UI/UX Workshop

INTRO TO USER EXPERIENCE DESIGN & RESEARCH

Meet Your Instructors

Anna Saraceno

Senior Interaction Designer
Salesforce Marketing Cloud

Sonali Shah

Lead UX Researcher
Salesforce Marketing Cloud

Meet Your Classmates

- Name
- What do you do? (Professionally and/or for fun!)
- Why are you here?
- Name something you think has a particularly good or bad user experience. It can be anything!
  - A site or app (Facebook, Craigslist, etc.)
  - A place (the BMV, Anthropologie, etc.)
  - A process (getting a passport, going through airport security, etc.)

What will we do in this workshop?

- Monday (10/24)
  - High-level overview of UX
  - How UX fits into product development
  - Design principles and evaluation criteria
  - Perform a heuristic evaluation of a web page
  - Start thinking about design recommendations
- Takeaways
  - Basic understanding of what UX is
  - Intro to heuristic evaluation method
  - Experience deriving design insights from heuristic evaluation
- Items
  - Completed heuristic evaluation

What will we do in this workshop?

- Wednesday (10/26)
  - Visualize design recommendations via sketching and paper prototyping
  - Introduce UX research
  - Learn basics for recruiting and interviewing
  - Write a script for testing your prototype
- Takeaways
  - Visualizing design ideas
  - Intro to creating interactive prototypes
  - Intro to basics of UX research
  - Experience in interview script-writing
- Items
  - Low Fidelity Prototype (Sketch)
  - Interview Script

What will we do in this workshop?

- Tuesday (11/1)
  - Conduct user interviews on your designs
  - Draw basic insights and propose design recommendations
  - Wrap up and share resources

- Takeaways
  - Experience in conducting interviews
  - Drawing insights from research findings
  - Translating research insights into design decisions
  - Focus on the value of iteration
  - Experience in explaining design rationale

- Items
  - Analysis Spreadsheet
  - Insights/Recommendations Doc

What WON'T we do in this workshop?

- Learn design tools (Photoshop, Illustrator, Sketch…)
- Gain experience in every research method
- Make high-fidelity interactive prototypes
- How to get a job in UX

WHAT IS UX ?

The goal of UX design in business is to “**improve customer satisfaction** and **loyalty** through the **utility**, **ease of use**, and **pleasure** provided in the **interaction with a product**.”

OXFORD JOURNAL INTERACTING WITH COMPUTERS

UX design is a commitment to building products **with the customer in mind**.

MARIEKE MCCLOSKEY,
DIRECTOR OF RESEARCH AT USERTESTING.com

It's **design with an awareness of every touchpoint** that makes up the **overall experience** with your product or service.

JOSHUA PORTER,
ROCKET INSIGHTS & BOKARDO

It’s a commitment to developing products and services with **purpose**, **compassion**, and **integrity**.

WHITNEY HESS,
EXPERIENCE DESIGN COACH

It’s the practice of **meeting people’s needs** before, during, and after product development.

ERIK LEVITCH,
UX CONSULTANT

UX design is about **delighting users** by **anticipating their needs** and **giving them something they didn't think to ask for**.

REED JONES,
USER RESEARCHER AT STUBHUB

What do all of these UX definitions have in common?

Successful UX...

Bases decisions on real user needs and desires.

Leaves users feeling successful and positive.

Requires a process for guiding decisions.

UX vs. UI

UX = User Experience

UI = User Interface

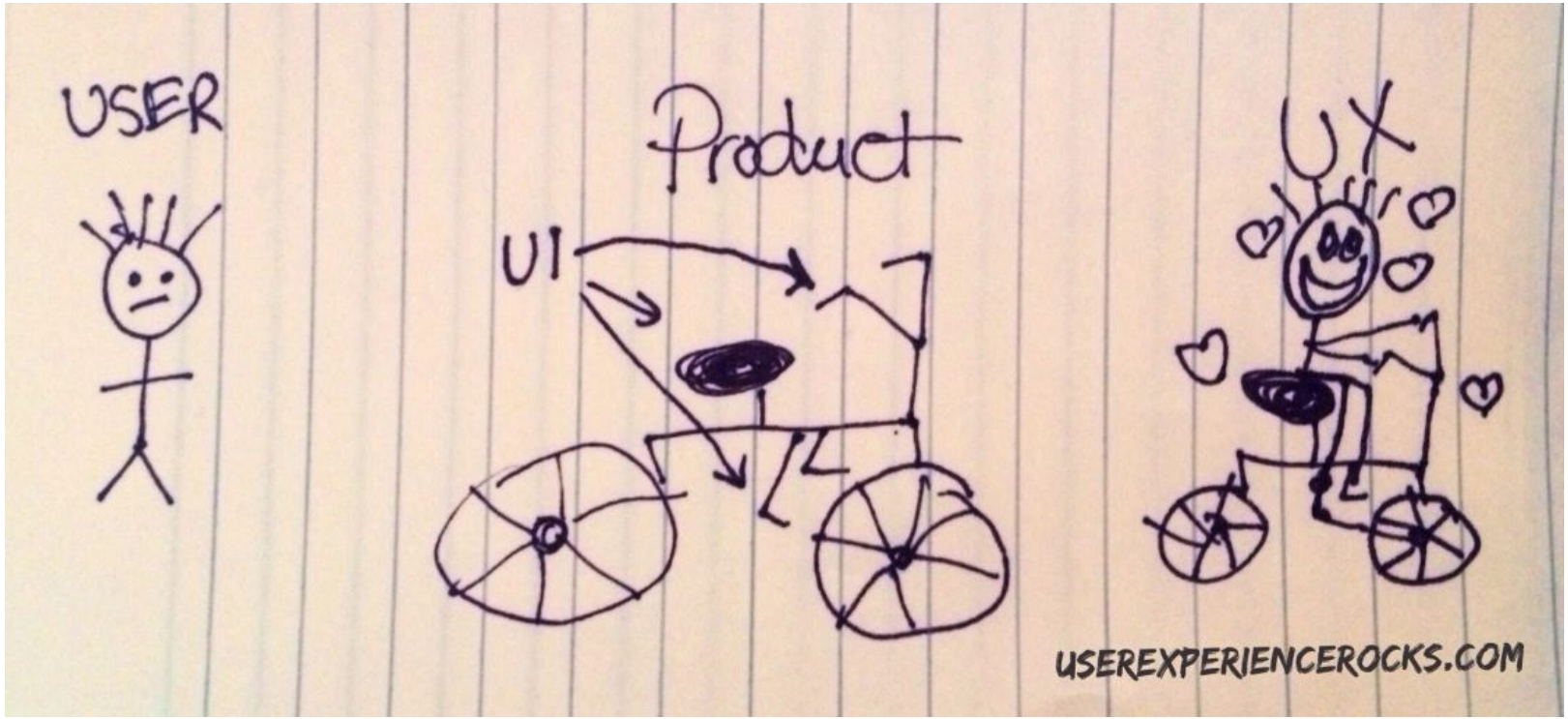
“User Experience (UX) and User Interface (UI) are some of the most confused and misused terms in our field.

