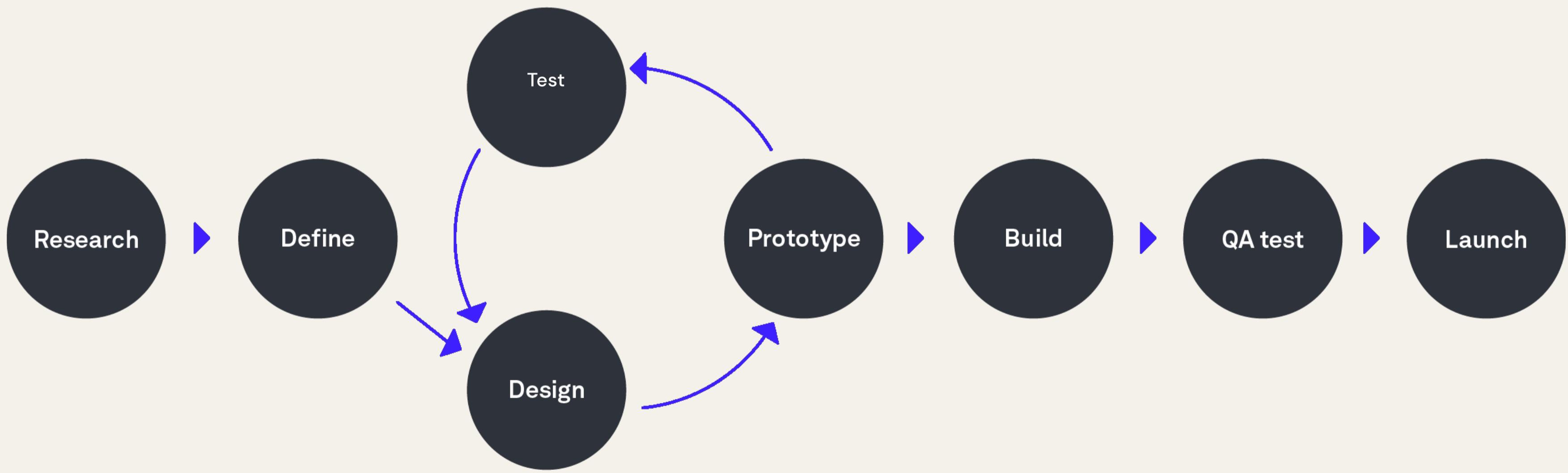


My process

“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 iterating
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.

This screenshot shows a software interface for managing sellers. It includes sections for 'General Information' (with fields for Name and two 'Another field' entries), 'Merged Sellers' (listing three sellers with their names, domain(s), and number of listings), and a 'Save' button. A 'History' sidebar on the right lists several items.

2nd Iteration

The flowchart is titled '2nd Iteration' and starts with 'Listing in Violation (Seller X Product x Website X Timestamp)'. It branches into 'User Takes No Action' (leading to 'OPEN STATUS') and 'User Takes Action' (leading to 'COURTESY/WARNING LETTER'). From 'OPEN STATUS', it leads to 'RESOLVED' or 'PENDING'. The 'PENDING' state has a note: 'What if it BOT finds the violation again in 1h, 1d, 1w??'. From 'PENDING', it leads to 'Send Strike 1' (with a note: '>48 h no Seller Response') or 'Do Nothing'. This leads to 'RESOLVED' or 'PENDING' again. The 'PENDING' state can also lead to 'Send Strike 2' (with a note: '>24 h no Seller Response') or 'Do Nothing', which then leads to 'RESOLVED' or 'PENDING'. Finally, it leads to 'Send Strike 3' (with a note: '>24 h no Seller Response') or 'Do Nothing', which leads to 'RESOLVED'. There are also notes for 'If it returns within a specific time period' and 'Recursive after this as above steps (Usually stops with 3 strikes)'. A 'Policy Page' section at the bottom specifies 'Number of strikes: 3' and 'Cadence between strikes' of 'Between strike 1 and 2: 48 hours' and 'Between strike 2 and 3: 24 hours'.

PROCESS

Process - early stages cont.

Data notes on ChannelSync - from Mixpanel

12 months of data

Event Value

BE. Manage Auction-Market MAP Violations - Total	1,389
D. Access Subscriptions Page - Total	1,146
BF. Manage Price Comparison MAP Violations - Total	915
C. Access Retailer Page - Total	688
A. Access Channel Page - Total	525
BV. Access Products Page - Total	403
T. Access Library Page - Total	415
BZ. Access Library Page - Total	415
BD. Manage Third-Party MAP Violations	367
BX. Access Prices Page - Total	389
BS. Build Violation Report - Total	296
Z. Access People Page - Total	224
BI. Manage Violation Enforcement - Total	196
BR. View Violation Reports - Total	158
BK. View Enforcement Activity - Total	159
BL. Manage Enforcement Templates - Total	118
G. Add Retailer - Total	115
BN. Manage Monitored Products - Total	95
B. Access Portfolio Page - Total	82
BB. Manage Channel Contacts - Total	67
BP. Manage Monitored Retailers - Total	68
BH. Manage Dealer Reported MAP Violations - Total	55
BM. Manage Enforcement Attachments - Total	52
X. View Company Library - Total	49
BA. Invite Coworkers - Total	41
BW. Download Products - Total	36
W. View Channel Library - Total	35

Subscriptions

Access Subscriptions Page	Clicked link to access Subscriptions feature. Default view - third-party MAP violations tab
Subscriptions/Violations/Third-Party	Manage Third-Party MAP Violations
Subscriptions/Violations/Auction-Market	Manage Auction-Market MAP Violations
Subscriptions/Violations/Price Comparison	Manage Price Comparison MAP Violations
Subscriptions/Violations/Qualitative	Manage Qualitative MAP Violations
Subscriptions/Violations/Dealer Reported	Manage Dealer Reported MAP Violations
Subscriptions/Enforcement/Reports	Manage Enforcement Reports
Subscriptions/Enforcement/Activity	View Enforcement Activity
Subscriptions/Enforcement/Templates	Manage Enforcement Templates
Subscriptions/Enforcement/Attachments	Manage Enforcement Attachments
Subscriptions/Products	Manage Monitored Products
Subscriptions/Products/Unmonitored Products	Manage Unmonitored Products
Subscriptions/Retailers	Manage Monitored Retailers
Subscriptions/Retailers/Unmonitored Retailers	Manage Unmonitored Retailers
Subscriptions/Reports	View Violation Reports
Subscriptions/Reports/Build Report	Build Violation Report
Subscriptions/Apps	Manage Subscription Apps

Option 1a = show a violations table in email body

Option 1b = Click to see violations and respond

Violation notice examples:

- No-REP-Customer-BRAND: MAP - Violation level one
- No-REP-Customer-BRAND: MAP - Violation level one
- No-REP-Customer-BRAND: MAP - Violation level one

Violations history example:

XYZ-Seller

96% MAP compliance (750 out of 780 listings) +22% in last 6 months

Current Violations

Product	Source	URL	Screenshot	MAP price	Advertised price	Delta	%	Status	Last seen	Action
Widget-A	Amazon			\$100	\$90	\$10	10%	New	Dec 1, 2022 11:30 AM	Ignore
Widget-A	Amazon			\$100	\$90	\$10	10%	New	Dec 1, 2022 11:30 AM	Ignore
Widget-A	Amazon			\$100	\$90	\$10	10%	New	Dec 1, 2022 11:30 AM	Ignore
Widget-A	Amazon			\$100	\$90	\$10	10%	New	Dec 1, 2022 11:30 AM	Ignore

Violations history example:

Violations

Current violations

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

↓

Can be prioritized
- Need to update at a specific frequency

No Graph

96% MAP compliance (750 out of 780 listings) +22% in last 6 months

XYZ Seller is due to receive Strike Level 1 message

Search

Can we add ignore indefinitely/ignore until next extraction here?

8 violations

Product	Source	URL	Screenshot	MAP price	Advertised price	Delta	%	Status	Last seen	Action
Widget-A	Amazon			\$100	\$90	\$10	10%	New	Dec 1, 2022 11:30 AM	Ignore
Widget-A	Amazon			\$100	\$90	\$10	10%	New	Dec 1, 2022 11:30 AM	Ignore
Widget-A	Amazon			\$100	\$90	\$10	10%	New	Dec 1, 2022 11:30 AM	Ignore
Widget-A	Amazon			\$100	\$90	\$10	10%	New	Dec 1, 2022 11:30 AM	Ignore

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 timestamp '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 a checkbox, a small image, and several action buttons. 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.

