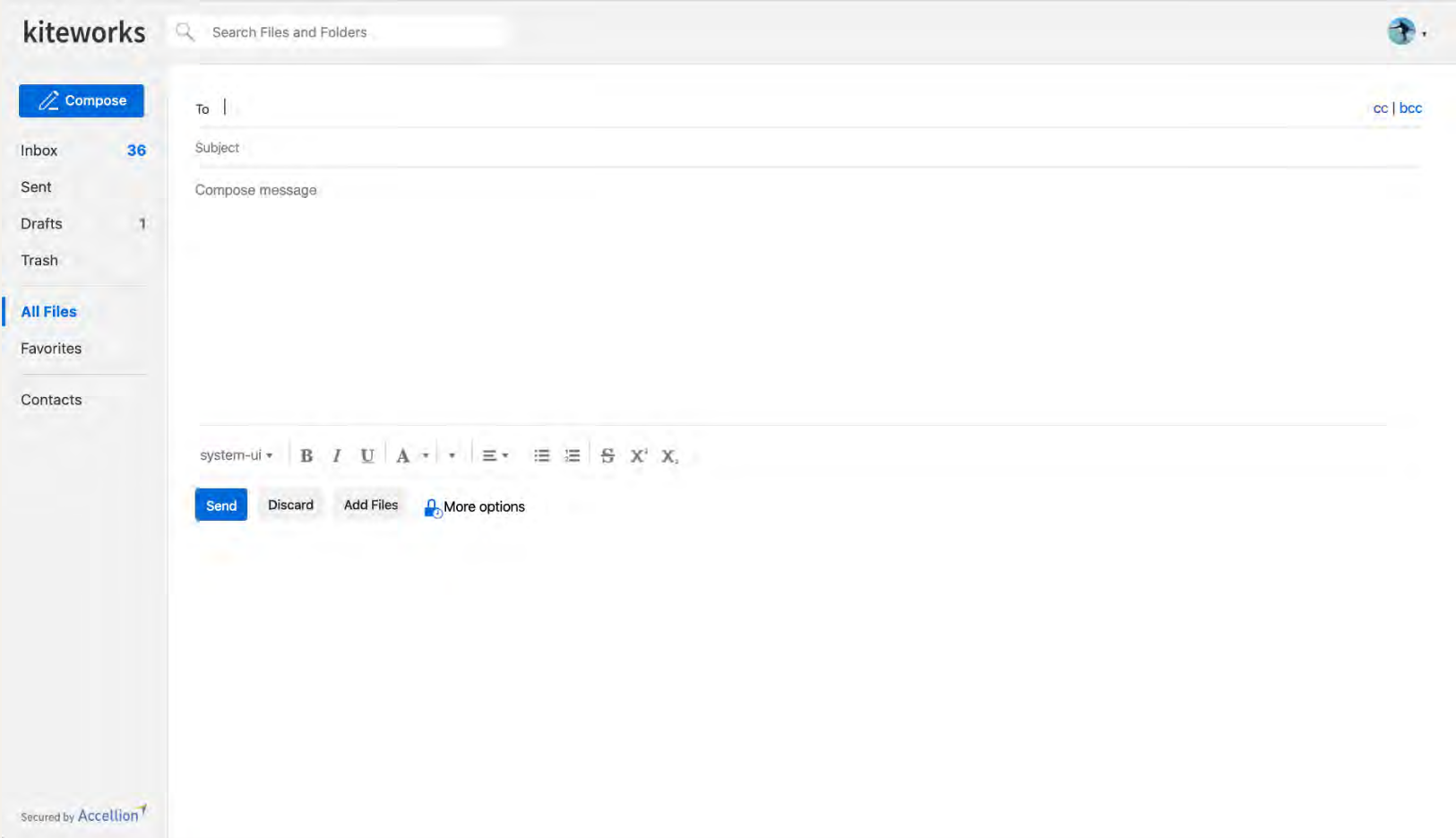
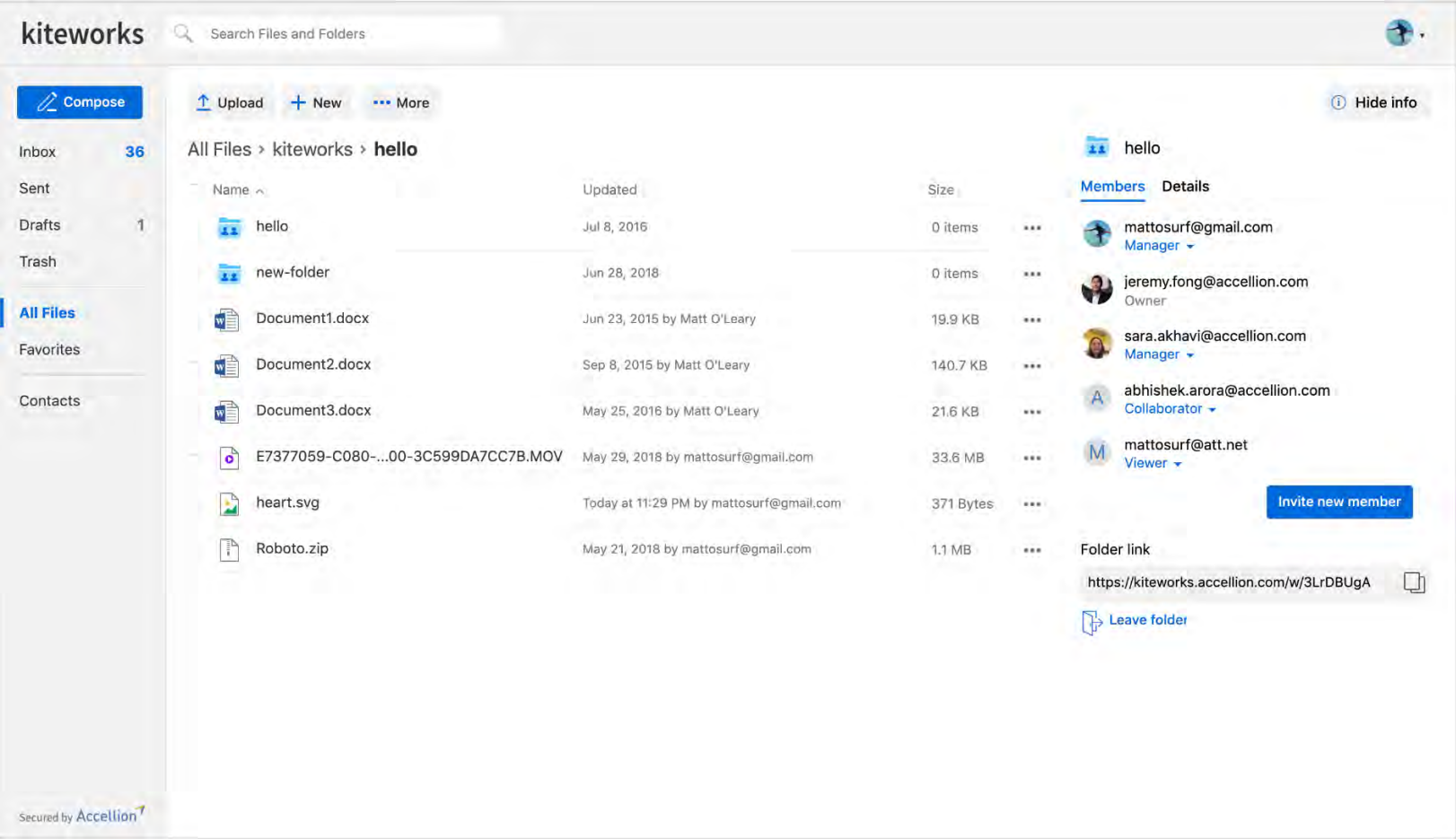