A UI without UX is like a painter slapping paint onto canvas without thought.

UX without UI is like the frame of a sculpture with no paper mache on it.

A great product experience starts with UX followed by UI. Both are essential for the product’s success.”

RAHUL VARSHNEY,
CO-CREATOR OF FOSTER.FM



JENNIFER ALDRICH
@JMA245
HTTP://USEREXPERIENCEROCKS.COM

UI designer: “What color should the button be so the user will see it immediately?”

UX designer: “Do we even need this button in the first place?”

EMILY POTTS
CREATIVELIVE BLOG

HOW DOES UX FIT INTO PRODUCT DEVELOPMENT?

The “Holy Trinity” of Product Development:

Product Owner ★ Lead Developer ★ Lead UX Designer

The “Holy Trinity” of Product Development:

Product Owner ★ Lead Developer ★ Lead UX Designer

- Key project stakeholder
- Owns the vision and roadmap for a product
- Conveys vision to the team
- Responsible for strategic and tactical decisions

The “Holy Trinity” of Product Development:

Product Owner ★ **Lead Developer** ★ Lead UX Designer

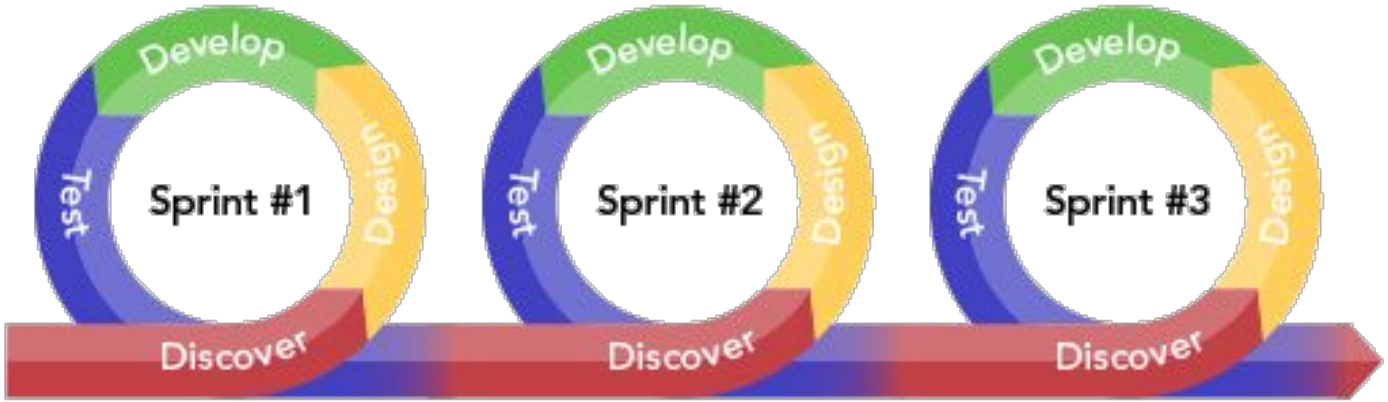
- Responsible for underlying architecture of product
- Own development plans and delegate dev work
- Bridge between dev team and PO

The “Holy Trinity” of Product Development:

Product Owner ★ Lead Developer ★ **Lead UX Designer**

- Responsible for helping define the “how” of PO’s vision
- Learn about and advocate for users throughout design and development
- Bridge between UX team and PO