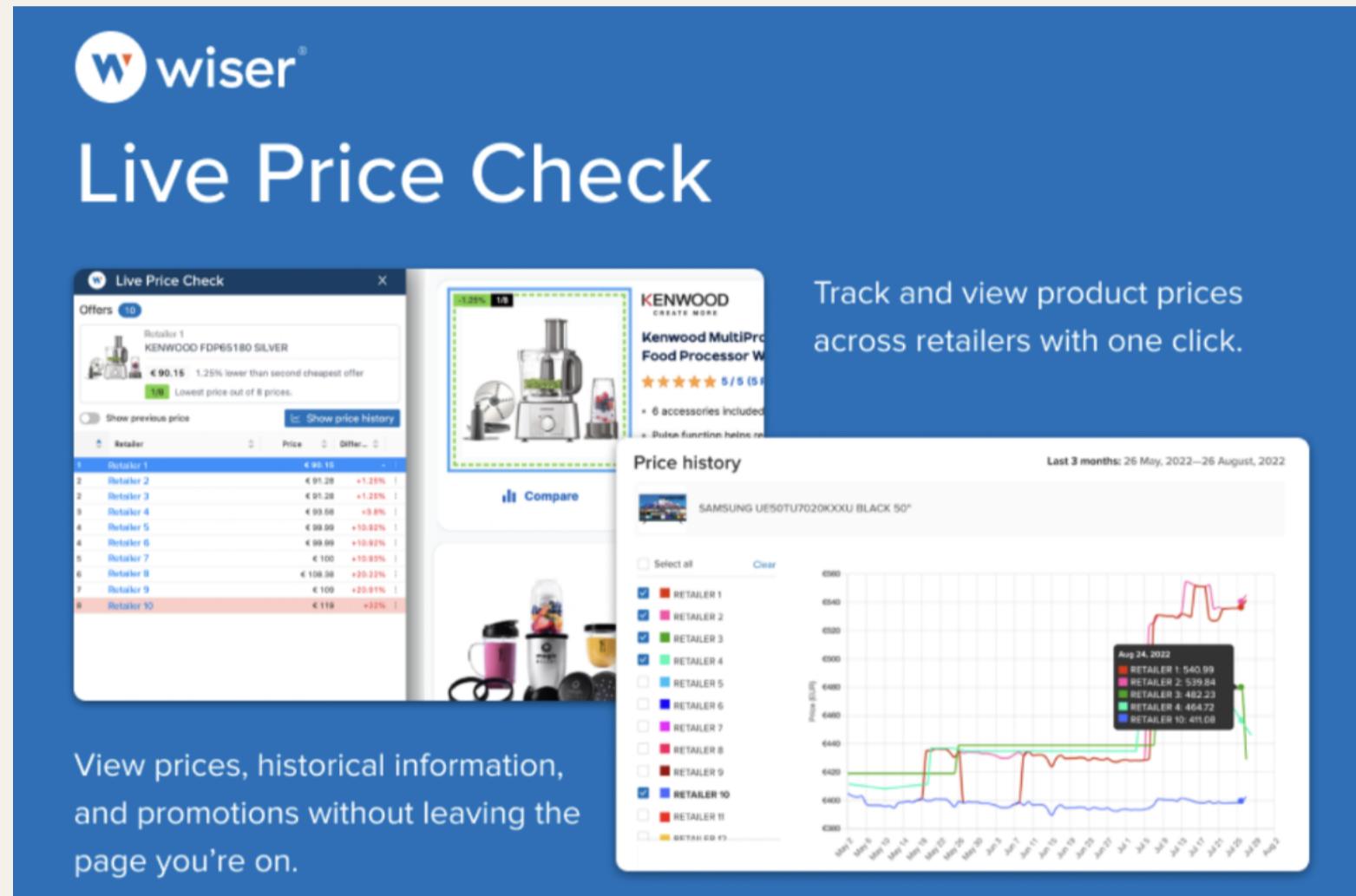
This screenshot displays a high-fidelity prototype of a policy management interface. On the left, a modal window titled 'Edit 'General MAP Policy'' shows fields for 'Policy name' (set to 'General MAP Policy'), 'Country' (set to 'US and Canada'), and 'Classification' (set to 'All sellers'). A toggle switch 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 video conference.

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

Wiser 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.

Wiser Live Price Check Improvements

Previous version

The screenshot shows the previous version of the Wiser Live Price Check interface. On the left, a sidebar displays a list of 12 products, each with a title, current price, and previous price, along with a percentage change. A blue circle indicates the total number of products. Below this is a chart showing price trends over time. The main area shows three product cards:

- Hotpoint RLA36P Under Counter Fridge - White**: From £180.00. Product Features: Size (cm) H85.0, W59.8, D62.0cm; Fresh food capacity (L) 146. Available options: Free delivery available, Installation & recycling available. [Choose Options](#)
- Beko LSG3545W Tall Fridge - White**: £310.00. Product Features: Size (cm) H145.7, W54.0, D57.5cm; Fresh food capacity (L) 252; Frost free Yes. Available options: Free delivery available. [Choose Options](#)
- Bush ME5585UCF Under Counter Fridge**: £160.00. Product Features: Size (cm) H145.7, W54.0, D57.5cm; Fresh food capacity (L) 252; Frost free Yes.

Wiser Live Price Check Improvements

NEW version

The screenshot shows the Wiser Live Price Check extension running in a web browser on the Argos website. The extension's sidebar displays a list of retailers and their prices for a specific product, with Argos highlighted. The main page shows a grid of iron products from various brands like Russell Hobbs, Philips, and Bosch, each with its price, rating, and a 'Add to trolley' button.

Retailer	Price (\$)	Difference (%)	Delivery
1 Amazon.co.ie	\$44.93	-19.44%	3 days
2 Amazon.co.uk	\$45.93	-17.64%	3 days
3 Currys	\$47.16	-15.44%	5 days
4 Ao.com	\$48.39	-13.23%	7 days
5 Appliances Direct	\$48.39	-13.23%	4 days
6 IE Euronics	\$52.08	-6.62%	3 days
7 IE Powercity	\$53.31	-4.41%	3 days
8 John Lewis	\$54.54	-2.21%	5 days
9 Argos	\$55.77	+2.21%	4 days
10 Argos	\$57.00	+2.21%	4 days
11 Very	\$57.00	+2.21%	3 days
12 Littlewoods	\$59.46	+6.62%	3 days
13 Hughes Direct	\$60.69	+8.82%	5 days
14 IE Argos	\$61.92	+11.03%	7 days
15 DE Argos	\$63.15	+13.23%	4 days
16 BE Argos	\$64.38	+15.44%	3 days
17 IT Argos	\$65.61	+17.64%	3 days
18 SP Argos	\$66.84	+19.85%	5 days
19 PO Argos	\$68.07	+22.05%	7 days
FR Argos	\$68.54	+22.90%	4 days

