

### 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 WHAT IS ?

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

UI/UX Workshop

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 UI/UX Workshop

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.

# VS.

UX = User ExperienceUI = User Interface

#### **UI/UX Workshop**

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

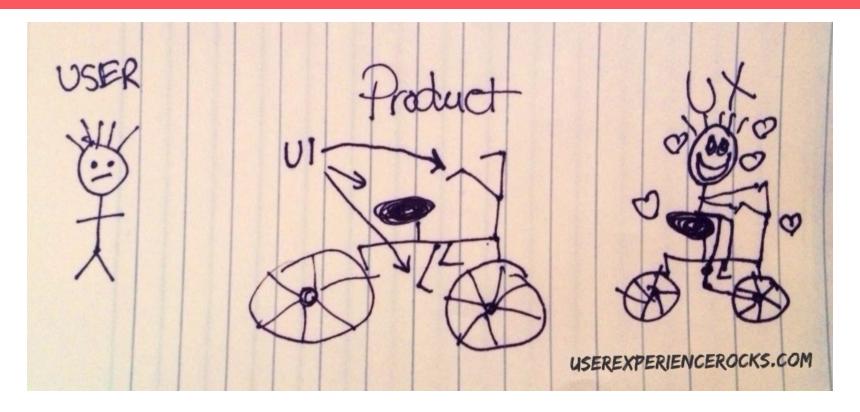
A UI without UX is like a painter slapping paint onto canvas without thought.

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

#### UI/UX Workshop



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?** 

Product Owner \* Lead Developer \* Lead UX Designer

**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

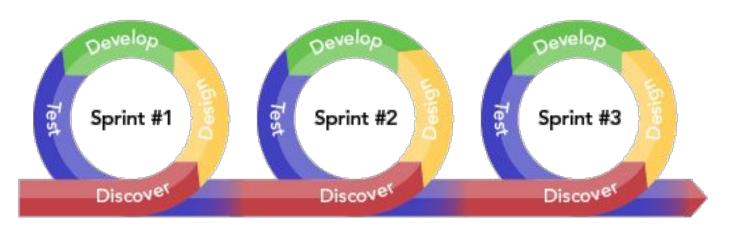
Product Owner ★ Lead Developer ★ Lead UX Designer

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

Product Owner ★ Lead Developer ★ Lead UX Designer

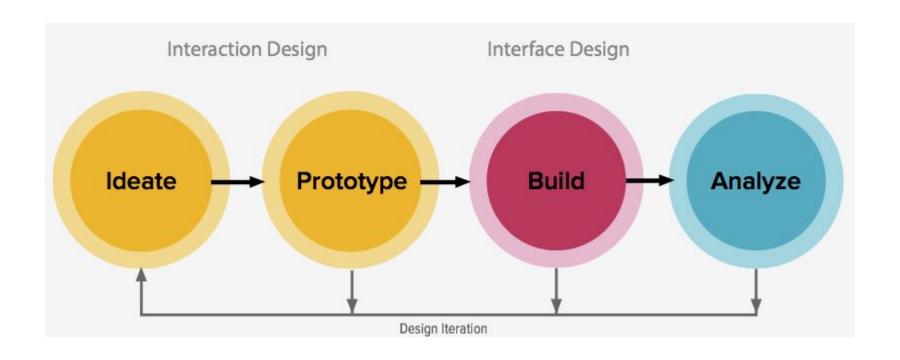
- Responsible for helping define the "how" of PO's vision
- Learn about and advocate for users throughout design and development
- Bridge between UX team and PO

#### Working in Cycles



Agile Method

#### 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** 

#### UI/UX Workshop

#### **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:

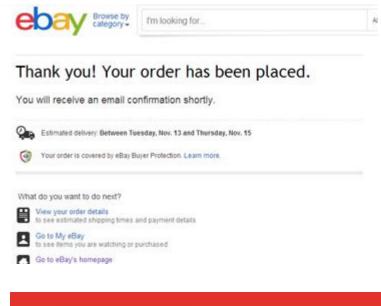
- Color
- Typography
- Layout
- Space
- Emotion



## 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

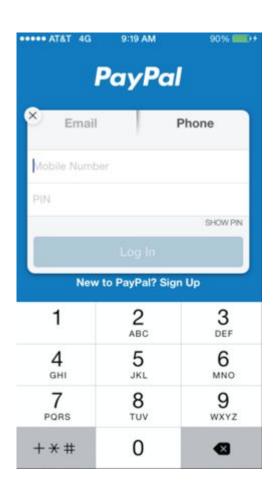




# PREVENT ERRORS

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.