Working in Cycles



Agile Method

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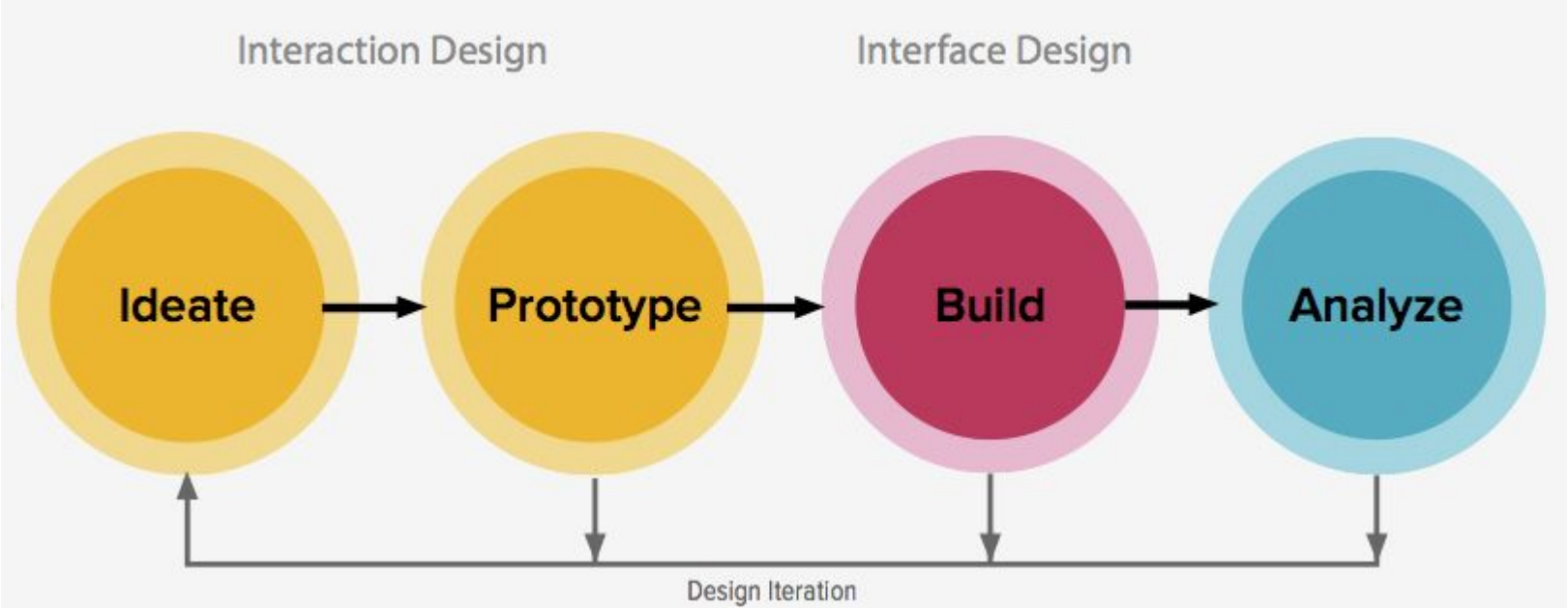
Iteration is key!



How do we evaluate if something has a good user experience?

- Self Evaluation (Heuristic)
  - PROS: Quick and simple. Doesn't require recruiting.
  - CONS: Doesn't take into consideration actual users. Doesn't help with understanding real use cases.

- User Research
  - PROS: User-centered! Make sure you understand the problem from the right point of view.
  - CONS: Recruiting can be difficult. Analysis can be time-consuming (but doesn't have to be!).
  - METHODS:
    Interviews, focus groups, observation, card sorting, contextual inquiry, surveys, etc.

Heuristic Evaluation

Think of heuristics like a **rule of thumb**, a **set of guidelines against which you can measure a design**, like a rubric. In a heuristic evaluation, the evaluator will look at the design being assessed and **document design elements, functions and flows that break with the heuristic set**. The purpose is for the evaluator to **uncover usability problems in a design**, which can then be fixed.

ARI WEISSMAN,
EFFECTIVE UI

Heuristic Evaluation Process

1. Choose a set of heuristics.
2. Use heuristics to identify UX issues.
3. Prioritize the issues according to severity.
4. Create design and/or research recommendations for each issue.

Heuristics

RULES
PRINCIPLES
GUIDELINES

Clarity

Efficiency

Consistency

Beauty

CLARITY

Eliminate ambiguity. Enable people to see, understand, and act with confidence.

SALESFORCE UX DESIGN PRINCIPLES

Think about clarity in context of:

- Presenting information
- Giving feedback
- Preventing & recovering from errors
- Primary and secondary actions

EFFICIENCY

Streamline and optimize workflows. Intelligently anticipate needs to help people work better, smarter, and faster

SALESFORCE UX DESIGN PRINCIPLES

Think about efficiency in context of:

- Navigation
- Task completion
- Finding information

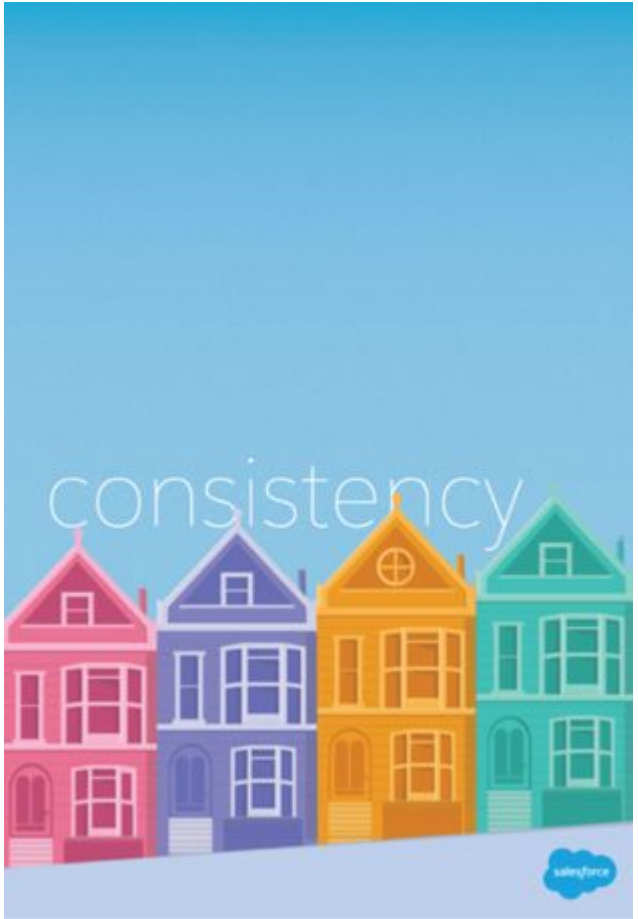
CONSISTENCY

Create familiarity and strengthen intuition by applying the same solution to the same problem.

SALESFORCE UX DESIGN PRINCIPLES

Think about consistency in context of:

- Workflows
- Iconography & visual style
- Terminology
- Menus
- Layouts & hierarchy



BEAUTY

Demonstrate respect for people's time and attention through thoughtful and elegant craftsmanship.

SALESFORCE UX DESIGN PRINCIPLES

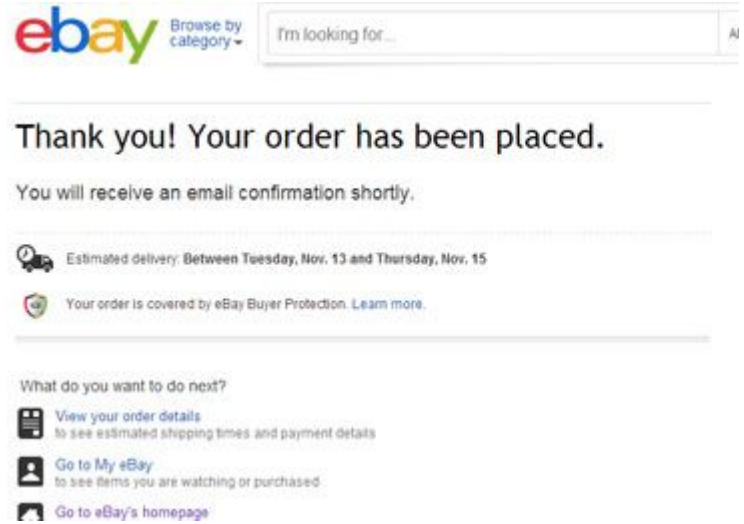
Think about beauty in context of:

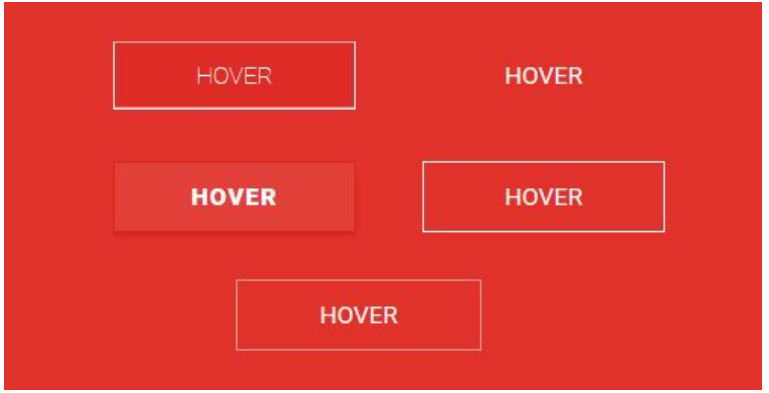
- Color
- Typography
- Layout
- Space
- Emotion

OFFER INFORMATIVE FEEDBACK

For every user action, there should be system feedback. For frequent and minor actions, the response can be modest, whereas for infrequent and major actions, the response should be more substantial. Visual presentation of the objects of interest provides a convenient environment for showing changes explicitly.

