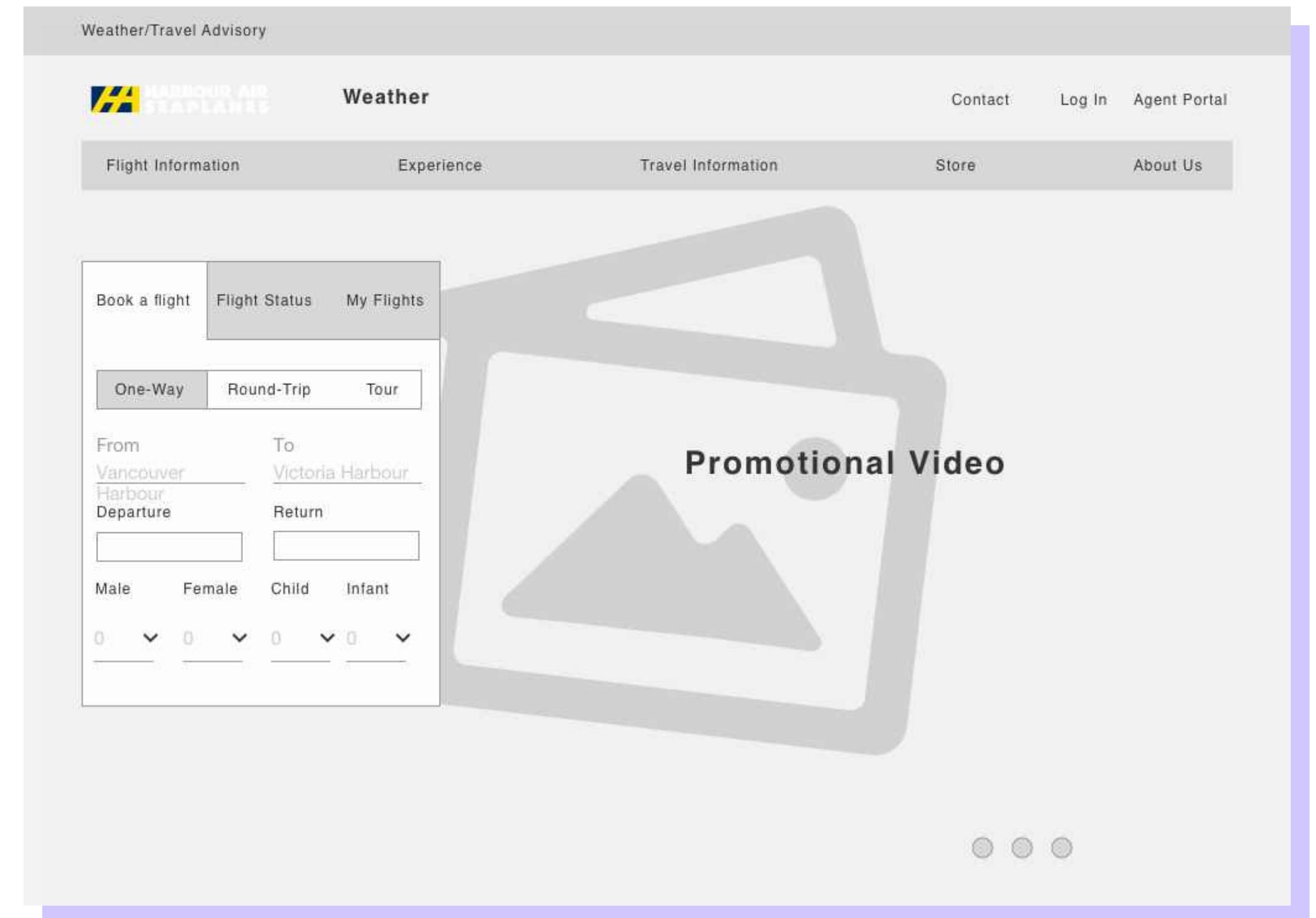
如何改进布局让用户感觉不那么拥挤？如何为游客突出促销和优惠？

DESIGN EXPLORATIONS 设计探索

Paper sketch 素描



Wireframes 线框图

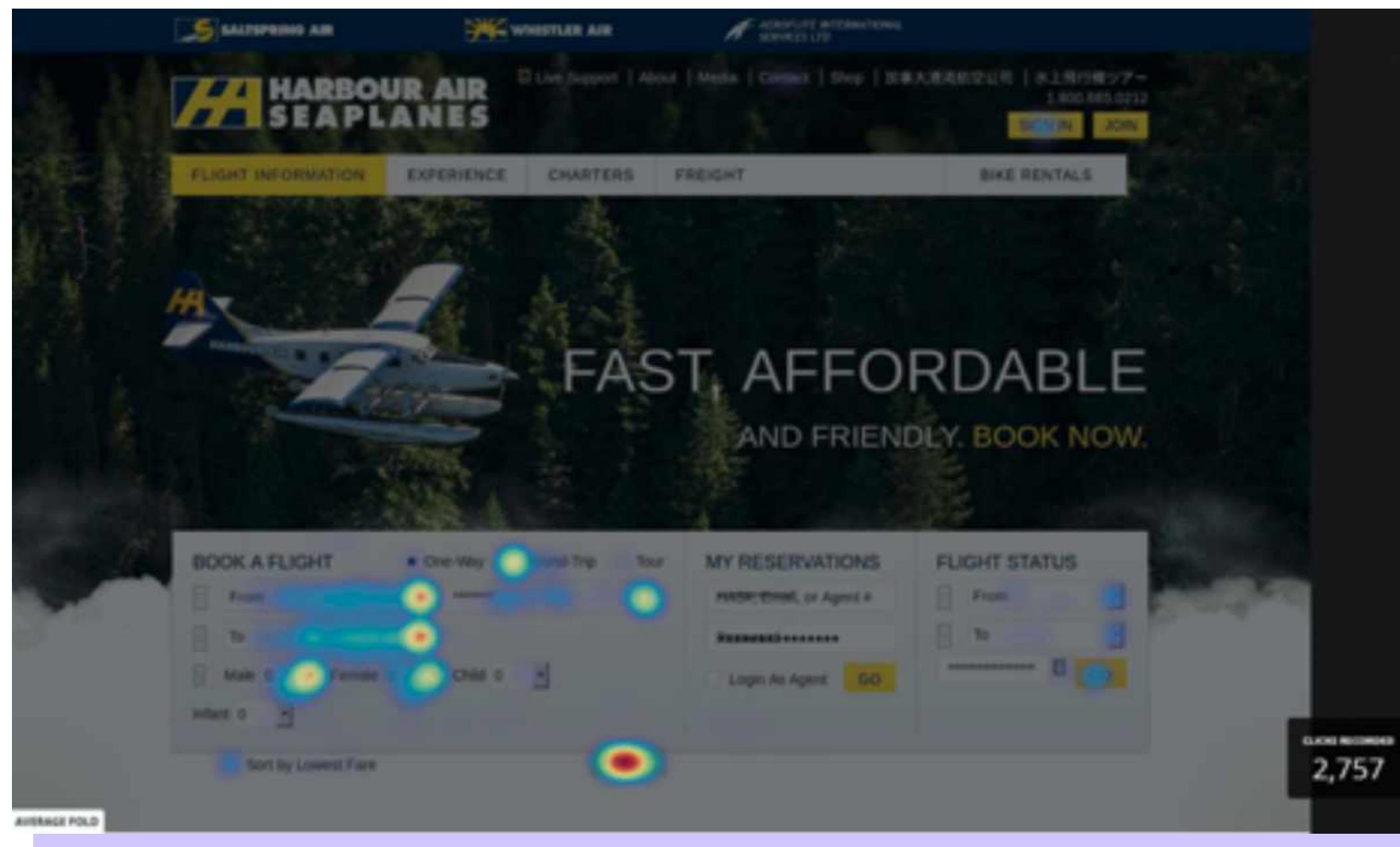


Homepage Updates 首页更新

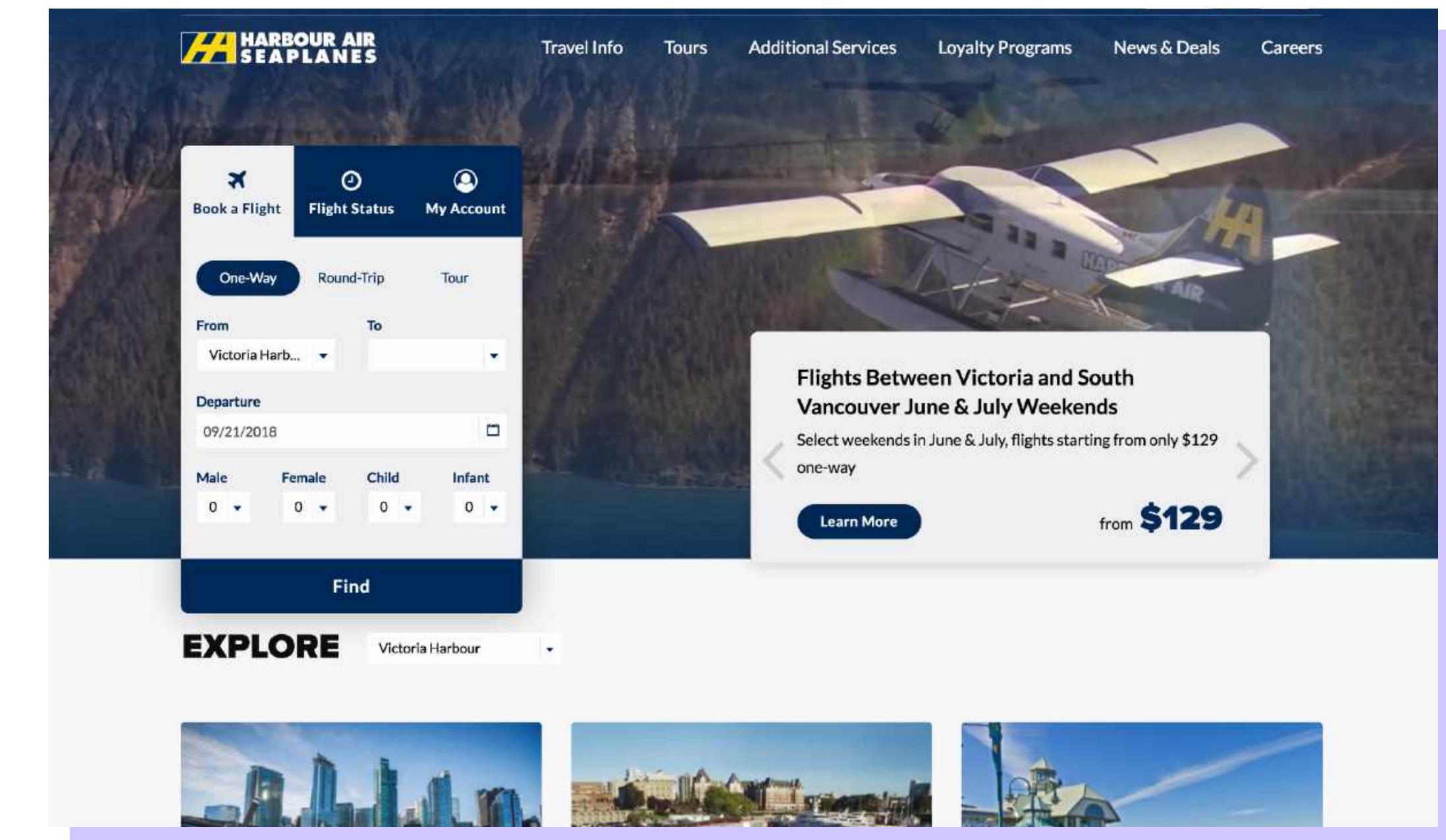
1. Move booking widget completely up the fold;
2. Add Promotion Banner and Explore sections.

将预订小部件完全向上移动，添加促销横幅和探索部分

Before



After



DESIGN DELIVERABLE HIGHLIGHTS 设计交付亮点

Design style guide

设计样式规范

4. UI COMPONENTS

Buttons

- Primary Button / On Light Background
- Primary Button / On Dark Background
- Secondary Button / On Dark Background
- Tertiary Button
- Segmented Buttons

Forms

- Text Field / On Gray Background
- Text Field / On White Background
- Dropdown Select / On Gray Background
- Checkbox

Tables

4. ICONS

System Icons

Third-party Icons

4. UI COMPONENTS

Forms

Tables

2. LOGO

Logo / On Light Background

Logo / On Dark Background

3. COLORS

Primary Color Palette

Shades of Gray

A selection of grayscale colors for background or text color use.