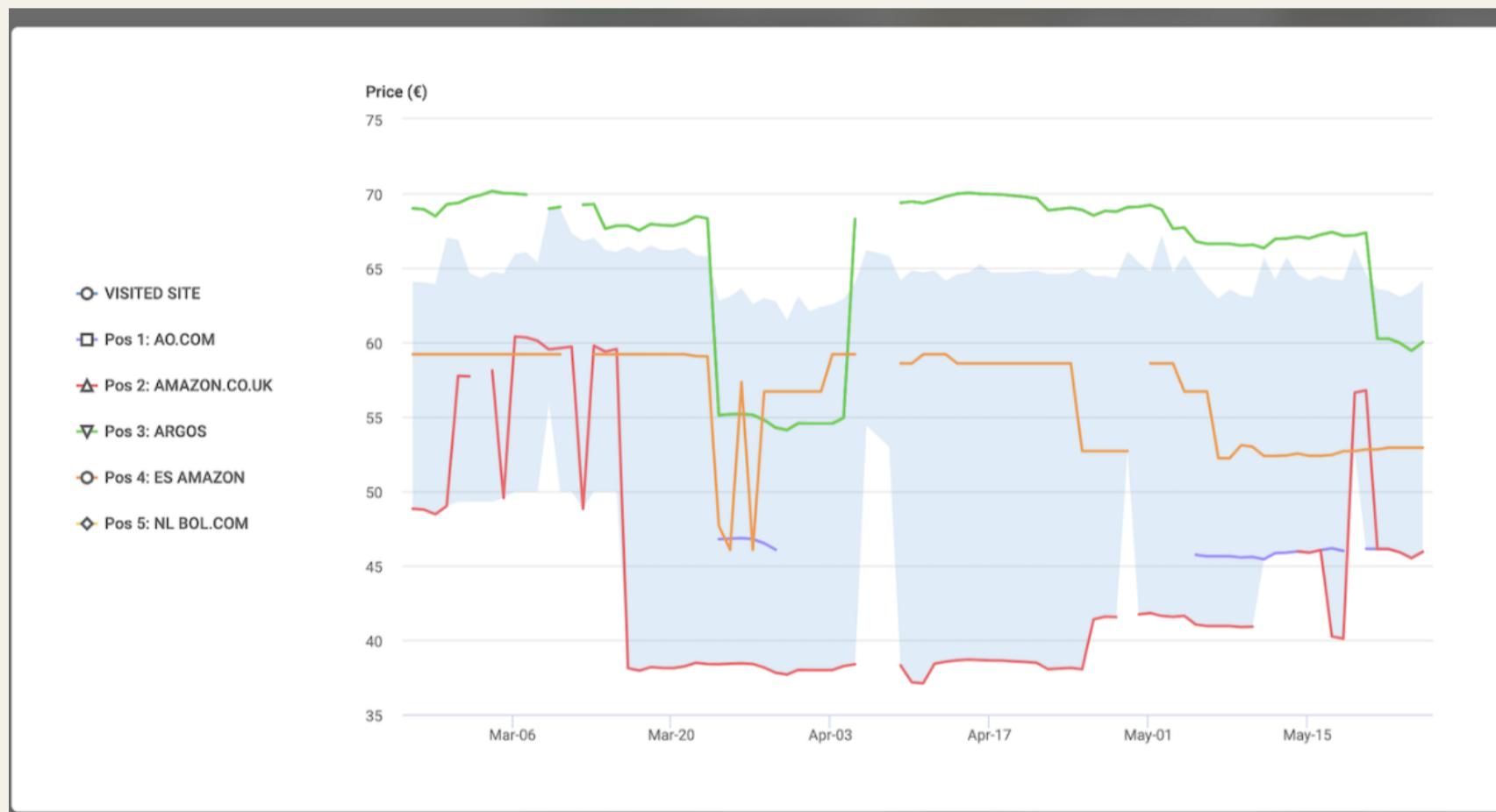
Key Improvements

- 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

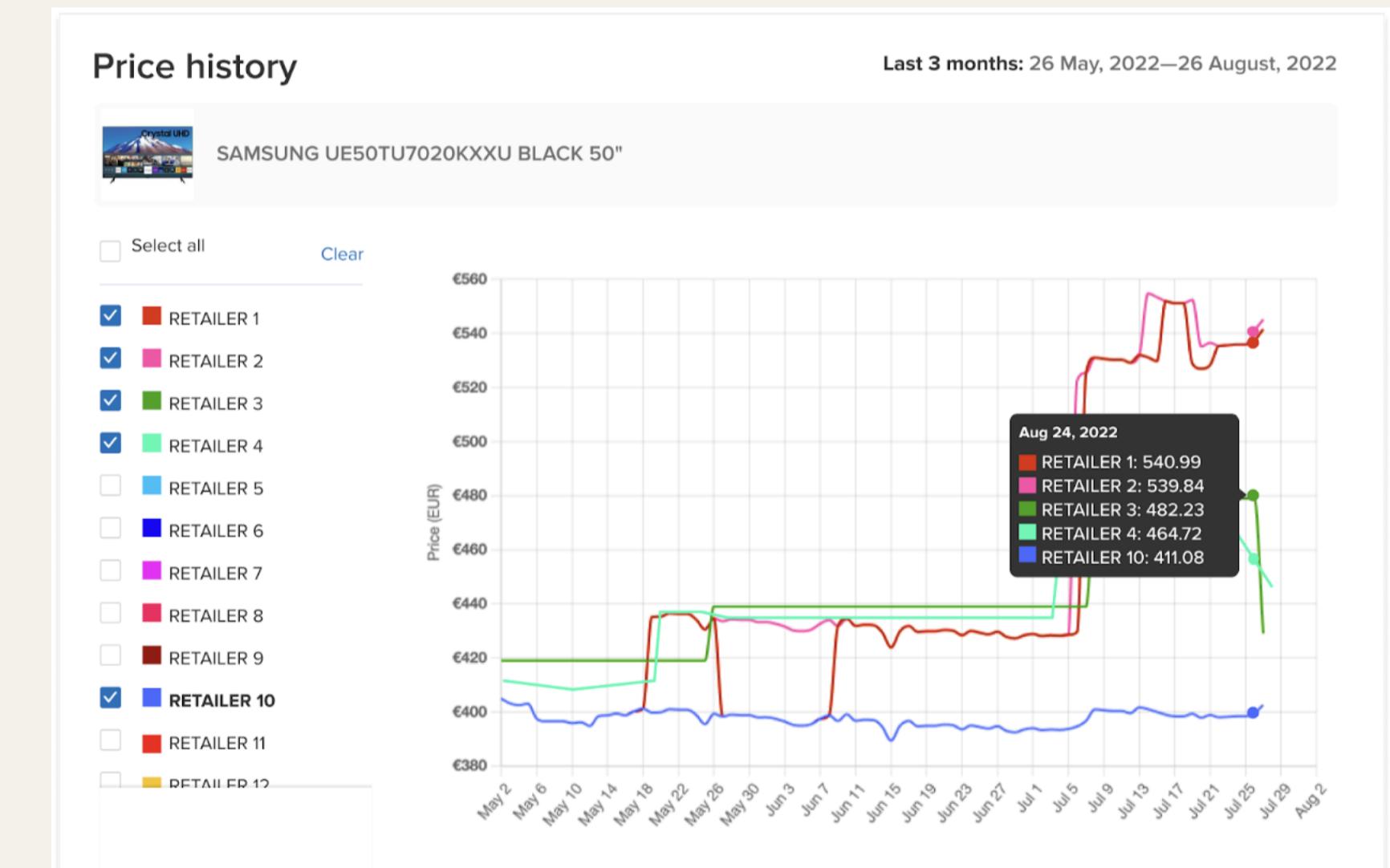
Wiser Live Price Check Improvements

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

Wiser Live Price Check Improvements

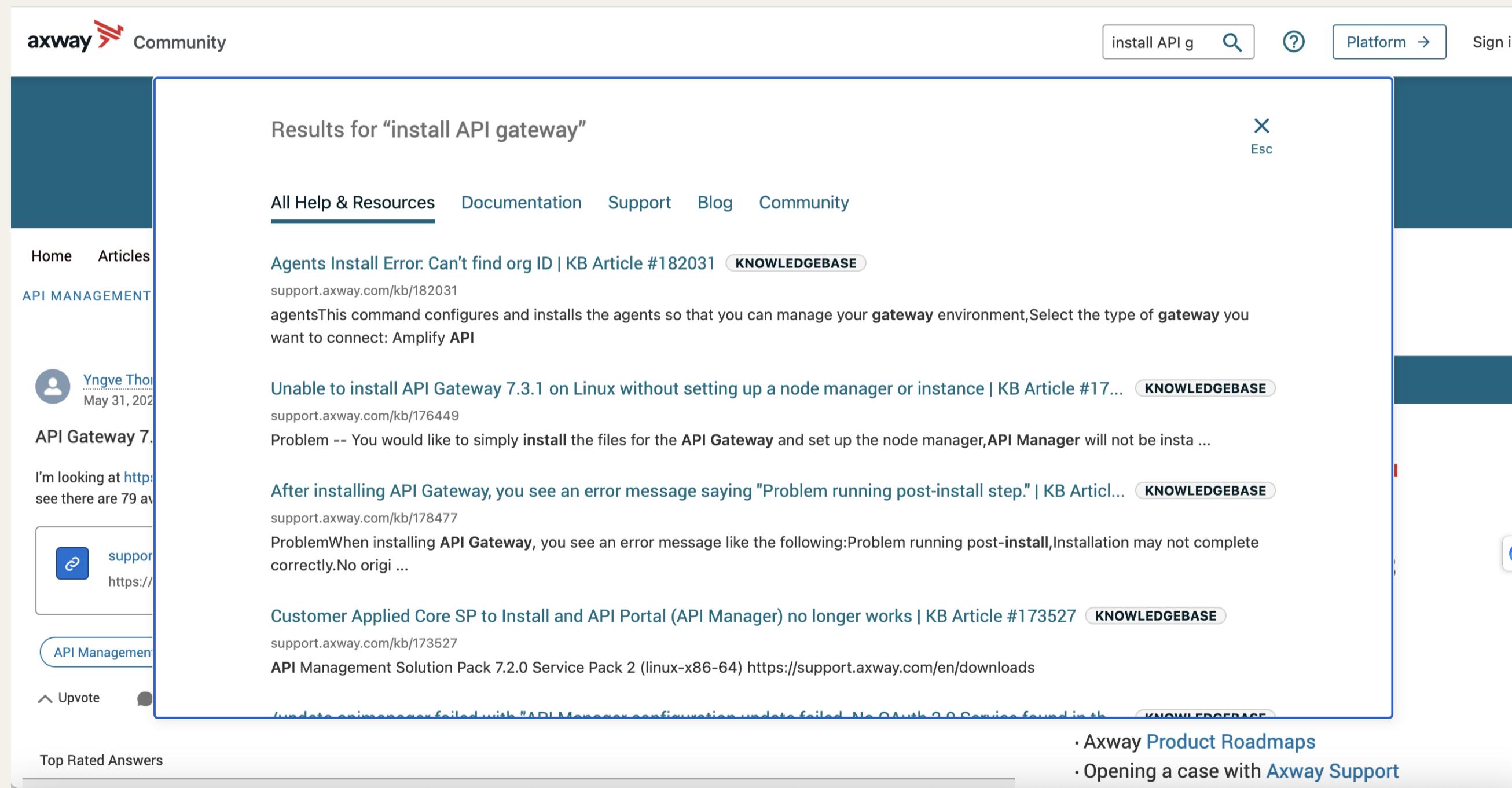
Outcome

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)

Axway Universal Header & Search

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



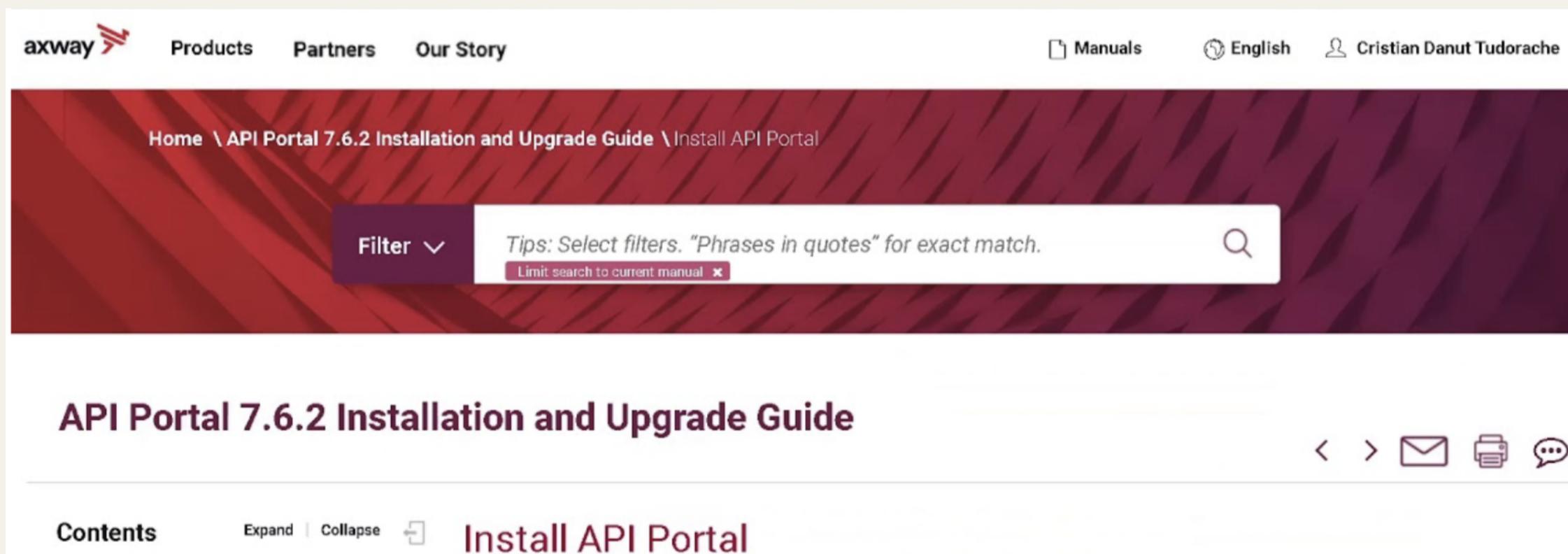
The screenshot shows the Axway Community search results page for the query "install API gateway". The results are displayed in a modal window. The top navigation bar includes the Axway logo, a search bar with the placeholder "install API g", a help icon, a platform dropdown, and a sign-in link. The search results are titled "Results for ‘install API gateway’". Below the title are navigation links: "All Help & Resources" (underlined), Documentation, Support, Blog, and Community. The first result is a knowledge base article titled "Agents Install Error: Can't find org ID | KB Article #182031" with a "KNOWLEDGEBASE" button. It includes a link to support.axway.com/kb/182031 and a snippet of text about agents configuration. The second result is another knowledge base article titled "Unable to install API Gateway 7.3.1 on Linux without setting up a node manager or instance | KB Article #17..." with a "KNOWLEDGEBASE" button. It includes a link to support.axway.com/kb/176449 and a snippet of text about API Gateway installation. The third result is a knowledge base article titled "After installing API Gateway, you see an error message saying "Problem running post-install step." | KB Article #17..." with a "KNOWLEDGEBASE" button. It includes a link to support.axway.com/kb/178477 and a snippet of text about post-install steps. The fourth result is a knowledge base article titled "Customer Applied Core SP to Install and API Portal (API Manager) no longer works | KB Article #173527" with a "KNOWLEDGEBASE" button. It includes a link to support.axway.com/kb/173527 and a snippet of text about API Manager configuration. At the bottom of the modal, there are two links: "Axway Product Roadmaps" and "Opening a case with Axway Support". The sidebar on the left shows navigation links for Home, Articles, API MANAGEMENT, API Gateway 7.0, and API Management, along with a "Top Rated Answers" section and a support link.

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.