BEN SHNEIDERMAN
THE 8 GOLDEN RULES OF INTERFACE DESIGN

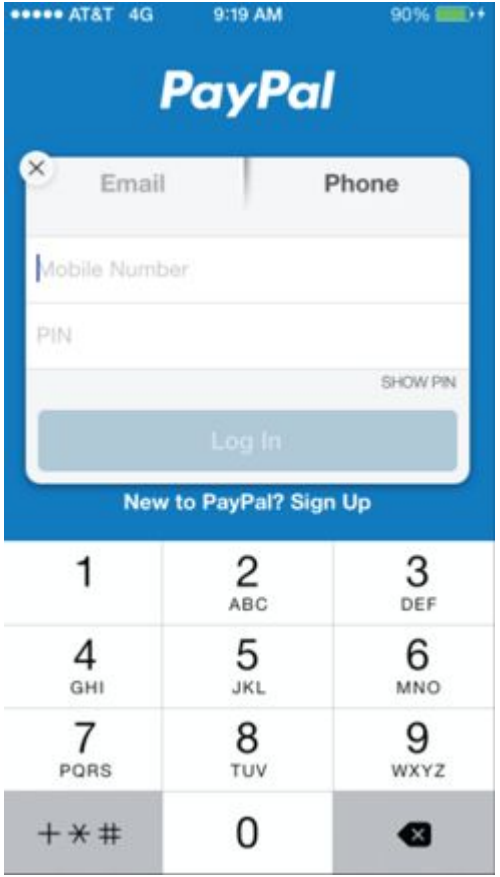




PREVENT ERRORS

As much as possible, design the system such that users cannot make serious errors; for example, gray out menu items that are not appropriate and do not allow alphabetic characters in numeric entry fields. If a user makes an error, the interface should detect the error and offer simple, constructive, and specific instructions for recovery. For example, users should not have to retype an entire name-address form if they enter an invalid zip code, but rather should be guided to repair only the faulty part. Erroneous actions should leave the system state unchanged, or the interface should give instructions about restoring the state.

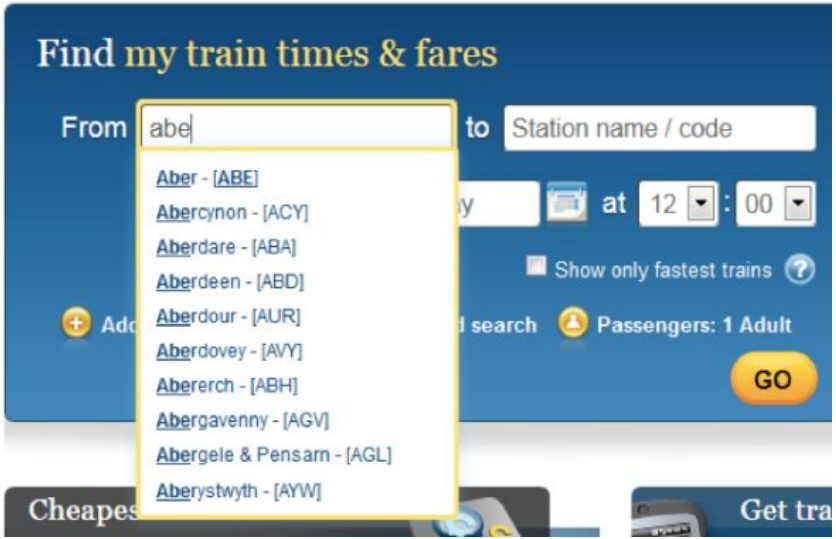
BEN SHNEIDERMAN
THE 8 GOLDEN RULES OF INTERFACE DESIGN



RECOGNITION OVER RECALL

Minimize the user's memory load by making objects, actions, and options visible. The user should not have to remember information from one part of the dialogue to another. Instructions for use of the system should be visible or easily retrievable whenever appropriate.

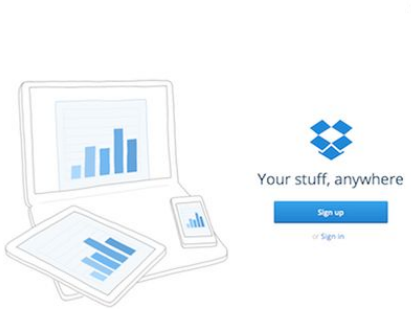
JAKOB NIELSEN
10 USABILITY HEURISTICS



AESTHETIC AND MINIMALIST DESIGN

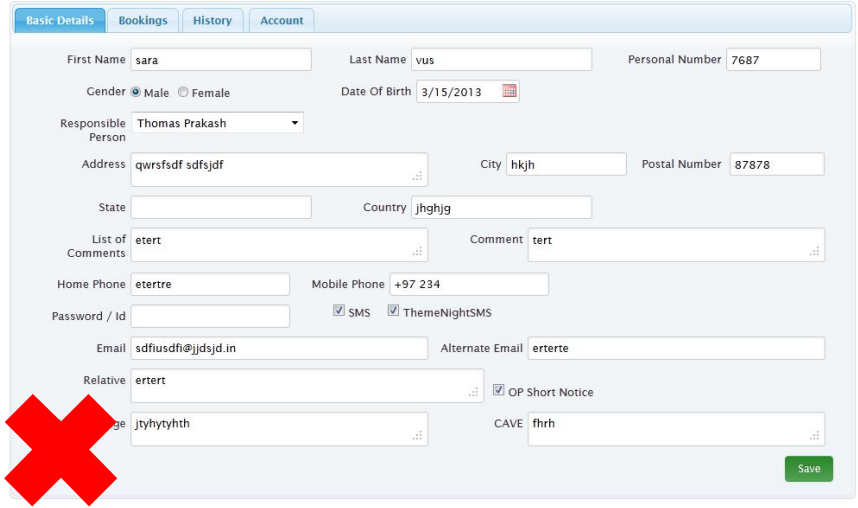
Dialogues should not contain information which is irrelevant or rarely needed. Every extra unit of information in a dialogue competes with the relevant units of information and diminishes their relative visibility.