Secondary Color Palette

Logos

HARBOUR AIR SEAPLANES

DESIGN DELIVERABLE HIGHLIGHTS 设计交付亮点

Visual Design 视觉设计

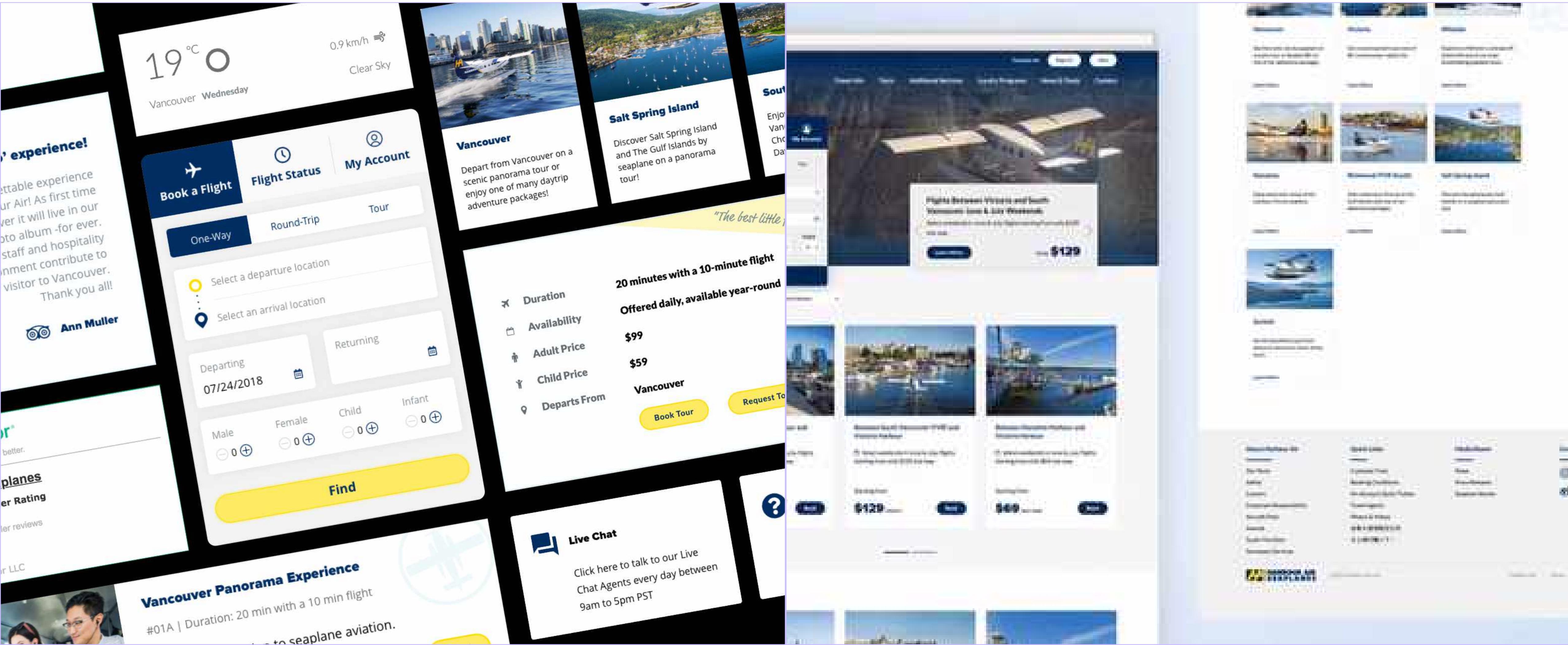


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设计反思

RESULTS 项目结果

The website was launched globally in early 2019. We have heard numerous positive feedback for the new website!

网站于 2019 于年初上线后，收到了许多对积极的反馈

“The Harbour Air facelift is great work! I use the website every month or two, and the old design was long overdue for an upgrade.”