Kiteworks Improvements

Key design changes to improve the experience and ease the transition for customers migrating from the legacy FTA product to the new Kiteworks product.



OVERVIEW

The 'job' Accellion is hired to do is secure & compliant file sending

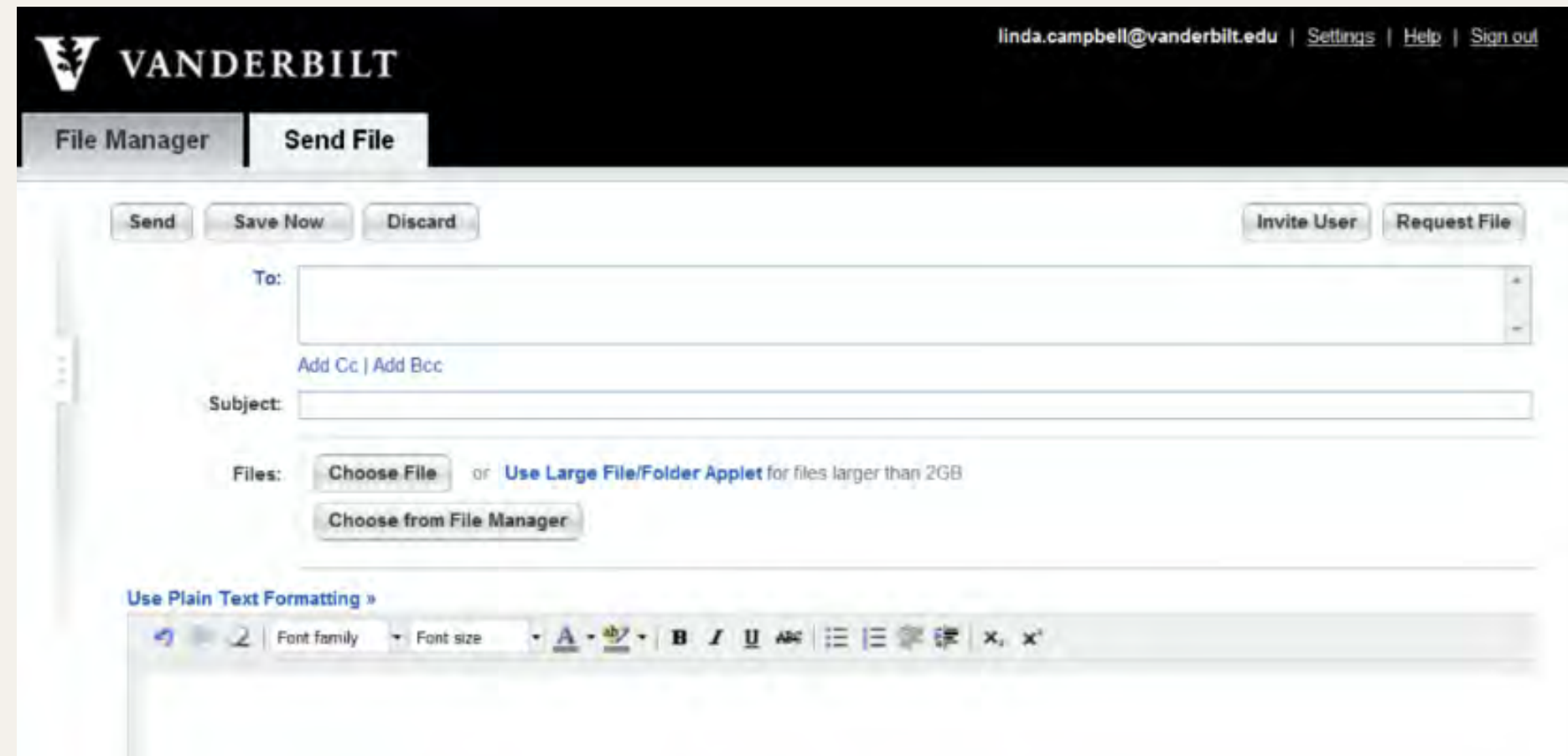
While at Accellion, working on their flagship product, kiteworks, I evolved the experience to better emphasize and improve the usability of the product's core value: Secure file sending.