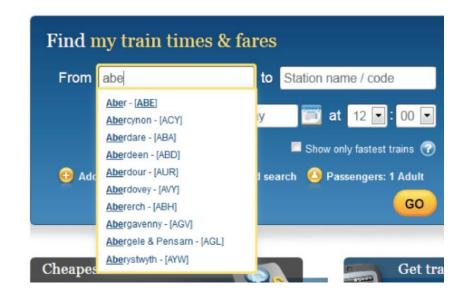
BEN SHNEIDERMAN
THE 8 GOLDEN RULES OF INTERFACE DESIGN



# 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

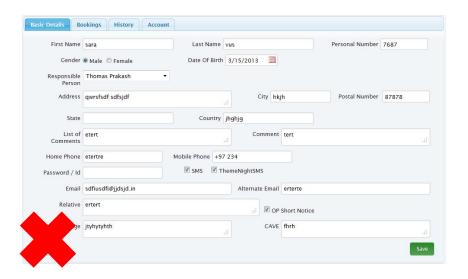


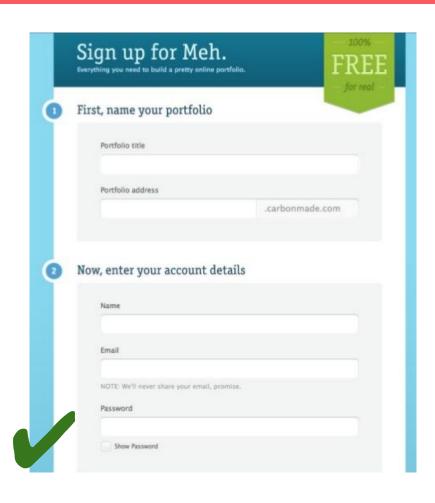
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# MAKE FUNCTIONAL FORMS

- 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.





SALESFO	RCE	LIGHT	NING
DESIGN	PRIN	CIPLE	S

#### 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.

#### Efficiency

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

#### Consistency

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

#### Beauty

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

- 1. Visibility of system status
- 2. Match between system and real world
- 3. User control and freedom
- 4. Help and documentation
- 5. Error prevention
- 6. Recognition rather than recall
- 7. Flexibility and efficiency of use
- Help users recognize, diagnose, and recover from errors
- 9. Consistency and standards

10. Aesthetic and minimalist design

- 1. Feedback
- 2. Design dialog to yield closure
- 3. Shortcuts
- 4. Simple error handling
- 5. Reversible actions
- 6. Put user in control
- 7. Reduce short-term memory load
- 8. Consistency

- Good design makes a product understandable
- 2. Good design is honest
- 3. Good design makes a product useful
- 4. Good design is unobtrusive
- Good design is long-lasting
- Good design is environmentallyfriendly
- Good design is thorough down to the last detail
- 8. Good design is innovative
- 9. Good design is aesthetic
- 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

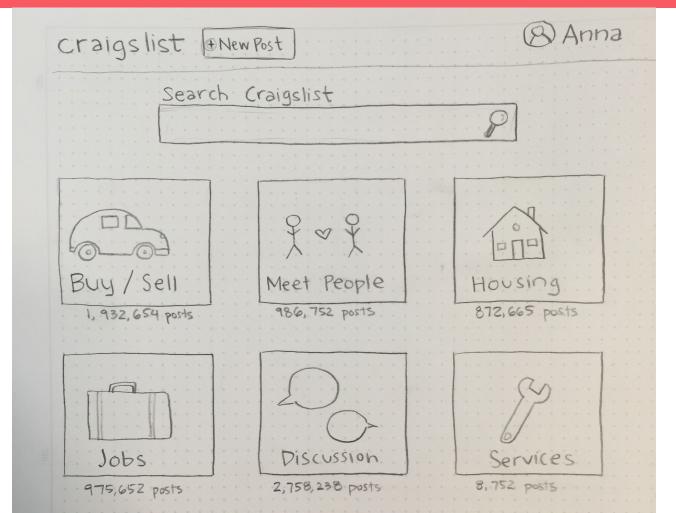
It's unclear how many postings are in each section.

