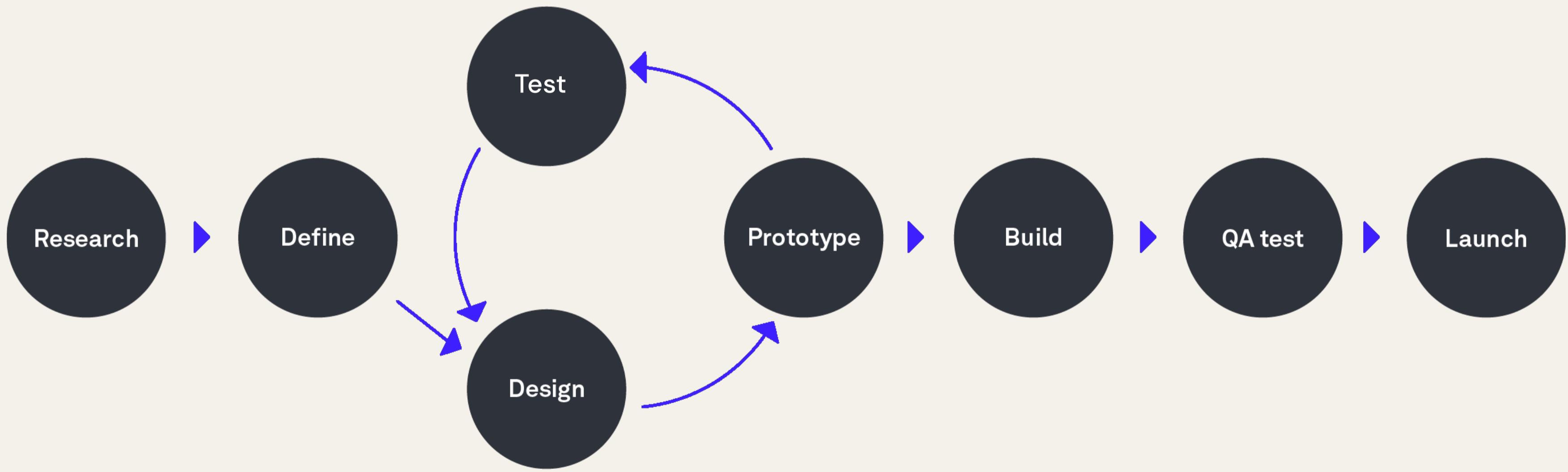


# My Process

*“Design like you’re right, but test like you are wrong.”*

1. Understand the problem and goals at a deep level
2. Define the scope, create flows, wireframes, share and iterate
3. Create prototype and test cycle begins – iterating towards the solution
4. Embed with development to implement the final design, test and fine-tune



## PROCESS

# Process – early stages

### *"The Messy Middle"*

The following are screen shots from a Miro board I shared with Product and Engineering to illustrate the sometimes messy, early phases of software design/development. In this case a refresh of the Wiser MAP application (Minimum Advertised Price monitoring and enforcement). Consists of wireframes, notes, flows, card sorts, lots of comments/questions, etc.

← Bob's Bags < >

**General Information**

Name:

Another field:

Another field:

**Merged Sellers** + Merge new seller

Name	Domain(s)	Number of Listings
		X
		X
		X

Save

**2nd Iteration**

**Policy Page**

Number of strikes: 3

Cadence between strikes:

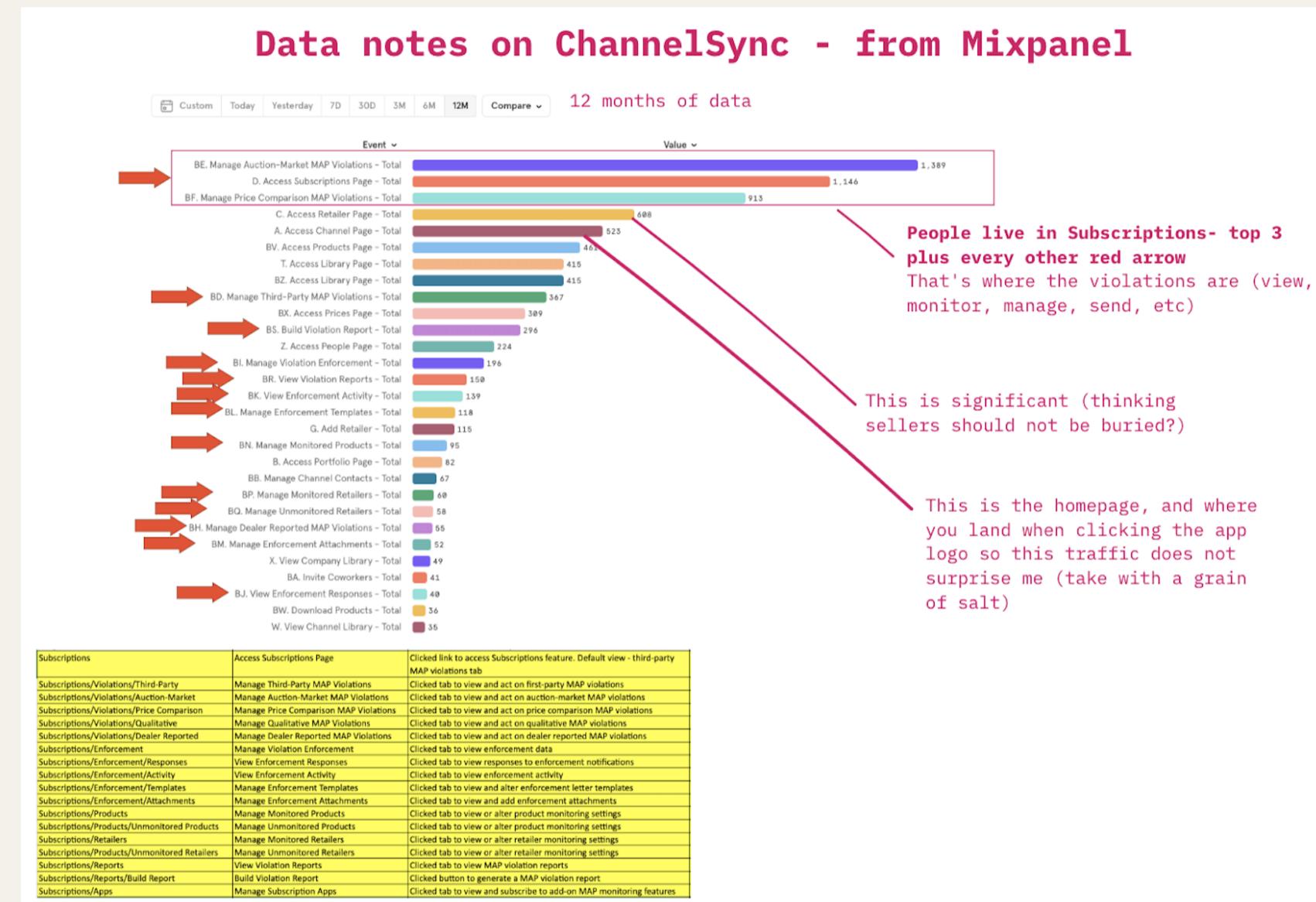
- Between strike 1 and 2: 48 hours
- Between strike 2 and 3: 24 hours

Recursive after this as above steps (Usually stops with 3 strikes)

If no seller response, Can tag the status like **Listing not monitored until notice from Customer??**

## PROCESS

# Process - early stages cont.



Option 1a -----> = show a violations table in email body

Option 1b -----> = Click to see violations and respond

**Violations**

Last extraction: Dec 19, 2022

Current violations

Sellers, Products

Report Data quality issues at a listing level (Already in LPC)

Seller	Seller type	Violations	Listings	MAP compliance	Products	Country	Found on	Last seen
XYZ-Seller	Authorized	23	263	91%	52	US	Nov 27, 2022	Dec 19, 2022
XYZ-Seller	Authorized	23	263	91%	52	US	Nov 27, 2022	Dec 19, 2022
XYZ-Seller	Authorized	23	263	91%	52	US	Nov 27, 2022	Dec 19, 2022
XYZ-Seller	Authorized	23	263	91%	52	US	Nov 27, 2022	Dec 19, 2022
XYZ-Seller	Authorized	23	263	91%	52	US	Nov 27, 2022	Dec 19, 2022
XYZ-Seller	Authorized	23	263	91%	52	US	Nov 27, 2022	Dec 19, 2022
XYZ-Seller	Authorized	23	263	91%	52	US	Nov 27, 2022	Dec 19, 2022
XYZ-Seller	Authorized	23	263	91%	52	US	Nov 27, 2022	Dec 19, 2022

No Sub-Categories  
Product can be under category

## PROCESS

# Process – Prototype development

The screenshot shows a web-based application interface for 'MAP Monitoring & Enforcement'. At the top, there are navigation links for 'Home' and 'Violations'. A prominent yellow callout box in the center-left area states 'Level 2 violation notice is due' with a link to 'Jan 5, 2023'. To the right, a summary shows '96% Compliance' with a note of '+2% in last 6 months'. Below this, a section titled 'Bob's Helmets' lists 'Current violations (12)'. The list includes items like 'Orange Bike Helmet 542' from 'Amazon' and 'Google Shopping', and 'Pink Bike Helmet 542' from 'Target'. Each item has icons for edit, delete, and preview. A 'Preview enforcement' button is located at the bottom right of this section.