THE PROBLEM

The 'mail' issue

A bit of history: Accellion was originally founded as a replacement for FTP (the very first product was called FTA, as in File Transfer Accellion).

the old UI



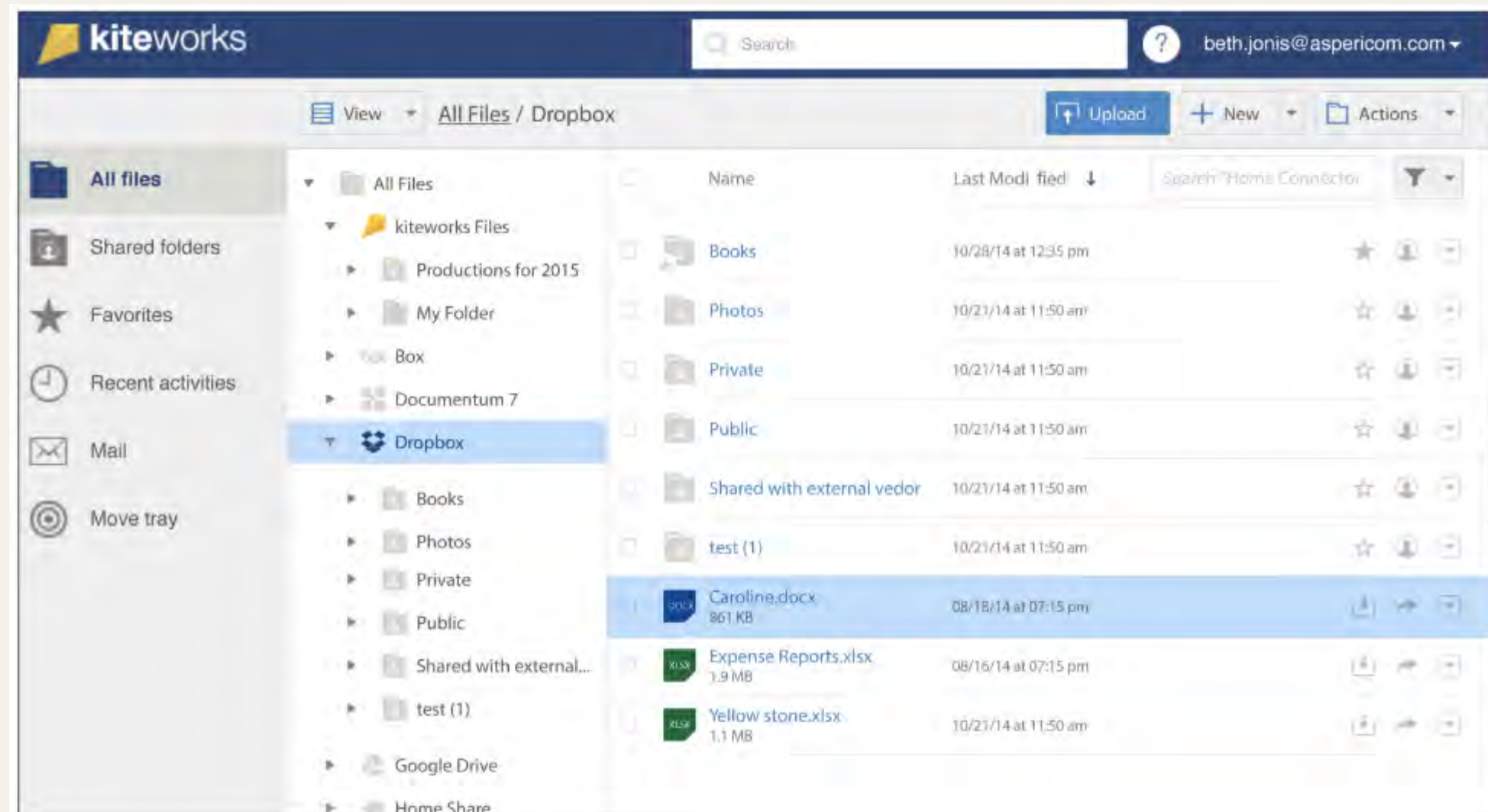
THE PROBLEM

Where's the send button?

The early success of Box and Dropbox inspired the creation of kiteworks with the misguided (in hindsight) concept that all the customers would change the way they worked and flock to the new product.

The issue: Often security policies mandates the use of kiteworks to send files securely, especially outside of the company. They need this app to be extremely easy to use for that purpose (don't like an unfamiliar/unintuitive interface).

early kiteworks (before me)



THE CHALLENGE

Need an easier path and a compelling reason for customers to switch

A significant UI refresh was required

Main focus is to increase simplicity and increase affordance of core product value: Securely send messages and files.

Other challenges for redesign:

- Easily see who else has access to the folders users have access to
- Easily invite new members or change access
- Leverage existing patterns established by other Enterprise File Sync+Share SaaS apps and email apps like Gmail and Outlook, etc.

My role

- UX design, Interaction design
- Usability testing

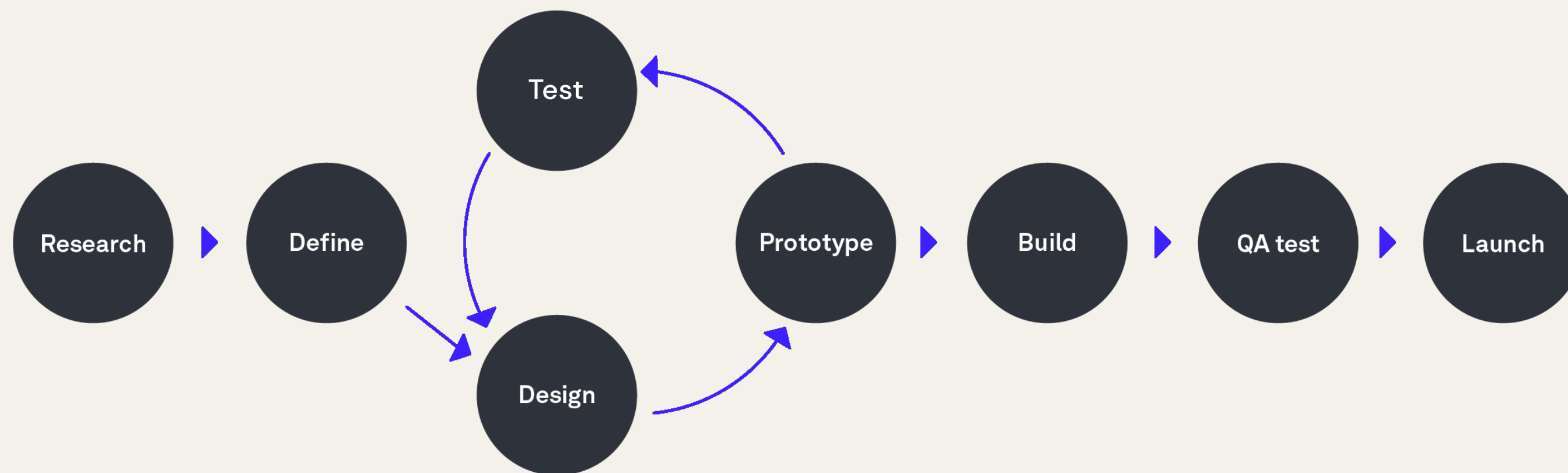
Worked with

- PM Team to align on requirements, help with getting feedback/ usability studies with customers
- Front-end engineers (including on-sight meetings in Singapore)

PROCESS

My process

My process is to understand the problem and goals at a deep level, then define the scope of work to stay focused. Then the design, prototype, and test cycle begins – iterating towards an acceptable solution. Next is to follow along the dev process to make sure the final product aligns with design.