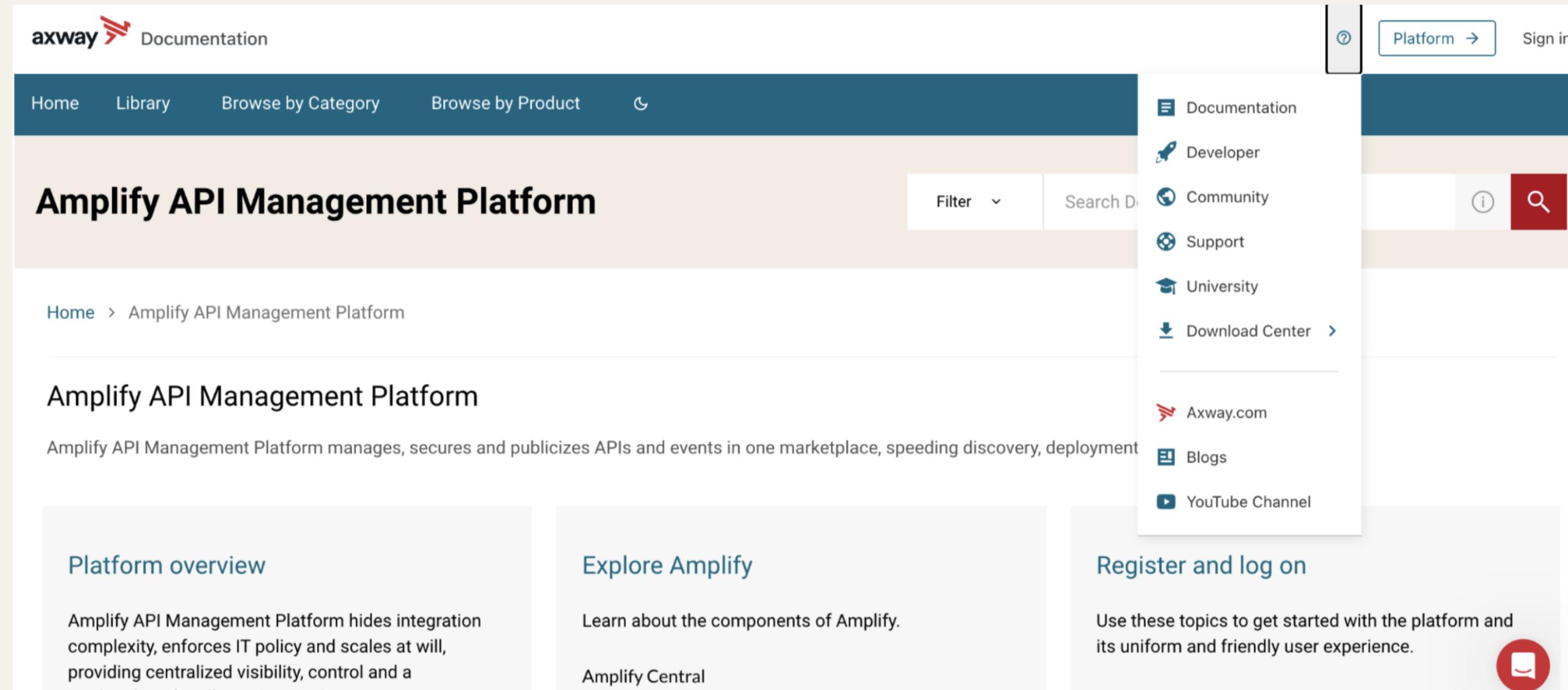
The Problem (Example from Documentation portal)



The screenshot shows a documentation page for the "API Portal 7.6.2 Installation and Upgrade Guide". The page has a dark red header with the Axway logo and navigation links for "Products", "Partners", and "Our Story". On the right side of the header, there are links for "Manuals", "English", and a user profile. A search bar is located in the top right corner. Below the header, the breadcrumb navigation shows "Home \ API Portal 7.6.2 Installation and Upgrade Guide \ Install API Portal". A purple "Filter" button is visible on the left. The main content area features a large title "API Portal 7.6.2 Installation and Upgrade Guide" and a sub-section "Install API Portal". At the bottom of the page, 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

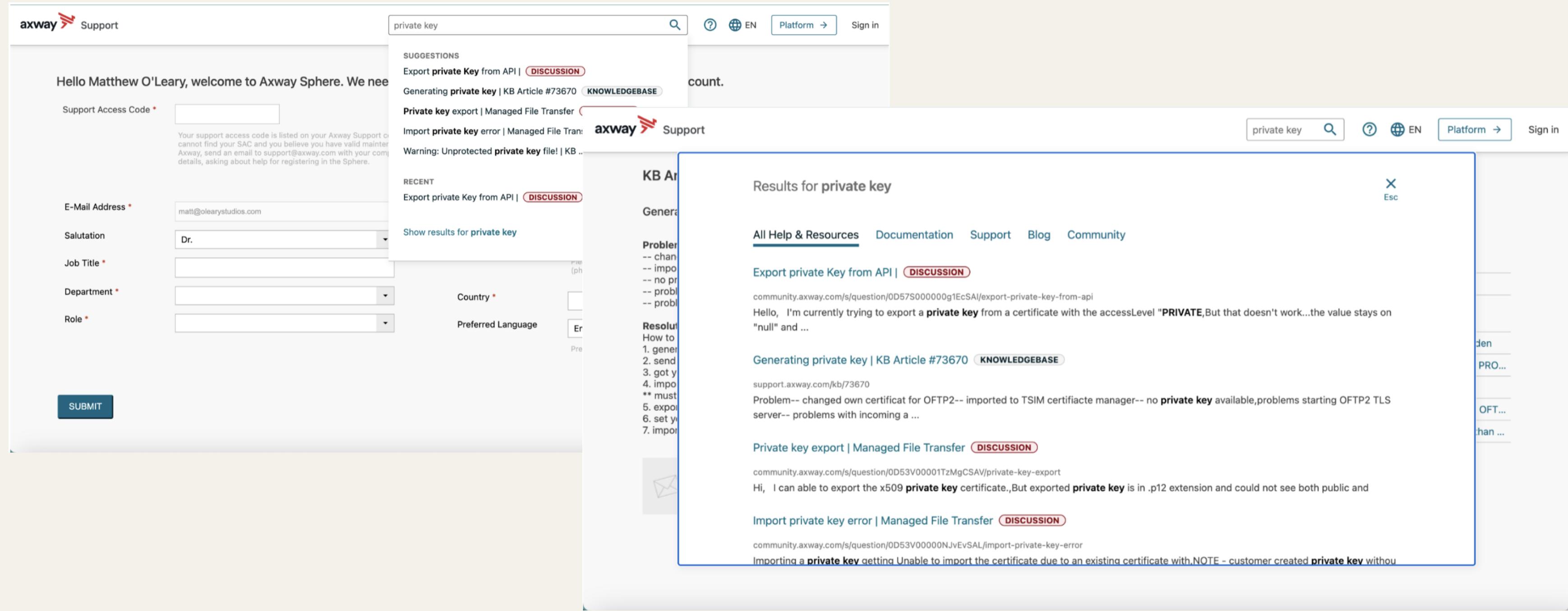
Solution for missing help & resources



Key Improvements

- Added the title – displayed in a consistent way across the platform let's 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 an 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 user 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 screenshot shows the legacy FTA interface. On the left is a sidebar with links for Inbox (36), Sent, Drafts (1), Trash, All Files (selected), Favorites, and Contacts. The main area shows an inbox list with items like 'hello' (Jul 8, 2016), 'new-folder' (Jun 28, 2018), and several Microsoft Word documents. A compose button is at the top left, and a search bar is at the top right. A modal window titled 'hello' shows member details for 'mattosurf@gmail.com' (Manager) and others, with an 'Invite new member' button.

The screenshot shows the new Kiteworks interface. It has a similar structure with a sidebar for Inbox (36), Sent, Drafts (1), Trash, All Files (selected), Favorites, and Contacts. The main area includes a compose button, a search bar, and a message editor. A modal window titled 'Compose' is open, showing a 'Members' tab with the same user information as the legacy interface, along with a 'Details' tab. The message editor includes fields for 'To', 'Subject', and 'Compose message'. At the bottom, there are buttons for 'Send', 'Discard', 'Add Files', and 'More options'.