Mid- to high-fidelity, clickable prototypes ready to test with internal stakeholders and customers.

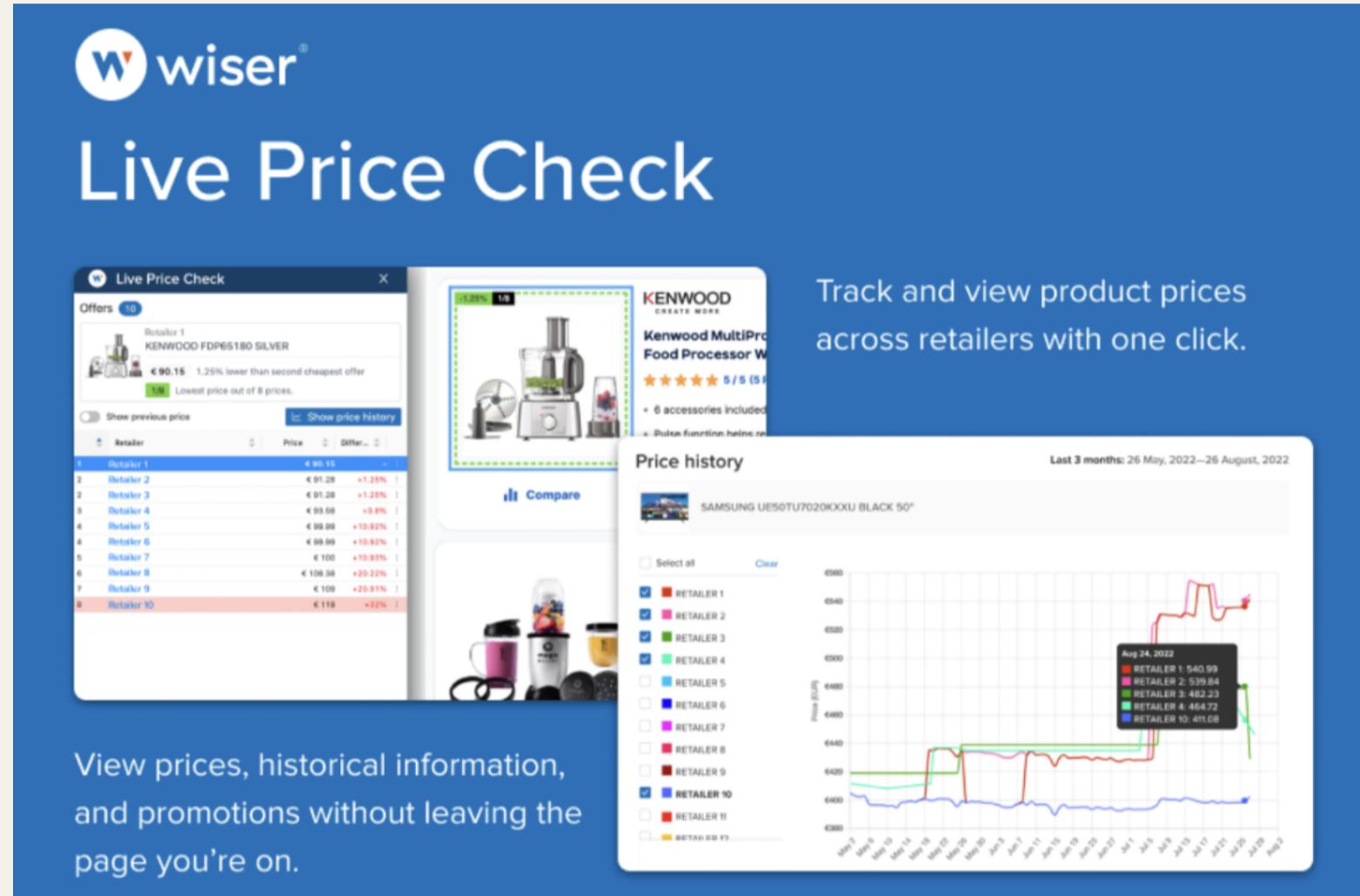
This screenshot displays a high-fidelity prototype of a policy editor. On the left, a modal window titled 'Edit 'General MAP Policy'' shows fields for 'Policy name' (set to 'General MAP Policy'), 'Country' (set to 'US and Canada'), and 'Classification' (set to 'All sellers'). A toggle switch indicates the policy is 'Active'. On the right, a video call interface for 'Recording\_2560x1440.mp4' is shown, featuring a video feed of a person named 'Jens' and various control buttons for the recording session.

This screenshot shows a communication inbox with a list of messages. The messages are as follows:

- Sent messages:**
  - Bob Smith (Mon Feb 5 11:00 AM) - Violation Notice - Level 2
  - Bob Smith (Mon Dec 15 11:00 AM) - Violation level 1 MAP Violation notice
  - Bob Smith (Mon Dec 1 11:00 AM) - MAP Violation warning
  - Bob Smith (Tue Nov 21 11:00 AM) - MAP Violation warning
  - Bob Smith (Fri Nov 17 11:00 AM) - MAP Violation warning
  - Bob Smith (Mon Nov 9 11:00 AM) - MAP Violation warning
  - Bob Smith (Thu Nov 2 11:00 AM) - MAP Violation warning
  - Bob Smith (Tue Oct 29 11:00 AM) - MAP Violation warning
- Violation Notice - Level 2:**
  - To: My-Brand-Name (Mon Feb 5 9:00 AM)
  - Hi Frank,
  - Thanks for letting me know. I have fixed all the violations mentioned based on the latest price sheet.
  - Best,  
Bob
- Replies:**
  - 7 violations resolved / 3 open (Wed Jan 28 11:00 AM)
- Follow-up:**
  - To: Bob's Helmets (Tue Jan 15 11:00 AM)
  - Hello Bob,
  - We understand emails can get lost or become a forgotten to-do. This is a reminder to ensure your pricing for [Brand]'s complies with our MAP policy. Refer to the attached copy of our MAP Policy. This email is the second notice that your pricing doesn't appear to be in compliance with our MAP Policy. Below are the details for the product that is in violation of our policy guidelines.
  - Continued violation of our product's MAP pricing will result in the review of Brand-XYZ and Bob's Helmets agreement, with consideration for selling/distribution restrictions or termination. Please update your pricing immediately on your website and any other channels. We'll be

Getting feedback from customers over Zoom

# Live Price Check Improvements



## Overview

Live Price Check is a Chrome extension that allows retailers, category managers, and brands to compare prices of selected products across all the other online shopping platforms in that particular country or region. It allows users to compare and track price changes from one retailer website without having to manually visit every other site where the product is sold, copy/paste into spreadsheets, etc. It also provides a price history chart to track trends and identify retailers with the lowest or highest prices over time.

## The Challenge

Analyze existing design and flows, and test with users, to identify areas to improve usability, intuitiveness, and utility of the application. Main takeaway is although the original product has a lot of utility, it is not easy to figure out and requires customer support to learn how to use the product.

## LIVE PRICE CHECK

# Live Price Check Improvements

## Previous version

The screenshot shows the previous version of the Live Price Check interface. On the left, a sidebar displays a list of 12 products for the BEKO LSG3545W WHITE refrigerator, with the first item being the current price (305.06). The main area shows two product details cards.