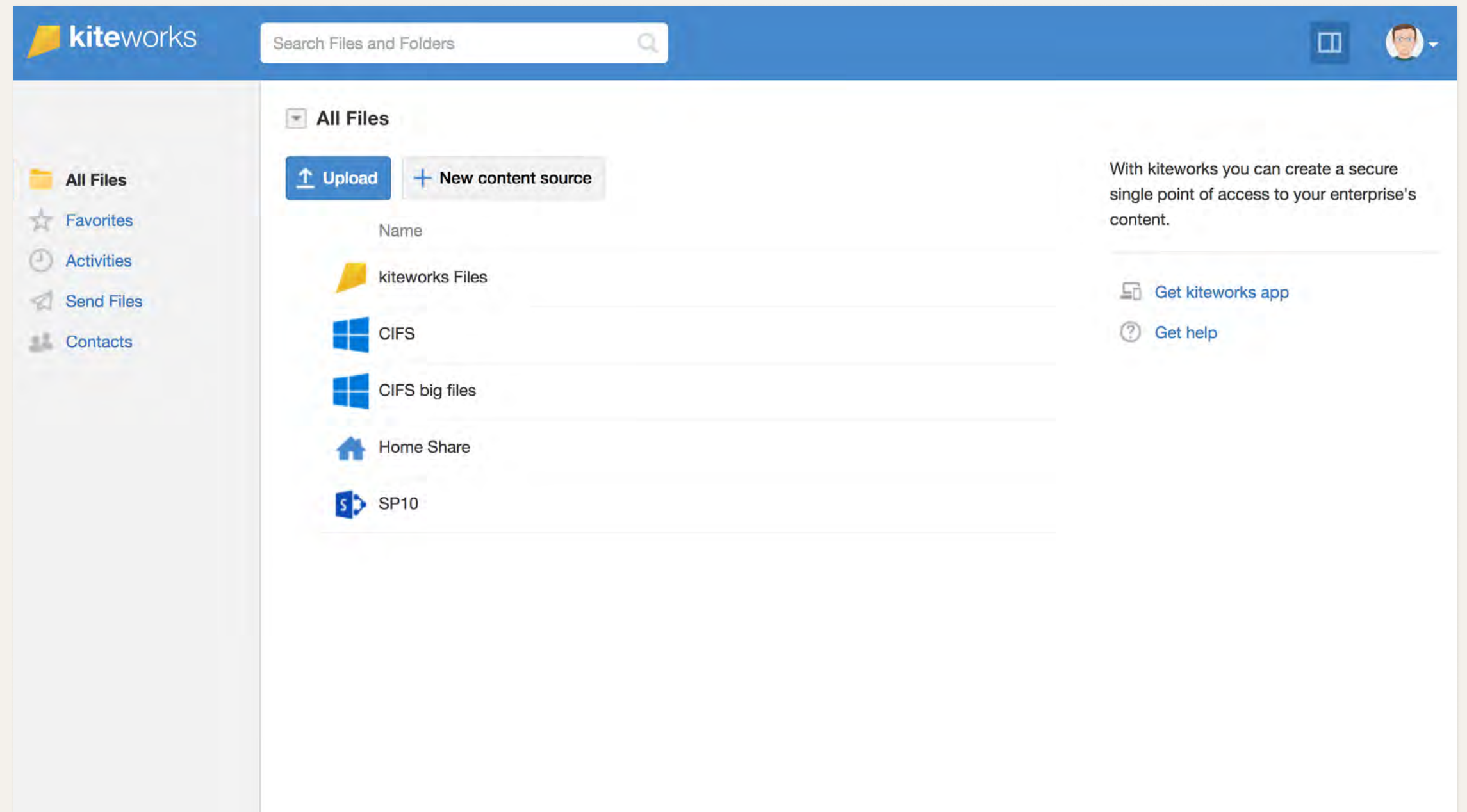
This image, originally from uxinstitute.com illustrates the process well but I made one intentional change: where it says 'Test' now, I changed that from 'Validate' since that very word suggests a potential bias to look for results that agree with your solution. The motto I prefer is to **"Design like you're right, but test like you are wrong."**

FIRST SOLUTION

Evolution...

This simpler, more familiar layout was a success, but there were still problems:

- Send Files as a label in navigation didn't show affordance for viewing received, sent, drafts, or messaging only for example
- Blue header is too strong of a brand expression and did not work as well for branded customers (65% of customers brand their instance)



What do customers struggle with / what do they care about?

As part of the discovery process and to achieve a deep understanding of customer needs and flows I helped organize and ran a week-long usability study project with the city of Pleasonton.

Each day I met with employees from various departments within the city: planning, police, fire, business development, IT and more. The individuals I met with had varying levels of experience using the product, from zero experience to power users. The goal of the project was to understand the behaviors and needs of a representative customer to improve the product for all customers and inform product design decisions going forward. The sessions took place in the users own environment and context to learn how they are using the product and where they are having issues. Sessions started with a casual interview followed by observation of the users going through a series of common tasks. The project revealed a wealth of issues that would not have been discovered without this deep level of testing.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	kiteworks - Onsite Moderated testing												
2													
3	Rated on a ease-of-use (1 - 5)												
4													
5													
6	Name	Navigate to Folder	Create Folder	Invite User	Change Permissions	Upload file	Open file	Comments	Send file	Versioning	Received Files	Overall Impression	
7		5	5	5	4	5	5	4	2	3	3	5	
8		5	5	5	5	5	5	5	5	4	4	5	
9		5	4	4	3	4	5	4	3	2	3	3	
10		5	4	4	3	4	5	4	3	2	3	3	
11		5	5	3	5	5	4	4	4	4	2	4	
12		5	5	4	4	4	5	4	3	3	1	4	
13		5	5	3	4	5	4	4	3	1		4	
14		5	5	4	5	5	5	5	4	3	3	4	
15		5	5	4	4	5	5	5	4	3	4	4	
16		5	5	5	5	5	5	5	5	5	5	5	
17		4	5	5	5	5	5	5	5	5	2	5	
18		5	5	5	4	5	5	4	3	4	4	5	
19		5	5	5	5	5	5	5	4	4	4	4	
20		4	4	4	4	4	5	5	3	2	2	4	
21		4	4	4	4	4	5	5	3	2	2	4	
22		4	4	4	4	5	5	4	3	0	0	3	
23		5	4	5	5	5	4	4	3	3	0	4	
24													
25	AVERAGE	4.764705882	4.647058824	4.294117647	4.294117647	4.705882353	4.823529412	4.470588236	3.529411765	2.941176471	2.625	4.117647059	
26													