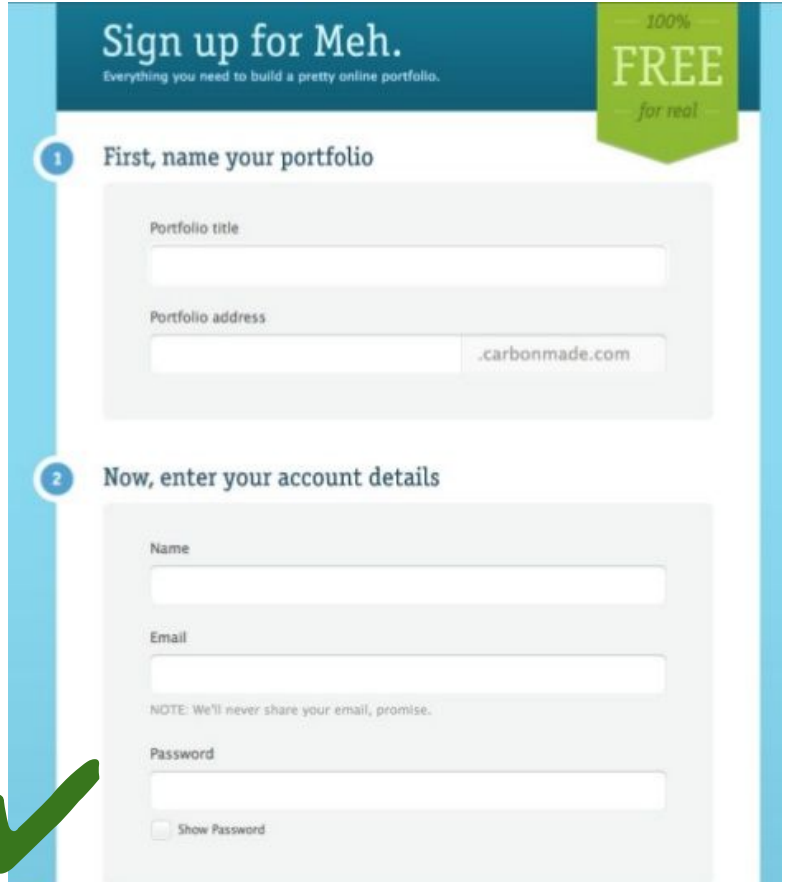
JAKOB NIELSEN
10 USABILITY HEURISTICS



MAKE FUNCTIONAL FORMS

- Clearly validate user input.
- Use a top-down layout and make sure fields are in sequential order.
- Align labels above fields for easier readability.
- Make sure error messages are clear.





SALESFORCE LIGHTNING DESIGN PRINCIPLES	JAKOB NIELSEN'S 10 HEURISTICS	SHNEIDERMAN'S 8 GOLDEN RULES	DIETER RAMS'S 10 PRINCIPLES
Clarity Eliminate ambiguity. Enable people to see, understand, and act with confidence.	1. Visibility of system status 2. Match between system and real world 3. User control and freedom 4. Help and documentation	1. Feedback 2. Design dialog to yield closure	1. Good design makes a product understandable 2. Good design is honest 3. Good design makes a product useful
Efficiency Streamline and optimize workflows. Intelligently anticipate needs to help people work better, smarter, and faster.	5. Error prevention 6. Recognition rather than recall 7. Flexibility and efficiency of use 8. Help users recognize, diagnose, and recover from errors	3. Shortcuts 4. Simple error handling 5. Reversible actions 6. Put user in control 7. Reduce short-term memory load	4. Good design is unobtrusive 5. Good design is long-lasting 6. Good design is environmentally-friendly
Consistency Create familiarity and strengthen intuition by applying the same solution to the same problem.	9. Consistency and standards	8. Consistency	7. Good design is thorough down to the last detail 8. Good design is innovative
Beauty Demonstrate respect for people's time and attention through thoughtful and elegant craftsmanship.	10. Aesthetic and minimalist design		9. Good design is aesthetic 10. Good design is as little design as possible

Let’s look at an example...

Efficiency

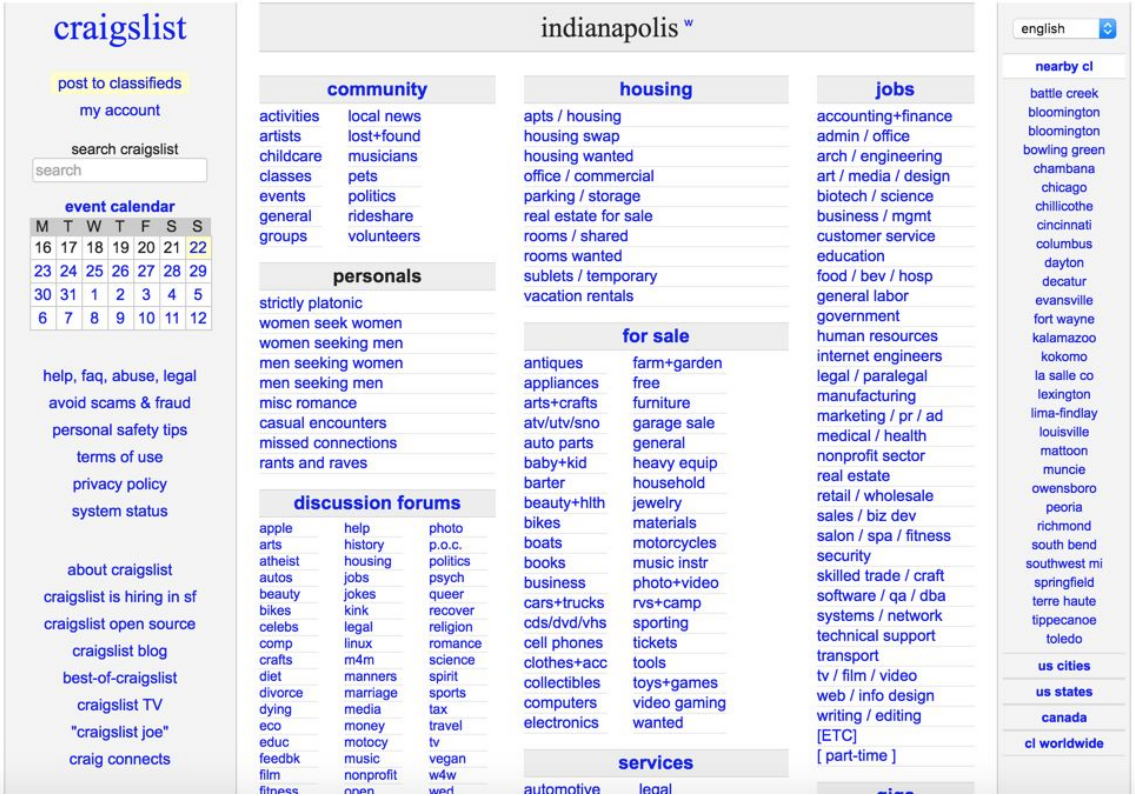
Search isn't prominent, and it can be difficult to find/navigate around different areas.