**Hotpoint RLA36P Under Counter Fridge - White**  
From £180.00

**Product Features** [Read more](#)

Size(cm)	Size H85.0, W59.8, D62.0cm
Fresh food capacity(L)	146

- Free delivery available
- Installation & recycling available

**Beko LSG3545W Tall Fridge - White**  
£310.00

**Product Features** [Read more](#)

Size(cm)	Size H145.7, W54.0, D57.5cm
Fresh food capacity(L)	252
Frost free	Yes

- Free delivery available

**Bush ME5585UCF Under Counter Fridge**  
£160.00

# Live Price Check Improvements

## NEW version

The screenshot shows the Argos website's 'Irons and steamers' category page. A sidebar on the left titled 'Live Price Check' provides a detailed breakdown of prices from different retailers. The main content area displays a grid of steamers, each with its name, price, rating, and a small image. Some products are highlighted with colored borders: a yellow border surrounds the first product (Russell Hobbs Series 1 Steam Generator Iron 24420), a purple border surrounds the second (Philips GC4902 Azur Steam Iron), and a green border surrounds the third (Russell Hobbs Speedglide PRO Steam Iron 23970). Each product card also includes an 'Add to trolley' button and a heart icon.

## Key Improvements

- Added product photo to description
- Added blue frame to selected product
- Dashed-lines around products
- Added amber color to indicate pricing in the middle
- Added the price delta
- Green and red coloring in overlay
- Improved readability overall:
  - Larger fonts
  - Changed text from all-caps to title or sentence-case
  - Increased contrast
- Affordance of price history chart is much stronger with an explicit button vs a mini-chart that doesn't look clickable

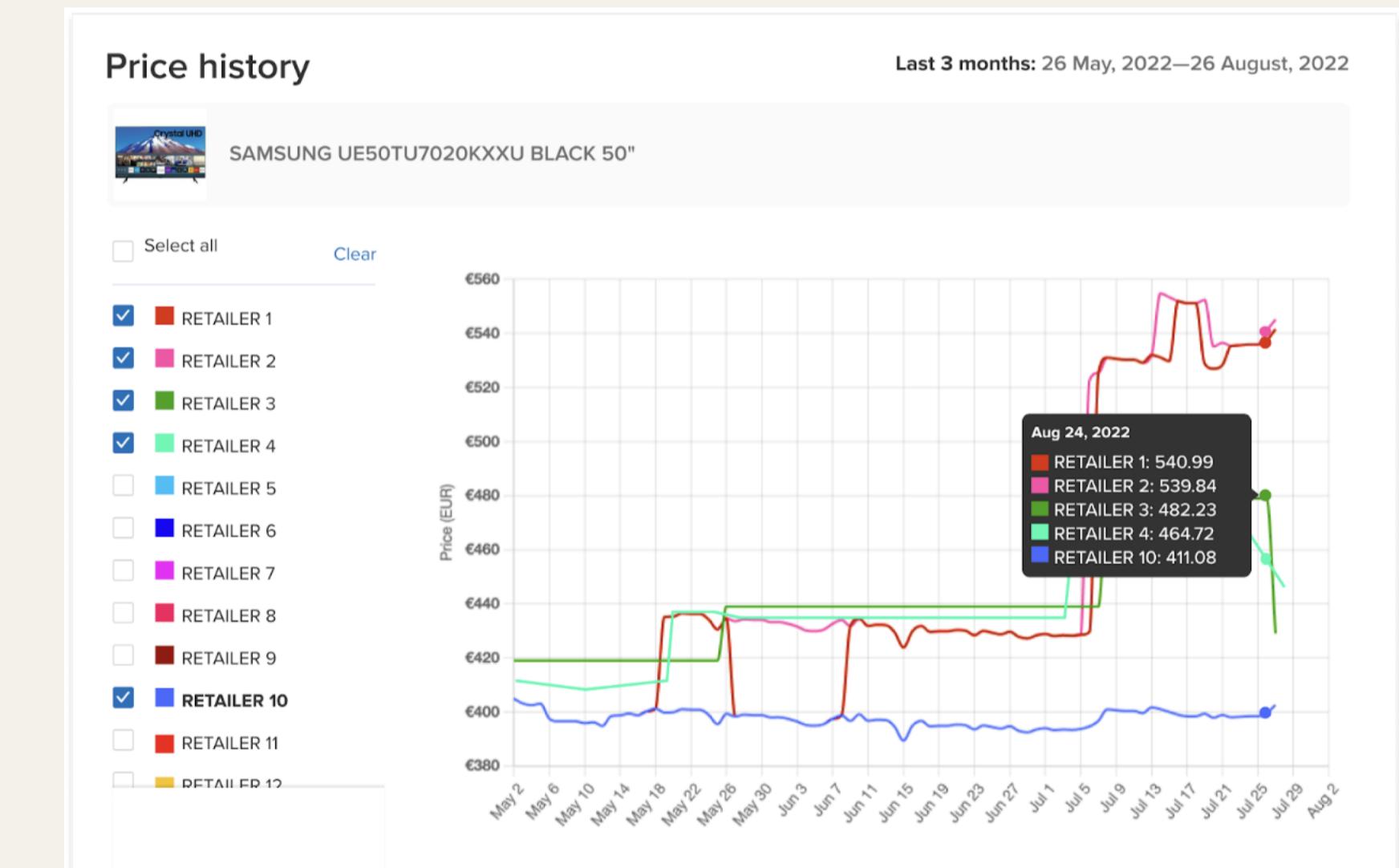
# Live Price Check Improvements

## Price History Chart

### Previous



### Improved



### Key Improvements

- Stronger splash of color to connect retailer name to line in chart
- Show selected product (picture and name) to maintain context
- Added chart title
- Added date range
- Bold styling on selected site

# Live Price Check Improvements

## Outcome

**The Improvements outlined above, along with other improvements, resulted in:**

- Delighted customers! – one customer for example called the changes to the way the product rankings are displayed as “Brilliant!”
- Less “hand-holding” by support staff because the app is now more self-explanatory, and intuitive resulting in an approximately 50% drop in support ticket volume (anecdotal)

# Universal Header & Search

Design to make previously hidden and siloed information easily available to customers as they traverse across various Axway web properties.

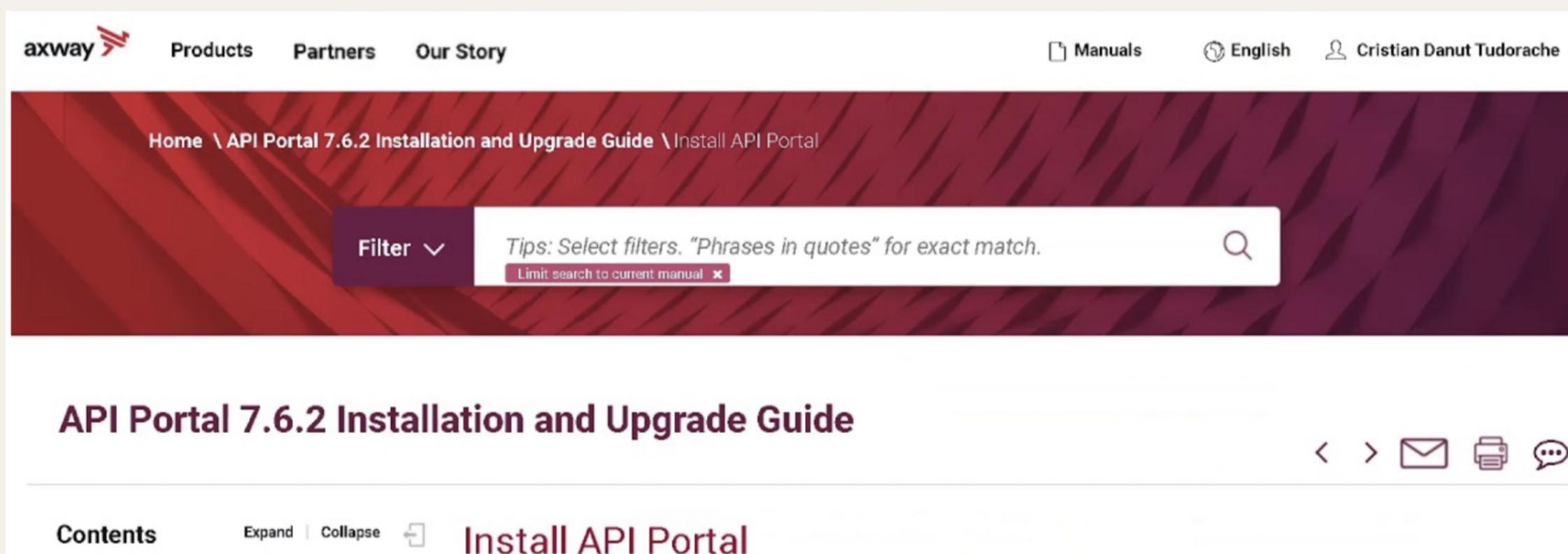
The screenshot shows a search results page titled "Results for ‘install API gateway’". The search bar at the top contains the query "install API g". Below the search bar, there are navigation links: "All Help & Resources" (underlined), Documentation, Support, Blog, and Community. On the left sidebar, there are links for "Home", "Articles", "API MANAGEMENT", "Yngve Tho... May 31, 202...", "API Gateway 7.", "I'm looking at http:// see there are 79 av...", "support https://", and "API Management". At the bottom of the sidebar, there are "Upvote" and "Top Rated Answers" sections. The main content area displays several search results, each with a title, a link to the KB Article, and a brief description. The first result is "Agents Install Error: Can't find org ID | KB Article #182031" with a link to support.axway.com/kb/182031. The second result is "Unable to install API Gateway 7.3.1 on Linux without setting up a node manager or instance | KB Article #17..." with a link to support.axway.com/kb/176449. The third result is "After installing API Gateway, you see an error message saying "Problem running post-install step." | KB Article #178477" with a link to support.axway.com/kb/178477. The fourth result is "Customer Applied Core SP to Install and API Portal (API Manager) no longer works | KB Article #173527" with a link to support.axway.com/kb/173527. At the bottom right of the content area, there are links for "Axway Product Roadmaps" and "Opening a case with Axway Support".