Additional research activities

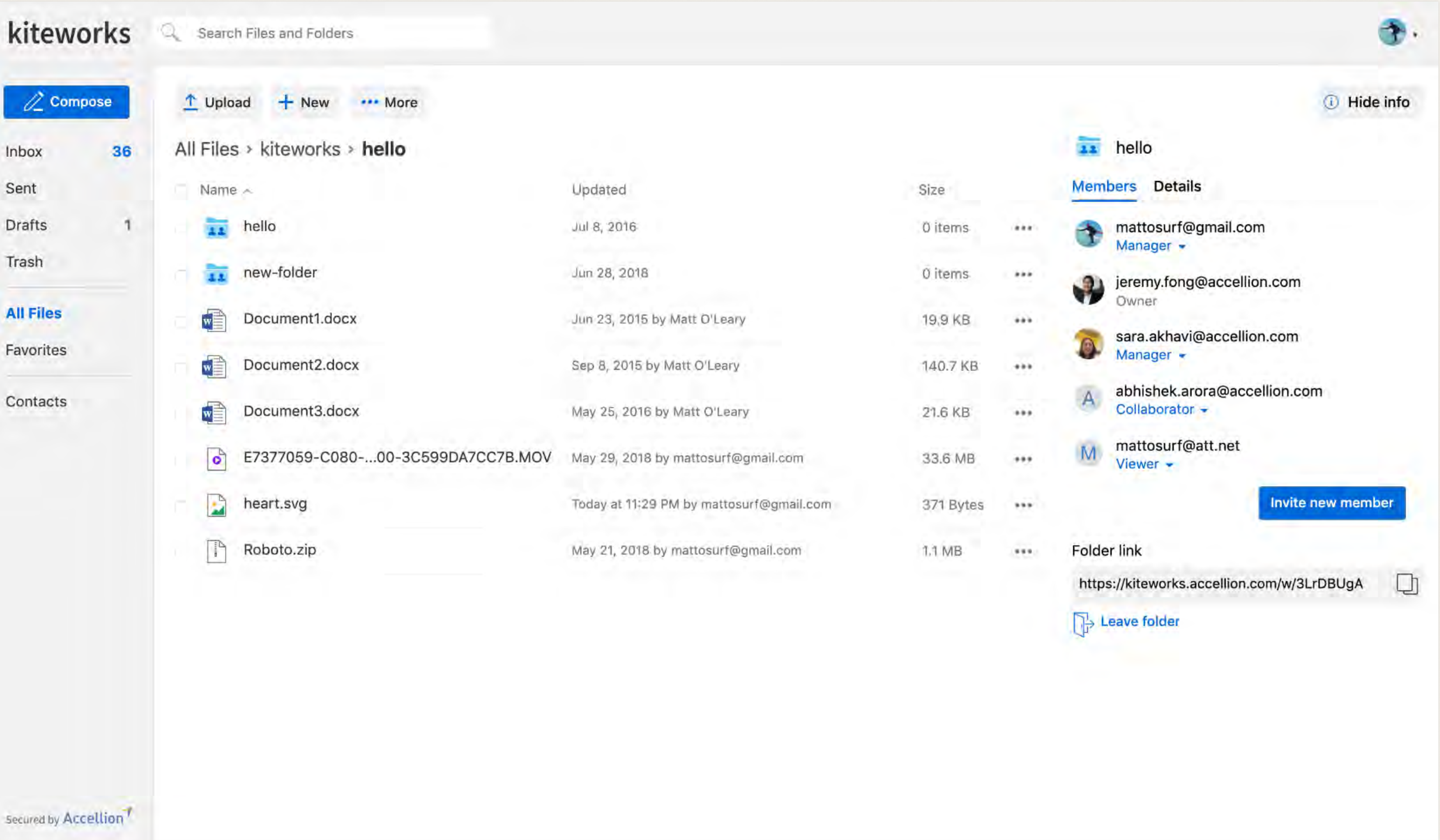
- Multiple calls/Screenshare meetings with customers.
- Attending webinars and presentations – especially focused on the very end when customers share their questions – to see what they care about (What features are they actually using, or interested in)
- Mini-tests using Validately (online recorded usability studies)

Key Takeaways

Send File icon (airplane logo) by itself in inline actions on files was not clear to users.