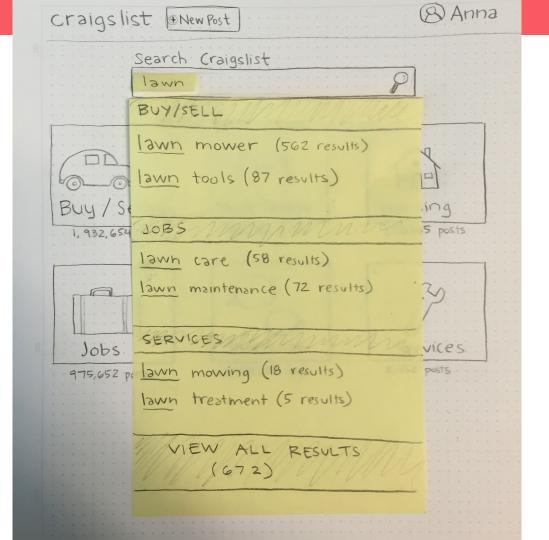
Show how many postings to expect in each area or search results. Implement a type-ahead search.

#### 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





# **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.





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





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

Day

# 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

# **Sketching & Paper Prototyping**

# **Introducing User Research**

Walkthroughs

**Interviews** 

Contextual Inquiries

**Experiments** 



A couple of references:

https://www.nngroup.com/articles/which-ux-research-methods/ http://uxmastery.com/resources/techniques/ Participatory
Design
Sessions

Focus Groups

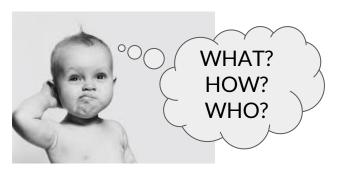
Guerrilla Research

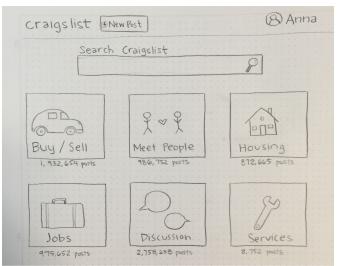
Eye-tracking studies

# User Interviews Process

- 1. Think about your research aim/goal and questions along with who you need to interview.
- 2. Prepare tasks and questions.
- 3. Conduct interview and record results.
- 4. Collate results and analyze.
- 5. Present insights and recommendations.

#### Think about the research...





# What are you researching?

Goal, scope and focus

"Assess the search feature and how effectively search results and category links are being presented"

## How are you researching it?

Length of time

"10min sessions"

• In person, over the phone

"In person quick interviews"

## Who are you researching?

 Representative or General (aka Anyone)

"Users of Craigslist"









Spend 5 minutes thinking about the following for your sketch...

What are you researching?

Goal, scope and focus

How are you researching it?

- Length of time
- In person or over the phone

Who are you researching?

- Representative (aka actual users of the system)
- General (aka anyone)

# 2. Prepare tasks and questions



#### Collaborate and Review

• Stakeholders - "Users, Leadership, Designers"

#### Look at your design/app

Fidelity of design, real system...

#### "Paper Prototype"

Understand it and use it yourself

#### "Manipulation of post-its....etc"

• Determine a flow (if relevant)

"Search feature"

#### 2. Prepare tasks and questions



#### **Prepping Questions**

- Note time frame: 7mins!
- Open, unbiased questions

"Do you like the button" □

"What do you think of the button" ✓

- Structure Questions (poss through a task if relevant)
  - Intro: about their user behavior/history
  - Middle: question features and functions. Explore expectations and if they're matched or not.
  - o End: Any further feedback and

Thank you

### 2. Prepare tasks and questions

### Introduction

Q1: How often do you use Craigslist?"

Q2: What do you use it for?"

# Task 1: Search for a 2 bed rental house in Broad Ripple, Indy"

Q3: What are your immediate impressions of the screen? (What strikes you about it? Calls to action?)

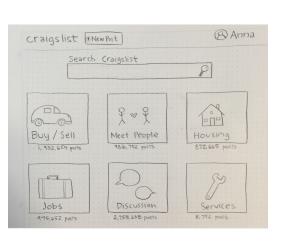
Q4: Before starting the search, how would you expect to do it on this screen?"
Q5: Having now done it, what do you think of what happened?"

#### Closing:

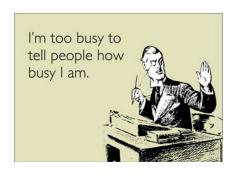
Q6: Do you have any further feedback?