# The Challenge

## Overview

The Amplify Platform by Axway is an integration platform that helps businesses connect and manage their data and applications across cloud and on-premises environments using APIs. In practice, the platform consists of a single login followed by a landing page where the user can navigate to a number of different services on different pages depending on what they have subscribed to.

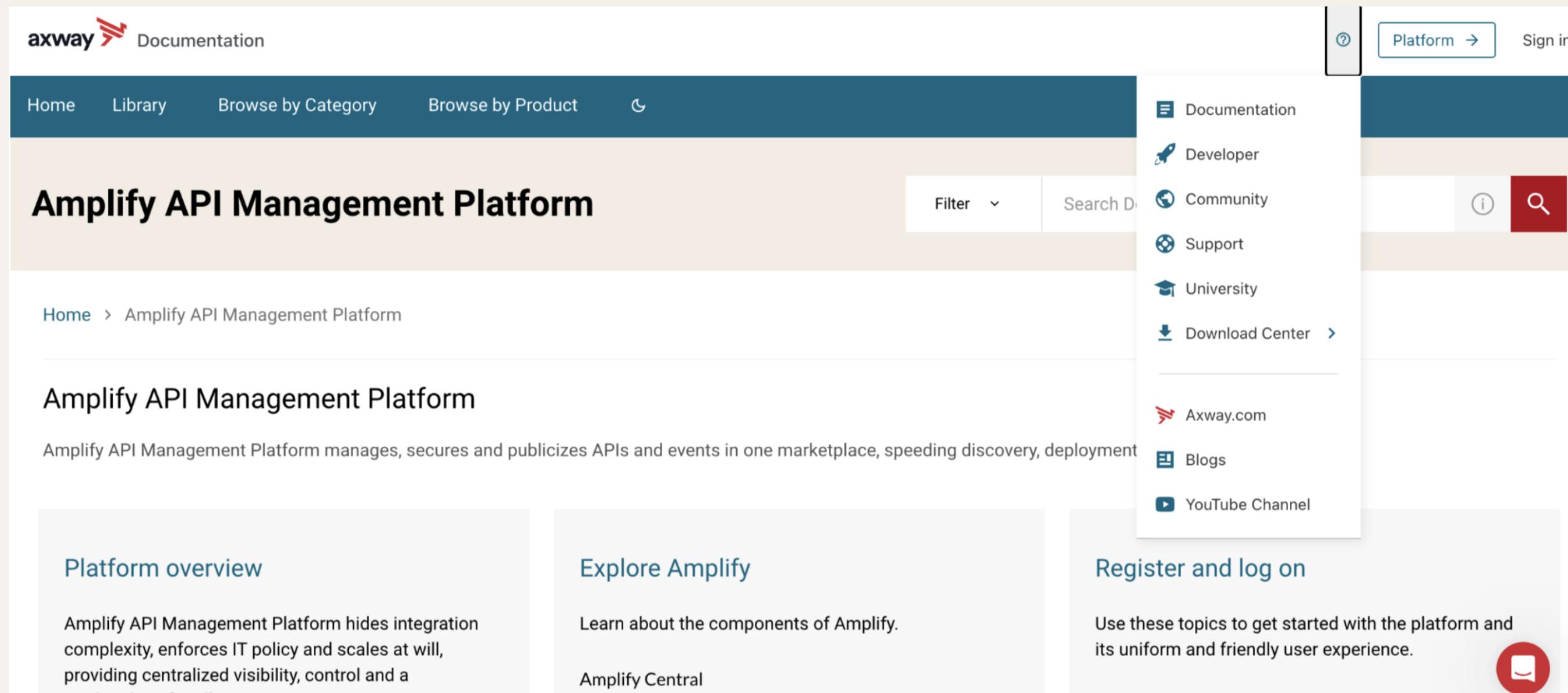
## The Problem (Example from Documentation portal)



The screenshot shows a documentation page for the 'API Portal 7.6.2 Installation and Upgrade Guide'. At the top, there's a navigation bar with links for 'Products', 'Partners', 'Our Story', 'Manuals' (selected), 'English' (language), and a user profile for 'Cristian Danut Tudorache'. Below the navigation is a search bar with tips like 'Select filters. "Phrases in quotes" for exact match.' and a 'Limit search to current manual' option. The main content area has a dark red header with the title 'API Portal 7.6.2 Installation and Upgrade Guide'. Below the header, there are navigation icons for back, forward, email, print, and a speech bubble. At the bottom, there are links for 'Contents', 'Expand | Collapse', and 'Install API Portal'.

- Missing a title – other than the URL, a user might not know they are visiting the documentation portal
- An “orphaned” header that does not match any other sites
- Missing navigation to any other help and resource sites
- No navigation element to platform

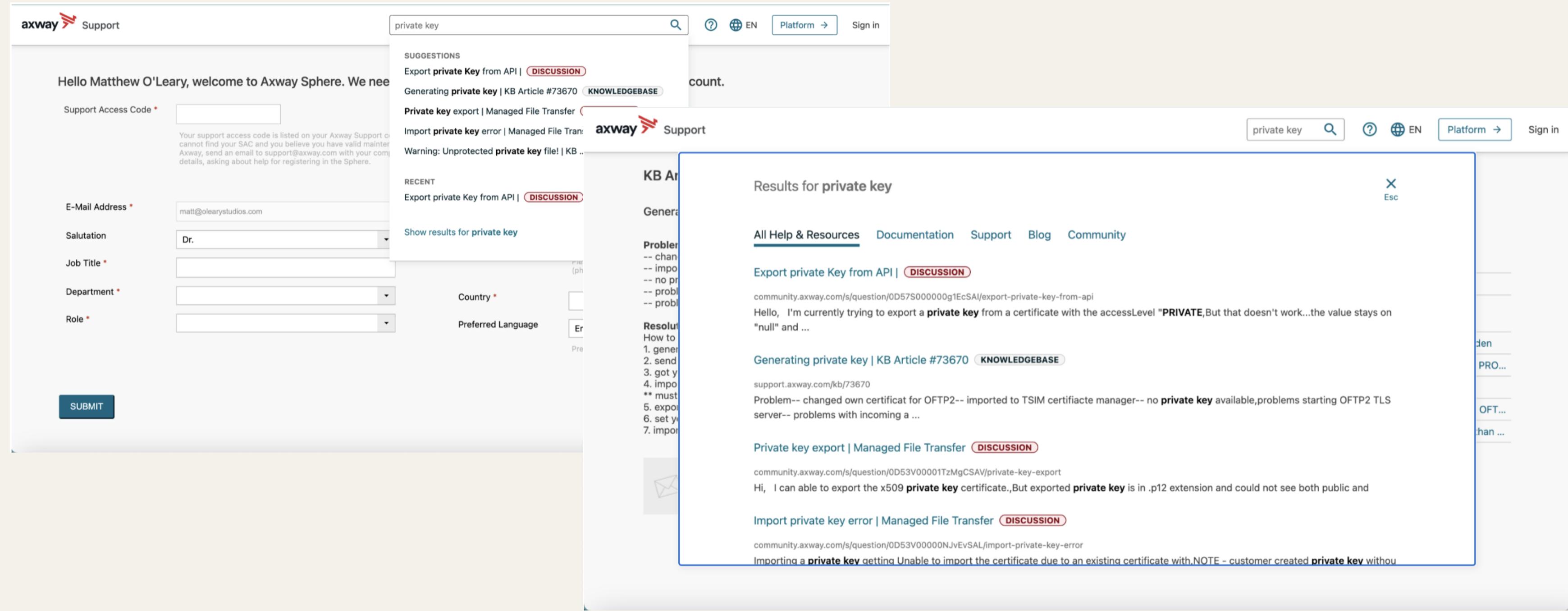
# Solution for missing help & resources



## Key Improvements

- Added the title – displayed in a consistent way across the platform lets users know where they are.
- Added help icon (a well-understood symbol on the web) that displays all the other resources available to get help.
- Added a easy way to head back to the Platform Landing page
- The other sites a user is able to visit have the exact same header format to create a cohesive experience, and learnable pattern – so from any resource site a users visits they can easily navigate back or to another site for help and information.