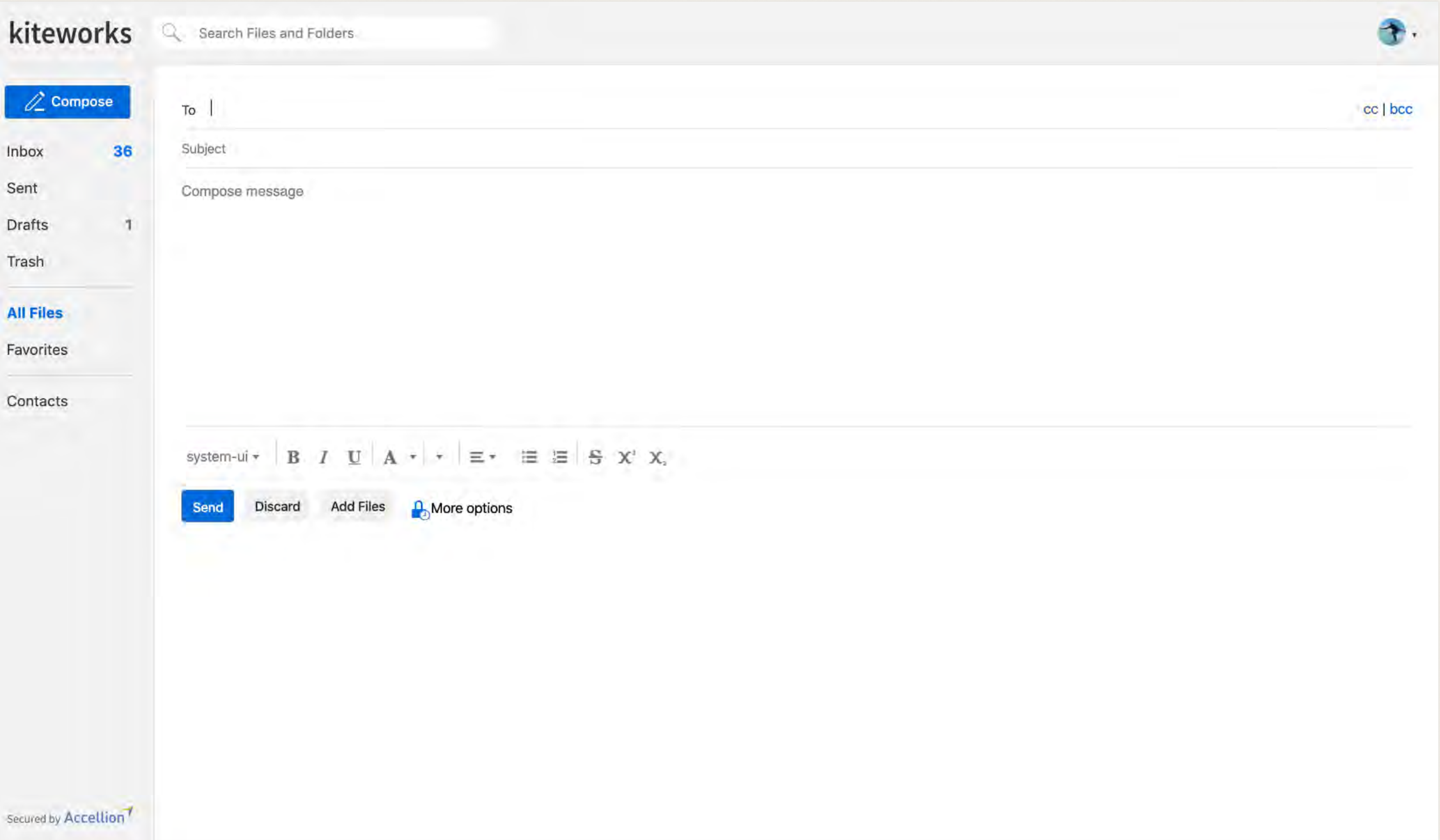
Received files hidden under the Send Files drop down. Users didn't expect to find it there.

NEW SOLUTION



I moved to a different company shortly after this version went into production so I was unable to get quantitative measurements on success. However according to my contacts there, the changes were a great success. The new look-and-feel has been extended to in-app forms, and requesting files features, as well as mobile apps.

NEW SOLUTION



Accellion is still using this design today (since early 2018) which in today’s world is a sign of success and a resilient design.

OUTCOMES

To date:

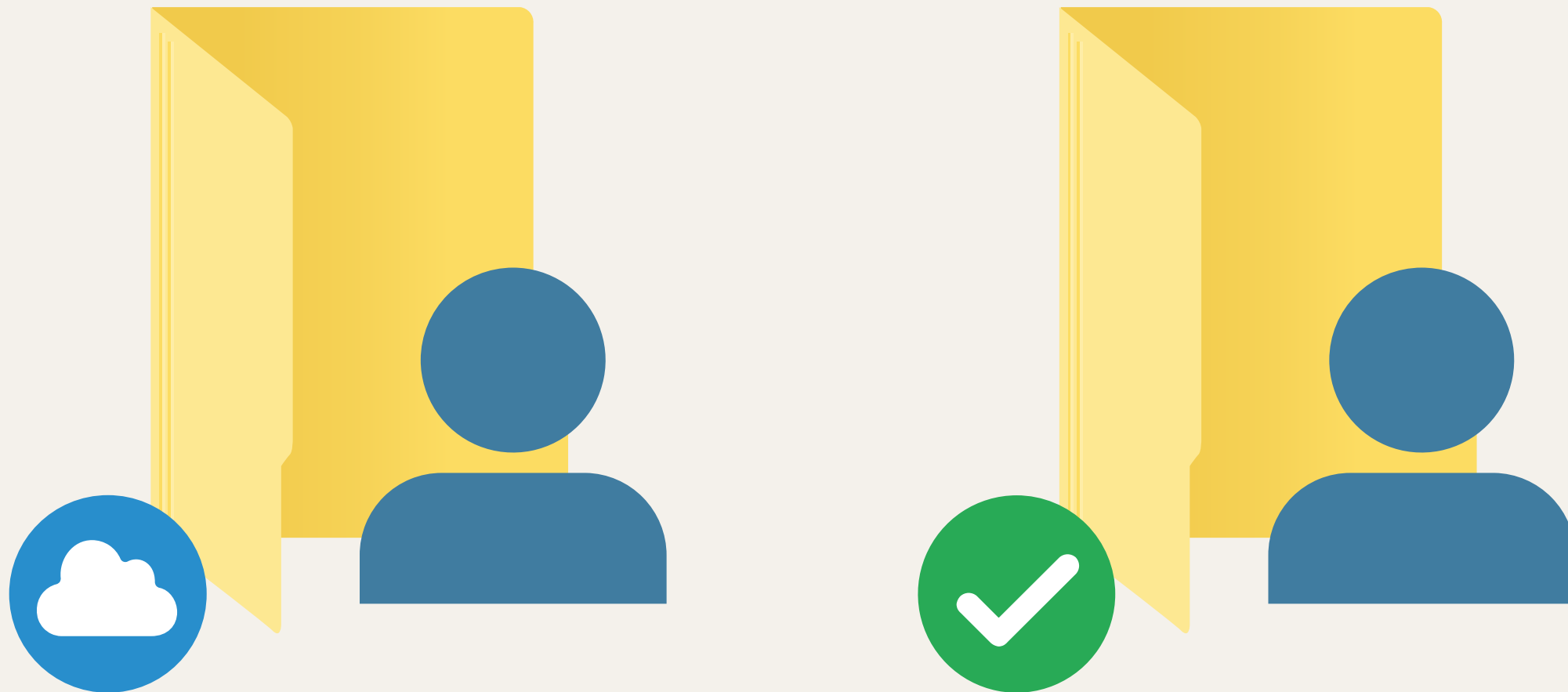
98% of customers have migrated from FTA to Kiteworks

Once migrated, there is very limited churn: Less than 3%

There were multiple triggers for customers to move, mostly security-related. However, the new design has proven successful at making this move as easy and smooth as possible, and at keeping migrated customers satisfied and productive.