Offer informative feedback

It's unclear how many postings are in each section.

Aesthetic and Minimalist Design

Many rows and columns of text. Most text and links are styled the same so everything blends together.



Efficiency

Search isn't prominent, and it can be difficult to find/navigate around different areas.

Make search more prominent. Decrease the number of options on the main page.

Offer informative feedback

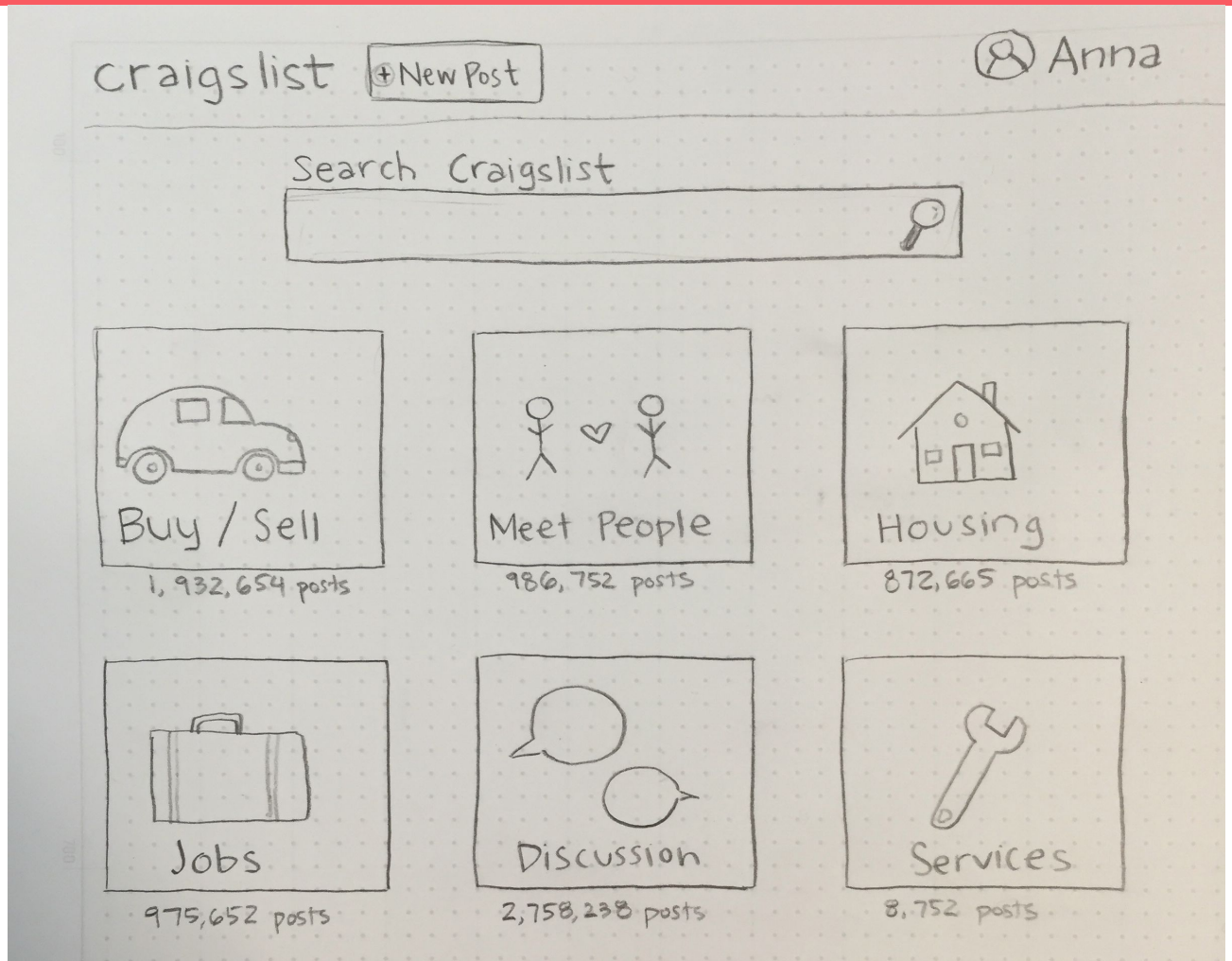
It's unclear how many postings are in each section.