“The new site is simple to navigate with lots of helpful content.”

“It's nice that they use a video to showcase the seaplane experience right on the homepage.”

Reflections

设计反思

1. Validate and iterate the revised designs with actual users;
与实际用户一起验证和迭代设计
2. Take accessibility into considerations;
考虑可访问性
3. Conduct post-launch evaluations:
 - a. Establish project success metrics (user engagement metrics) at the beginning of the project and use it for comparison once the website is launched.
进行发布后评估：在项目开始时建立项目成功指标，并在网站启动后使用它进行比较

SIDE PROJECTS 个人项目

I consider myself as a
full-stack designer

我认为自己是一个全栈设计师

HIGHLIGHTS 亮点

Prototyper 做原型

I'm into front-end development and trying new prototyping tools.

我喜欢前端开发并喜欢尝试新的原型工具



B

UX Research Design Process

Starts with asking yourself "what I don't know about my users and product"

How I approached my first UX Research ONLY Project at work



Beth Bell Invasive Plant Specialist

"I hate bad data. The way I view people collect the data doesn't matter to me."

ABOUT
Beth is an Invasive Plant Specialist working for the Ministry of Forests, Lands, Natural Resource Operations and Rural Development at the Government of British Columbia. She wants to manage invasive plants effectively and maintain transparency.

PERSONALITY

- 10+ years experience
- Office hours: 9-5 weekdays
- Very analytical
- Local invader specialist
- Appreciates humor

CHANNELS

- Invasive Plant Specialist
- Email
- Meetups

GOALS

- Manage Invasive Plant
- Monitor Invasive Plant

JOB RESPONSIBILITIES

- Participate Invasive Plants (annual planning in winter to decide what species to treat)
- Ministry of Forests, Lands, Natural Resource Operations and Rural Development (Invasive Plant Team)
- Manage and coordinate Invasive Plants contracts (executed through Government procurement process) or summer
- Verify and maintain Invasive Plants data input

PAIN POINTS

- Data Entry:** Batch uploading through the GIS Collector performs a lot of data duplication
- API:**
 - Due to the level of permissions, she will need to update data manually in the API every two months when there are annual change requests, like UTM / UTM change requests
 - Some software dependencies might be inconsistent
 - Often struggle with how to use the API. Her team will pull and data extracts manually to allow the data within constraints, then
 - API Plan/Design field comes a few tabs instead splitting on a single tab analysis after she clicks "View on map".

NEEDS

- In-depth quality of I**
 - The products she uses have clear documentation
- Effective data entry**
 - Have the tool where polling is
- Data analysis**
 - The dashboard provides real time data
 - Show the cost

Client: Ministry of Forests, Lands, Natural Resource Operations & Rural Development, Dec 2018 - Feb 2019
Role: UX Researcher
Activities: UX Plan Proposal, Interviews, Task Analysis, User Story Mapping