Syncplicity Improvements

General improvements to the Syncplicity platform on native desktop apps and mobile.



OVERVIEW

The 'job' Syncplicity is hired to do is to backup employee's important work files along with secure file sharing and collaboration

PROBLEM 1

Sync Status and Sharing Overlays

PREVIOUS



Fully synced or cached



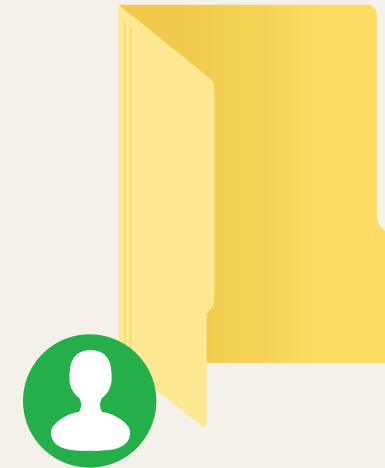
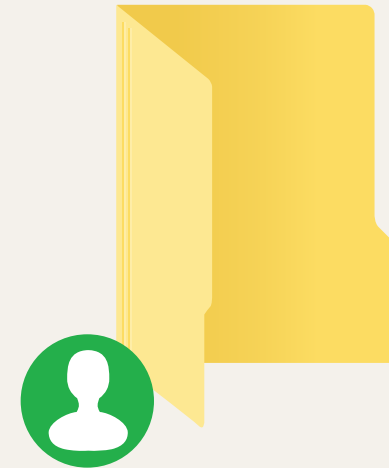
Shared (Folders only)



Available when online / Streaming



Fully synced / On the device('Favorited')



Folder_1



Folder_2



Folder_3

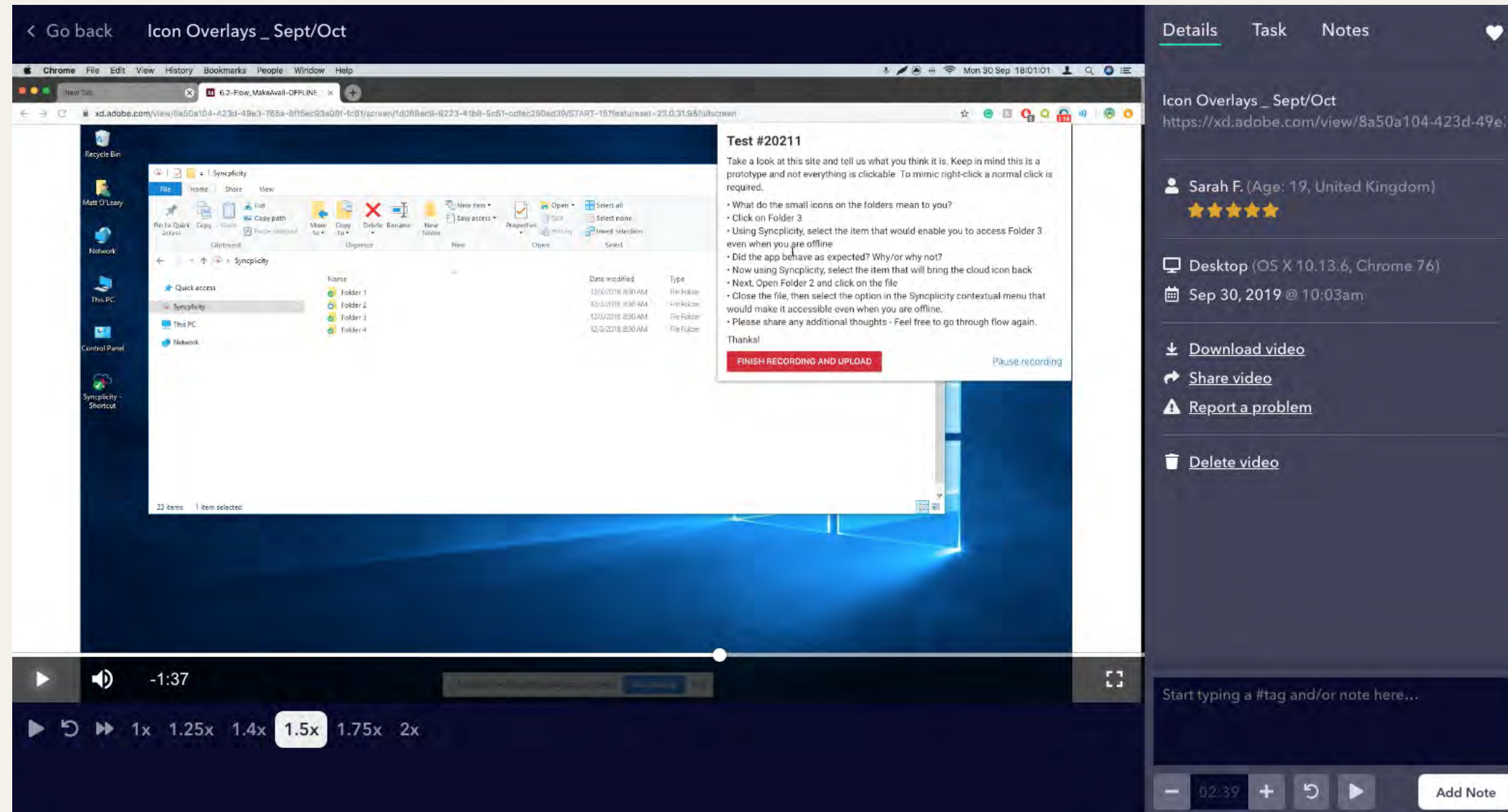


Folder_4

- All the green icons look the same (especially in list view)
- Also when shared, the overlay obscures the other (valuable) states

PROCESS

Unmoderated User Testing



In the design phase I ran unmoderated tests on prototypes on userbrain.net (Also tested the language on the action labels.)