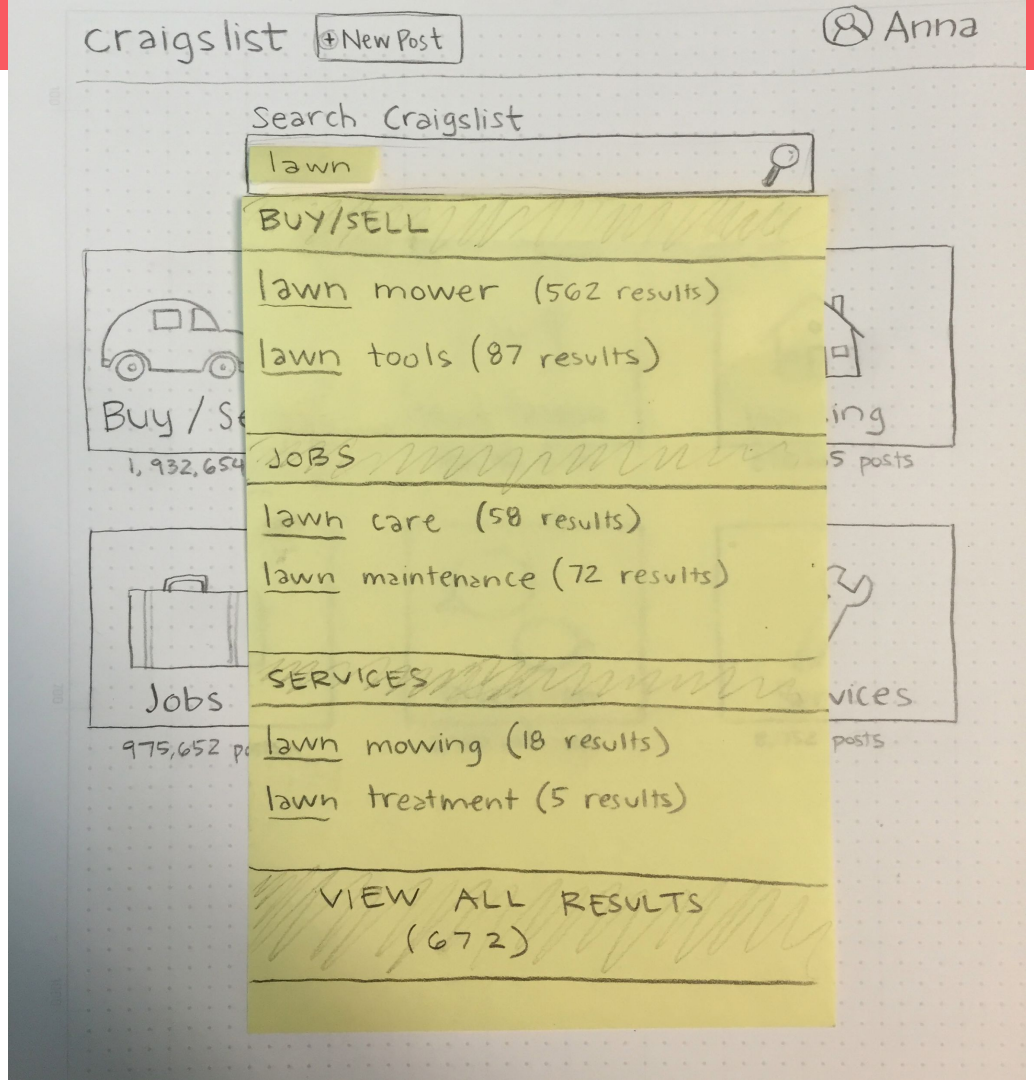
Show how many postings to expect in each area or search results. Implement a type-ahead search.

Aesthetic and Minimalist Design

Many rows and columns of text. Most text and links are styled the same so everything blends together.

Decrease the amount of text and links on the main page. Vary styles to emphasize the most important/common tasks. Evaluate information hierarchy


craigslist
+ New Post
Anna
Search Craigslist
Buy / Sell
1,932,654 posts
Meet People
986,752 posts
Housing
872,665 posts
Jobs
975,652 posts
Discussion
2,758,238 posts
Services
8,752 posts


craigslist
+ New Post
Anna
Search Craigslist
lawn
BUY/SELL
lawn mower (562 results)
lawn tools (87 results)
JOBS
lawn care (58 results)
lawn maintenance (72 results)
SERVICES
lawn mowing (18 results)
lawn treatment (5 results)
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Heuristic Evaluation Activity

In teams of 2, choose 3-4 heuristics to evaluate your assigned web page.

1. **Interact with the page.**
   Read through content. Fill out and submit forms in different ways (leave some fields blank, try different types of data, etc.). View the page in different browser widths, etc.
2. **Choose 3-4 heuristics.**
3. **Evaluate the page using chosen heuristics.**
4. **Make recommendations based on heuristic evaluation.**

A

http://gdi-conf.herokuapp.com/signup1/

B

http://gdi-conf.herokuapp.com/signup2/

Heuristics

Clarity

Efficiency

Consistency

Beauty

Offer informative feedback

Prevent errors

Recognition over recall

Aesthetic and minimalist design

Make functional forms