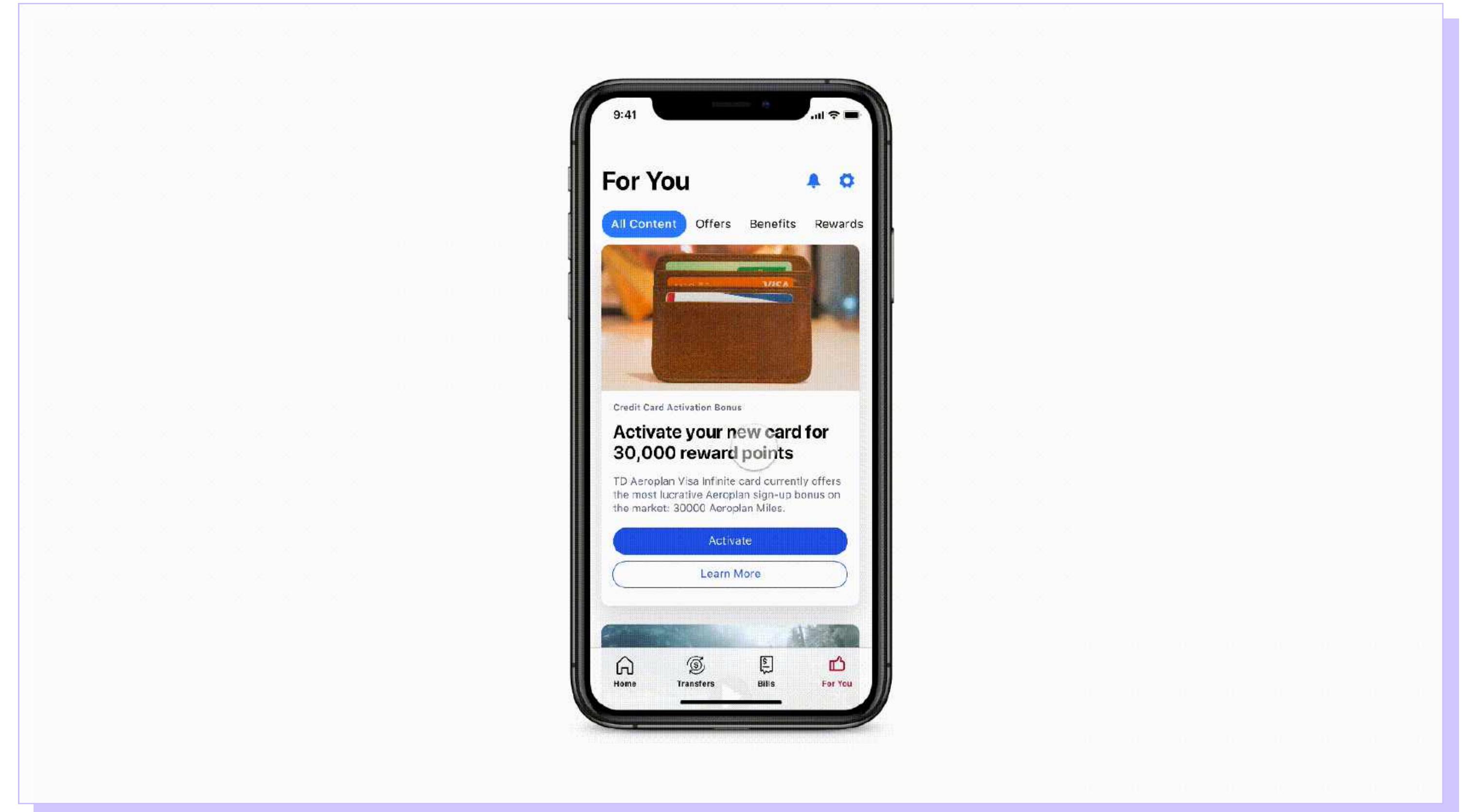
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HIGHLIGHTS 亮点

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I'm into front-end development and trying new prototyping tools.