SOLUTION

New Sync Status and Sharing Overlays

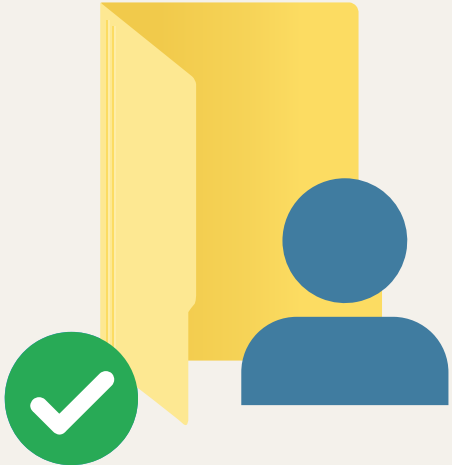
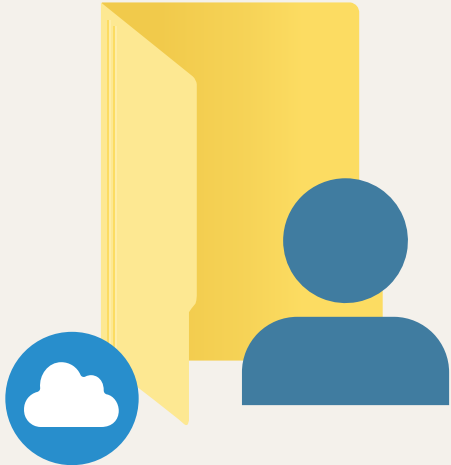
NEW



On the device / available offline



Available when online / Streaming



Name

 Folder_1

 Folder_2

 Folder_3

 Folder_4

Simple and more common/recognizable icons for cloud and on-device. Shows sync status AND whether items are shared or not.

PROBLEM 2

Folder sharing from the Desktop

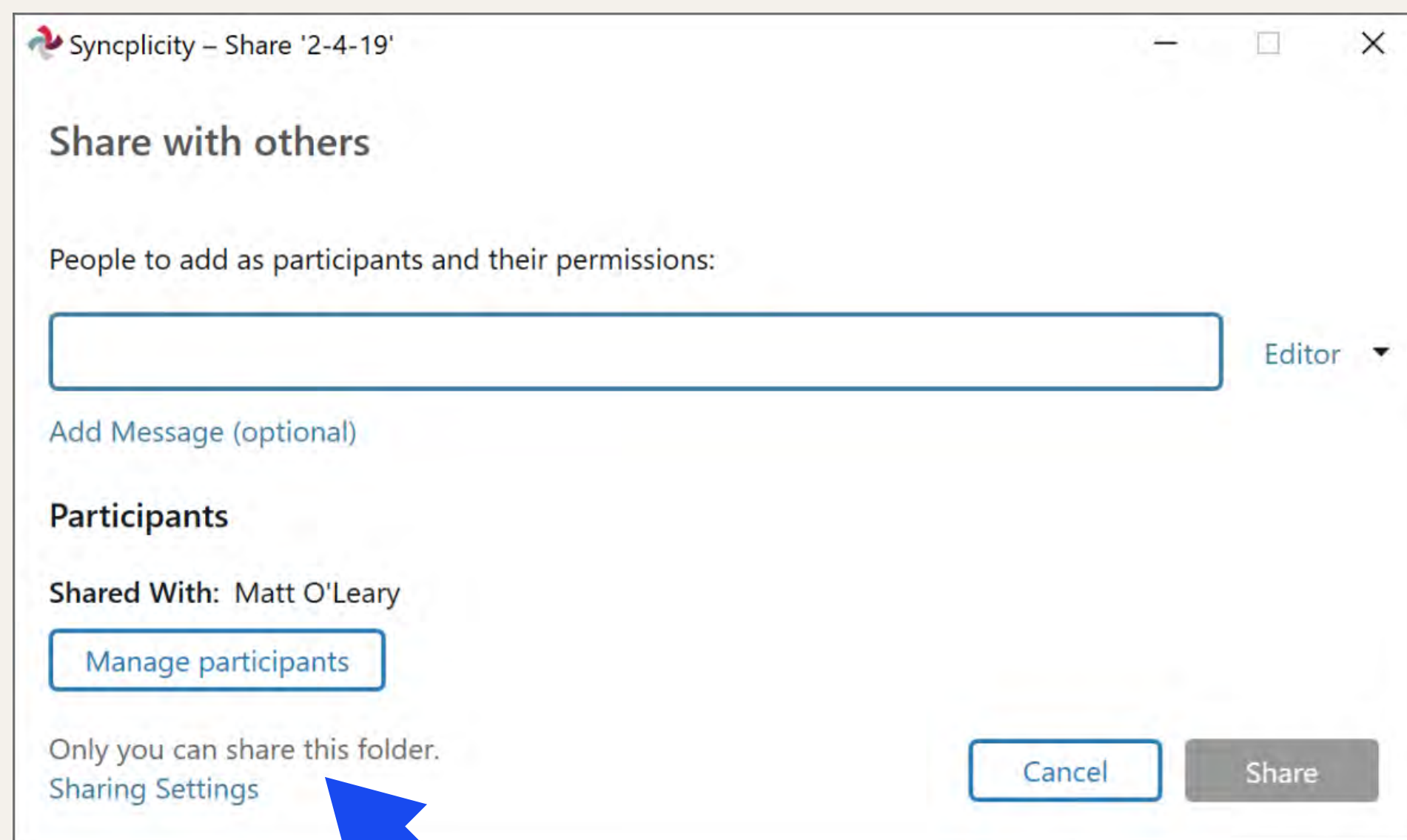
PREVIOUS:

From talking to many customers and watching them share folders using the app, one thing I started to notice was that people would always turn off the ability for folder recipients to re-share folders (via a small toggle). I asked a few folks about it and they would say “Yeah, I always turn that off - I don’t want people turning around and sharing my content - I want to be in control.”

SOLUTION

Folder sharing from the Desktop

NEW:



This setting used to be set to allow re-sharing as the default. Now the default has been changed for better user control and privacy.

Around this same time, the folder sharing feature was being developed for the desktop. So I shared with engineering my opinion that the default re-sharing setting should be changed to opt-IN instead of always on. After some pushback I decided to get some quant data and went to the small data team and we put a query together to test what all customers are actually doing here. I wasn't really sure how many folks were going out of their way to change the default so was surprised to see 82% changed it! These compelling numbers helped convince the team to change the default to put the users more in control, and better support their privacy.