Q7: Would you be interested in participating in future sessions like this?

#### Thank you







Let's spend 7 minutes writing out the following:

Describe who the collaborators are or would be in your research effort and reasons?

(i.e. Stakeholders, designers, managers etc)

Provide reasons for the design/app you will be exploring.

(i.e. sketches or initial designs as you're starting the research, or live app to evaluate what is being used?)

#### **Prep Questions**

- Intro: a couple of questions about their user behavior/history
- Middle: questions about features and functions of a given screen. Ask what they expect to see before revealing the next screen. Then after seeing the screen ask if its what they had expected...
- End: a couple of questions maybe rating the general experience with the sketch/design/app and any final feedback. Then say "thank you":-)

Day

5

# What will we do in this workshop?

- Tuesday (11/1)
  - Conduct user interviews on your designs
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  - 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

#### 3. Conduct interview and record results...



Introduce yourself and that you're going through a set of questions to explore a prototype/design/app...

- Friendly, professional tone
- Testing the app/not them there are no wrong answers
- Ask permission to record
- Mention ok to ask questions
- Assign a notetaker

During interview, ask every participant the same core questions

- Keep to your structure
- Understand terms and language don't try to correct them
- If no answer/opinion leave it blank
- Don't rush questions count up to 5 to catch any follow up thoughts
- Listen/note questions asked of you
- Be aware of your own biases and expectations





#### Let's get cracking... [7mins]:

- Begin your interview following the points introduced to you.
  - Introduce yourself, purpose of session
  - Ask for permission to record
  - Explain that there are no wrong answers just looking for feedback
  - After getting permission, hit your record audio button
- Take notes of the answers paper/pen or online apps like audio-note, textpad or enter in directly into a prepped spreadsheet (see next topic)

#### 4. Collate results and analyze.

Copy over your findings to one document in which you can overview the results easily - Google sheets for instance...

- Participants = rows
- Questions = columns

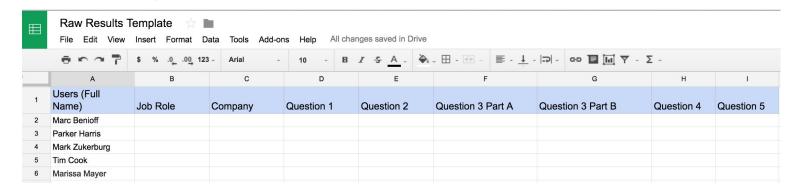
Look over your results to find trends and commonalities and interesting differences.

You could color code cells
 "Negative/Hesitance/Reluctance": Red;
 "Unsure": Yellow; "Positive": Green

... and include other colors representing other interesting finds....

Compare the findings against the heuristics (that you were introduced to)

 Write out what needs to be done to address each usability issue i.e. a recommendation. For example, unable to see the text. Rec: present text upon clear background...



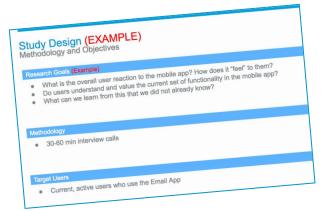


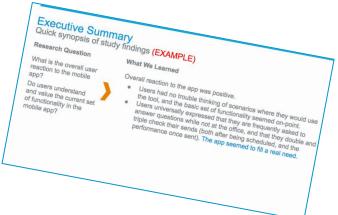
#### Take 5 minutes to look at your results

- Look to see if you have any....
  - o positive □ 🗸 (Green)
  - o negative □ **\*** (Red)
  - o unsure answers/comments □ ? (Yellow)
- Do you have any patterns or similarities across your results
  - Repetition of comments/preferences i.e. iphone versus Android