我喜欢前端开发并喜欢尝试新的原型工具

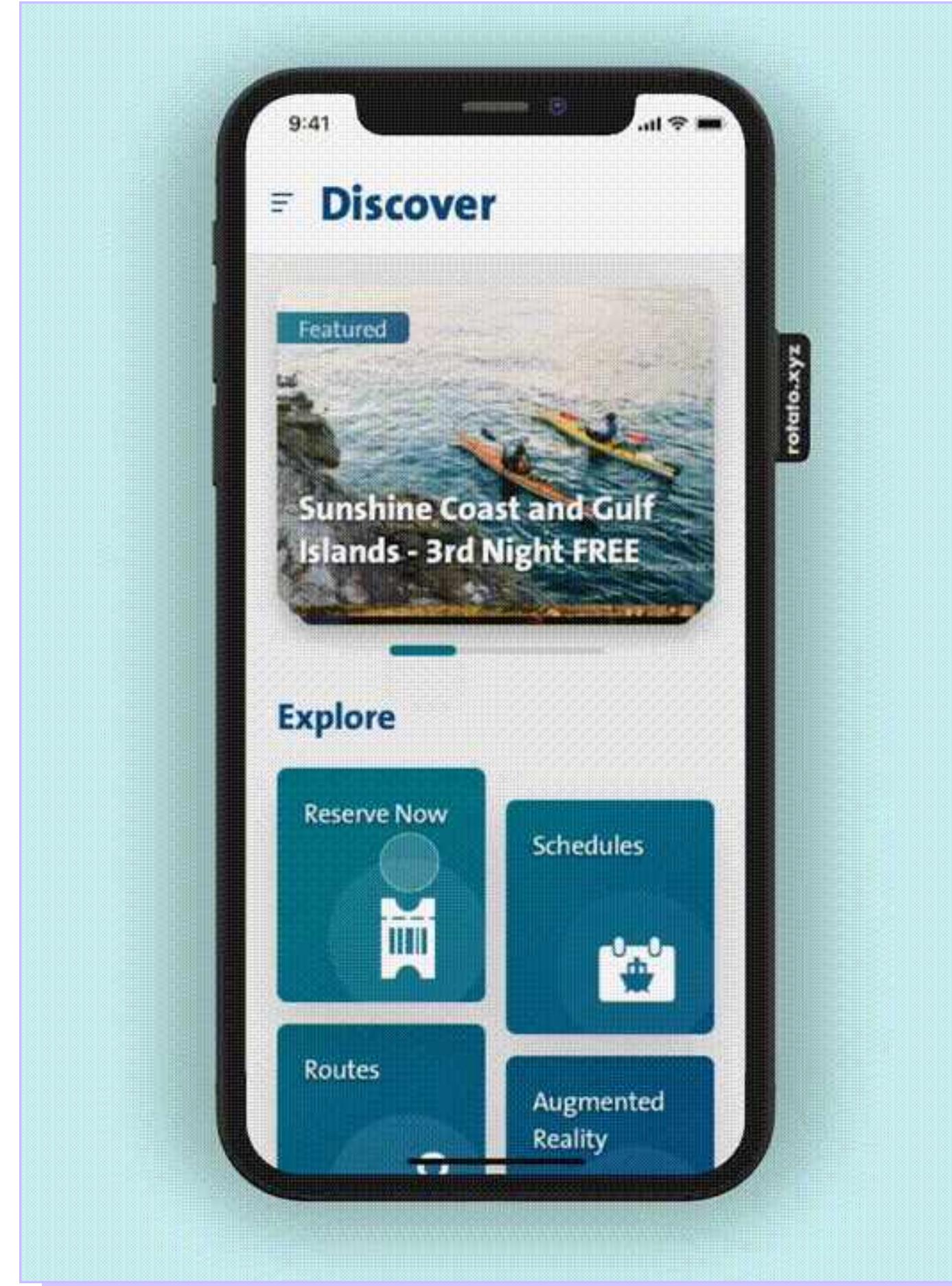


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HIGHLIGHTS 亮点

Design facilitation /operations 促进设计团队交流

I experiment tools and education to betterment design process.

- UserTesting 101
- Accessibility program

我喜欢尝试工具和教育来改进设计过程

- 用户测试
- 无障碍计划

What is UserTesting?

User testing tool to test ideas with target users.

- UserTesting is the human insight leader;
- The most complete solution for human insight;

Source: [2019 Design Tools Survey](#)

How does UserTesting work?

How it works

See, hear, and talk to your customers, remotely, as they engage with your products, apps, and messaging.

- 1. Target**
Target your audience on the diverse User Testing Panel or connect with your own users. Get feedback within hours.
- 2. Engage**
Get self-guided videos of your customers interacting with your prototype, website, or app—or conduct live interviews.
- 3. Discover**
Browse transcripts, tag themes and review metrics to uncover insights about almost any experience.
- 4. Share**
Build a shared understanding of your customers. Create highlight reels and share in your favorite collaboration tools.

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The what, who, why and how of "a11y"

P.S. "a11y" is Twitter shorthand for accessibility (there are 11 letters between the a and y).

- 1. What is digital accessibility?**
 - a. Why accessibility?
 - b. How does an accessible digital experience look like?
- 2. Understanding accessibility standards**
 - a. What is WCAG?
 - b. Conformance levels
 - c. Legal requirements
- 3. Creating accessible content**
 - a. Flybits accessibility designer checklist
- 4. Tools & testings**
 - a. Development tools
 - b. Design tools
- 5. References**

Flybits

Thank You!

谢谢！