# Federate Search Improvements



I did on the design side was to create a prototype demonstrating how universal search would work. With help from the Director of Customer Success, I tested the prototype with several customers (both casual and 'power' users). We got great feedback, and made some iterations, but mostly the utility was clear, matched expectations, and was a better option than what currently existed.

Next was heavy collaboration with Engineering to develop the search service itself, and make the resource (a big blob of javascript) available to all the different teams responsible for their sites.

# Outcome

## What worked?

For most sites the implementation went great – especially with sites built by internal teams.

## What didn't work?

On sites developed by 3rd parties, completely outside of Axway, the implementation did not mesh with their frameworks and the “round-trip” experience of searching for something anywhere and jumping around and back was broken. This was frustrating but one of the costs of outsourcing and building on a variety of non-standard/proprietary stacks.

## Overall results

- The universal header was a huge step in creating a more smooth, consistent, and cohesive experience across the Amplify Platform and related help sites
- A wealth of formerly siloed information is now findable from every screen of the platform
- It would be even better if every site was built on the exact same stack, but it is a great improvement
- The overall structure, UI, and behavior of the header was documented and added into the Axway Design System for other dev and design teams to reference and pick-up as new sites are created

# 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.

The image displays two side-by-side screenshots of the Kiteworks application interface, illustrating design changes for file management and messaging.

**Left Screenshot: File Management**

- Header:** Shows the 'kiteworks' logo and a search bar labeled 'Search Files and Folders'.
- Toolbar:** Includes 'Compose', 'Upload', 'New', and 'More' buttons.
- Navigation:** Shows 'Inbox' (36 items), 'Sent', 'Drafts' (1 item), 'Trash', and a sidebar with 'All Files', 'Favorites', and 'Contacts'.
- Content:** A list of files and folders under 'All Files > kiteworks > hello'. Items include 'hello' (Jul 8, 2016), 'new-folder' (Jun 28, 2018), 'Document1.docx' (Jun 23, 2015 by Matt O'Leary), 'Document2.docx' (Sep 8, 2015 by Matt O'Leary), 'Document3.docx' (May 25, 2016 by Matt O'Leary), 'E7377059-C080-...00-3C599DA7CC7B.MOV' (May 29, 2018 by mattosurf@gmail.com), 'heart.svg' (Today at 11:29 PM by mattosurf@gmail.com), and 'Roboto.zip' (May 21, 2018 by mattosurf@gmail.com).
- Details View:** A modal for a folder named 'hello' shows 'Members' (mattosurf@gmail.com, Manager) and 'Details' (mattosurf@gmail.com, Manager). It includes an 'Invite new member' button and a 'Folder link' (https://kiteworks.accelion.com/w/3LrDBUgA).
- Footer:** 'Secured by Accelion' logo.

**Right Screenshot: Messaging**

- Header:** Shows the 'kiteworks' logo and a search bar labeled 'Search Files and Folders'.
- Toolbar:** Includes 'Compose', 'To' (placeholder), 'Subject', and 'cc | bcc' buttons.
- Navigation:** Shows 'Inbox' (36 items), 'Sent', 'Drafts' (1 item), 'Trash', and a sidebar with 'All Files', 'Favorites', and 'Contacts'.
- Content:** A message composition screen with fields for 'To', 'Subject', and a rich text editor toolbar. Buttons include 'Send', 'Discard', 'Add Files', and 'More options'.
- Footer:** 'Secured by Accelion' logo.

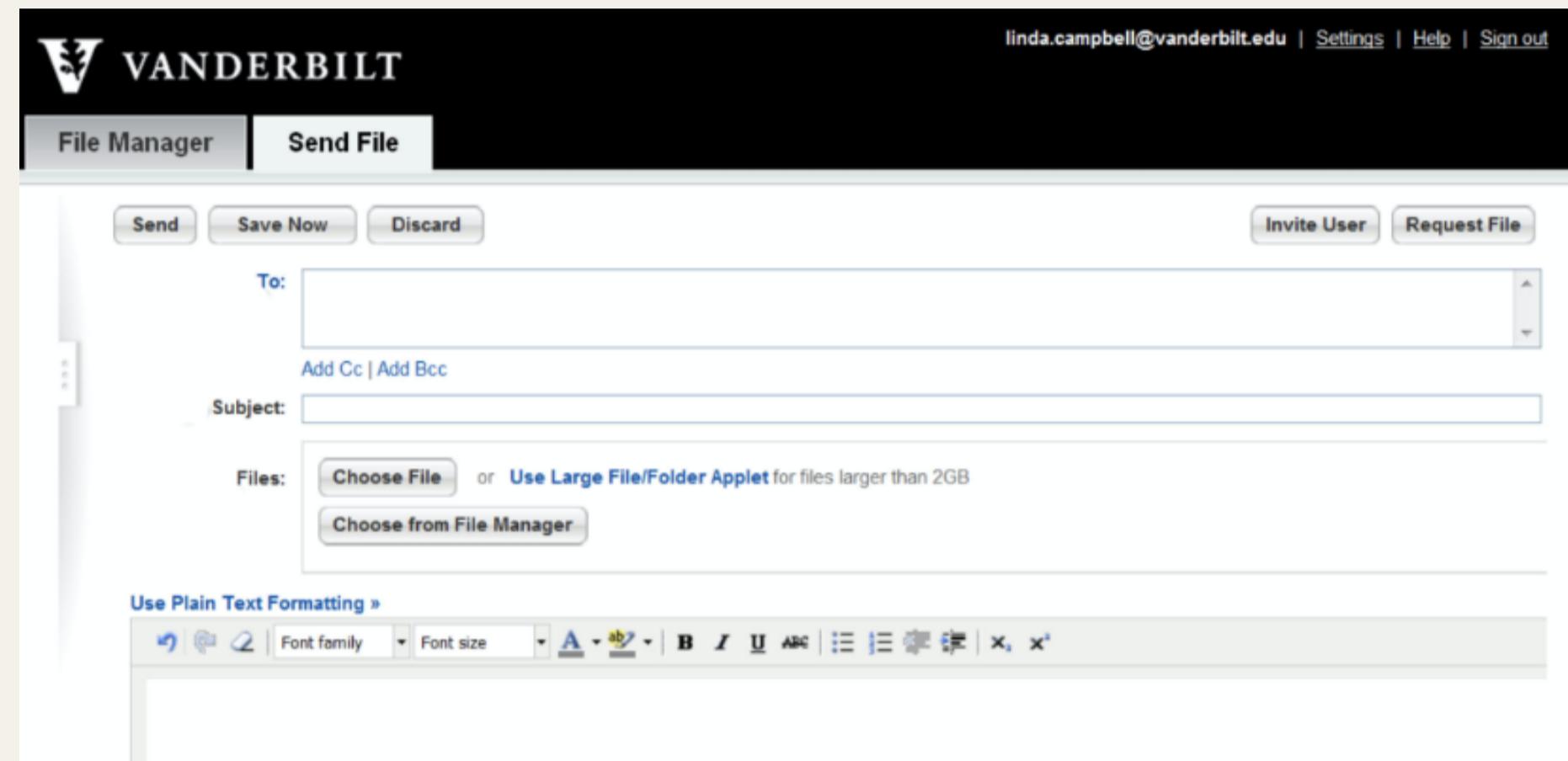
# The 'job' Accellion is hired to do is secure & compliant file sending

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 'mail' issue

the old UI

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).



# 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 screenshot shows the early version of the kiteworks web interface. The top navigation bar includes the kiteworks logo, a search bar, and a user dropdown for 'beth.jonis@aspericom.com'. Below the header is a toolbar with 'Upload', 'New', and 'Actions' buttons. The left sidebar contains links for 'All files', 'Shared folders', 'Favorites', 'Recent activities', 'Mail', and 'Move tray'. A 'Dropbox' section is also present in the sidebar. The main content area displays a list of files and folders. The first folder listed is 'Books'. Other items include 'Photos', 'Private', 'Public', 'Shared with external...', 'test (1)', 'Caroline.docx', 'Expense Reports.xlsx', and 'Yellow stone.xlsx'. Each item has a preview icon, a file name, a last modified date, and a set of actions (download, share, etc.).