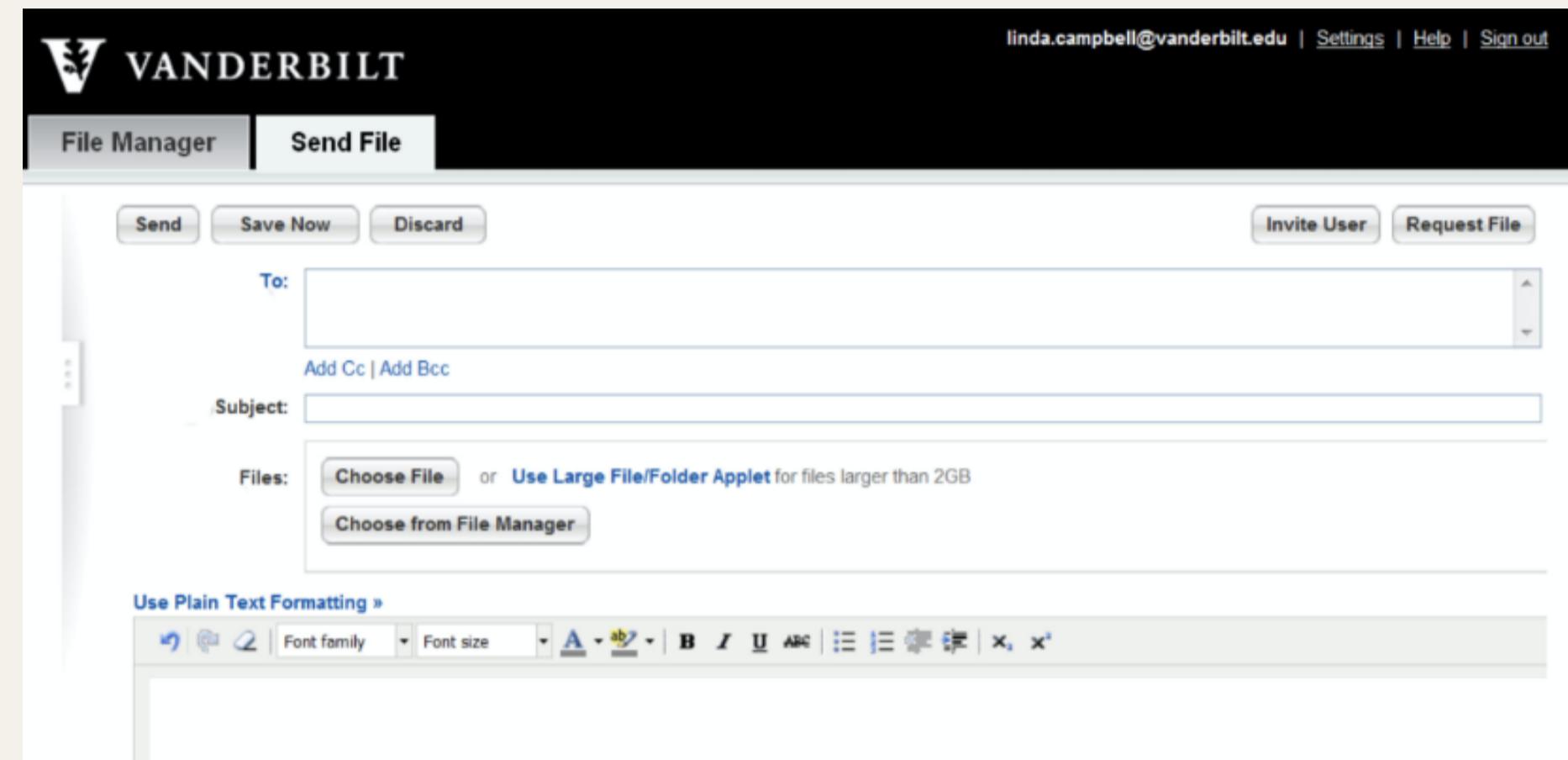
The 'job' Accellion is hired to do is secure & compliant file sending

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 application interface. At the top, there is a header bar with the kiteworks logo, a search bar, and a user profile dropdown. Below the header is a navigation sidebar on the left containing links for 'All files', 'Shared folders', 'Favorites', 'Recent activities', 'Mail', and 'Move tray'. The main area is titled 'All Files / Dropbox' and displays a list of files and folders. The 'Dropbox' section is expanded, showing sub-folders like 'Books', 'Photos', 'Private', 'Public', 'Shared with external...', 'test (1)', 'Google Drive', and 'Home Share'. To the right of the list is a table with columns for 'Name', 'Last Modified', and a search bar. The table lists several files: 'Books' (modified 10/28/14 at 12:35 pm), 'Photos' (modified 10/21/14 at 11:50 am), 'Private' (modified 10/21/14 at 11:50 am), 'Public' (modified 10/21/14 at 11:50 am), 'Shared with external vendor' (modified 10/21/14 at 11:50 am), 'test (1)' (modified 10/21/14 at 11:50 am), 'Caroline.docx' (modified 08/18/14 at 07:15 pm, size 861 KB), 'Expense Reports.xlsx' (modified 08/16/14 at 07:15 pm, size 1.9 MB), and 'Yellow stone.xlsx' (modified 10/21/14 at 11:50 am, size 1.1 MB). Each file entry includes download and share icons.

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)

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)

The screenshot shows the kiteworks application interface. At the top is a blue header bar with the kiteworks logo, a search bar labeled "Search Files and Folders", and a user profile icon. Below the header is a sidebar on the left containing links for "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

At the bottom right 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 two links: "Get kiteworks app" and "Get help".

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 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	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	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

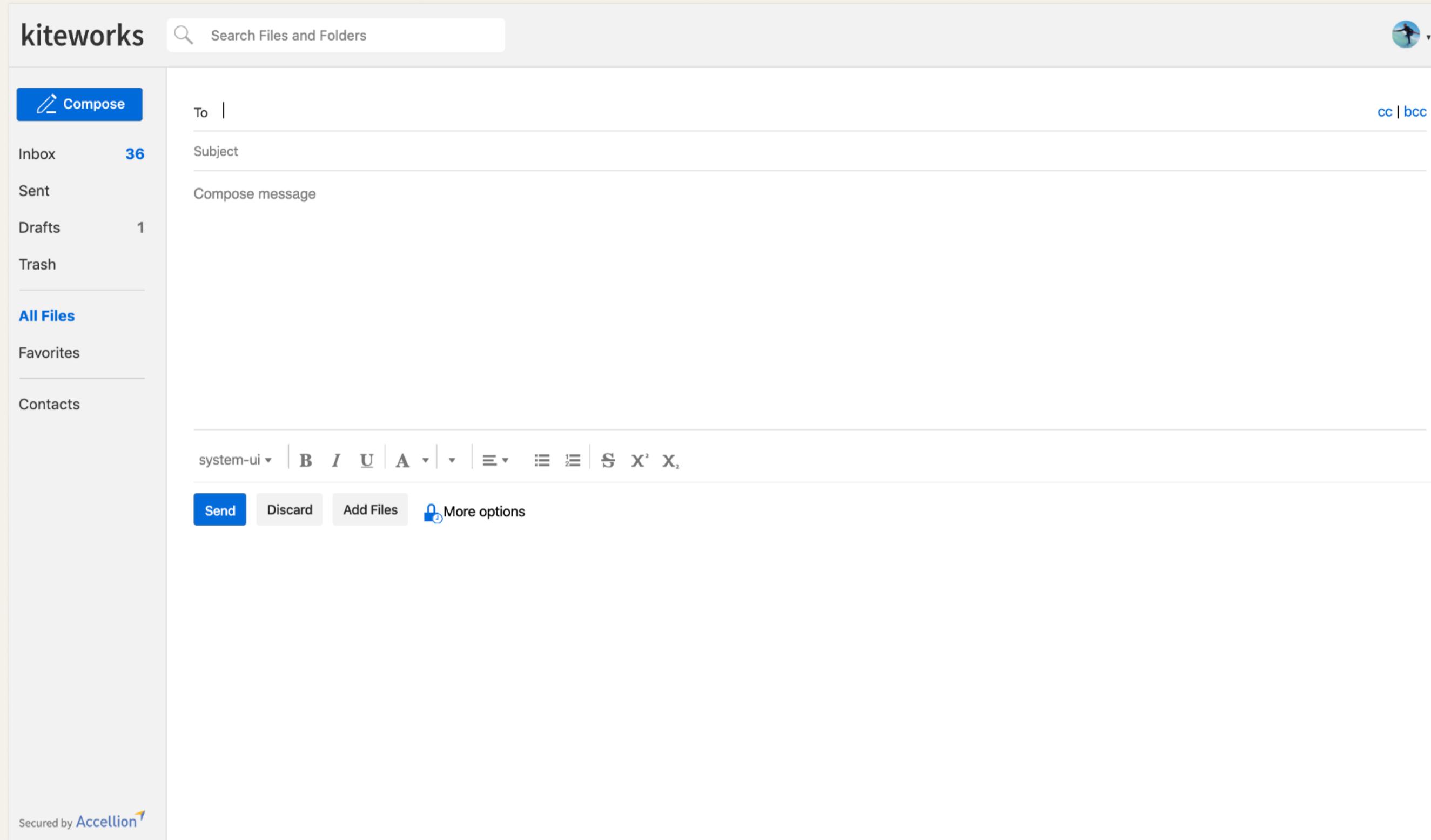
The screenshot shows the kiteworks web interface. On the left, a sidebar navigation includes 'Compose' (highlighted in blue), 'Inbox' (36 items), 'Sent', 'Drafts' (1 item), 'Trash', 'All Files' (selected), 'Favorites', and 'Contacts'. A watermark for 'Secured by Acceillion' is at the bottom left. The main area shows a file list under 'All Files > kiteworks > hello'. The list includes:

	Name	Updated	Size	Actions
<input type="checkbox"/>	hello	Jul 8, 2016	0 items	...
<input type="checkbox"/>	new-folder	Jun 28, 2018	0 items	...
<input type="checkbox"/>	Document1.docx	Jun 23, 2015 by Matt O'Leary	19.9 KB	...
<input type="checkbox"/>	Document2.docx	Sep 8, 2015 by Matt O'Leary	140.7 KB	...
<input type="checkbox"/>	Document3.docx	May 25, 2016 by Matt O'Leary	21.6 KB	...
<input type="checkbox"/>	E7377059-C080-...00-3C599DA7CC7B.MOV	May 29, 2018 by mattosurf@gmail.com	33.6 MB	...
<input type="checkbox"/>	heart.svg	Today at 11:29 PM by mattosurf@gmail.com	371 Bytes	...
<input type="checkbox"/>	Roboto.zip	May 21, 2018 by mattosurf@gmail.com	1.1 MB	...

To the right, a sidebar for the 'hello' folder shows 'Members' (mattosurf@gmail.com - Manager, jeremy.fong@acceillion.com - Owner, sara.akhavi@acceillion.com - Manager, abhishek.arora@acceillion.com - Collaborator, mattosurf@att.net - Viewer) and 'Details' (Invite new member, Folder link: <https://kiteworks.acceillion.com/w/3LrDBUgA>, Leave folder).

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.

To date:

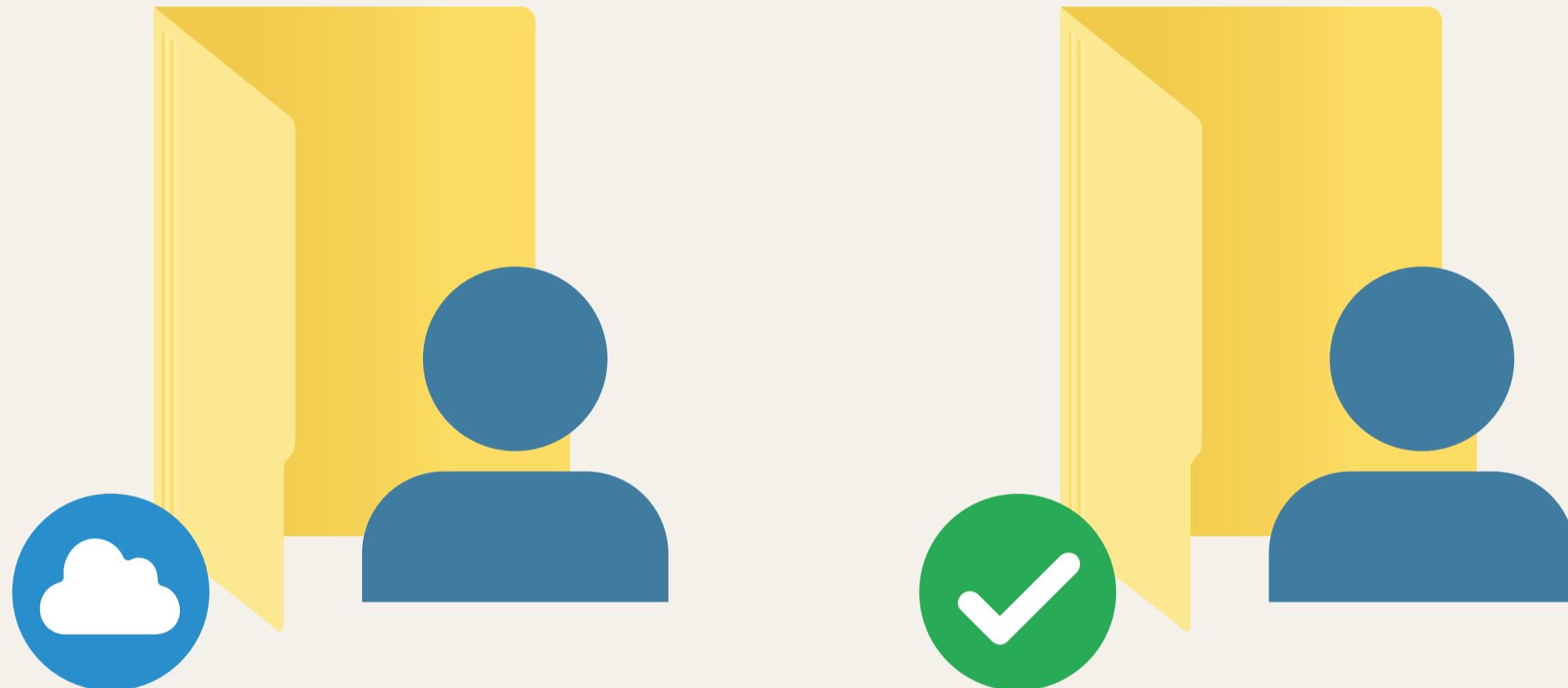
98% of customers have migrated from FTA to Kiteworks

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



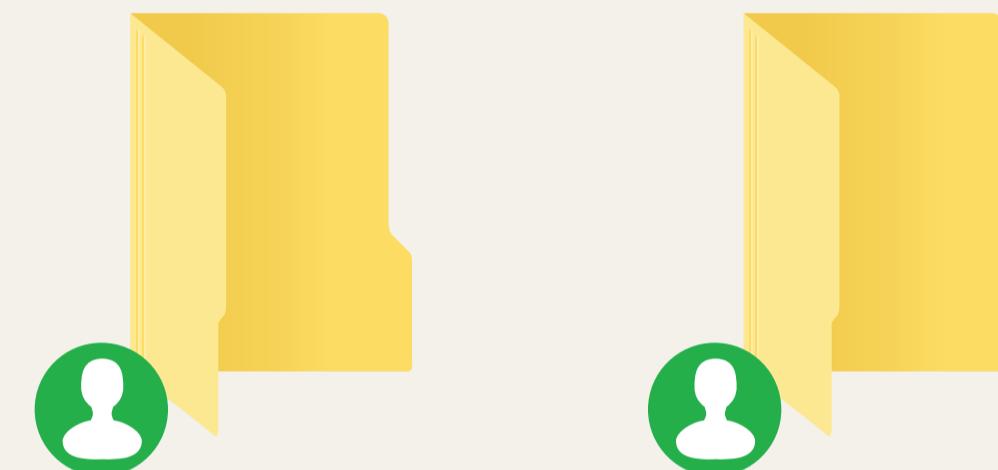
Shared (Folders only)



Available when online / Streaming



Fully synced / On the device('Favorited')