	Before doing this task, where would you expect to find the email?	Go ahead and do the task. What do you think about where it has been saved? [might state that they would sorol down, use the search or navigate through the folder structure]		What about the benefits that this now provides by allowing y to search and organize content into folders regardless of typ (images, docs, content, emails and templates now can live together)?
ol)	Uhm first of all I would have created some follows to delimite believer all content, content at on the high Contourly scribling down and being all the licition in hys. modified is to give infocusely or added so I can make date relevant. Type - shortfly type first them modify Scribled down and see it altest. The very sting I would say there nothing I maily have to look at the last - as their something to differential companyly in delinguish integrate, which impage.	There hand that ging its all centers a sille confany, having all that content in one age! I have to be able to see what I'm neeligating to. Innex if I close not content to be not able to the to the content to a hard the content to a hard to replace to a hard to replace to 5 demands. Like when you go into anal, here the last template, but email a Moujor tall template to the content to the conte	on yearh definitely hundle - how record - is there a way to make that a semaless translation. Shriking about the massive translation there, don't know a great way to do this, don't know what	The Polis Projet - its always been accorded content with one single cornering or or the foliage of the Polis Projet in ordinary and to see don't join to inacquite all other Salanes and the bandes subsequite recogniting sites, people have all of content over - magnite everythm over - polishers produktions.
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			The same would be paid to an interfer pressibler - we could be four. The would be a long in it, it would be a long in it. It would be a long in it is would be a long in it is would be a long in it. It would be a long in it is worth in it worth	
	I have no idea? I would probably go to classic content first just to make sure. Actually I'd chick the modified date then she scrolled down and she found it.	ulm: just assumed made with content builder so its a newer pieve. I don't know - CC is kinds odd that it includes email template and images. It feels that it droub be separated based on other programs - you upload separate and build template elsewhere. Good if separate follows and femplates.	The issue would be, in our monthly newsletter we probably include like 5 photos, so this would be a very long list of photos. It would be really hard to sortisoral through to find what we need it would simplify if it was divided up especially if I don't know exactly what I was searching for.	
ney (Slop-Hunger now)	I have no idea I would probably go to the Classic Content first just make sure Actually I would probably their. the dates.	Images in different folders. Starting to scrall down in the new tool.	refolder take time? No I think all of our content is in all content right now, and I think that's our problem, we didn't know there were folders available. Usually tim not uploading content in this view I am working on an email and uploading media as I'm building it issues in the past of renaming and editing the sizes from that view.	No. not right now
	Content CAnves and also in classic content. I would expect in in the	Filter down to ernet. His to point our delogue - thesis why thought it was from to begin to with. Expicited to find it in the allocations. Dialogue: it was dear this probably why thought it was there even thought it was the allocation of the action of the control of the contr	On buy passe don't do file. We have a hand's of botten - level of one to the revert to insecting newtyleng, and we have allowed before. You did not be the revert to insecting newtyleng, and we have active to distinct. A world in the contraction of the contract	That is great. We can search for something by name its great. It would be feater or

#### 5. Present Insights and Recommendations.





#### Present using Google Slides

- Research Aim/Goal
- Methodology (what was done)
- Target Audience
- Executive Summary

#### You can also add additional slides

- Key Insights
- Recommendations
- Other interesting, key observations...





Let's present back some findings...

- Each team should
  - document 1 key insight and
  - create 1 design recommendation based on the insight.
  - We will go around and have each team share an insight.
- When you present, be open to questions and potential discussion...

# YAY - We did it!



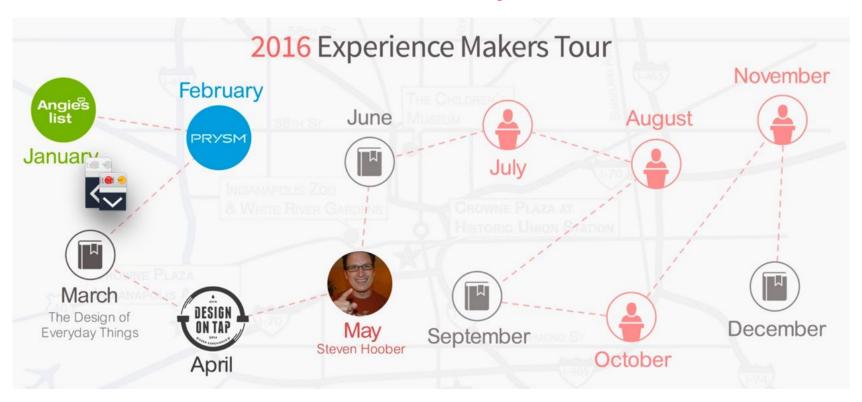
A couple of more points...

- You might conduct the interview over the phone or over an online meeting app. If so,
  - Test your online-meeting link and run through a trial of your session
  - Speak clearly and at a comfortable pace (i.e. not too fast)
  - Describe the structure of the session etc...
  - Record your session so you can go back and reflect

Now....



# Want more UX fun? Join Experience Makers!



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