# 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)

# 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)

The screenshot shows the Kiteworks interface. The top navigation bar is blue with the Kiteworks logo, a search bar, and user profile icons. On the left, a sidebar lists 'All Files', 'Favorites', 'Activities', 'Send Files', and 'Contacts'. The main content area displays a list of 'All Files' with the following items:

Name
Kiteworks Files
CIFS
CIFS big files
Home Share
SP10

On the right side of the main content area, there is a promotional message: "With kiteworks you can create a secure single point of access to your enterprise's content." Below this are links to "Get kiteworks app" and "Get help".

# What do customers struggle with?

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 Pleasanton.

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	Rated on a ease-of-use (1 - 5)												
3													
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	4	4	4	4	5	4	3	3	1	4	
13		5	3	4	5	5	4	4	3	1		4	
14		5	4	5	5	5	5	5	4	3	3	4	
15		5	4	4	5	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	4	5	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	AVERAGE	4.764705882	4.647058824	4.294117647	4.294117647	4.705882353	4.823529412	4.470588235	3.529411765	2.941176471	2.625	4.117647059	
25													
26													

## Additional research activities

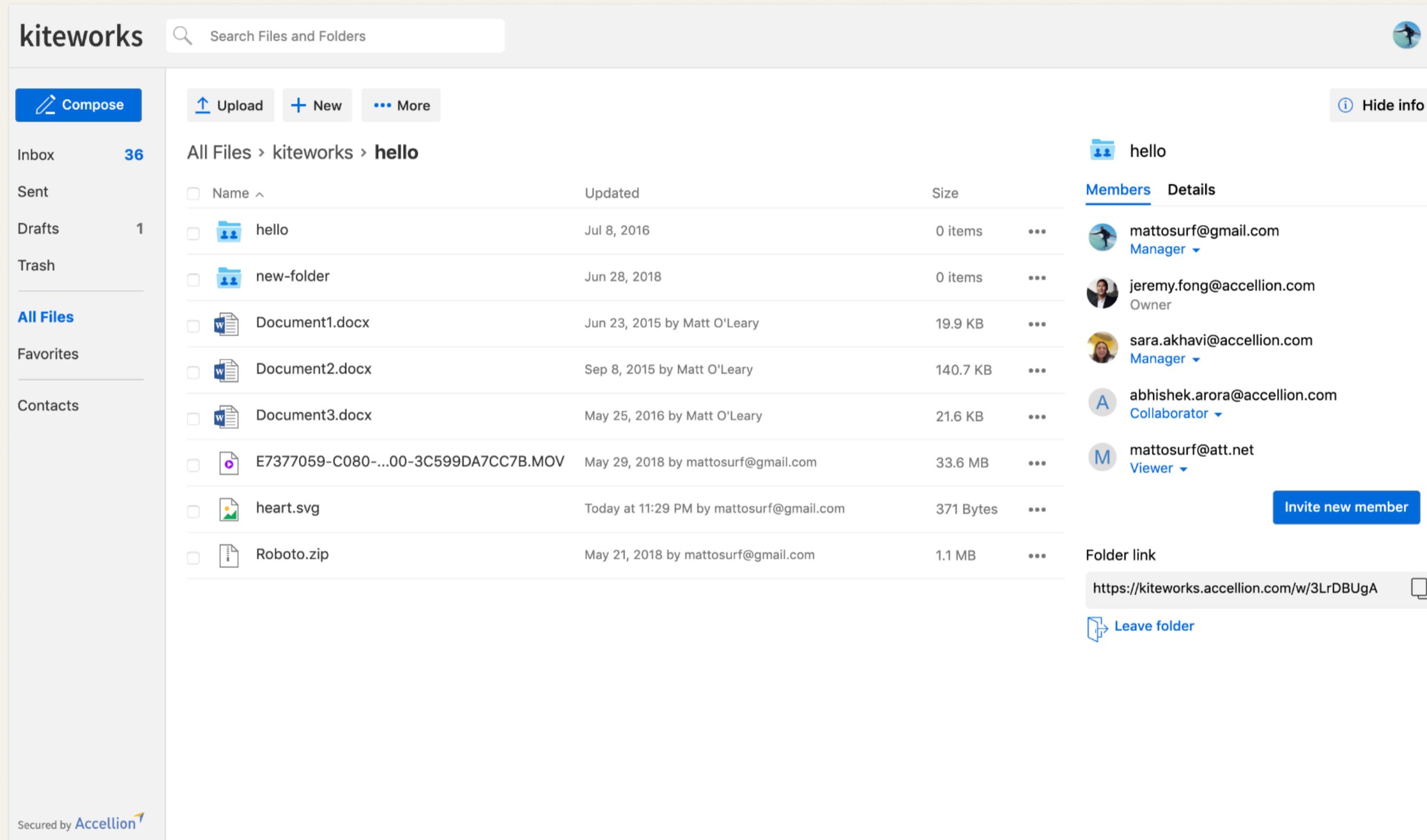
- Multiple calls/Screenshare meetings with customers.
- Attending webinars and presentations – especially focused on the very end when customers share their questions – to see what they care about (What features are they actually using, or interested in)
- Mini-tests using Validately (online recorded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



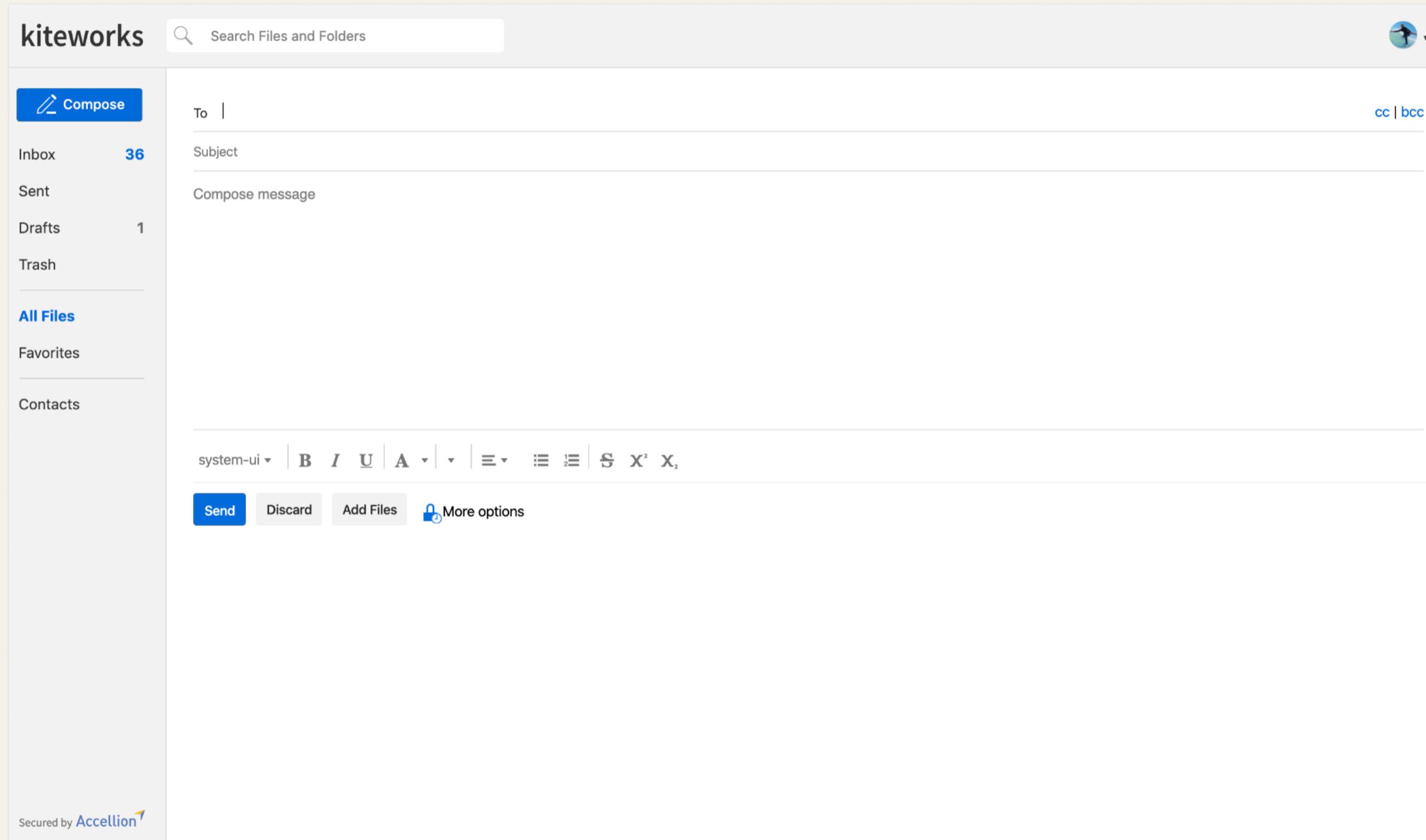
The screenshot shows the kiteworks web interface. On the left, a sidebar includes 'Compose' (blue button), 'Inbox (36)', 'Sent', 'Drafts (1)', 'Trash', 'All Files' (selected), 'Favorites', and 'Contacts'. The main area displays a file list under 'All Files > kiteworks > hello'. The list includes:

- hello**: Jul 8, 2016, 0 items, Manager (mattosurf@gmail.com)
- new-folder**: Jun 28, 2018, 0 items, Owner (jeremy.fong@accellion.com)
- Document1.docx**: Jun 23, 2015 by Matt O'Leary, 19.9 KB, Manager (sara.akhavi@accellion.com)
- Document2.docx**: Sep 8, 2015 by Matt O'Leary, 140.7 KB, Manager (abhishek.arora@accellion.com)
- Document3.docx**: May 25, 2016 by Matt O'Leary, 21.6 KB, Collaborator (mattosurf@att.net)
- E7377059-C080-...00-3C599DA7CC7B.MOV**: May 29, 2018 by mattosurf@gmail.com, 33.6 MB
- heart.svg**: Today at 11:29 PM by mattosurf@gmail.com, 371 Bytes
- Roboto.zip**: May 21, 2018 by mattosurf@gmail.com, 1.1 MB

On the right, a 'Members' section lists four users with their roles: Manager, Owner, Manager, and Collaborator. Buttons for 'Invite new member' and 'Folder link' (with a URL) are also present.

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.

## Outcome

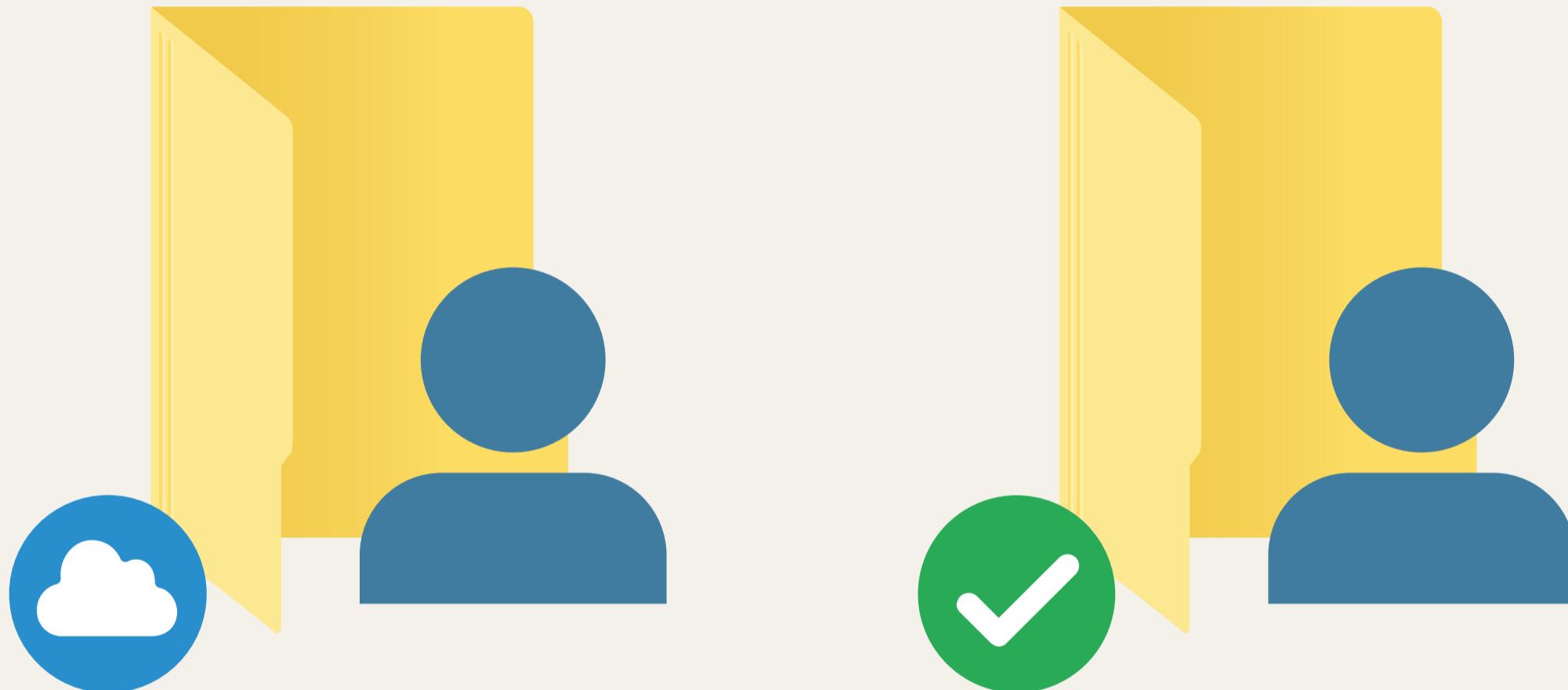
100% of customers have migrated from FTA to Kiteworks

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.



## SYNCPLICITY IMPROVEMENTS

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

# Sync Status and Sharing Overlays

## PREVIOUS



Fully synced or cached



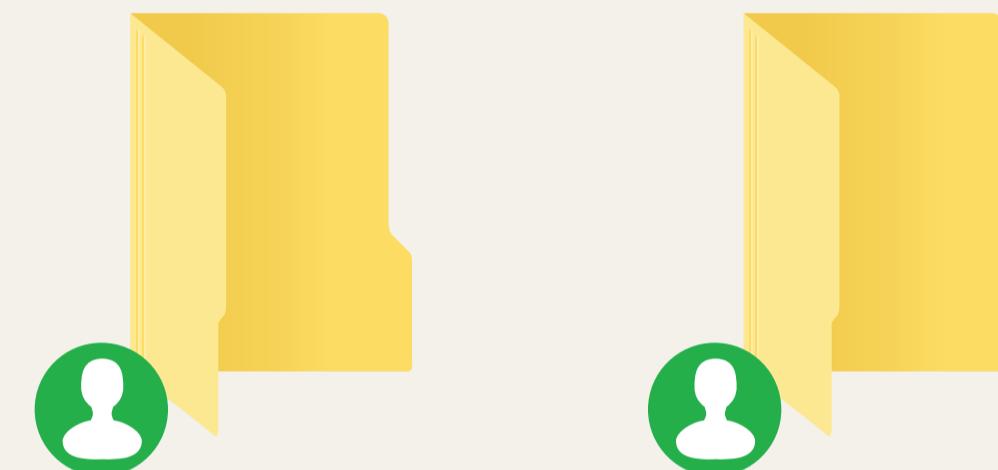
Shared (Folders only)