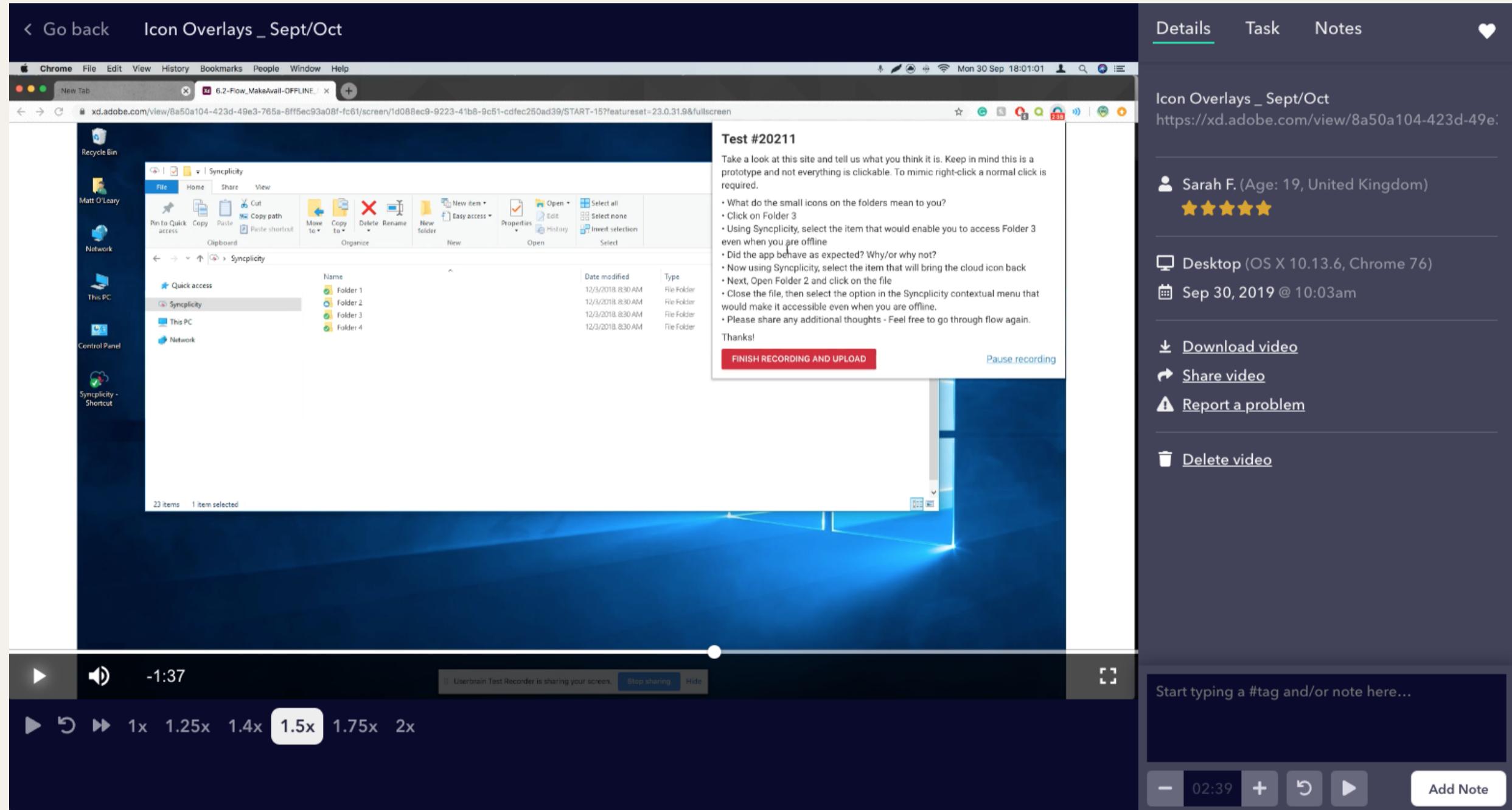


- Folder_1
- Folder_2
- Folder_3
- Folder_4

- 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

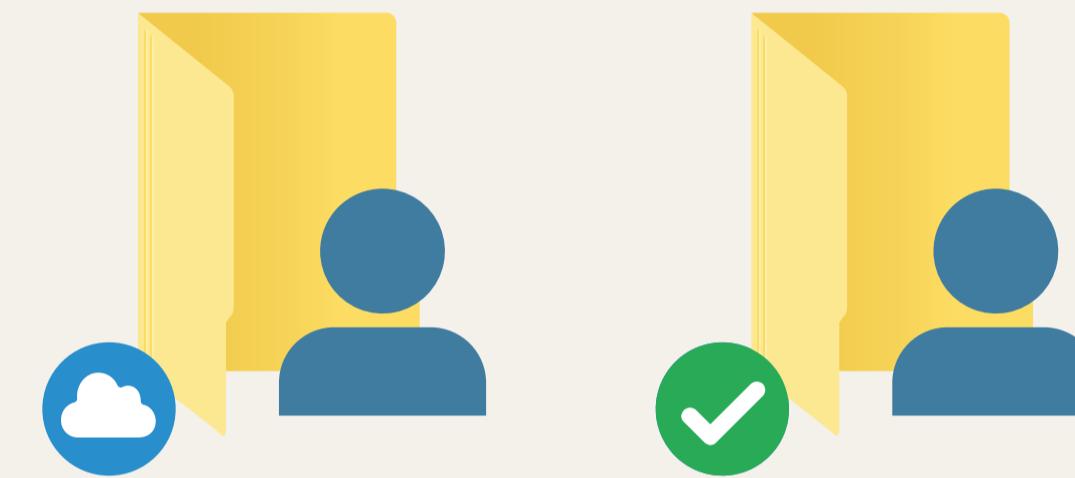
NEW



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

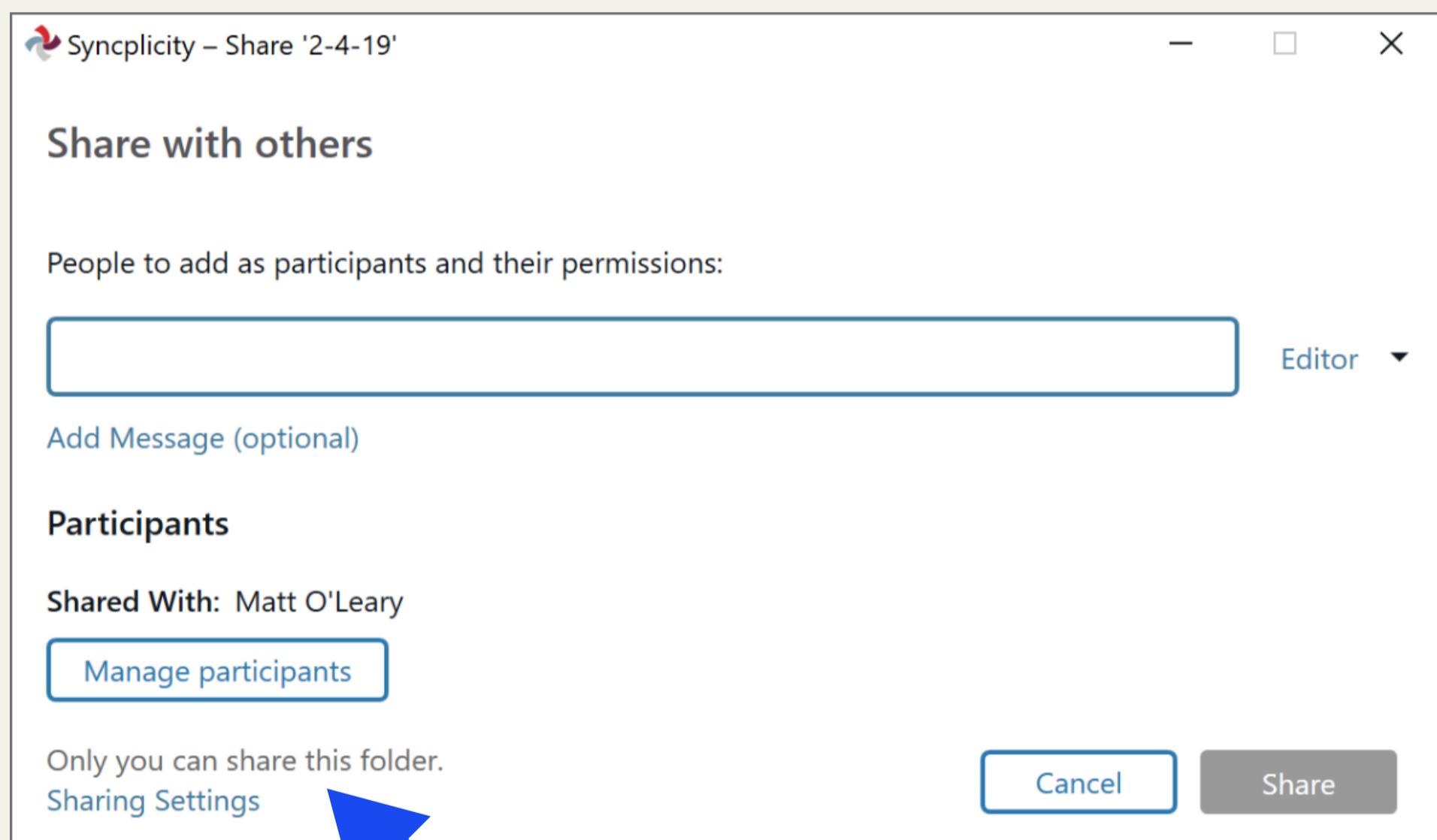
PREVIOUS:

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.