Available when online / Streaming



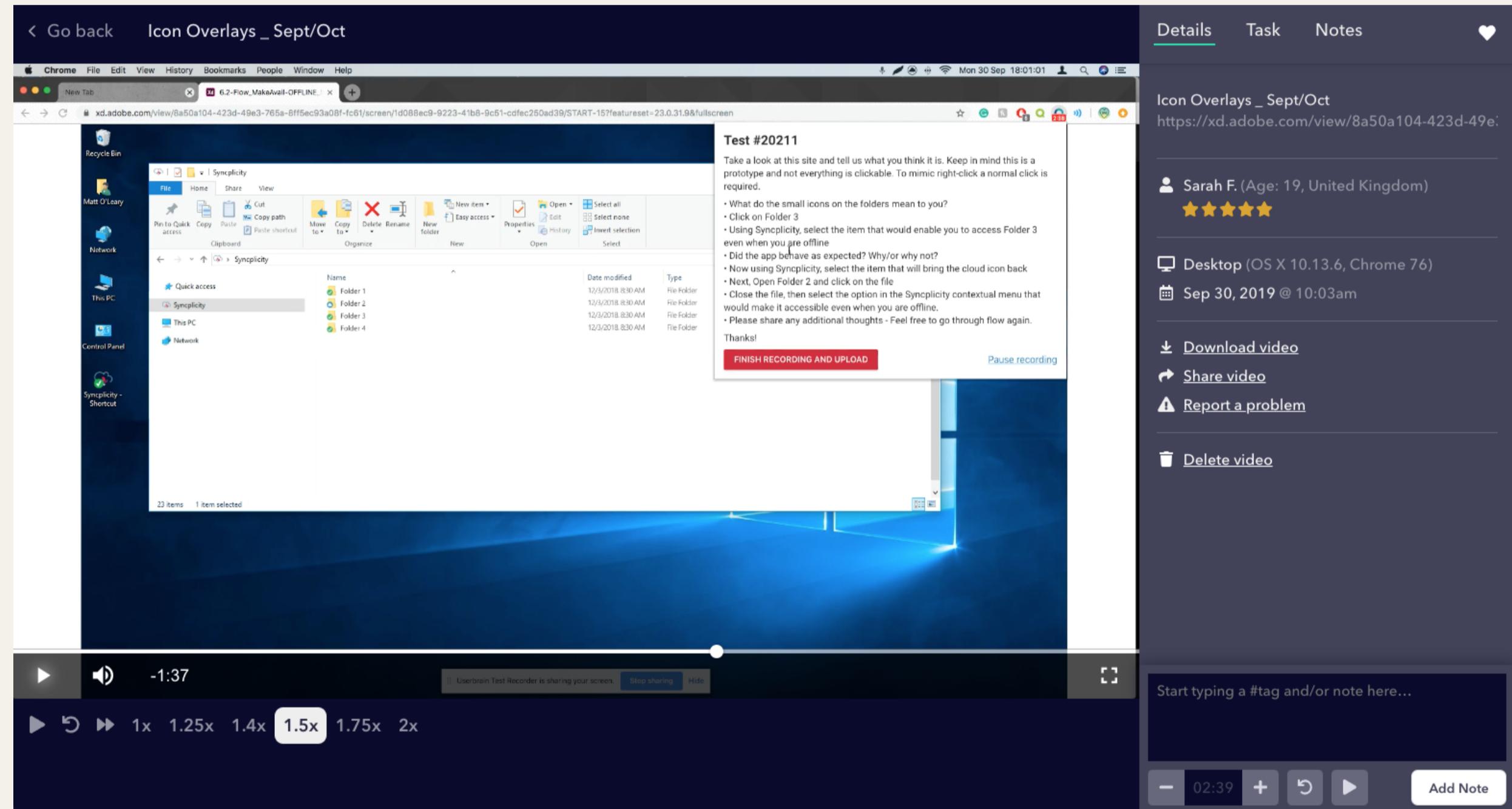
Fully synced / On the device('Favorited')



- 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

# Unmoderated User Testing



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

# Outcome

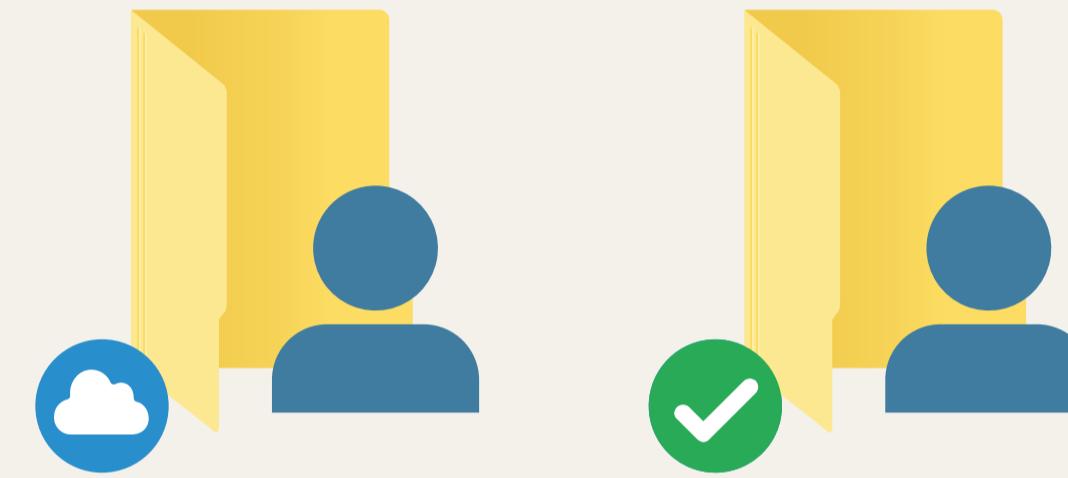
## NEW



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.

# Folder sharing from the Desktop

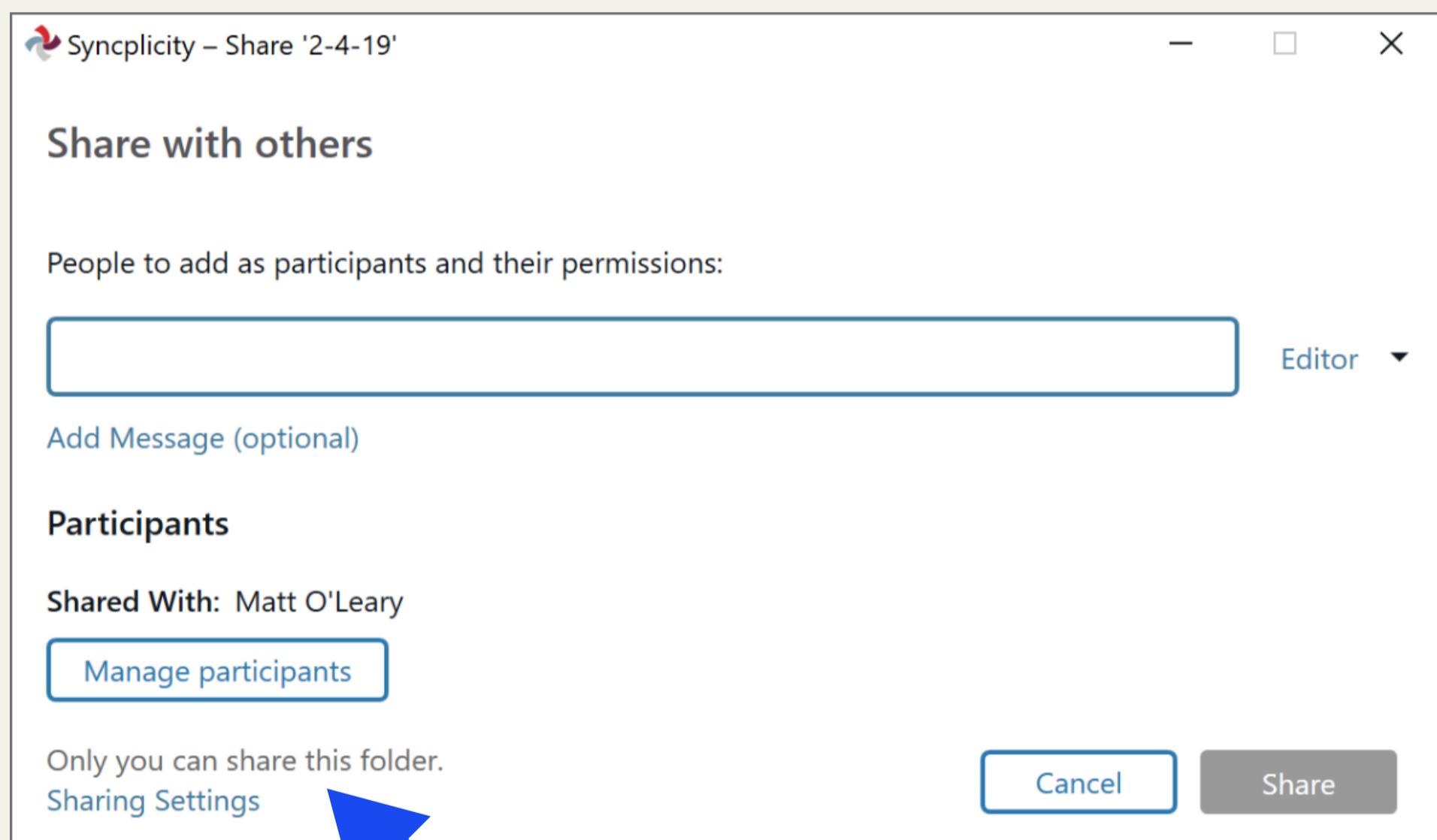
## PREVIOUS:

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.”

## SYNCPLICITY IMPROVEMENTS

# 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.